Promoting Services Trade in ASEAN
Trade in Courier Services

PAPER 5

JANUARY 2018

ASEAN-JAPAN CENTRE

国際機関 日本アセアンセンター

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NOTES

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The following symbols have been used in the tables:

- Two dots (..) indicate that data are not available or are not separately reported.
- A dash (-) indicates that the item is equal to zero or its value is negligible.
- Use of a dash (-) between dates representing years, e.g., 2015–2016, signifies the full period involved, including the beginning and end years.
- Reference to "dollars" ($) means United States dollars, unless otherwise indicated.

There are seven papers in total. The other six papers cover professional services; R&D services; telecommunication services; computer and related services; maritime, air, rail and road transport services; and tourism.

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CONTENTS

I. INTRODUCTION

Courier services, also known as express delivery services, are an essential service industry, especially for many kinds of activities. The industry is a catalyst for ASEAN's trade and investment growth. The General Agreement on Trade in Services (GATS), administered by the World Trade Organization (WTO), lists one job category under courier services, namely, 02B Courier services.[1]

The services provided by operators in the courier services industry cater to all, in the form of both business-to-business (B2B) and business-to-consumer (B2C) services. As such, the growth of the industry is intrinsically linked to the population and economic growth of the ASEAN region.

Of the "three sources of value added", i.e. provision of (1) tangible products, (2) information or (3) amenities, courier services correspond to the first and tend to grow with economic development. In the ASEAN region, which consistently records vigorous economic advances, the role of courier services is becoming larger year after year.

Figure 1 illustrates the role of courier services in value chains (in the form of smile curves).

The term "courier services industry" covers establishments engaged in parcel deliveries. There is no universal definition for courier or express delivery services (see annex A for legal definitions of express delivery services in the ASEAN Member States). Like transport services, courier services enable the smooth physical transmission of documents and parcels, thereby contributing to enhancing productivity along value chains, horizontally as well as vertically. At times courier services compete with national postal administrations; the establishment of a level playing field, at least at the international level, is required for fair competition in courier services. Defining the scope of the postal monopoly in the narrowest way (to allow a minimum level of scale economies) and introducing courier services where they are needed (especially in remote areas in the ASEAN region) will stimulate economic efficiency and expand consumer choice.

Courier services are distinguished from mail services most significantly by their swift delivery times – times that are usually only optional for ordinary mail services. Courier services are therefore more costly than ordinary mail services, and their use is thus limited by cost considerations.

The courier services value chain is complex and entails numerous activities and participants. Service providers offer a complete chain of time-bound logistics solutions from consignment collection at the customer's location to packaging, transport, storage, clearance and final delivery of the shipment. Express delivery may be local, intercity or international, depending on the operator's capabilities. For cross-border delivery, customs clearance and duty payment are also handled by express delivery service providers. Courier services suppliers charge fees that are based on the classification of the parcel (typically documents versus non-documents[2]), its weight, the distance to be transported and the urgency of delivery. Courier services operators usually provide visibility of the shipment through real-time tracking mechanisms.

The growth of e-commerce is an important factor spurring the development of courier services. Increasing consumption and growing internet penetration are boosting e-commerce activity in ASEAN. In order to maintain cost competitiveness, companies that operate online prefer to work with third-party courier providers instead of hiring in-house delivery staff. The strong presence of

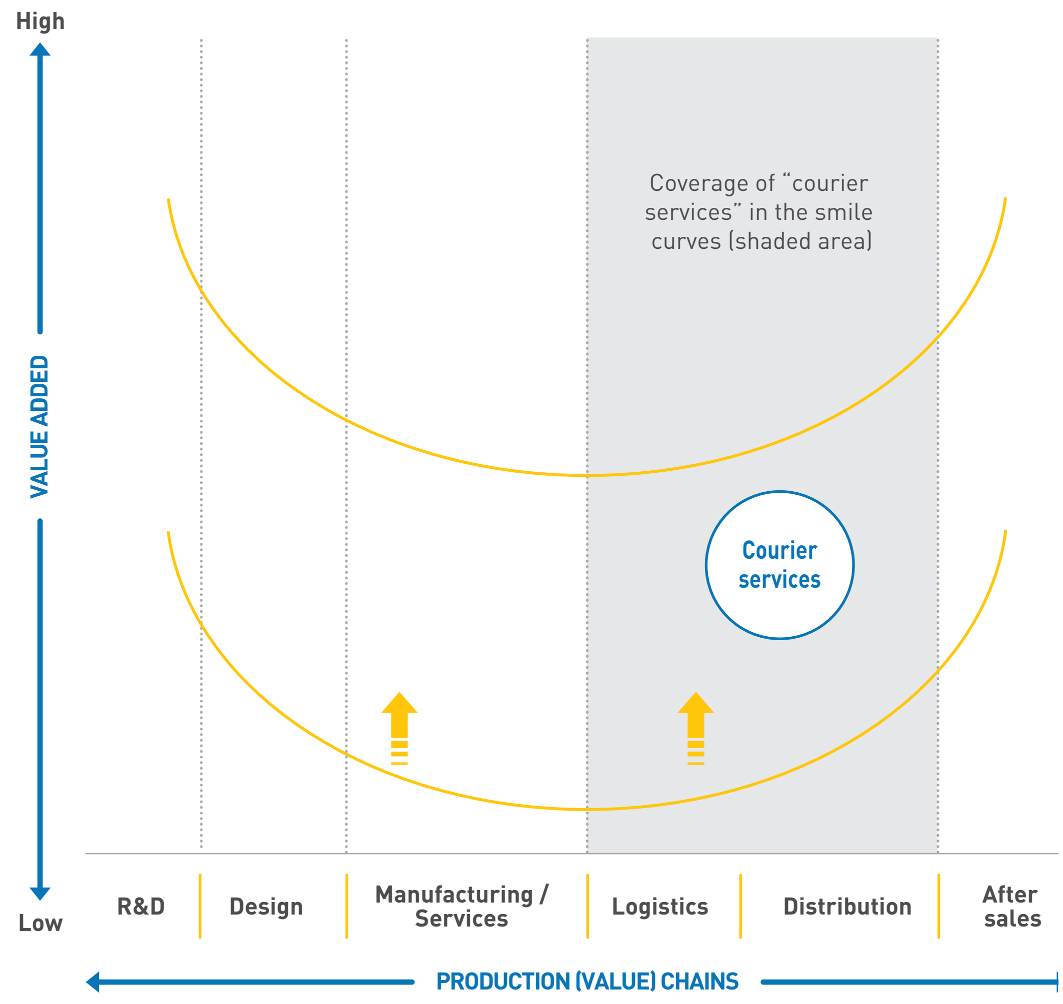
1 See WTO, "Services Sectoral Classification List" (MTN.GNS/W/120, released 10 July 1991).

