

UNCTAD Expert Meeting

On Results from Pilot Surveys on Exports of
ICT-Enabled Services; Thailand Case study

28 - 29 November 2017



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ETDA Introduction



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INCREASING e-TRANSACTION VOLUME AND VALUE

e-Commerce
Promotion

e-Trade
Facilitation

Soft Infrastructure
Development

ETDA AIMS TO DEVELOP A SOFT INFRASTRUCTURE

by adding confidence and facilitating online or e-Transactions that are fundamental to the digital economy

Setting standards, monitoring cybersecurity and establishing laws for handling e-Transactions.

STANDARDS | SECURITY & PRIVACY | LAWS

Electronic Transactions Development Agency (Public Organization) or ETDA is a government agency under Ministry of Digital Economy and Society.

OPPORTUNITIES AND TRENDS IN THAI e-COMMERCE ENVIRONMENT

DIGITAL LIFESTYLE THAI POPULATION



Internet Users
43.87 MILLION



Source: NBTC
 Last Update: 30 June 2017

Mobile Subscribers
93.66 MILLION



Source : NBTC
 Last Update: 30 June 2017(e)

Line Users
41.00 MILLION



Source: LINE Corp
 Q4 2016

Facebook Users
46.00 MILLION



Source: we are social
 Jan 2017

e-PAYMENT 2016



28,635
 BILLION USD

Source : BOT/2016
 1 USD = 33.344 Thai Baht
 (Exchange Rate as of 4 October 2017, BOT)



e-COMMERCE 2016

76.78
 BILLION USD

Source : ETDA e-Commerce Survey 2017
 1 USD = 33.344 Thai Baht
 (Exchange Rate as of 4 October 2017, BOT)



Thailand ICT-Enable Services Pilot Survey



Background on Thailand with ICT-enabled Service:

- 1. ICT-enabled Service is a new word for Thailand**
2. Organizations collect data on services based on different objective, time frame and standard
- 3. Data Collection Process is different from International standard**
4. Organizations need to collaborate and work on integration of the scattered data on service





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Work Collaboration





Survey Methodology



Set up working group meetings with main stakeholders

-  Training on Mode of Supply in the ICT-enabled Services By UNCTAD Representatives
-  Access and analyze available data on 9 sectors of ICT-enabled services

Select 1 out of 9 sectors for a pilot: Telecommunication services **Two main sources of Telecommunication Services**

-  International Transaction Reporting System: ITRS
-  The International Telecommunication Service Survey
 - This survey was conducted with 14 major enterprises and their value of export is equal to 80% of total exports for this sector.

Conduct the survey based on UNCTAD ICT-Enabled Services Questionnaire

Why is Telecommunication sector selected ?



Most data is available on Telecommunication services within limited survey time (November 2017)



Bank of Thailand annually collects the export value of services in 10 sectors and the Telecommunication, Computer and Information services are collected for the balance of payments statistics (BOPS)



With the objective of international money transfer on cross border supply (Mode 1): Export values of Telecommunication services are confirmed and classified with the surveyed companies





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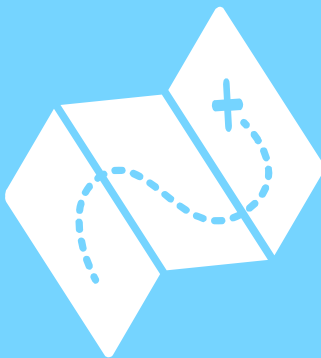
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Disclaimer

These statistical tables were prepared as part of the project “Pilot Surveys on Exports of ICT-Enables Services” which aims to test the feasibility of improving statistics on international trade in services and, in particular, on services transactions delivered remotely over the ICT networks.

The authenticity of the statistics cannot be guaranteed with certainty or completeness. So the value from this survey must not be interpreted as indicators or official statistics and should not be used for policy- or decision-making.



Survey results (1)

Exports of ICT-enabled services by category in 2016

Million USD

Sl. No.	Category of services	Total Turnover*	Total exports**	Cross- border over ICT networks***
1	Telecommunications	13,945.0	481.3	481.3

Source:

* Total Turnover are the revenues from sales and services in Telecommunications sector.

** Total exports are from BOP (extracted only the value from Telecommunications services)

*** Cross-border over ICT networks are from Pilot survey

Interesting issues

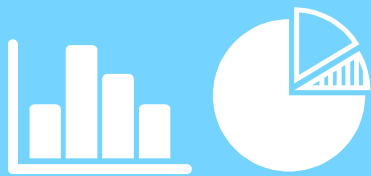


More than 80% of export value came from only 14 enterprises.



The total exports value of Telecommunication services is equal to the cross-border over ICT networks exports value.

