

3-day GOS: APEC Services Competitiveness Roadmap (ASCR) Annual Dialogue

5 – 7 May 2025

International Convention Center JEJU (ICC JEJU), KOREA

Background:

3-day APEC Services Competitiveness Roadmap (ASCR) Annual Dialogue 2025 will review the progress of ASCR and discuss the future APEC Services Agenda with the aim of developing a successor to ASCR, seeking input from stakeholders, including industry representatives and relevant organizations. The Dialogue will also explore the role of digital deliverable services and structural reform in advancing APEC's services agenda and ensuring better alignment across initiatives.

DAY 1

MONDAY, 5 MAY 2025, 09:00 – 17:30 (PET)

08:30 – 09:00	Registration and Reception (30 minutes)
09:00 – 09:20	Opening Remarks (20 minutes)

Jillian DeLuna, Convenor, APEC Group on Services (TBC)

09:20 – 12:50 JOINT GOS-EC DIALOGUE ON SERVICES AND STRUCTURAL REFORM (PART I)

09:20 – 9:50	Session 1: Introduction and Overview (30 minutes)
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Christopher Findlay, Honorary Professor, Australian National University
Jane Drake-Brockman, Senior Visiting Fellow, University of Adelaide and Co-Convenor, Asia Pacific Services Coalition

09:50 – 10:50	Session 2A: Digital Finance and Digital Payments (60 minutes)
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Moderator: Christopher Findlay, Honorary Professor, Australian National University

Keynote address

Dr. Titik Anas, Senior Lecturer and Researcher, Department of Economics, Padjadjaran University

Panellists:

- **Peter Lovelock**, Chief Consulting & Innovation Officer, Access Partnership
- **James Angus Bond**, Head of Government Affairs, Australia and New Zealand, Citi and Vice President, Australian Services Roundtable
- **Lisette Cipriano**, Senior Digital Finance Specialist, ADB
- **Amira Karim**, Global Public Policy - Payments & Financial Services, Amazon Singapore

10:50 – 11:20	Break (30 minutes)
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11:20 – 12:20	Session 2B: Standards and AI (60 minutes)
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Moderator: Jane Drake-Brockman, Senior Visiting Fellow, University of Adelaide and Co-Convenor, Asia Pacific Services Coalition

Role of Standards

Shanshan Li, Secretary-General, AMF (Asia Marketing Federation), Director of Global Relationship and Cooperation, ODCCN (Organization for Trade Development and Standards Cooperation)

Shaifubahrim Saleh, Board Member, Malaysia Venture Capital Management Berhad and Former President of Malaysian Services Providers Confederation

Runn Sachasiri Niu, Head of Cloud Expansion and CEO Office, Nium, Singapore

Impact of New Technologies: How AI is Reshaping Digital Services

Byeongjo Kong, Digital Specialist, ADB

Devi Ariyani, Executive Director, Indonesia Services Dialogue Council (ISD)

Qin Gou, Professor, Central University of Finance and Economics, Beijing, China

12:20 – 12:40

Session 3: Session Wrap-Up and Action Items (20 minutes)

Moderator: Christopher Findlay, Honorary Professor, Australian National University

12:40 – 14:00

Lunch

14:00 – 17:30

JOINT GOS-EC DIALOGUE ON SERVICES AND STRUCTURAL REFORM (PART II)

14:00 – 14:10

Welcome and Introduction

Christopher Findlay, Honorary Professor, Australian National University

The session involves a two-part activity centered on higher education policy challenges in the fictional economy of Sylvana and the market entry strategy of Viridis, an online education provider from another economy, Viridia.

14:10 – 16:10

Part 1: Policy Challenges in Sylvana

Moderator: Christopher Findlay, Honorary Professor, Australian National University

This section examines the structural and policy constraints in Sylvana's higher education sector and explores reform options. Sylvana faces significant issues, including low tertiary enrolment rates, poor research output, weak global university rankings, and a "brain drain" due to students studying abroad. The government aims to double higher education enrolment within a decade, supported by scholarships, but supply-side challenges persist.