2 Documents include letters, trade documents, applications, checkbooks, bank statements and promotional materials; non-documents include equipment parts, electronic products, spare parts and trade samples, among others.

courier companies provides e-commerce companies with an added advantage of greater access to customers. Thus, growth in e-commerce activity has been driving demand in ASEAN's courier services industry.

Conceptually, "hub-and-spoke" distribution networks are used for courier services: this is a traffic system shaped like a wire wheel, in which all traffic moves along spokes connecting the hub (at the centre) and the nodes at the other end of the spokes. The benefits of such a network are that a limited number of routes are necessary to connect all nodes and that new spokes can easily be created. Consignments are moved from the collecting branch or franchisee to collection and distribution hubs by various means of transport. Deliveries are completed either directly by distribution hubs or indirectly through local agents. The latter route is especially used by medium-size and smaller players.[3]

Figure 1. **Value chains and courier services**



Source: ASEAN-Japan Centre.

3 Drawbacks of the hub-and-spoke network include the fact that day-to-day operations may be rather inflexible, and that changes in demand may have unexpected consequences throughout the network. However, this network significantly reduces the cost of courier traffic and thus supports the standard business model used globally.

II. CURRENT STATE OF COURIER SERVICES AT THE COUNTRY LEVEL

Table 1 shows the number of international express items (dispatch and receipt) in recent years. Express items, as defined by the Universal Postal Union, cover those items dispatched or received mainly through post offices; hence, these data might not cover private-sector-mediated express delivery services. In the absence of more specific data, the information in the table is useful enough to indicate the increasing demand for express delivery services at large.

Indonesia, Myanmar and the Philippines have experienced increases in the number of international express items handled. When compared with China, Japan and the Republic of Korea, though, there is more scope for further increase: Indonesia's population is four times larger than that of Japan, for example, yet the number of internationally dispatched items in Indonesia is just one quarter that in Japan. The express nature of courier services is much needed for ASEAN's participation in global value chains, as the timely delivery of essential business items (such as signed contracts) facilitates business operations.

Table 1. Number of international express items, 2013–2015 (Thousands)

Country	Dispatch			Receipts		
	2013	2014	2015	2013	2014	2015
ASEAN Member States						
Brunei Darussalam	10.7	10.3	10.0	41.5	46.3	44.5
Cambodia	..	..	..	0,7	..	..
Indonesia	458.0	444.4	527.8	411.8	368.3	407.5
Lao People's Democratic Republic	42.6	..	..	48.4	..	..
Malaysia	335.0	..	359.6	611.9	..	543.6
Myanmar	25.6	28.1	34.5	41.1	44.3	44.5
Philippines	415.3	..	2 465.4	307.3	..	739.1
Singapore	..	..	..	..	..	..
Thailand	..	..	905.0	..	..	1 004
Viet Nam	141.1	..	..	297.9	..	..
Memorandum						
China	10 655.8	10 010.2	7 440.0	7 934.5	13 100.9	28 106.8
Japan	11 000.0	14 000.0	19 000.0	..	..	..
Korea, Republic of	7 518.8	8 522.3	10 039.7	1 832.1	2 118.2	2 429.5

Source: Universal Postal Union's database (http://pls.upu.int/pls/ap/ssp_report.main?p_language=AN&p_choice=BROWSE).
Note: Covers items passed through post offices only.

Innovation in courier services in ASEAN has been limited so far because of the labour-intensive nature of the industry. Because of this, in countries where further recruitment is difficult, such as Japan, some progress has been made in compensating for labour shortages (box 1).

Box 1. Innovation in courier services: Delivery drone and courier boxes

Technological advances in courier services are changing how courier services are provided: express delivery using drones (remote-controlled flying devices) is making possible unmanned, efficient delivery of express items. In Japan, the Government and some companies started a trial of a drone home delivery service in Chiba Prefecture in April 2016. The joint project – involving the central Government, the city of Chiba, research institutions and companies including e-commerce giant Rakuten Inc. – is the first drone delivery trial in an urban area. To enable the conduct of the trial, Chiba was designated as a special deregulation zone. ASEAN could make efforts towards legal deregulation for this new type of express delivery services (The Japan Times, 11 April 2016, http://www.japantimes.co.jp/news/2016/04/11/business/japan-starts-trial-drone-home-delivery-service-chiba/).

Another innovation useful for ASEAN would be the installation of "courier boxes" at customers' homes: express delivery items are expected to be handed over directly, and more than 20 per cent of delivered items undergo two or three delivery attempts (based on information from a Japanese courier service company). The use of designated courier boxes into which couriers can put item(s) on the first delivery attempt would surely facilitate the process as well as contribute to reduction in the use of unnecessary human resources.

Although it is difficult to estimate the volume of private-sector-mediated courier services (table 1 captures just part of them), demand for such services is surely on an increasing trend in the ASEAN region. In order to assess the potential for further expansion, a description of the status quo in each country is useful.

Brunei Darussalam. Courier services are offered by foreign companies including DHL (subsidiary of Deutsche Post, Germany), TNT (Netherlands), FedEx (United States) and UPS (United States) – the four largest courier services integrators operating as airlines, express carriers and courier delivery services – as well as Parcel Monkey, which provides low-cost delivery.

The Government of Brunei Darussalam has set out a vision called Wawasan 2035, which aims at development of a knowledgeable and highly skilled society, improvement in the quality of life and sustainable development. The Ministry of Communications supports this initiative through its vision of a smart society and excellence in communication. The postal service department has been this ministry's responsibility since 1984. Its mission is to create efficient worldwide connectivity of mail services for the society through 23 branches in the country.

Cambodia.[4] Cambodia's courier services industry has grown rapidly in recent years, attracting global parcel delivery and logistics operators such as DHL, TNT, OCS, Federal Express, UPS, ABL Cambodia, ACI-Air Courier International, BSK Regional Express Services, Cam Freight Service and Nippon Express (Japan). The market for courier services is already open. However, the operator is required to obtain a license from the Ministry of Post and Telecommunication.

In order for the country to benefit fully from courier services, the Government should improve transport regulations to ensure the quality and safety of transport systems and improve domestic infrastructure connectivity, especially linking urban and rural transport and logistics systems. Integrating multimodal transport systems, such as connecting the land (rail and roads) and waterway (inland and maritime)

[4] Based on ASEAN Economic Forum. "Trade in Services in Cambodia".

transport networks, is important to enhance domestic connectivity. Cambodia also needs to promote integrated road transport and cross-border shipments with Thailand and Viet Nam.

