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**REPORT OF THE JOINT OECD-EUROSTAT MEETING OF EXPERTS ON TRADE-IN-SERVICES
STATISTICS**

11-12 December 2000, Paris

Paper prepared by William Cave, OECD - France

*OECD-EUROSTAT MEETING OF EXPERTS ON TRADE-IN-SERVICES STATISTICS
Château de la Muette, Paris
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**REPORT OF THE JOINT OECD-EUROSTAT MEETING OF EXPERTS
ON TRADE-IN-SERVICES STATISTICS**

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1. Opening session

1. The meeting was opened by Mr. Blades, Head of the Non-Members Division of the Statistics Directorate of the OECD. He welcomed the participants, the full list of whom is given in Annex 1.
2. Mr. Blades told the meeting of the appointment of a new Chief Statistician of OECD, Mr Enrico Giovannini, who would take up his duties in January 2001 and of Slovakia's recently confirmed membership of the OECD.
3. He said that this meeting marked a transition point for this Group. The draft Manual on Statistics of International Trade in Services had been sent to the UN in mid-November for translation and submission to the UN Statistical Commission in March 2001. This group had played a vital role in its construction. He said that he hoped that it would be approved. It was clear that the Manual is a compromise between the detailed needs of trade policy analysts and trade negotiators and the much more restricted possibilities of statistical compilers.
4. It was time to pause and look ahead to the next steps. He asked that the meeting address some questions: if the Manual is approved, how could we begin implementation in a number of areas? What development tasks remain to us after the publication of the Manual and how can they be moved forward? What should be our priorities?
5. He emphasised that OECD had one very specific objective for these two days, which was to agree on how to begin a Secretariat collection of trade in services by partner country data in 2001 since it appeared that 16 countries have such data, which are published.
6. Finally he wished delegates a successful meeting and an enjoyable two days in Paris and passed the Chairmanship to Mrs Almut Steger of the Deutsche Bundesbank. Mrs Steger thanked Mr Blades and observed that although there were no new countries present there were new delegates. She invited all participants round the table to introduce themselves.

2. Adoption of the Agenda [STD/NA/SERV/A(2000)1]

7. The agenda was adopted and is attached at Annex 2.

3. Report of the Meeting of Experts on Trade-in-Services Statistics of 5-6 July 1999

8 Delegates were presented with the draft report of the previous meeting 5-6 July 1999 (STD/NA/SERV(2000)4). **One change in paragraph 63 was tabled by Mr Henderson (Stats Canada), which was accepted and the revised report agreed.**

4. Reports on recent developments

a) *Draft Manual on Statistics of International Trade in Services*

i) *Conclusions of the Meeting of the UN Expert Group*

9 Mr Becker UNSD, provided a report STD/NA/SERV(2000)3 on the conclusions of the UN Expert Group, which had been convoked in July 2000 at UN headquarters in New York to review the Draft Manual on Statistics of International Trade in Services.

10 The Group had included government statisticians, business experts, trade negotiators and international organisations. The feedback from the Group on the Manual was mainly positive, it noted the importance of the Manual for improving measurement of international trade in services and commended the Task Force for its work in preparing the draft Manual, but it highlighted the need for some further work in the presentation of the Manual and post-publication development work. The latter included a compilation guide. The need to maintain a dialogue between the statisticians and trade negotiators was emphasised.

11 Mr de Boeck (National Bank of Belgium) suggested that the compilation guide should address the issue of a harmonised code list and said that some thought could be given to elaborating some of the definitions of the types of service, which he felt were not always as full as they could be in the Manual. Mrs Steger remarked that the question of codification was important and there should be cooperation between the agencies to avoid confusion and duplication of effort by the countries. Mr Whichard (US/BEA) remarked that there is now a little more compilation guidance in the Manual.

12 Mr Henderson said that one request of the UN Expert Group was for a mission statement at the beginning of the Manual. Mr Cave (OECD/STD) responded that the introduction to the Manual now included an acknowledgement of the need for further development work in a number of areas. **It was also planned to draft an executive summary and this would be circulated to the Group in due course.** Mr Henderson suggested an interesting example for compilation guidance from work done by Trinidad and Tobago. A further request of the UN Expert Group had been a correspondence between EBOPS, CPC and GNS/W/120. Ms Fitzgibbon IMF said that this correspondence was under development and would be included in the Manual.

13 Mr de Boeck said that the work of Eurostat on inward FATS had two strands: enterprise statistics and FDI and outward FATS was based on FDI. Mrs Steger said that these points may be useful for the guide on implementation.

ii) *Latest version of the draft Manual - main changes*

14 Mr Cave introduced the latest version of the draft Manual STD/NA/SERV(2000)2, highlighting the main recent changes. These changes included in Chapter one recognition of the difficulty of measurement of trade in services, the need for some kind of quality

considerations in producing more detailed statistics, a further development agenda, a higher profile for services delivered by 'natural persons' and definitions of trade in services and services. Recommendations on EBOPS implementation had been softened to take into account concerns expressed in the worldwide review of the Manual.