Key Issues Identified:

- Restrictive regulatory frameworks hinder foreign participation, online education recognition, and teacher mobility.

- Benchmarking against peer economies shows Sylvana's higher education regime is 65% more restrictive.
- Reforms could improve innovation performance, research output, and reduce student outflow.

Reform Options:

1. **Viridia Model:** Inspired by Viridia's successful earlier liberalization of its higher education sector, which improved global rankings and research output.
2. **Open Cross-Border Regime:** Focuses on easing restrictions on online education delivery.
3. **Open Establishment Regime:** Prioritizes foreign institutions establishing local campuses.
4. **Minimal Reform:** Addresses cross-cutting issues like transparency but retains most other restrictions

Participants will be divided into six stakeholder groups (universities, students, employers, private providers, staff representatives, and trade officials) to rank options according to their interests. Detailed case study notes will be provided. The activity concludes with a review of support and opposition patterns for the reform proposals.

16:10 – 16:30	Break (30 minutes)
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16:30 – 17:20	Part 2: Viridis's Market Entry Strategy in Sylvana
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Moderator: Christopher Findlay, Honorary Professor, Australian National University

This part takes a business orientation. It focuses on Viridis's efforts to enter Sylvana's market amidst regulatory and operational challenges. Viridis offers AI-driven online degree programs but must navigate Sylvana's restrictive policies on foreign education providers, as discussed in part 1.

Challenges Faced:

1. Regulations on Cross-Border Service provision:
2. Data Management and Privacy:
3. Infrastructure Limitations:
4. Competition Concerns:
5. Standards Misalignment:
6. Career and Technical Education (CTE):

Proposed Strategies:

- Hybrid models combining online delivery with limited local presence.
- Partnerships with local institutions or industry organizations for accreditation and internships.
- Differentiation through niche programs addressing skills gaps in AI ethics or sustainable technologies.

Participants will hear a debate among Viridia's managers on trade-offs regarding entry speed, regulatory compliance, and independence, addressing risks such as intellectual property exposure and reputational damage. Detailed case study notes will be provided,

and participant groups will suggest next steps for Viridia's strategy across the six debated areas.

17:20 – 17:25 **Closing and Next steps (5 minutes)**

Christopher Findlay, Honorary Professor, Australian National University

The activity involves collaborative discussions among stakeholders to address policy reforms in Sylvana (Part 1) and devise viable entry strategies for Viridis (Part 2). Both parts highlight the interplay between regulatory frameworks, market dynamics, and institutional strategies in fostering higher education growth.

17:25 – 17:30 **Live Survey (5 minutes)**

Kevin Nguyen, Project Officer, The Australian APEC Study Centre at RMIT University

DAY 2

TUESDAY, 6 MAY 2025, 09:00 – 17:30 (PET)

08:30 – 09:00 **Registration and Reception (30 minutes)**

09:00 – 12:00 **GOS PRIVATE PUBLIC DIALOGUE ON CHALLENGES AND OPPORTUNITIES FOR WOMEN'S PARTICIPATION IN HIGH SKILL, DIGITALLY DELIVERED SERVICES IN APEC**

09:00 – 9:10 **Welcome Remarks (10 minutes)**

Christine Schaeffer, Assistant Director, APEC Trade and Investment Section, Australian Department of Foreign Affairs and Trade (DFAT)

The Public Private Dialogue (PPD) will focus on advancing the economic empowerment of women in APEC through addressing the challenges and opportunities of their greater participation in the dynamic growth sectors of high skill, digitally delivered services. The PPD will also provide input into the formulation of recommendations for how APEC economies can best help to progress this objective in different areas through relevant supportive policies in both the public and private sector. This PPD and its outcome constitute steps towards carrying out the key areas of the Action Plan contained in La Serena Roadmap for Women and Inclusive Growth endorsed by APEC Senior officials in December 2019 in Chile. It also supports one of the Republic of Korea's three main policy priorities for APEC 2025, namely digital innovation and transformation essential for accelerating sustainable and inclusive growth