Indonesia.[5] Some favourable domestic factors are driving the growth of courier services in Indonesia. The country's courier service providers are a crucial part of its logistics industry. They mainly utilize land transportation, with other modes of transportation for international deliveries. A factor driving the demand for courier services in the country is the growing adoption of e-commerce services by Indonesians. Growing online purchases of goods, mainly in the fast-moving consumer goods[6] and electronic industries, has increased the reliance of online businesses on courier services. This trend is sustaining growth in the country's courier services industry.

A rise in operational costs is a key challenge for the industry. One of many factors causing the rise is the lack of transportation infrastructure. Because of its geographical characteristic as an archipelagic country, Indonesia needs multiple modes of transportation – road, train, sea and air – in order for providers to conduct courier services. The poor connectivity of roads results in longer transportation times as well as higher fuel (mostly oil) expenses.

Lao People's Democratic Republic.[7] In accordance with the Law on Postal Services (Amended) of 25 December 2013, the Ministry of Post and Telecommunications has the rights to authorize, renew, suspend, withdraw or terminate business licenses of designated operators of branch and international postal services. The Ministry had already given international postal service licenses to Entreprise des Postes Lao, TNT, OCS, PT Air Cargo Lao and DHL Express Laos Sole Co., Ltd.

DHL Express Laos Sole, established in 1995, is the foremost and the market-leading international air express company in the country. DHL operates 10 service and express centres, located in commercially important places. The company is committed to maintaining its leading position as the preferred air express operator.

Malaysia.[8] Malaysia's courier services industry comprises an integrated network of door-to-door delivery systems. The industry offers integrated shipment services from collection to transportation and delivery. Various categories of users utilize express delivery services, including both companies and private individuals. Courier services suppliers may own branches or have other service points through franchisees and associates.

As of August 2017, 128 courier services operated in Malaysia, comprising both local and multinational companies. The shift towards licensing by class under the regime adopted in 2013 has resulted in an upgrading of the industry as it requires additional capital investment. For instance, Class A licensees are allowed to provide courier services for both international and domestic destinations. However, they are required to provide track-and-trace systems within a year of starting operations and at least five outlets locally within two years of starting operations. Meanwhile, Class B and Class C licensees are allowed to operate businesses nationwide or within a state, respectively. The total numbers of licensees by class in August 2017 were 39 in Class A, 48 in Class B and 41 in Class C.

In Malaysia, most courier services are labour-intensive: delivering, repackaging, returns, sales and marketing, track and trace, cash on delivery, payments and customer service are meticulous tasks. Express delivery timelines usually range from 24 to 72 hours for most destinations.

5 Summary information based on online database SPEEDA.
6 Fast-moving consumer goods are non-durable products sold rather quickly and at a relatively low cost, such as soft drinks, toiletries, over-the-counter medications, processed foods and other consumables for daily use.
7 European Chamber of Commerce and Industry in the Lao People's Democratic Republic (ECCIL) Website.
8 Summary information based on online database SPEEDA.

The years 2016 and 2017 saw the entry of more new players from various businesses into the courier services market. The entrance of e-commerce companies, internet retailers and other businesses into the industry is a good indicator of the growth of e-commerce. Although major e-commerce companies are establishing their own delivery networks, they are also partnering with local postal and courier service providers to optimize their business operations. Hence, services such as pickup and delivery are expected to improve as a result of competition between new and existing competitors to better serve the customers.

Myanmar. As Myanmar begins its economic transformation, demand for courier services is expected to skyrocket. Courier services companies must apply to the National Regulatory Authority to obtain authorization and/or a license. The Authority issues licenses with terms that accord with the Myanmar Postal Law, which is currently at the draft stage.

The Authority has issued licenses for international fast express services to companies such as Magnate Group Logistics Co. Ltd., United Courier Services Co. Ltd. and DHL Express. United Courier Services has offered worldwide services since 2015, as an authorized service contractor of UPS in Myanmar. The OCS Myanmar office was established in 2004, operating in various logistics businesses, and obtained a domestic express courier operating license in June 2012. DHL Express opened its largest express facility in Myanmar, near the Yangon International Airport, in 2016.

The Ministry of Transport and Communication and Japan's Ministry of Internal Affairs and Communications have signed a memorandum of cooperation in the postal sector for the modernization and improvement of Myanmar's postal services.

Philippines.[9] In the Philippines, the courier services industry has developed to serve the needs of Filipinos both at home and abroad. LBC Express Inc., the country's biggest and first Filipino-owned courier company, introduced 24-hour door-to-door delivery services in the 1970s. This occurred a few years after DHL entered the Filipino market to establish an operational hub for the Far East and the Pacific Rim. After the inauguration of the Foreign Investment Act of 1991, as the demand for air parcel delivery increased, the major parcel delivery and logistics operators such as FedEx, UPS and TNT entered the Philippines.

Among local operators, LBC Express serves "Balikbayan" or overseas Filipino customers with international payments and remittance services. PHL Post, a Government-owned postal services provider, offers logistics and warehousing services. With the increasing demand for e-commerce in the country, 2Go and Air 21 have seen rapid growth. The spread of information technology and business process outsourcing (IT-BPO) services in the Philippines is another driver of third-party logistics – use of a third party to carry out elements of a company's distribution and fulfilment services.

Singapore.[10] Located at the centre of the ASEAN market, Singapore's courier services industry has grown rapidly in recent years. Firms have established operations in Singapore because of its lower corporate tax rates as compared with other developed countries and because of the tax-exempt capital gains system. In addition, Singapore has good business infrastructure, including airport, port and other transport networks. Consequently, major parcel delivery and logistics operators with global operations, such as DHL, FedEx and UPS, ventured into Singapore in the 2000s. These global players focus on developing their businesses on the basis of B2B requirements.

9 Based on KEN Research, "Philippine Logistics Market Outlook to 2019".
10 Summary information based on online database SPEEDA.

As for local companies, Singapore Post became a pioneer in the local express delivery and courier services industry. As such, it has mainly carried out the delivery of documents by mail and courier. However, over the years, with the popularity of e-commerce and growing affluence, international companies such as Yamato Transport (Japan) have also managed to penetrate the market.