- 15 Chapter two had been restructured to clarify the presentation. The simplified approach to the statistical treatment of modes of supply acknowledged that this was suitable for a first approximation but the need for an empirical approach was now clearer.
- 16 In Chapter three construction services were divided between construction abroad and construction in the home economy, which followed the treatment in the joint OECD-Eurostat classification but was slightly different to the BPM5 presentation. There was also more explanation on construction, merchanting, insurance and the transport memorandum items.
- 17 In Chapter four on FATS statistics, there had been a re-ordering of the priority variables to make sales the most important, this is now more in line with balance of payments (BOP) trade. There is also a box on FDI. Some example decision rules on deciding the country of ownership. The longer term goal of a product dimension has been elaborated.
- 18 The Annex on Natural Persons had been improved and is now Annex 1 instead of Annex 4. This is part of the raised profile of this issue in the Manual. It also indicates the need for further development work on a statistical framework. A replacement annex 4 was under preparation to give an EBOPS/CPCv1.0/GNS correspondence.
- 19 If the Manual was approved in March 2001 then publication was planned for later in that year. The Task Force would seek to coordinate implementation advice, data collection and commence further development work.
- 20 Ms Fitzgibbon added that there was now a box on FISIM. Mrs Steger said that she found that the readability of the Manual was much improved.
- 21 Mr Henderson observed that in Chapter one it could have been useful to mention that commercial confidentiality is a restriction on detail of the statistics that could be provided. Mr de Boeck said that he had two minor comments, firstly that the term "FATS statistics" is still potentially confusing for people who also may use FATS to mean Foreign Affiliates Trade Statistics. He suggested "FATS in Services" might be better. He also drew attention to a possible conflict between the use of majority ownership of voting rights as the determinant for foreign control, which could be a source of confusion regarding links with FDI data, where the concept of voting rights was not the factor considered.
- 22 Mr McKenzie (British Invisibles) asked if there was an implementation timetable. Mr Roman (Eurostat) emphasised the vital importance of coordination in the work on FATS and FDI including geographical allocations and economic activity. **Mrs Steger, summing up, said that coordination on FATS and FDI was important and that the Task Force should review the issue of using voting rights in the concept of control in chapter 4.**

b) Globalisation Manual -Overview

- 23 Mr Hatzichronoglou (OECD/DSTI) introduced paper STD/NA/SERV(2000)5 which provides an overview of the proposed Manual on Economic Globalisation Indicators. The work on globalisation indicators dated back to the early 1990s, when the OECD Industry Committee mandated its Statistical Working Party to devise new indicators of globalisation. As an example of the need for new indicators he cited a firm's export market shares, which might decline if a foreign affiliate was established to supply that market, but the actual market share taking into account both modes of supply was enhanced.

- 24 First it was necessary to develop the appropriate conceptual framework to describe the activity of multinational firms and identify the indicators relevant to policy concerns. Currently 18 variables were used. The proposed Manual would have four chapters:
- i. Introduction to the concept of economic globalisation and the measurement thereof;
 - ii. Foreign direct investment and the economic activity of multinational firms;
 - iii. The internationalisation of technology;
 - iv. Aspects of the globalisation of trade.
- 25 He said that the most useful information on country of ownership concerned the country of the Ultimate Beneficial Owner (UBO). He cited a Eurostat study that showed big differences between data in terms of UBO and data on First Foreign Parent (FFP).
- 26 He also spoke of the importance of defining the universe of firms and referred to important differences obtained from employment by establishment and employment by enterprise. He had been instructed to have the document discussed by all Directorates, because of its wide scope. This process and any necessary revisions ensuing may slow progress.
- 27 Mrs Steger and Ms Storgaards (Statistics Finland) said that there was a need for continued cooperation between trade in services and globalisation groups. Mr Hoffmann (ILO) asked why movement of persons was not discussed. Mr Hatzichronoglou said that the movement of people was not considered a driver of globalisation, but was rather a consequence of globalisation. Capital movements and technology transfer were drivers.
- 28 Mr McKenzie agreed with the approach set out in paragraph 9 of the paper, which would attempt to build a wider view of 'export market' share based on exports and sales of locally established affiliates. He asked whether companies' foreign activities, other than direct investment, would be picked in the FATS data. One such example was the licensing arrangement for production set up by some drinks companies.
- 29 Mr Renard (Banque de France) spoke of the example of Denmark and their difficulty in identifying the country of the UBO, which was the better concept, but there was a lack of knowledge and the problem of confidentiality. There is a need for an international database of multinational companies that all countries could refer to. Mr Hatzichronoglou pointed out that respondents in firms may not know who is the ultimate parent company and that was why OECD would advocate that FATS questionnaires should seek both UBO and FFP and be directed to senior management. Construction of a multinational database, if it were possible and there are many practical obstacles including the issue of confidentiality, would be very helpful in this respect. But it would be a lengthy and difficult task. Mrs Steger said that there remained a number of unsolved problems.
- 30 Ms Storgaards asked about the availability of all the documents mentioned in Annex 2 of paper 5. The Secretariat replied that some were not yet on the internet and had only been distributed to globalisation experts. Mr Renard suggested that trends in stocks of FDI data rather than trends in flows, were more suitable for graphical analyses.
- 31 **Mr Hatzichronoglou agreed and said that he planned to send the next edition of the draft Globalisation Indicators Manual to the Trade in Services Expert Group.**