09:10 – 10:00

Session 1: Barriers holding women back in high skill, digitally delivered services (50 minutes)

Moderator: Sherry Stephenson, Member, Pacific Economic Cooperation Council (PECC) Services Network

The digital revolution is reshaping the global services landscape, creating new avenues for trade and employment. Among these, digitally delivered services (DDS) have emerged as the fastest-growing and most dynamic component of the global economy, offering unprecedented opportunities for innovation and economic growth. However, despite the transformative potential of DDS, women across APEC economies continue to face significant barriers that limit their participation and potential as key contributors to this growth. This session discusses existing gaps in women's participation and the reasons behind these in the three high-skill service sectors of focus, from the perspective of executives from these sectors

Speakers:

Silvia Lara, Gender Research Lead, LinkedIn Economic Graph Research Institute, Singapore

- General overview of main barriers holding women back in the digitally intensive, high skill service sectors

Hanna Norberg, Founder and Principal, TradeEconomista; Initiator and President TradeExperettes, Co-founder TPRForum

- Perspective from professional (consulting) services sector

Grace Gown, Head of Global Public Policy, Xero, Australia

- Perspective from financial services sector

Winnie Kula, President of the PNG ICT Digital Cluster and Founder eNovaX Solutions, Papua New Guinea

- Perspective from information technology services sector

Views will be sought on the following questions:

1. *How important is the area of digitally intensive services for women's greater participation in trade and their economic future?*
2. *The background paper discusses several reasons behind the current economic gender equality gaps in the APEC region in the area of high skill, digitally delivered services. What has contributed to these gaps, and how costly have they proven to your operations?*
3. *What might be the benefits of greater women's participation in the digitally intensive service sector of your focus? And how this might have a positive impact not only on women but on society and economic performance and trade.*
4. *What are the main actions or programmes of support that you would ask from governments to allow women to better realize their potential through playing a bigger role in the growth area of digitally intensive services?*

Discussion with panel and participants

10:00 – 10:40	Session 2: Women in high-skill digital services: Addressing skills, access, and inclusion challenges (40 minutes)
	<p>Moderator: Dr. Mia Mikic, Research Associate, Waikato University, New Zealand</p> <p><i>While more women work in services in the APEC region than in manufacturing and agriculture, the proportion of women in the highly skilled services jobs that demand digital skills is much less than that of men, particularly for managers and technicians/associate professionals. The study suggests that there is a “digital equality gap” that is in part responsible for this, characterized by a skills mismatch for digital, financial and managerial jobs created by fewer numbers of women STEM graduates (less than one-third in APEC), and women’s unequal access to training and digital tools and infrastructure. This session discusses these issues, along with other barriers (access to capital, cultural and attitude, and regulatory barriers) and the challenge of informality that impede women’s greater participation in these services</i></p> <p><u>Speakers:</u></p> <p>Joana Valente, Partner in Technology and Transformation, Deloitte, Australia</p> <ul style="list-style-type: none"> ➤ Enhancement of digital skills for women in high tech professions <p>Samar Alrayyes, Co-chair, TechWomen, New Zealand</p> <ul style="list-style-type: none"> ➤ Tackling structural and institutional barriers <p>Steven Tobin, ILO Regional Office for Asia and the Pacific</p> <ul style="list-style-type: none"> ➤ Challenges in converting informality into the formal economy <p>Devi Ariyani, Executive Director, Indonesia Services Dialogue Council (ISD)</p> <ul style="list-style-type: none"> ➤ What can companies in the Asia-Pacific Services Coalition do to promote women’s involvement and status in high skill, digital services? <p><u>Discussion with panel and participants</u></p>
10:40 – 11:10	Break (30 minutes)
11:10 – 11:50	Session 3: Artificial Intelligence and its impact on women in services (40 minutes)
	<p>Moderators: Sherry Stephenson, Member, PECC Services Network Dr. Mia Mikic, Research Associate, Waikato University, New Zealand</p> <p><i>AI is being adopted faster than PCs or the Internet were in the previous technological revolutions. Data from many sources indicate that by the year 2030, there will be a seismic shift in job skill requirements as AI accelerates change in the workplace, and particularly in the services area. It is unclear at present what type of impact AI technologies will have on women. What is clear is that ingrained attitudes and biases exist in the development and application of AI tools, which may influence women’s ability to apply these. This session will discuss these issues and offer insights not only</i></p>