The delivery of parcels is open to competition and does not require a license from the Infocomm Media Development Authority. The Authority is responsible for the administration of the Postal Services Act, which governs all postal services in Singapore. Industry players interested in providing domestic and international basic mail services are required to first obtain a license from the Authority.[11]

Thailand.[12] Express consignments are delivered by 14 licensed companies, including 10 express carriers that are members of the Thai Express Courier Association (TEXCA) as well as 4 major courier operators that are members of the Conference of Asia Pacific Express Carriers (CAPEC): DHL, FedEx, TNT and UPS.

Express consignment operations in Thailand developed from an on-board courier service, carrying documents and small parcels on commercial flights and operating at the airport. As the number of goods increased substantially and the types of shipments expanded to include industrial packages and freight, the operational area became inadequate. Hence, the express consignment operations were moved to the Customs Free Zone, which encompasses an area of 660,572 square meters at the Suvarnabhumi Airport.

Viet Nam.[13] Viet Nam's courier services industry is an integrated network of door-to-door delivery systems. In general, express delivery times range between 24 and 72 hours for most in-country destinations, as elsewhere in the ASEAN region. Operators usually offer real-time shipment tracking facilities.

Most courier services providers are small and medium-sized enterprises with limited capital investment and human resource capabilities. Large international players such as TNT Express (Netherlands) offer a wide range of services. In contrast, to remain competitive, smaller companies such as TNC Express & Logistics (Viet Nam) typically provide specialized customer service.

III. ASCENDENCY OF COURIER SERVICES

Like other transport services (air, marine, road and rail transport services), courier services are not delivered by Mode 2 (supply through consumption abroad) and Mode 4 (supply through movement of natural persons) (table 2), as the basic condition for delivering this particular kind of service requires the existence of physical facilities that are not movable. That said, non-residents can act as couriers when travelling abroad (Mode 2) and courier professionals do travel in conducting their services (Mode 4), both forms of operations that are very limited and assumed to be close to zero.

The estimated value of courier services supply in ASEAN was $22 billion in 2015, whereas those exported from ASEAN were$14 billion (table 2). In both directions of services supply in this sector, cross-border supply (Mode 1) overwhelms supply through commercial presence (Mode 3).

11 https://www.imda.gov.sg/regulations-licensing-and-consultations/frameworks-and-policies/postal.
12 Information from the Thai Express Courier Association.
13 Summary information based on online database SPEEDA.

Table 2. Estimated value and share of courier services supply in ASEAN, by mode of supply, 2015 (Billions of dollars and per cent)

	Receipts from the world (imports)				Supply to the world (exports)			
	Courier services		Total services		Courier services		Total services	
Mode of supply	**Value**	**Share**	**Value**	**Share**	**Value**	**Share**	**Value**	**Share**
Mode 1	19[a]	86	308	30	14[a]	100	302	30
Mode 2	0	0	103	10	0	0	101	10
Mode 3	3[b]	14	565	55	-[b]	0	554	55
Mode 4	0	0	51	5	0	0	50	5
ASEAN total	**22**	**100**	**1 027**	**100**	**14**	**100**	**1 007**	**100**

Source: AJC, based on own estimates, UNCTAD for total services and WTO for mode shares of total services.
Note: For total services, each mode share estimated by the WTO for the global supply is applied to ASEAN. The basic data for estimates by mode are cross-border services (Mode 1) from UNCTAD; the WTO data on shares have been applied to the UNCTAD data to calculate the value of each mode.

[a] Courier services are part of transport services in the balance of payments (BoP), under the "Other (including Postal and Courier)" category. Therefore values in this table include other services such as postal services.
For Brunei Darussalam, as data are not available for courier services alone, the ratios of courier services to transport services that are available for other ASEAN Member States for the respective years are used to estimate the value of courier services. For 2010, transport services data were not available. Therefore, the average of the 2009 and 2011 data was used as an estimate.
For Cambodia, data for 2015 were not available. Therefore, the average of the 2013 and 2014 data was used as an estimate.
For Malaysia, data from the International Monetary Fund (IMF) were used up to 2009. Data from the Department of Statistics Malaysia were used for 2010 onwards, converted into U.S. dollars by using the IMF's annual exchange rate.
For Myanmar, although import data for 2011 are not available, the figure is assumed to be insignificant.
For Singapore, data on passenger services are also included.
For Viet Nam, as data are not available for courier services alone, the ratios of courier services to transport services that are available for other ASEAN Member States for the respective years are used to estimate the value of courier services. Data for transport services are based on BPM5. For 2015, transport services data were not available. Therefore, the average of the 2013 and 2014 data was used as an estimate.

[b] For estimated sales, see the estimation procedure in Paper 1, box 2.

1. Mode 1: International trade

Courier services are one of the components of transport services in trade statistics that are based on the balance of payments. Courier services, including postal services, account for at most 5 per cent of all transport services in ASEAN. Therefore, delivery of documents and non-documents is still a limited service and does not have an important business position in economic activities. The trade balance in ASEAN has been in deficit throughout the period between 2005 and 2015 (tables 3 and 4), with imports being 30–40 per cent larger than exports.

Exports of courier services have been concentrated in Singapore, followed by Malaysia. These two countries account for four fifths of the total of $14 billion exports of these services from ASEAN. The importance of courier services relative to total services exports stands out for Brunei Darussalam, at 33 per cent in 2015 – four times higher than the ASEAN average.

Imports, with a value of $19 billion, are more concentrated. Singapore and Viet Nam account for nearly 90 per cent of total imports of courier services into ASEAN. Viet Nam was already the second largest importer in the early 2000s, the period corresponding to dynamic growth of trade businesses in ASEAN. The near absence of domestic courier services companies handling international courier services in Viet Nam has led to high use of foreign courier services companies.