c) Tourism Satellite Accounts

- 32 Mr Dupeyras (OECD/DSTI) referring to Room Document One, reported on the sometimes difficult but ultimately successful cooperation between the World Tourism Organization, OECD, Eurostat and the UN to agree a unified "Tourism Satellite Account (TSA): Recommended Methodological Framework", which had been approved by the UNSC in March 2000 and was now undergoing a final presentational editing by the UN prior to publication. He said that the room document could be passed on to interested parties.
- 33 There had been an enormous effort since last year to find a concensus between two divergent views of TSA existing in the different organisations. He said that OECD Statistics Directorate had played an important role in this process of bringing the two systems together.
- 34 This TSA framework was designed as a tool for the measurement of the socio-economic impact of tourism on a country in a way that could be compared to other industries and other countries. Tourism is not an industry in the statistical sense, but a collection of activities defined by the consumer, usually described as a visitor .
- 35 He said that implementation would now be the focus of activity and that 16 countries had either produced TSAs or were actively in the process of producing them. Implementation required multidisciplinary cooperation nationally and internationally. It would raise further questions such as how to analyse the data. There were also discussions with OECD/STD concerning the creation of a tourism statistics database and a decision was expected in the first quarter of 2001.
- 36 Mr Cave (OECD/STD) asked whether there were any examples of tourists' expenditure breakdowns by product as these could be of interest to the GATS. Mr Dupeyras said that he did not know, but suggested that could be a question for his next meeting of tourism statistics experts.

d) OECD Survey of Internet Financial Services

- 37 Mr Hans Christiansen (OECD/DAFFE) gave a report on a current pilot survey of internet financial services. It stemmed from a strong policy-related interest by the Financial Markets Committee. The aim was to discover what data were available in countries on cross border financial services delivered via the internet.
- 38 Mrs Steger thought that this was an interesting initiative, and speaking on behalf of the Deutsche Bundesbank, she said that it would try to collect information if it were possible. Mr McKenzie said that there were an increasing number of banks registered to do business in the UK, but without any office there. The IMF asked who the questionnaires were sent to and commented that modes of supply would be difficult to distinguish. **Mr Christiansen agreed and said that he would provide a list of contacts for his questionnaire to the trade in services Secretariat for circulation to the Group for their information.**

5. Trade Policy - statistical information priorities for negotiators

- 39 Ms Nielson (OECD/ECH) gave a presentation on the current state of the GATS negotiations and the priorities of trade negotiators for statistics. Regarding the MSITS, she stressed that the manual represents an important achievement and a very large step forward in terms of trade-in-services statistics, although there are some areas where there is still some distance to travel before it could guide negotiations and monitor the outcome.
- 40 On the GATS 2000 negotiations, these had recommenced formally in January 2000 and a stocktake of progress and proposals was scheduled for March 2001. Many proposals had been

tabled, which were normally sector or mode specific. There were negotiations in the GATS Rules Working Party on the possibility of an emergency safeguard procedure. Regarding particular sectors, negotiations were conducted mainly in terms of the GNS classification. In some cases there were proposals to amend this.

- 41 The overall progress was slow but steady at this stage, but there is much technical work to be done in services. There are some concerns that things could slow down, given that there is no deadline for the negotiations.
- 42 There had been a recent increase in attention paid to statistics by negotiators. A one-day seminar was held in October to bring together statistics experts and trade delegates to help understand what was and was not currently available in services statistics and some of the issues faced by statisticians. In the context of the GATS 2000 negotiations, there are general and specific, political and technical drivers for the desire for more statistics for trade in services. She said that GATS Article XIX calls for an assessment of trade in services, both in overall terms and on a sectoral basis, to be carried out as part of the establishment of the negotiating guidelines for successive rounds of GATS negotiations. This had become an important issue for some developing countries. There was a clear need for statistics to inform the negotiations and monitor agreements.
- 43 As negotiations get more serious, practical negotiating needs also drive the interest in statistics. Members want to know how to assess the value of offers and requests; what they stand to gain or lose and, most importantly, where they should focus their priorities.
- 44 In addition, services statistics may play a role in WTO member countries' consideration of how they want to conduct the negotiations. Statistics also are needed after the negotiations in terms of monitoring of commitments undertaken and to assess the extent to which the objectives and priorities established are being met.
- 45 The negotiation of an emergency safeguard for services has also raised specific problems and requirements with regard to services statistics. Lack of services statistics has been cited as an important impediment to development of a safeguard, as thresholds would need to be identified in order to trigger action.
- 46 More broadly, there is a need for statistics to inform the public of the effects of services liberalisation.
- 47 The three main areas of particular interest to GATS negotiators included:
 - i) product data - here she highlighted the Manual's advances with regard to health, education, audiovisual services and greater detail for financial services, telecommunications, distribution, energy and internet services. Negotiators were also likely to find the detailed product correspondences in the Manual helpful. Any product breakdowns for FATS, even the basic goods/services split, would be useful;
 - ii) trade by partner country (or even region) is a high priority and would be particularly welcome as many request/offer negotiations are conducted bilaterally even though the results are extended by the most favoured nation principle. Partner country data also allows countries to prioritise their requests for market access by partner and sector. There is also considerable interest on the breakdown of services trade by region, or between developed and developing countries. Future work to develop proposals for a common approach to geographic breakdowns by type of service, including common definitions of geographical regions is also welcome.
 - iii) modes of supply - The introduction of modes of supply into the Manual - though not without difficulties - is fundamental, given the centrality of the concept of modes to GATS

negotiations and commitments. Figures by mode allow countries to assess where their priorities are both as exporters and importers and to identify the measures that are having most impact on the trade. However, attribution to particular modes will remain a vexed question. The simplification rules are sensible, although there are real constraints on being able to map every aspect of a services transaction according to mode. While it made sense to allocate EBOPS classifications to a dominant mode of supply for statistical purposes, a couple of issues are raised from a trade point of view:

