DEVELOPING COUNTRIES PARTICIPATION IN GVCS: ONGOING AND FUTURE WORK

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Background

- The international fragmentation of production is re-shaping the world economy.
- 3 key systems: ‘Factory Europe’, ‘Factory Asia’ and ‘Factory North America’(Baldwin and Lopez-Gonzalez, 2013.
- Heightened ‘interconnectedness’; implies that trade is increasingly *complementary* rather than *competing*.
- From a policy stand-point this means that impediments may not just affect foreign firms but also the competitiveness of domestic ones (Barriers to imports are barriers to exports)
- This presents new opportunities for policy coordination geared to meet common goals (FTAs, BITS, MFN reduction).
- Regulatory frameworks appear to be increasingly important in view of promoting further specialisation and international competitiveness.

Aim

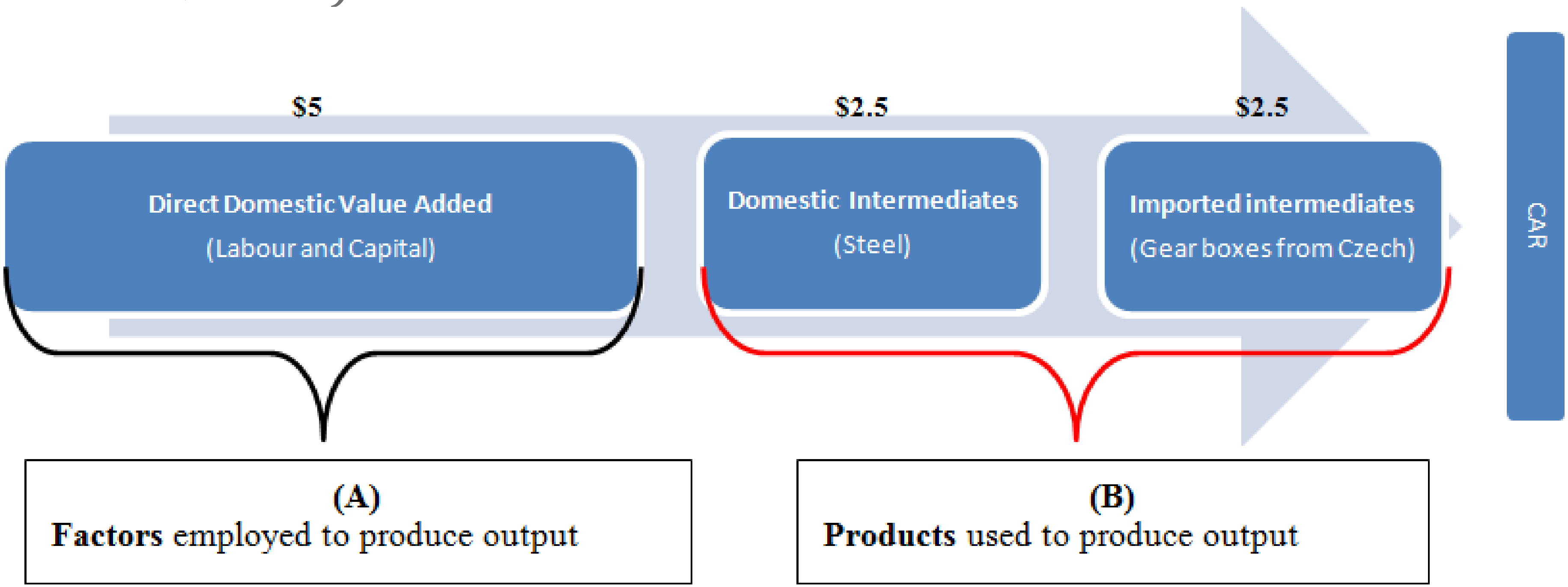
- Unravelling GVC activity:
    i. Mapping participation;
    ii. Identifying drivers – policy and non-policy related;
    iii. Understanding consequences (jobs, distribution of gains etc);
- OECD TAD work falls along these lines
- Before, a brief note on how we measure it.