Table 3. Exports of courier services and its share in total exports of services and goods and services, 2005–2015 (Millions of dollars and per cent)

Country	Annual average 2005-2010	2011	2012	2013	2014	2015
Courier services export						
Brunei Darussalam[a]	136	165	186	209	228	230
Cambodia[b]	75	137	155	173	191	182
Indonesia	435	445	448	451	454	457
Lao People's Democratic Republic	37	40	40	52	51	61
Malaysia[c]	856	1 414	1 535	1 519	1 610	1 437
Myanmar	77	128	138	210	329	265
Philippines	162	186	228	207	260	282
Singapore[d]	7 657	9 598	10 158	9 342	10 317	9 625
Thailand	633	304	322	380	381	426
Viet Nam[e]	626	743	732	834	895	839
ASEAN total	**10 694**	**13 160**	**13 942**	**13 377**	**14 716**	**13 804**
Share in total exports of services						
Brunei Darussalam[a]	18.5	23.0	26.2	29.7	32.7	33.2
Cambodia[b]	4.9	6.6	6.9	7.2	7.5	7.3
Indonesia	3.6	3.4	3.4	3.3	3.3	3.3
Lao People's Democratic Republic	11.0	7.3	6.9	6.7	6.7	7.6
Malaysia[c]	3.1	3.6	3.8	3.6	3.8	4.1
Myanmar	23.1	16.9	11.2	7.6	10.5	6.9
Philippines	1.2	1.0	1.1	0.9	1.0	1.0
Singapore[d]	10.2	8.0	8.0	6.7	6.7	6.5
Thailand	2.2	0.7	0.6	0.6	0.7	0.7
Viet Nam[e]	10.6	8.4	7.6	7.8	8.2	7.5
ASEAN total	**8.8**	**7.9**	**7.6**	**7.4**	**8.1**	**7.8**
Share in total exports of goods and services						
Brunei Darussalam[a]	1.6	1.6	1.8	1.9	2.0	1.9
Cambodia[b]	1.6	2.5	2.7	3.0	3.2	3.1
Indonesia	0.4	0.3	0.3	0.3	0.0	0.2
Lao People's Democratic Republic	2.7	1.7	1.4	1.7	1.5	1.7
Malaysia[c]	0.4	0.6	0.6	0.6	0.6	0.7
Myanmar	1.3	1.5	1.5	1.7	2.5	1.9
Philippines	0.4	0.3	0.3	0.3	0.3	0.4
Singapore[d]	2.0	1.7	1.8	1.6	1.7	1.8
Thailand	0.4	0.1	0.1	0.1	0.1	0.2
Viet Nam[e]	1.1	0.7	0.6	0.6	0.1	0.5
ASEAN total	**1.2**	**1.1**	**1.1**	**1.2**	**1.2**	**1.2**

Source: AJC, based on data from IMF, WTO and the Department of Statistics, Malaysia.

Note: Courier services are part of transport services in the balance of payments (BoP), under the "Other (including Postal and Courier)" category. Therefore values in this table include other services such as postal services.

[a] As data are not available for courier services alone, the ratios of courier services to transport services that are available for other ASEAN Member States for the respective years are used to estimate the value of courier services. For 2010, transport services data were not available. Therefore, the average of the 2009 and 2011 data was used as an estimate.

[b] Data for 2015 were not available. Therefore, the average of the 2013 and 2014 data was used as an estimate.

[c] Data from the IMF were used up to 2009. Data from the Department of Statistics, Malaysia were used for 2010 onwards, converted to U.S. dollars by using the IMF's annual exchange rate.

[d] Data on passenger services are also included.

[e] As data are not available for courier services alone, the ratios of courier services to transport services that are available for other ASEAN Member States for the respective years are used to estimate the value of courier services. Data for transport services are based on BPM5. For 2015, transport services data were not available. Therefore, the average of the 2013 and 2014 data was used as an estimate.

Table 4. Imports of courier services and its share in total imports of services and goods and services, 2005–2015 (Millions of dollars and per cent)

Country	Annual average 2005-2010	2011	2012	2013	2014	2015
Courier services import						
Brunei Darussalam[a]	61	84	95	118	125	123
Cambodia[b]	43	103	120	137	154	146
Indonesia	298	334	345	355	366	376
Lao People's Democratic Republic	6	12	13	15	19	14
Malaysia[c]	962	961	688	657	536	425
Myanmar[d]	3	-	-	-	17	8
Philippines	305	452	579	552	635	626
Singapore[e]	9 109	12 355	14 602	15 284	16 833	16 486
Thailand	1 246	894	761	812	777	727
Viet Nam[f]	658	1 430	1 629	1 608	1 702	1 551
ASEAN total	**12 033**	**15 195**	**17 204**	**17 930**	**19 463**	**18 931**
Share in total imports of servies						
Brunei Darussalam[a]	4.8	5.8	6.4	7.7	7.9	7.6
Cambodia[b]	5.2	10.4	11.6	12.7	13.6	13.2
Indonesia	1.2	1.2	1.2	1.2	1.2	1.2
Lao People's Democratic Republic	5.8	3.6	3.9	2.7	3.7	2.4
Malaysia[c]	3.5	2.5	1.6	1.5	1.2	1.1
Myanmar[d]	0.5	-	-	-	0.7	0.3
Philippines	3.5	3.7	4.1	3.4	3.0	2.7
Singapore[e]	11.5	10.4	11.2	10.4	10.6	10.7
Thailand	3.4	1.9	1.7	1.7	1.7	1.7
Viet Nam[f]	9.3	12.1	13.5	11.6	11.7	10.0
ASEAN total	**4.9**	**5.2**	**5.5**	**5.3**	**5.6**	**5.1**
Share in total imports of goods and services						
Brunei Darussalam[a]	1.8	1.9	2.0	2.4	2.4	2.2
Cambodia[b]	0.8	1.6	1.9	2.1	2.2	2.1
Indonesia	0.3	0.2	0.2	0.2	0.2	0.2
Lao People's Democratic Republic	0.4	0.4	0.4	0.4	0.4	0.2
Malaysia[c]	0.6	0.5	0.3	0.3	0.2	0.2
Myanmar[d]	0.1	-	-	-	0.1	0.0
Philippines	0.6	0.6	0.7	0.7	0.7	0.7
Singapore[e]	2.7	2.5	2.9	2.9	3.2	3.7
Thailand	0.7	0.4	0.3	0.3	0.3	0.3
Viet Nam[f]	1.0	1.3	1.4	1.2	1.1	0.9
ASEAN total	**0.9**	**1.0**	**1.0**	**1.0**	**1.1**	**1.1**

Source: AJC, based on data from IMF, WTO and the Department of Statistics, Malaysia.

Note: Courier services are part of transport services in the balance of payments (BoP), under the "Other (including Postal and Courier)" category. Therefore values in this table include other services such as postal services.

[a] As data are not available for courier services alone, the ratios of courier services to transport services that are available for other ASEAN Member States for the respective years are used to estimate the value of courier services. For 2010, transport services data were not available. Therefore, the average of the 2009 and 2011 data was used as an estimate.

[b] Data for 2015 were not available. Therefore, the average of the 2013 and 2014 data was used as an estimate.

[c] Data from the IMF were used up to 2009. Data from the Department of Statistics, Malaysia were used for 2010 onwards, converted to U.S. dollars by using the IMF's annual exchange rate.

[d] For 2011, although the data are not available, the figure is assumed to be insignificant.

[e] Data on passenger services are also included.