- The dominant mode of supply may change over time or with technological developments
- It could lead to over or under estimation of modes (a particular concern in terms of underestimation of mode 4 trade; while mode 4 components are likely to appear for many services, it may not often appear as the dominant mode).

In particular modes 3 and 4 are worth highlighting as particularly important in the context of negotiations.

- 48 She agreed with the statement on page 107 of the Manual that: "The interest of trade negotiators would be to identify, in the statistics, all foreign nationals who are delivering service products of the type for which commitments are being made or might be made in future, as well as, and separate from, statistics on foreigners employed directly with resident and non-resident status".
- 49 Finally the Manual is a fundamental step in increasing the comparability of data, between countries and across modes of supply. Such comparability is crucial in the mercantilist world of trade negotiations. She said that perhaps the most important thing is to maintain the lines of communication between statisticians and trade negotiators in order to increase the understanding of each others' priorities and challenges.
- 50 Mr Karsenty asked about the problem of downloadable products and whether to classify these as goods or services. He asked whether statisticians should make a decision for statistical purposes or should they wait for WTO to decide. Ms Nielson thought that this was certainly a sensitive issue and a highly political one where early resolution did not seem likely. On balance, she thought that the benefits of being able to identify the magnitude of trade in these products may outweigh some of the problems of statisticians moving ahead independently to classify these products.
- 51 Mr Hoffmann asked if trade negotiators go back to their governments and ask for resources for statistics and commenting on ISCO, he said this had not been designed for trade negotiations but if it were to be so used then ILO should be formally told. Mr Henderson observed that the recommendation of the UN Expert Group to the UN Statistical Commission with regard to funding to support implementation of the new Manual was basically directed to national statistical offices and central banks. Ms. Nielson agreed that there was scope for trade negotiators to pressure their governments, and noted the need for a formal follow-up on the use of ISCO as a tool for trade-in-services commitments.
- 52 Mr Schuller observed that statisticians were often middlemen collecting for industry's increasing needs but at the same time forced to reduce the burdens on business. It would be useful therefore if negotiators also spoke to firms. Mrs Steger said that the issue of burdens was ever present and in Germany it was important to have legal requirements for statistics. Mr Roman said that statisticians need strong arguments to collect these data and some countries such as UK, Netherlands and Ireland wished to reduce collection of trade in services by partner country. Ms Horn commented that in the UK 350 people work on trade in goods statistics, while 30 worked on trade in services.

- 53 Mr de Boeck asked if this was a temporary information need for negotiations or a long term need. Mr Karsenty thought that the GATS needs were permanent in order to monitor trade, even though the negotiations had a temporary and shifting focus. Ms Steger said that perhaps we could be clearer about which were the short-term needs and which the long-term. Ms Nielson replied that while there were some issues which had a temporary significance at the moment of negotiations, the basic structure of the GATS, which required certain types of statistics, was likely to remain over the longer term. While some individual issues may lose importance, general interest in the type (including by mode) and geographical pattern of trade would remain.
- 54 Concerning FATS statistics, Mr Hatzichronoglou pointed out that many countries had legal obstacles to collecting the outward data. Ms Horn thought that we should make efforts to make the best use of what data we have. Ms Nielson replied that dialogue could help trade negotiators be more realistic about data. Mr Renard recalled that three years ago only 1 in 3 countries had contacted trade negotiators and in France it remained a problem. He added that there was a problem of division of responsibilities in the countries between the central banks and the national statistical institutes. The latter were more concerned with structural data, yet the former usually collected trade in services information.

6. Next Steps

a) *First steps in implementation of the Manual (recommended core items)*

i) *EBOPS*

- 55 Mr Cave presented paper STD/NA/SERV(2000)6, which set out the differences between EBOPS and the joint OECD-Eurostat Classification. There were no plans to ask for EBOPS data prior to UN approval of the Manual, but country comments were sought on current and future availability of new EBOPS items, as well as the obstacles to collecting the increased detail.
- 56 Mr Kim (Bank of Korea) said that Korean data was provided by the commercial banks. Their data for construction services was now in conformity with EBOPS, but if more detail is needed then Korea would have to reconsider its current collection system. Mrs Steger described the situation in Germany, where in response to pressure to reduce the burden on banks of reporting through payment systems, data collection methods were under review. Direct reporting systems were being developed for larger companies. Maintaining data quality would be a challenge and more detail would not be available in the near future. Mr Schüller said that Luxembourg faced similar problems as well as the problem of confidentiality (e.g. space transport). Under survey and direct reporting systems, it was easier to identify credits than debits. Mr Peyroux (Banque de France) said that France faced the same problem, the raising of thresholds for statistical reporting of payments in Europe would impact on the reporting of trade in services. They too are examining survey systems.
- 57 Ms Horn was optimistic about the possibility of getting travel expenditure on goods from the UK International Passenger Survey. Mr Henderson remarked that Canada was rewriting the main sources and methods reference, since last year they could provide the royalties breakdown, part of education and part of goods in travel expenditure. There was more information on the Statistics Canada website. Ms Morales said that Spain's position was similar to that of France and Germany. The need for a new survey system implied the need for INE to work more in this area in future. Ms Muff observed that confidentiality was a