Measuring: Trade flows

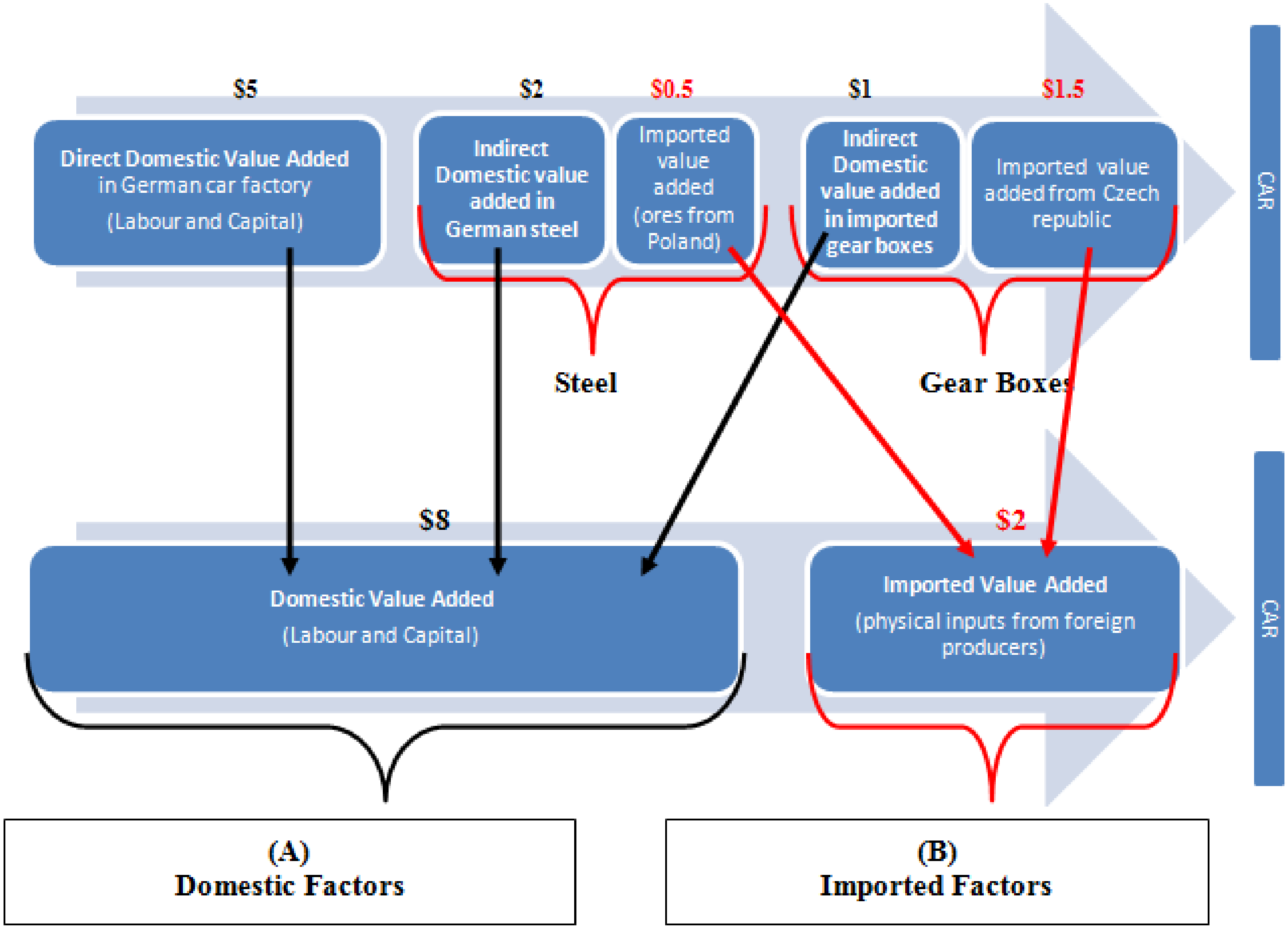
- We have traditionally relied on tariff headings labelled ‘parts and components’, but:
  - products are not exclusive to one end-use (i.e. think milk or tyres)
  - trade statistics give us no indication of; i) how products are combined (linkages between buying and selling sectors); or ii) about the final destination of the resulting output.
  - Are measured gross and not net which can mislead analysts into wrongfully attributing location of value added (iPhone – Kraemer et al. (2011))
- This does not mean that trade statistics are useless! We still need to track product movement. That is where trade policy happens (tariffs).

Measurement: What the factories are doing...

- To produce a $10k car a factory uses
  - Direct domestic value added (capital and labour)
  - Intermediates (domestic steel + imported gear boxes)



What the workers are doing (value added)...



Mapping

- Inter-Country Input-Output table measures:
  - Backward linkage (sourcing): Foreign value added content of gross exports.
  - Forward linkages (selling): Domestic value added sold to other countries for these to produce gross exports.
  - Value added in final demand (Los et al. 2014)
  - Other: length or distance to consumer.
- Trade data:
  - By end use → Intermediate good imports and exports (primary and processed) using BTDxE
- Firm level:
  - Using targeted surveys or case studies (ultimately it is firms and not countries which engage in GVCs).

Global Matrix of Value Added Trade

Domestic Value Added embodied in foreign final demand	France	Germany	United Kingdom	Rest of EU	Turkey	South Africa	Russian Federation	India	China	Korea	Japan	Rest of Asia	Australia	New Zealand	South America	Mexico	United States	Canada	RoW	Total
France				1%															1%	4%
Germany	1%		1%	3%													1%		1%	8%
United Kingdom				1%													1%		1%	4%
Rest of EU	2%	2%	1%	5%			1%		1%								2%		3%	20%
Turkey																				1%
South Africa																				1%
Russian Federati				1%															1%	3%
India																			1%	2%
China				1%							1%	1%					2%		1%	8%
Korea																				2%
Japan									1%			1%					1%		1%	5%
Rest of Asia				1%					1%		1%	1%					1%		1%	7%

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