[f] As data are not available for courier services alone, the ratios of courier services to transport services that are available for other ASEAN Member States for the respective years are used to estimate the value of courier services. Data for transport services are based on BPM5. For 2015, transport services data were not available. Therefore, the average of the 2013 and 2014 data was used as an estimate.

2. Mode 3: Commercial presence

Nearly 100 foreign courier services companies operate in ASEAN (table 5). However, they exist mainly in Thailand, Singapore, the Philippines, Malaysia, Viet Nam and Indonesia. No foreign firms were identified in Brunei Darussalam, Cambodia, the Lao People's Democratic Republic and Myanmar. The estimated sales of foreign courier services companies in 2015 were $3.3 billion, the bulk of which were generated in Thailand and in Singapore (table 5). In contrast, ASEAN courier services firms reside mainly in Singapore, with a total sales value of $100 million (table 5).

Table 5. Estimated sales of courier services through foreign presence, 2015
(Number and millions of dollars)

Country	Receipts from abroad		Supply to the world	
	Number of foreign entities[a]	Estimated sales	Number of ASEAN entities abroad	Estimated sales
Brunei Darussalam	0	0	0	0
Cambodia	0	0	0	0
Indonesia	1	24	0	0
Lao People's Democratic Republic	0	0	0	0
Malaysia	5	197	1	-
Myanmar	0	0	0	0
Philippines	7	358	0	0
Singapore	33	1 240	8	98
Thailand	44	1 395	0	0
Viet Nam	4	44	0	0
ASEAN total	**94**	**3 258**	**9**	**98**

Source: AJC, based on data from Toyo Keizai Shimposha, UNCTAD, Thomson Reuters and Orbis.
Note: For estimated sales, see the estimation procedure described in Paper 1, box 2. Zero does not necessarily mean that there is no foreign affiliate. It means that either no physical existence of foreign affiliate is identified or that foreign companies extend only business alliance options to domestic firms.
[a] Includes affiliates for which sales cannot be estimated (five for Singapore and two for Thailand).

Foreign courier services companies in ASEAN originate in Europe, Japan, the United States and Hong Kong (table 6), including FedEx, Deutsche Post and TNT, as well as Japan's big courier services firms such as Sagawa and Yamato. ASEAN courier services firms, especially Singaporean ones, operate mainly in Australia and India. Singapore Post and DHL Express Singapore are large investors from ASEAN.

Table 6. Foreign affiliates in ASEAN and ASEAN affiliates abroad in courier services, by source and destination country (Number and millions of dollars)

	Country	Foreign affiliates in ASEAN: Number of affiliates	Foreign affiliates in ASEAN: Estimated sales	ASEAN affiliates abroad: Number of affiliates	ASEAN affiliates abroad: Estimated sales
Developed countries	United States	10	678	1	..
	Europe	9	132	0	0
	Australia	0	0	2	16
	Japan	75[b]	1 778	1	..
	Others	0	0	0	0
	Subtotal	**94**	**2 588**	**4**	**16**
Developing countries	ASEAN[a]	3	1	1	..
	China	0	0	1	..
	Korea, Rep. of	0	0	0	0
	India	0	0	2	82
	Hong Kong (China)	2	677	1	..
	United Arab Eirates	1	..	0	0
	Others	0	0	0	0
	Subtotal	**6**	**678**	**5**	**82**
Unspecified/Supernational		0	0	0	0
World		**100**	**3 266**	**9**	**98**

Source: AJC, based on data from Toyo Keizai Shimposha, UNCTAD, Thomson Reuters and Orbis.
Note: For estimated sales, see the estimation procedure in Paper 1, box 2. Zero does not necessarily mean that there is no foreign affiliate. It means that either no physical existence of a foreign affiliate is identified or that foreign companies extend only business alliances to domestic firms.
[a] The number of foreign affiliates in ASEAN and ASEAN affiliates abroad should balance. However, either the destination or the source country of some of these affiliates is not available. Therefore they do not match.
[b] Includes seven affiliates for which sales cannot be estimated.

IV. TRADE AGREEMENTS AND REGULATIONS IN ASEAN MEMBER STATES

The barriers to entry by companies are raised exponentially when a company chooses to cover a bigger area, regardless of its original geographical focus at the national, regional and international levels. To attain broader coverage and a larger network, firms must dedicate funds for higher setup costs and a greater amount of capital investment to infrastructural development, which may include a larger fleet of trucks, computerized documentation, a real-time GPS tracking system and even professional systems for sorting and consolidating parcels. In addition to these fixed costs, there are variable costs – which tend to be large, as the labour-intensiveness of the industry raises staff costs, which make up a major portion of such costs.

Table 7 shows the Hoekman Index[14] for courier services in the ASEAN Member States under the AFAS (9th package). As shown, courier services are open in most ASEAN Member States.

Table 7. Hoekman Index of the AFAS (9th package, signed in November 2015) for courier services

Country	Mode 1	Mode 2	Mode 3
Brunei Darussalam	1	1	0.75
Cambodia	1	1	1
Indonesia	0	0	0
Lao People's Democratic Republic	0.5	0.5	0.5
Malaysia	1	1	0.75
Myanmar	1	1	0.5
Philippines	0.75	1	1
Singapore	1	1	1
Thailand	1	1	0.75
Viet Nam	1	1	1

Source: AJC, calculated from the specific commitment tables of each ASEAN Member State under the AFAS (9th package).
Note: Mode 4 is not covered under the AFAS. It is covered under the AMNP (ASEAN Agreement on the Movement of Natural Persons).

Table 8 lists shares of foreign ownership allowed in courier services (as percentages) under AFAS 9. Five ASEAN Member States (Cambodia, the Lao People's Democratic Republic, the Philippines, Singapore and Viet Nam) allow 100 per cent foreign ownership. As express delivery services can also be provided by postal agencies, opening the market would enhance international competition, thereby leading to supply of varieties of convenient courier services.

Table 8. Maximum of foreign ownership allowed in courier services under the AFAS (9th package) (Per cent)

Member State	Foreign ownership allowed
Brunei Darussalam	70
Cambodia	100
Indonesia	n.a.
Lao People's Democratic Republic	100
Malaysia	51
Myanmar	No mention
Philippines	100
Singapore	100
Thailand	49
Viet Nam	100

Source: Calculated from tables 2 and 3.