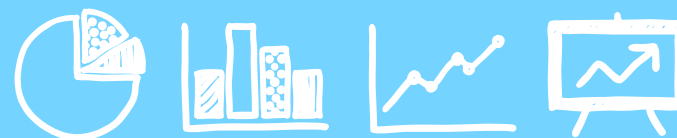
Survey results (2)



Exports of ICT-enabled services by country in 2016

Sl. No.	Partner country	Total exports (%)	Cross-border over ICT networks (%)
1	CHINA	10.2	10.2
2	JAPAN	8.9	8.9
3	KOREA , SOUTH	8.0	8.0
4	SINGAPORE	5.0	5.0
5	HONG KONG	4.4	4.4
6	Others	63.5	63.5
	All	100.0	100.0

Source: Pilot survey + ITRS



Disclaimer : based on page 10

Survey results (3)



Distribution of employees by principal activity and gender in 2016

Sl. No.	Category of services	% Distribution	
		Male	Female
1	Telecommunications	48.9	51.1

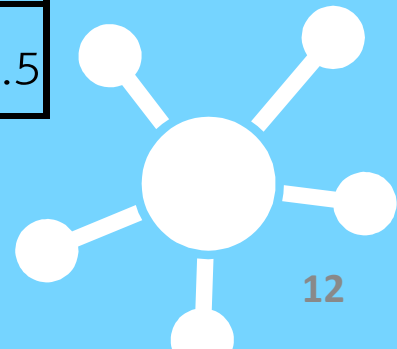
Source: Pilot survey

Distribution of enterprises by controlling Ownership in 2016

Sl. No.	Category of services	Ownership status (%)	
		Thai	Foreign
1	Telecommunications	97.5	2.5

Source: Pilot survey

Disclaimer : based on page 10





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Results from this project



Thai organizations have learnt a lot from the workshop by UNCTAD experts. It can eliminate all the doubts that exist.



Understanding the conceptual/methodology that meets the international standards to be used in this survey



Collaboration network from many entities such as Bank of Thailand, National Statistical Office, Ministry of Commerce etc.



Get some experience and obstacles from the field survey



Receive some comments from entrepreneurs on this questionnaire



Thailand plans to study on ICT-enabled services survey to make policy recommendation based on data collection by Ministry of Commerce, Bank of Thailand, National Statistical Office, etc.

More findings from the survey



Some entrepreneurs have the exports value of Telecommunication services as equal as the Telecommunication services export values over network due to



No maintenance service cost or



The exports value of Telecommunication services can be delivered remotely over ICT networks 100%



Some entrepreneurs want to reduce the Territory tax by setting branch abroad. Their export value became in Mode 3 that will not be included in this survey.

Comment/Suggestion

Comments from Enterprises 'side about UNCTAD questionnaire (1)



Entrepreneurs from developing countries such as Thai entrepreneurs have not known Definition of Mode of Supply, so they don't know which mode they should be.



Understanding the business environment of each entrepreneurs is different. So they need someone to explain the questionnaire.

Comments from Enterprises 'side about UNCTAD questionnaire (2)



There were too many questions at the beginning of the questionnaire till the respondents may give up before going to the major information.



Other comments



Modes of Supply explanation makes the respondents feeling confused.



Describe the Definition should be clear and easy to understand.

Suggestions from surveyor (1)



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Definition should be clear, easy to understand and give the respondents some relevant examples to reduce the confusion.

Total exports of telecommunication services : total receipts from telecommunication services to non-residents **excluding** receipts from the establishment of companies located outside the country.

Exports of telecommunication services over ICT network : receipts from Total exports of telecommunication services such as international calling charges, international roaming charges etc. **including** the telecommunications services over ICT network value that use by non-residents and that usage happened outside the country.



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Suggestions from surveyor (2)



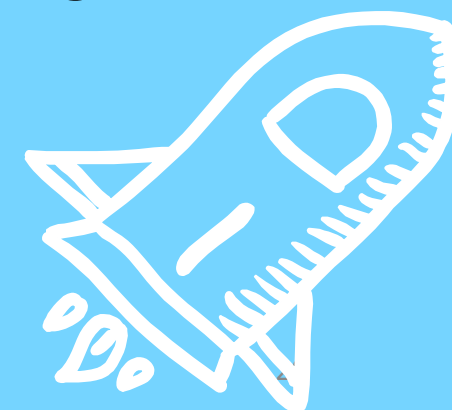
Different business insights. The target group should be divided into 2 groups:



SMEs are large groups. The questionnaire should be short, concise, easy to understand.



Enterprises are small groups. High market value. Have a good understanding of this business.



Suggestions from surveyor (3)



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When the target group is divided into 2 groups, the method of surveying should be selected properly for each group.



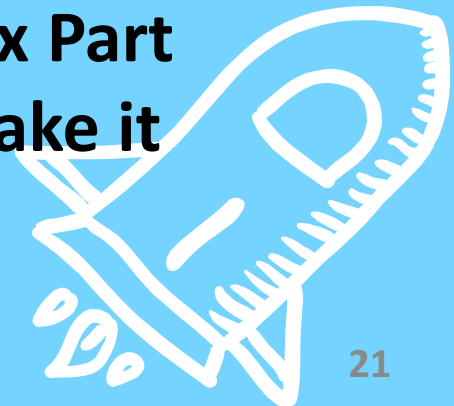
Short questionnaire is suited for the SMEs and it should be developed to an online survey.



UNCTAD questionnaire is suited for the Enterprises by using in-depth interview method.



Move the definition of Mode of Supply to be in the Annex Part of the survey, also to explain all modes separately and make it clear and easy to understand





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