constraint on the level of detail that Switzerland could provide. It collected gross insurance premiums, air freight and rail freight but could not reveal them.

58 Mr Roman suggested that Eurostat needed to work more at the EU level on the problem of data that was confidential nationally. It had already come up with solutions in certain cases. Mr Varga (National Bank of Hungary) reported that Hungary used a bank reporting system and could provide the main BPM5 services with some extra detail. The Central Bank and the National Statistical Office were conducting a methodological review of data collection, including direct reporting. They would consider the Manual's recommendations and EBOPS items of importance in Hungary, but there was as yet no timetable for changes. Mr McKenzie was interested in more information on FISIM. He said that ONS provided BI with an estimate of FISIM for the UK's overseas earnings, but the methodology was different from that used in the national accounts.

ii) FATS Statistics

59 Mr Cave introduced paper STD/NA/SERV(2000)7 . He said that on FATS statistics there was a history of cooperation within OECD between this Expert Group and the globalisation experts of the Statistical Working Party of the Industry Committee (SWIC). Equally there has been cooperation between OECD and Eurostat. It was time to renew this cooperation. The Manual was not as yet approved but if it were in the Spring of 2001 then it would be useful to have identified the issues that needed to be addressed regarding the drawing up of possible proposals for changes to data collection. The paper showed the difference between the current FATS activity breakdown and ICFA.

60 Concerning the current joint FATS statistics questionnaire, Mr Hoffmann asked if it was asking for the desired concept of employment, by excluding temporary workers. To exclude them would undermine the calculation of labour productivity in industries with many temporary workers.

61 Mr Hatzichronoglou said that the two FATS Inquiries, were now well established, and had yielded data for 21 countries, although inward data was more widely available than outward data, which so far had only been provided by 8 countries. The first FATS services publication was planned for the spring of 2001.

62 Mr Whichard drew attention to the sub-totals that were in ICFA, which matched in some instances the existing activity sub-totals. Initially attention might focus on these sub-totals. Mr de Boeck advocated a two-speed approach to inward and outward FATS in the questionnaire, as inward data were capable of yielding more detail and more variables. However if ICFA was followed too closely, with geographic breakdowns then confidentiality would be a problem.

63 Mr Roman urged caution in moves to amend FATS questionnaires, he favoured a strategy of consolidation for 2001 at least. He also requested country comments on the ICFA, which he thought had possibly not received sufficient attention from experts in the preparation of the Manual. Mr McKenzie said that if inward data were comprehensive then it could provide a proxy for outward data. However, Mr Roman said that asymmetries in data between countries meant that this approach was problematic. Mrs Steger added that countries also need to have their own information.

64 Mr Cave asked if the Secretariat should prepare some kind of joint analytical paper presenting the balance of payments trade alongside the FATS. Mr Roman thought that this would be interesting in principle but it is too early as there are many problems to be resolved. However that should not prevent feedback on what information was available.

65 Mr Henderson said that the first Canadian FATS data would be available in 2001, with more detail in 2002. He also asked for clarification of the section D heading in the current FATS questionnaire.

66 **Summing up, Mrs Steger stressed the need for cooperation between OECD work on trade in services, FATS and FDI. This should include a presentation of the Manual to the globalisation experts and the Financial Statistics Working Party. Participants were invited to provide comments on the ICFA, the suitability of the current sub-totals and whether there is a need for a higher level of aggregation. The Interagency Task Force was asked to reconsider the wording in the Manual on “voting rights”. No new FATS variables/classifications would be sought on the joint questionnaire prior to UN approval of Manual. There could be a two speed approach on inward and outward data. The results of the FATS services survey should be provided to this Expert Group. There should be no pro-rata presentation of employment in the case of partial ownership.**

iii) Country developments - US trade in services (US DoC/BEA)

67 Mr Whichard introduced paper STD/NA/SERV(2000)8 on US Statistics on Trade in Services. Although balance of payments trade in services was important in the US, foreign affiliate trade in services (excluding banks and distribution) was more important in terms of outward sales and inward sales. He set out the priorities for future developments. In 2000 instructions had been added to the surveys concerning the treatment of e-commerce and internet related services.

68 In response to a question from Mr Kim, he explained that for firms response was obligatory. Mr Schuller asked if there was a difference in the quality of the export and import figures. Mr Whichard thought that partner country data might shed some light on this question. Responding to Mrs Steger, he said that there were a limited, less detailed range of monthly data on the balance of payments and that the need to renew permissions for surveys was a major task for the Bureau.