[14] Hoekman (1995) proposes an indexation method for measuring the GATS-style degree of commitment in the services sector. This method assigns values to each of eight cells (four modes and two aspects – market access (MA) or national treatment (NT)), as follows: first assign the value 1 when the sector at issue is "fully liberalized", 0.5 when "limited (but bound)", 0 when "unbound" (Government has not committed to liberalize), by subsector, by mode and by aspect (MA or NT), and take the simple average for aggregation; then calculate the average value by services sector and by country. The higher the figure, the more liberal are the country's service trade commitments to the FTA members. Using the database that the AJC constructed, the Hoekman Index was derived for each of 155 subsectors. Then the simple average at the level of the 11 sectors was calculated. The Hoekman Index takes the value between 0 and 1, with 0 referring to the most restricted status, with 1 being the most open situation.

Aside from the AFAS, there is a need for ASEAN-wide regulatory cooperation in connection with courier services. The US-ASEAN Business Council (2005) notes that the courier industry thrives in countries with efficient import and export procedures, including customs procedures. The business environment for courier services in ASEAN is diverse, ranging from those that are highly liberalized to those in which postal administrations continue to maintain control over the provision of courier services (see section V). ASEAN Member States should therefore make concerted efforts to improve border clearance procedures and liberalize customs procedures.

In this context, ASEAN has its "ASEAN Customs Cooperative Framework": the First ASEAN Finance Ministers' Meeting held in 1997 in Thailand established the customs principles of consistency, simplicity, efficiency, transparency, access to appeals (legal actions) in cases of damages or loss, and mutual assistance. This sort of regulatory framework should also be put into practice.

V. IMPACTS OF FURTHER LIBERALIZATION OF COURIER SERVICES ON ECONOMY

Courier services prosper in countries with efficient import and export procedures, open aviation regimes and attractive investment climates. The environment for courier services in ASEAN ranges from highly liberalized and open economies with independent regulators to those in which postal administrations continue to maintain jurisdiction and control over the provision of such services. To avail themselves of the benefits that accrue to economies with efficient courier services, ASEAN Member States must take immediate steps to improve border clearance procedures and liberalize aviation regimes. Over the medium term, greater market access, including the liberalization of investment regimes, fair competition and closer regional integration, should be pursued with vigor.

For courier-based delivery, 25 percent of costs and 20 percent of transit time are spent in and/or on customs practices (US-ASEAN Business Council 2005). Although these figures might have been reduced over the past years, it remains important to further promote reductions of costs and time spent on customs-related practices. Table 9 provides the Customs Capability Index calculated for 2015 by Frontier Economics (2015) for the Global Express Association (which is the global industry association for courier services).[15] Large variation exists across the ASEAN Member States, ranging from Myanmar's score of 4.0 to Thailand's score of 9.5. As international courier services by nature require standardized customs capability across countries, more policy efforts are needed to harmonize the scores.

[15] The contents of this indexation method are discussed in detail in section VI in the context of policy suggestion.

Table 9. Customs Capability Index, 2015

Country	Customs Capability Index score
Brunei Darussalam	5
Cambodia	8
Indonesia	7
Lao People's Democratic Republic	7
Malaysia	6
Myanmar	4
Philippines	8
Singapore	7.5
Thailand	9.5
Viet Nam	5.5
Memorandum	
China	6
Japan	9
Korea, Republic of	10
United States	7

Source: AJC, adapted from Global Express Association.
Note: Table 12 shows the scoring of the 10 capacity variables. For the Lao People's Democratic Republic, an estimate was made by the AJC.

Table 10 displays regression results estimating the impacts of customs-related indices on trade in the world, including some ASEAN Member States[16] (Frontier Economics 2015).[17] A common implication of these indices is that through the improvement of the courier services-related indices, about 5 per cent more trade will be created. Considering the recent global economic growth rate of 2 percent or so, the figure is promising, as promoting trade-based economic expansion by liberalizing trade in courier services is an objective that is reachable by ASEAN as a whole.

Table 10. Regression results for the impacts of customs-related industry indices on trade in the world (including some ASEAN Member States), 2015 (Per cent)

	World Bank Ease of Doing Business Index	World Bank Logistics Performance Index (for infrastructure)	Customs Capability Index
Exports	4.8	6.0	5.0
Imports	4.5	4.6	3.7
Average of exports and imports	4.7	5.3	4.4

Source: Frontier Economics (http://www.frontier-economics.com/).
Notes: Average impacts of improving the index scores by one unit (10 per cent of the full score) for exports, imports and average of exports and imports are shown. The World Bank's Ease of Doing Business index measures the degree of business-friendly regulation; the Logistics Performance Index measures the level of infrastructural development for logistics services.

16 The ASEAN Member States covered are Brunei Darussalam, Indonesia, Malaysia, Myanmar, the Philippines, Thailand and Viet Nam.

17 The customs-related indices are related, but not specific, to courier services by nature and considered here in the absence of indices unique to courier services. Among them, the Customs Capability Index is most relevant to courier services.

Several ongoing trends affect courier services in ASEAN. National postal administrations are corporatizing and extending their services to include courier services. Initiatives have been launched to integrate the region into a single market for goods and services, with active participation by Governments in liberalizing air transport services and regional aviation markets. For WTO members, further commitments with regard to market access, national treatment and fair competition are expected under the Doha Round. Bilaterally, disciplines for the services sector including courier services have already been incorporated into the United States–Singapore Free Trade Agreement (FTA) and are expected under the United States–Thailand FTA.

VI. CONCLUSIONS AND POLICY SUGGESTIONS

1. General policy suggestions

As a priority and an achievable target for the immediate term, the ASEAN Member States could undertake measures to promote trade facilitation, including the elimination of barriers to efficient customs clearance, the establishment of appropriate de minimis levels, the introduction of full electronic data interchange, and overall integration of customs policies and procedures. Customs and trade facilitation is a priority for the industry and one of the four key areas18 proposed under the WTO (since 1996).

The economies that are most efficient and have the highest standards are those in which the distribution sector is competitive and has been left free of burdensome regulations and barriers to investment and market entry.

According to Frontier Economics (2015), there are five attributes of courier services that customers value as high when they are met and as low when they are not met:

(1) Global reach: being able to send items anywhere

(2) Reliability: realizing timely arrival of items

(3) Transparency: being able to track items

(4) Speed: being able to reach markets and customers quickly

(5) Security: ensuring the safety of items while moving

The US–ASEAN Business Council (2005) points out that in the face of heightened security requirements, the adoption of customs facilitation measures is essential: further promotion of automated customs clearance, risk management strategies, the separation of goods release from accounting processes, the establishment of a de minimis level and the general simplification and modernization of customs processes and procedures.

