



SERVICES POLICY REVIEW

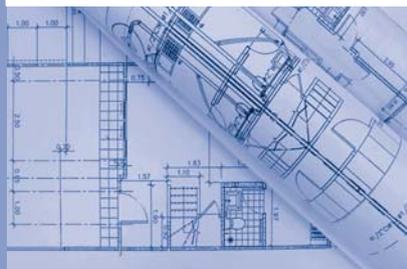


PARAGUAY





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This publication was prepared by a team led by Mina Mashayekhi, Head of the Trade Negotiations and Commercial Diplomacy Branch (TNCDB) of UNCTAD. The team included TNCDB staff members and experts based in Paraguay. Staff members who participated in the drafting of this report are Bruno Antunes, Alberto Gabriele and Luisa Rodriguez. Experts in Paraguay included Gilda Arrellaga, international trade law expert, Agriconsulting Europe in Paraguay, and Tatiana Lopez, Economist and public policy expert.

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ACRONYMS AND ABBREVIATIONS

ACEPAR	Paraguayan Steels S.A.
AFD	Financial Agency for Development
AFP	Agency for Pension Funds
ALADI	Latin American Integration Association
ANDE	National Administration of Electricity
ANEAES	National Agency of Evaluation and Accreditation for Higher Education
ANTEL	National Administration of Telecommunications (Uruguay)
ANTELCO	National Administration of Telecommunications
APAR	Paraguayan Association of Architects
APROCON	Association of Construction Professionals
ARCU SUR	MERCOSUR System for Accreditation of University Careers
ASSAL	Latin American Association of Insurance Supervisors
ASOBAN	Association of Banks of Paraguay
AWS	Amazon Web Services
BBVA	Banco Bilbao Vizcaya
BCP	Central Bank of Paraguay
BID	Inter-American Development Bank
BNF	National Development Bank
CAMPY	Chamber of Mobile Operators of Paraguay
CAPACO	Paraguayan Construction Chamber
CAPAVI	Paraguayan Chamber of Housing and Infrastructure
CAVIALPA	Paraguayan Chamber of Road Constructors
CERNECO	Centre for Regulation, Norms and Studies on Communication
CIAM	MERCOSUR Integration Commission for Agricultural Measuring, Agronomy, Architecture, Geology and Engineering
CMC	Council of the Common Market
CMTI	World Conference on International Telecommunications
CNB	Non-banking Correspondents
CNV	National Stock Exchange Commission
CONACYT	National Council for Science and Technology
CONATEL	National Council for Telecommunications
CONES	National Council for Higher Education
CONFEA-CREA	Regional Council for Engineering, Architecture and Agronomy
COPACO	Paraguayan Communications Company
COSIPLAN	South American Council of Infrastructure and Planning
CPI	Paraguayan Centre of Engineers
CPC	Provisional Central Classification of Products
DGEEC	General Directorate of Statistics, Polling and Census
EAP	Economically Active Population
ECLAC	Economic Commission for Latin America and the Caribbean
EDGI	Electronic Government Development Index
EEB	Basic School Education
FDI	Foreign Direct Investment
FEDAPAR	Federation of Associations of Parents of Educational Institutions of Paraguay
FEPRINCO	Federation of Production, Industry and Trade
FONACIDE	National Fund of Public Investment and Development
FONAVIS	National Fund of Social Housing
FOCEM	(MERCOSUR) Structural Convergence Fund
FSU	Universal Services Fund
FTAs	Free Trade Agreements
GATS	General Agreement for Trade in Services
GCI	Global Competitiveness Index