69 Mr Karsenty asked about financial services and Mr Whichard said that the financial services questionnaire was on the BEA website.

70 Mrs. Leena Storgards described recent developments in trade in services surveys in Finland, which were set out in a room document, where they had changed from a bank reporting to a survey system. The new survey covered 2000 enterprises and had drawn on ideas from other countries particularly Stats Canada. There were some doubts over quality and coverage in the measurement of imports and a perception that companies needed more detailed definitions of services than those contained in the Manual. Statistics Finland had made some important productivity improvements in the changeover. Because the decision to change systems had been taken quickly it had not proved possible to do a parallel run of the two systems.

71 Canada tabled a short description of procedures used over the last two years in the Canadian balance of payments to extend that country's total trade in services by more countries.

iv) Partner country data

72 Mr Cave presented paper STD/NA/SERV(2000)9, which set out proposals for an OECD collection of trade in services by partner country data in 2001. He said that the Secretariat was aware that 16 Member Countries published directly or indirectly statistics on trade in services by partner country. Eurostat had been collecting and publishing such data for a number of years. The time was right for a wider international presentation of such data. The main

difference between OECD needs and the Eurostat presentation was that OECD would seek to collect trade flows between all its Member Countries. OECD asked for comments on the proposed collection.

- 73 Mr Whichard said that he had been advised that for the US providing partner country data on a detailed BPM5 category basis would be problematic, but that the US could easily provide geographical breakdowns for total trade in services, transportation and other services. He suggested that the Secretariat might analyse the bilateral differences. Mrs Steger said that the EU had undertaken analyses of bilateral data, there was a lot of work involved and asymmetries could not be fully resolved.
- 74 Mr Henderson remarked that one needed to be careful with any new intermediate level aggregations, such as BPM5, if different from those actually published nationally, lest confidential data be disclosed by subtraction. Checking for confidentiality was typically expensive in terms of resources. He said that Canada and US had studied their bilateral asymmetries, and for high-level aggregates, he had seen some wide divergences in bilateral data for APEC countries. Mr Kim said that Korea had begun compiling a geographical breakdown of their balance of payments on a BPM5 basis in 1998.
- 75 Mr Roman said that the existence of bilateral asymmetries is considered an important issue. A Committee and a Technical Group are dealing with it at the European level. Eurostat is responsible for the compilation of the EU BOP and the ECB for the Euro-zone BOP. Both Institutions have agreed on a common methodology for compiling the EU and Euro-zone aggregates. Eurostat and the ECB agreed together that the official BOP statement should be based exclusively on extra (EU/Euro-zone figures) and not world figures. However at Eurostat data are available and disseminated for every MS and the EU aggregate with the partner "EU" (as a total). No bilateral data (e.g. Germany with France) is disseminated by Eurostat although some information is available. Eurostat can provide OECD with these data. Eurostat's level 1 and level 3 geographical breakdowns, which were also used in FDI (common OECD-Eurostat questionnaire), differed from those used by OECD for trade in goods. Eurostat would be reluctant to change this, and would suggest that the already existing classification is used so that the comparability between FDI and trade in services is ensured and in order to facilitate the work of EU MS (avoiding changes in the reporting to OECD/Eurostat). Eurostat can provide OECD with EU Member States data broken down by partner countries: it will be an extension of the already existing procedure used in the present OECD-Eurostat publication.
- 76 Mrs Steger said that Germany published trade in goods by country data by country of origin and destination, whereas the Eurostat used country of consignment. Germany preferred its own figures, it produced a broad breakdown for partner countries. OECD would need to consider carefully what data it presented.
- 77 Mr Cave agreed and suggested that users would need guidance on the use of partner country data for trade in services, their quality, asymmetries and other special problems surrounding them. He noted the problem of country/regional classifications and mentioned the desirability also to align with FDI. He asked for clarification on whether OECD could publish any of Eurostat's intra-EU partner country data. Ms Morales questioned the assertion that data were of lower quality and said that countries would need to know more about what the Secretariat planned to do. Mr McKenzie said that at present it was totally impossible to produce a full partner country trade matrix by type of service. Mr Cave responded that OECD would not expect to be able to provide a fully detailed matrix as each country would have its own list of partner countries and types of service.
- 78 **Mrs Steger said that some kind of simplified core matrix would be desirable and that should be investigated by the Secretariat.** Mr Henderson asked whether IMF and UN had a

standard geographical breakdown. Mr Becker said that the UN trade publication simply lists trade flows by partner country. Ms Fitzgibbon replied that IMF does not have a standard list for geographical reporting, nor does it collect partner country balance of payments data. Mr Becker said that the UN trade publication simply lists trade flows by partner country. Mr Karsenty said that WTO needed intra-EU by partner country data. An OECD collection of trade in services by partner country would be very interesting. **As far as publication went, even the table of what data exist as presented in paper 9, would be very useful for users.**