into the rapidity of technological change but also into what types of education and professional skills will be needed by women to be able to participate and thrive in the future in high skill, digitally delivered service sectors.

Speakers:

Peter Lovelock, Chief Consulting & Innovation Officer, Access Partnership

- Inherent biases in the creation of AI tools

Gareth Tan, Associate Director and Technology Lead, APCO, Singapore

- Role of AI in preparing women for next generation careers

Silvia Lara, Gender Research Lead, LinkedIn Economic Graph Research Institute, Singapore

- Insights from LinkedIn latest research on AI's impact on women's work

Discussion with panel and participants

11:50 – 12:20	Session 4: Roundtable discussion, Recommendations and Wrap-up (30 minutes)
	<p>Moderator: Bonnie Rivendell, Associate Director, International Development and Director of Australian APEC Centre at RMIT University</p> <p><i>The closing session will draw out some main conclusions from the PPD and discuss recommendations that can be advanced by the APEC GOS and the PPWE aiming to enhance the ability of women to advance their participation in high skill, digitally delivered services.</i></p> <p><u>Discussion with panel and participants</u></p>
12:20 – 12:25	Live Survey (5 minutes)
	Kevin Nguyen , Project Officer, The Australian APEC Study Centre at RMIT University
12:25 – 12:30	Closing and Next steps (5 minutes)
	Christine Schaeffer , Assistant Director, APEC Trade and Investment Section, Australian Department of Foreign Affairs and Trade (DFAT)
12:30 – 14:00	Lunch
14:00 – 15:15 WORKSHOP ON PROFESSIONAL SERVICES – UNDERPINNING ECONOMIC ACTIVITY AND JOBS GROWTH	
14:00 – 14:10	Welcome and Introduction (10 minutes)
	Christine Schaeffer , Assistant Director, Australian DFAT
14:10 – 15:15	Professional Services – Underpinning Economic Activity and Jobs Growth

Moderator: Arjuna Nadaraja, Chair, Australian Pacific Economic Cooperation Committee (AusPECC)

Professional services are important to some economies as a significant export sector, but they are undeniably essential to every economy as an intermediate service that underpins all two-way trade and investment. As intermediate services, professional services also have a direct and positive impact on the competitiveness of manufacturing, merchandise trade, and across other services sectors of economies. It is argued that improved competitiveness, particularly in services, leads to both more and better-quality jobs.

However, the traditional, domestically focused approach to regulating and licensing professionals is increasingly out of step with the needs of today's interconnected global economy. It hampers the seamless delivery of multijurisdictional and multidisciplinary professional services. This challenge has become even more pressing with the rise of rapidly evolving technologies that bring both new opportunities and regulatory challenges.