GDP	Gross Domestic Product
GNB	Getin Noble Bank
GMC	Common Market Group
Gs	Paraguayan Guarani
GVCs	Global Value Chains
ICT	Information and Communication Technologies
IDI	Informatics Development Index
IFD	Institute for Teacher Training
IFS	International Featured Standards
INC	National Cement Industry
INCOOP	National Institute of Cooperatives
IPC	Consumer Price Index
IPS	Institute of Social Welfare
LTE	Long Term Evolution
MDGs	Millennium Development Goals
MEC	Ministry of Education and Culture
MERCOSUR	Southern Common Market
MFN	Most Favoured Nation
MHz	Mega Hertz
MIC	Ministry of Industry and Trade
MOPC	Ministry of Public Works and Communications
MSPBS	Ministry of Public Health and Social Welfare
MVNO	Mobile Virtual Network Operator
NAFTA	North American Free Trade Agreement
NAP	Network Access Point
NRI	Network Readiness Index
OECD	Organisation for Economic Cooperation and Development
PCP	MERCOSUR Protocol on Government Procurement
PEES	Economic and Social Strategic Plan
PNUD	United Nations Development Programme
PNT	National Telecommunications Plan
PPP	Public-Private Partnership
RANA	Network of National Agencies for Accreditation in MERCOSUR
REPSE	Register of Specialised Services Providers
RIACES	Ibero-American Network of Accreditation Agencies
ROA	Return on Assets
ROE	Return on Equity
SENATIC	National Secretariat on Information and Communication Technologies
SENAVITAT	National Secretariat of Housing
SGSI	Informatics Security Managing System
SGT 4	Working Sub Group N° 4 of MERCOSUR “Financial Aspects”
SIPE	Information System for State Procurement Providers
SMEs	Small and Medium Enterprises
SNEPE	National System of Evaluation of the Educational Process
SNPP	National Service of Professional Promotion
SOEs	State-Owned Enterprises
SPR	Services Policy Review
STP	Technical Secretariat of Planning
TISA	Trade in Services Agreement
UAA	Universidad Autónoma de Asunción
UCA	Universidad Católica de Asunción
UCSA	Universidad del Cono Sur de las Américas
UIT	International Telecommunications Union
UNASUR	Union of South American Nations

UNCTAD	United Nations Conference for Trade and Development
UNICEF	United Nations Children's Fund
UNINORTE	Universidad del Norte
UNINTER	Universidad Internacional Tres Fronteras
UPAP	Universidad Politécnica y Artística del Paraguay
USD	United States Dollars
US GAAP	US Generally Accepted Accounting Principles
UTCD	Universidad Técnica de Comercialización y Desarrollo
UTIC	Universidad Tecnológica Intercontinental
WEF	World Economic Forum
Wi-Fi	Wireless Fidelity
WTO	World Trade Organization

EXECUTIVE SUMMARY

The contribution of the services sector in Paraguay is very important from the perspective of various parameters. It contributes more than 50 per cent of Gross Domestic Product (GDP) with leading sectors including distribution, communication, construction and transport. It contributes more than 60 per cent of employment. Distribution and social, community and personal services are important sectors from the perspective of employment. Leading sectors contributing to investment include finance, distribution, communication and transport. “Other business services” contribute to trade.

Strengthening the services sectors is important from the perspective of advancing towards development goals, according to Paraguay’s economic and development strategies. Paraguay’s development strategies emphasise universal access to housing, sanitation, water, health, education and energy (electricity). Transport, telecommunications, electricity, education and access to finance are also of critical importance to improving Paraguay’s overall competitiveness.

Paraguay has several achievements with regard to the overall framework of services policies. These include the creation of a services forum to coordinate policies and engage diverse stakeholders in policy-making, and solid regulation and prestige of regulatory agencies in some services sectors (such as telecommunications and financial services).

Discussions with stakeholders in the context of preparing this study revealed that improvements in the following areas could maximise development benefits in the sector:

- Supply-side capacity;
- Control and enforcement of existing regulation and formalisation;
- Inter-institutional coordination, particularly between the academic sector and the private sector;
- Collection and analysis of statistics;
- Regulation relating to quality standards, competition and consumer protection;
- Access to credit and financing; and
- Utilisation of trade agreements.

Turning to the sectors under review, Paraguay presents challenges due to its infrastructure gap, which affects prospects for economic and social development. These challenges are likely to generate opportunities for the construction sector in the coming years but require increased levels of investment. To support such investment, the government of Paraguay is planning a number of development and regulatory improvements. Examples of these improvements include the approval of a Law on Public Private Partnerships (PPPs), which guarantees certain public works be financed by the private sector with sovereign bonds, and rules promoting the establishment of foreign investment in Paraguay and the formation of consortiums among local and international companies. At the institutional level, this interest is also reflected in concrete actions to optimise the management capacity of the Ministry of Public Works and Communications (MOPC), to support the management of infrastructure projects.

Providers of construction services face challenges related to informality, a shortage of skilled personnel and an unstable supply of construction inputs. The main challenge related to policies in this sector is ensuring access to finance, particularly in connection with housing. In the regulatory domain, shortcomings include insufficient regulation of construction works and the coexistence of different types

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