- 79 **Mr Cave noted the concerns that had been expressed and proposed that the Secretariat write to Member Countries and Eurostat seeking trade in services data by partner country and zone totals - for services as a whole and for any readily available breakdowns by type of service. The Secretariat would seek to work as far as possible with Eurostat and its data, but any EU members or candidates, that had more publically available partner country data than Eurostat published, would be invited to supply them to OECD. He also said that an initial data presentation would be done for the members of this Expert Group and Member Countries to comment.**
- 80 Mr de Pave (National Bank of Belgium) agreed in principle, given that countries could check data prior to publication. Mr Whichard said that collecting readily available breakdowns was a good way to start and that was how the OECD Trade in Services publication had begun. The new data would be a useful validation tool for improving the quality of national data.
- 81 **The Secretariat's proposal (in para 79 above) was agreed.**

b) *Other Classification/Methodological/Developmental Issues*

i) Natural Persons

- 82 Ms Butkeviciene presented the new Annex 1 of the Manual on Movement of Natural Persons in the context of further development work. Regarding the characteristics of those supplying services under GATS Mode 4, she described the following: foreign nationals working abroad; sector of work; those coming to provide a service (but not those *seeking* employment); of any skill level, but negotiators tend to talk of 'professionals'; both movements and presence information are relevant.
- 83 Mr. Hoffmann referred to the link between the movement of natural persons and consequent international payments, which might be included as income or trade in services in the balance of payments. We need to be able to better distinguish and measure relevant payments. The Annex 1 mentions ISCO as a possibly relevant classification. ISCO is due to be revised in 2003 for 2008 by the Conference of Labour Statisticians. If the specification or understanding of trade commitments require some amendments to definitions or to distinctions made, then these needs should be announced without delay. There would be a need for formal requests from interested organisations.
- 84 He also mentioned the International Classification of Status in Employment (ICSE) and some sources on migration data. He mentioned that there is a potential to use the Labour Force Surveys (LFS), particularly of sending countries, and suggested that e.g. Eurostat's European LFS, which serves as a model also for EFTA and candidate countries, may be a useful vehicle. This possibility could be explored through one of the supplements to the regular survey. There was a need to actively engage employment statisticians in dialogue regarding natural persons. Mr Cave suggested that a coordination strategy needs to be mapped out by the international organisations. Ms Fitzgibbon said that it was very important to engage the national statisticians. Ms Horn said that first the definition of target individuals had to be refined. Ms Butkeviciene

spoke of South Africa, Lesotho and Tanzania possibly planning to produce some data on movement of natural persons, following the seminar in Addis Ababa in November. Mrs Steger said that this should be investigated and concluded that this was a new and interesting area.. She invited participants to reflect on this issue and consider how measurement could be advanced.

ii) *Classification of telecoms and financial services products*

85 Mr Cave presented STD/NA/SERV(2000)10 for information. It described proposed product breakdowns of telecommunication services and financial services, which had been identified by the UN Expert Group as areas for future development. The paper was produced by Statistics Canada, INEGI Mexico and the US Bureau of the Census; and the product list had been produced in the context of work on the North American Product Classification System. The product classification for telecommunications was the more advanced work of the two and had been constructed in the light of discussions with the industry on what data could be collected. The paper was essentially the same as one that had been presented to the Voorburg Group and the UN Technical Sub-Group on Economic Classifications for consideration of the telecommunications breakdown for inclusion in the CPC.

86 Mr Becker remarked that there was a consensus emerging on a proposal for an aggregated version of the telecommunications product list in paper 10 for CPC 2002 and he circulated a document with the proposed CPC telecommunications product list. He added that there was no equivalent proposal for financial services, but CPC 2002 would have an alternative aggregation of financial services. Mr McKenzie observed that the paper 10 financial services list did not fully reflect internationally traded financial services and the list would need to be structured. Mrs Steger summarised by saying that the Group noted this work, would need to return to this subject in future and would be interested in the outcome of any testing of the product lists in data collection.

iii) *Draft Annex to the Manual on E-commerce and international trade in services*

87 Mr Cave introduced paper STD/NA/SERV(2000)11 on issues related to e-commerce and the measurement of international trade in services between residents and non-residents. This had been drafted as a possible annex to the Manual on Statistics of International Trade in Services. But it had not been sufficiently developed to be included in the Manual. He asked for comments especially on its suitability as a possible post-publication annex to the Manual; how the issues raised could be advanced; information on national projects in this area and interest in a loose e-mail network of those working on e-commerce issues related to the measurement in international trade of both goods and services.

88 Mr McKenzie said that the distinction between broad and narrow definitions of e-commerce was helpful. He suggested that the paper should also reflect the distinctions between business to business (B2B) and business to consumer (B2C) e-commerce. Of these B2B was the more important. Mr Karsenty replied that the paper did not address the measurement of e-commerce per se but trade in services and the allocation of new e-commerce related services within EBOPS. Mrs Steger remarked that the size of the e-commerce component of trade was important to know.

89 Mr Henderson thought that the paper was a useful start in structuring ideas. There were two important issues to distinguish: i) what *share* of trade takes place on the internet? and ii) is internet trade *covered* by present data collection? He said that the main gaps in coverage

consisted of 1) the many new and often small companies who make the internet happen, 2) the imports of digital products provided by business to consumers. He said that Statistics Canada would be sending out its household internet use survey in early 2001, which had been modified to include questions on the value of services sales made over the internet and the share believed to be from domestic sources (an indirect measure of trade with non-residents). Internet services were described operationally as a product that was transmitted and received digitally (it was possible in other words, that the same product could also be a good, such as a unit of prepackaged software). Household expenditure surveys could be another vehicle for collecting B2C imports.