The session will explore:

- *how and what professional services are traded internationally*
- *the challenges faced by both providers and consumers of these services*
- *key elements of sound regulatory frameworks that build trust, ensure standards and support the seamless flow of professional services; and*
- *how a competitive professional services sector can contribute to economic efficiency and jobs growth*

Panel Speakers:

Stuart Fuller, Chair, Asia Society Australia; and Chair, University of New South Wales Law & Justice Advisory Council

- Perspective from an international provider of professional services: how professional services are provided; and regulatory environments that facilitate business efficiency vs those that add costs for clients

Brahma D Sharma, Strategic Advisor & Executive & Leadership Coach, Business Strategy & Growth, Governance, Asia Business Advisory, Board Member ASEAN

- Perspective from an international consumer of professional services: provider-client relationship and trust; what is the value add sought by clients

Christopher Findlay, Honorary Professor, Australian National University

- Where are the links, path from professional services competitiveness to jobs growth

Kathlyn Loseby, President NSW of Australian Institute of Architects

- What do regulators look for in licensing foreign professionals and how best to ensure domestic standards as well as the seamless flow of professional services

Discussion with panel and participants

15:15 – 15:20	Live Survey (5 minutes)
	Kevin Nguyen , Project Officer, The Australian APEC Study Centre at RMIT University
15:20 – 15:25	Closing and Next steps (5 minutes)
	Christine Schaeffer , Assistant Director, Australian DFAT – TBC

DAY 3

WEDNESDAY, 7 MAY 2025, 09:00 – 17:30 (PET)

08:30 – 09:00	Registration and Reception (30 minutes)
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09:00 – 17:30	GOS: APEC SERVICES COMPETITIVENESS ROADMAP (ASCR) ANNUAL DIALOGUE
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09:00 – 9:10	Welcome and Introduction (10 minutes)
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Jillian DeLuna, Convenor, APEC Group on Services

09:10 – 10:40	Session 1: ASCR Final Review and Looking Forward to APEC's Next Services Agenda
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Facilitator: Jillian DeLuna, Convenor, APEC Group on Services

Speakers:

- **Andre Wirjo**, Senior Analyst, APEC Policy Support Unit (PSU)
- APEC Business Advisory Council (ABAC)
- **Matteo Fiorini**, Trade Policy Analyst, OECD

10:40 – 11:00	Break (20 minutes)
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11:00 – 12:00	Session 2: Stakeholder Session 1 – Perspectives from Service Providers
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Moderator: Peter Lovelock, Chief Consulting & Innovation Officer, Access Partnership

This session will seek input from industry on how APEC's future services agenda can better reflect the opportunities and challenges faced by a range of service providers across APEC economies. This session will also explore issues facing the digital deliverability of services across sectors.

Speakers:

- **Jane Drake-Brockman**, Co-Convenor, Asia Pacific Services Coalition
- **Dr Choo Kok Beng**, Malaysian Services Providers Confederation

Moderated Q&A (25 minutes)

12:00 – 14:00	Lunch
14:00 – 15:00	<p>Session 3: Stakeholder Session 2 – Perspectives on Digital Services</p> <p>Moderator: Sahir Amlani, Director for Services and Digital Trade, Office of the U.S. Trade Representative</p> <p><i>This session will seek input from digital service providers on how the APEC’s next services agenda can support the changing landscape for digital services and support for adoption of emerging technologies.</i></p> <p><u>Speakers:</u></p> <ul style="list-style-type: none"> ▪ Helen Seidel, Head, Government Engagement, Visa ▪ Grace Gown, Head of Global Public Policy, Xero ▪ Rob Porter, Vice President, Global Affairs, Coupang <p>Moderated Q&A (25 minutes)</p>
15:00 – 15:20	Break (20 minutes)
15:20 – 16:50	<p>Session 4: Economy Discussion Session</p> <p>Moderator: Australia representative</p> <p><i>The APEC Services Competitiveness Roadmap identified enabling factors to develop and sustain competitive services sectors. This session will seek input from APEC economies on potential enabling factors for APEC’s future services agenda</i></p> <p><u>Economy interventions:</u></p> <p>Key messages from the session</p>
16:50 – 16:55	<p>Live Survey (5 minutes)</p> <p>Kevin Nguyen, Project Officer, The Australian APEC Study Centre at RMIT University</p>
16:55 – 17:00	<p>Closing and Next steps (5 minutes)</p> <p>Jillian DeLuna, Convenor, APEC Group on Services</p>