- 90 Mrs Steger asked if other countries had plans to survey in this area. Ms Horn said that the UK household expenditure survey would ask if families buy goods or services on the internet or not? Mr Peyroux said that INSEE was trying to identify all French commercial websites in order to conduct a survey of the relevant enterprises. The first results were expected in 2001.
- 91 Mr Karsenty reminded the group of the importance of the issue of allocation of internet-related services raised in the paper. If these products are traded we need to count them and agree allocation rules. This group was in a good position to take a view. Ms Horn suggested that digital products should be counted as goods, if they were goods when on other media, and in that respect, she said that, this paper contradicted a recent UNCTAD paper. Ms Fitzgibbon said that there was a major disagreement on what was a good and what was a service. Consultation was needed with the IMF Balance of Payments (BOP) Committee, BOP compilers and there was another group looking at this issue. From an overall BOP perspective it does not matter whether digital products are treated as goods or services.
- 92 Mr Karsenty suggested that we as statisticians could not make a general decision as to how negotiators would distinguish goods from services. It was a very important trade issue that could only be resolved in trade negotiations. But perhaps we could agree on how to allocate them statistically on a temporary basis. Mr Whichard said that the US allocated downloadable products to “royalties and license fees”, as they were disembodied products with unlimited potential for duplication at virtually no cost. Regarding the paper he advocated that it should be disseminated as a discussion document sooner rather than later. It need not be a formal annex to the Manual, which would be burdensome and ponderous administratively. Mr Hatzichronoglou said that downloadable products were also a problem for FATS, whether as an activity or a product. Mr Becker said that neither ISIC or CPC had decided what to do with downloadable products as yet.
- 93 Ms Fitzgibbon thought that in considering classification, we might usefully go back to basic SNA principles and took the analogy of the sale of a book, where the final purchasers’ price included the basic price, the margin of the distributor and a transportation charge. Ms Storgards said that there was certainly a need for definitions. Mr Karsenty suggested that countries should be asked how they are classifying downloadable products. Ms Fitzgibbon emphasised the need for good metadata on country practices.
- 94 Ms Pohjansaari (Statistics Finland) asked to be included in the e-mail network on e-commerce and trade. It was concluded that the Task Force should reconsider the e-commerce paper in the light of this Group’s comments, aim to produce and disseminate a discussion paper and at the same time seek to build a consensus on statistical classification of internet related, and in particular downloadable, products.

7. The Joint OECD-Eurostat publication OECD/STD

- 95 Mr Magdeleine (OECD/STD) reported on the second joint OECD-Eurostat publication in November 2000 with the new title “OECD Statistics on International Trade in Services”.

OECD and Eurostat had signed a new one year contract. The publication had increased detail by type of service for standard country presentations. Timeliness had been markedly improved. More information was available in the electronic version. Both OECD and Eurostat were satisfied with the way the joint operation had been conducted.

- 96 He also demonstrated the Beyond 20/20 data browser and said that data were freely available, in this format, to government users from OLIS. More information could be obtained from joscelyn.magdeleine@oecd.org.
- 97 Mrs Steger expressed dissatisfaction with the data published for Germany. **The Secretariat would investigate concerns over German data with the Bundesbank and Eurostat. It was agreed that the 2001 edition would be broadly similar to the 2000 edition.**

8. Other Business

- 98 A message from Ms Bertrand (OECD/DAFFE), who was on mission in Beijing, was read out concerning the activity of the Working Party on Financial Statistics. The overall work programme of the Working Party can be found in document DAF/FE/MC/STAT(2000)18.
- 99 The Working Party had taken the first steps to look into statistics on mergers and acquisition which dominate the FDI activity. Its interest is twofold:
- the quality and the comparability of current statistics compiled by commercial sources
 - recording M&As in the balance of payments (cross-border) and in SNA -- there is a harmonisation issue particularly when the purchase is by exchange of shares and when there is a capital increase through domestic and international markets.
- 100 The IMF/OECD survey of implementation of methodological standards of direct investment will be pursued with revisions of the content and eventually public dissemination of the information.
- 101 A workshop on FDI is to be held in June 2001; the objective is to work towards operational guidelines where some of the methodological issues still remain difficult or unclear eg the treatment of holding companies, fully consolidated system, etc. There is cooperation with EUROSTAT, ECB and IMF.
- 102 Mr Karsenty said that the WTO “International Trade Statistics 2000” was now published and could be obtained in pdf format free from the WTO website.

9. Future work of the Expert Group

- 103 Mrs Steger invited suggestions for the future work of this Expert Group. There were none forthcoming, but Mr Whichard commented that there was already a full programme of work stemming from the Manual.

10. Date of the Next Meeting

- 104 The next meeting was provisionally arranged for 10-11 December 2001.
- 105 Mrs Steger thanked the participants and the Secretariat for their work and closed the meeting.

Annex 1

**OECD-EUROSTAT MEETING OF EXPERTS IN TRADE-IN-SERVICES
STATISTICS**

11-12 December 2000

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