With the application of electronic data interchange technology, ASEAN countries such as Singapore, Thailand, the Philippines, and Malaysia have successfully reduced average customs processing for air shipments to one day or less (US–ASEAN Business Council 2005). Electronic data interchange enables exporters and importers to input data electronically, with links to customs and other supporting import-licensing agencies, for efficient approval and release of goods.

[18] The four key areas, known as "Singapore issues" (because the WTO ministerial conference in 1996 was held in Singapore), are Government procurement, trade facilitation (customs issues), trade and investment, and trade and competition.

2. Workable policy suggestions

To promote the regional flow of goods in the ASEAN region requires the implementation of policy initiatives to strengthen the domestic logistics sector and improve connectivity. These efforts are likely to benefit courier services ASEAN-wide. To make this happen in the foreseeable future, concrete policy measures must be implemented. Table 11 lists the 10 components of the Customs Capability Index for formulating workable policy suggestions.

Table 12 provides the status of the ASEAN Member States in terms of the custom capability variables in table 11.

Table 11. Components of Customs Capability Index for workable policy suggestions

Customs capability variable	Corresponding question in customs capability questionnaire	Scoring method
(1) Electronic customs/ Pre-arrival processing	Does customs accept and process electronically the data required for release of shipments in advance of their actual arrival so that they can be released either prior to or immediately after arrival?	1 = yes 0.5 = sometimes 0 = no
(2) 24-hour/7-day automated customs processing	Is full-time (24 hours and 7 days) automated processing for the customs ports at which you operate available?	1 = yes 0 = no
(3) Adapted working hours customs personnel	Are the working hours of customs personnel adapted to commercial needs?	1 = yes 0 = no
(4) Inspection at operator facility or transfer?	For shipments arriving by air, does customs inspect and release goods at the operator's facility or require their transfer to another facility?	1 = operator's facility 0.5 = depends on the situation 0 = transfer required
(5) Other agency inspections cause delays	If there are inspections by agencies other than customs, do those cause delays?	1 = no 0.5 = sometimes 0 = yes
(6) De minimis regime present?	Does the customs administration apply a de minimis regime that allows goods the value of which does not exceed a certain amount to be exempted from duties and taxes?	1 = yes 0 = no
(7) If de minimis, simplified procedures?	If yes, are those goods subject to simplified procedures e.g. consolidated release/clearance?	1 = yes 0 = no
(8) Threshold for informal customs procedure	Does the customs administration apply a de minimis regime that allows dutiable goods the value of which does not exceed a certain amount to be exempted from formal declaration procedures?	1 = yes 0 = no
(9) Necessity to provide a consular trade document?	Does customs or any other agency require in connection with importation of goods that the importer provide any of the following items? - a consular invoice - a consular visa for a commercial invoice - other trade document	1 = yes 0 = no
(10) Third-party customs broker?	Does customs or any other agency require clearance of import shipments by a third-party customs broker?	1 = yes 0 = no

Source: Adapted from Frontier Economics (2015), Table 1.

Table 12. Scoring of the ASEAN member states' custom capability by variable

Custom capability variable	Brunei Darussalam	Cambodia	Indonesia	Lao People's Democratic Republic	Malaysia	Myanmar	Philippines	Singapore	Thailand	Viet Nam
(1) Electronic customs/ Pre-arrival processing	0	0	0	0	0	0	0	1	1	0.5
(2) 24-hour/7-day automated customs processing	0	0	1	0	1	0	0	1	1	0
(3) Adapted working hours customs personnel	0	1	0	1	1	0	1	1	1	0
(4) Inspection at operator facility or transfer?	1	1	1	1	1	1	1	0.5	1	1
(5) Other agency inspections cause delays	1	1	1	0	0	0	1	0	0.5	0
(6) De minimis regime present?	1	1	1	1	1	0	1	1	1	1
(7) If de minimis, simplified procedures?	0	1	1	1	1	1	1	1	1	1
(8) Threshold for informal customs procedure	1	1	1	1	1	0	1	1	1	1
(9) Necessity to provide a consular trade document?	0	1	0	1	0	1	1	0	1	0
(10) Third-party customs broker?	1	1	1	1	0	1	1	1	1	1
Sum (Customs Capability Index)	**5**	**8**	**7**	**7**	**6**	**4**	**8**	**7.5**	**9.5**	**5.5**

Source: AJC calculation. Adapted from Global Express Association.
Note: For the Lao People's Democratic Republic, an estimate was made by the ASEAN-Japan Centre.

To aid in developing workable policy suggestions, table 13 lists policy targets that are essential for courier services, connecting customs principles and customs capability variables. To resolve the "no match" policy issues in the table, a seminar could be held to share best practices in courier services in each ASEAN Member State.

Concerning "global reach", what is important is access to intermodal markets (e.g., smooth linkages between air and ground modes of transport), which enables courier services suppliers to practice flexible and seamless operations. Put differently, intermodal operations enable courier services firms to control their airline operations and conduct their own ground pick-ups and deliveries. Concerning "reliability" and "security", policies to encourage courier services suppliers to invest further in the downstream end of the supply chain, including parking, information technology–based customer support and financial service centres. In order to achieve these policy targets of global reach, reliability and security, a series of seminars should be held to share international best practices (some of which are being organized by the ASEAN–Japan Centre) as part a concerted effort to promote trade in courier services.

Table 13. Policy targets for courier services

Policy target	Most relevant customs principle	Most relevant workable policy suggestion (in the table above)
Global reach	Mutual assistance	No match (Sharing international best practices)
Reliability	Consistency	No match (Sharing international best practices)
Transparency	Simplicity and transparency	(9) Necessity to provide a consular trade document? (10) Third-party customs broker?
Speed	If there are inspections by agencies other than customs, do those cause delays?	(1) Electronic customs/Pre-arrival processing (2) 24-hour/7-day automated customs processing (3) Adapted working hours customs personnel (4) Inspection at operator facility or transfer? (5) Other agency inspections cause delays (6) De minimis regime present? (7) If de minimis, simplified procedures? (8) Threshold for informal customs procedure
Security	Does customs or any other agency require clearance of import shipments by a third-party customs broker?	No match (sharing international best practices)

Source: AJC

The courier services provided by developed-country firms are highly concentrated and account for most of the industry's revenue (table 6). The local segment in the ASEAN region is much smaller and is highly fragmented. Large courier services firms offer a wide range of services relying on highly capitalized delivery networks (in terms of handling equipment and sorting technology). Small firms, usually more labour-intensive, provide specialized customer service in metropolitan areas.

With a view to formulating concrete policy proposals for trade in courier and transport services, the Third Seminar on Promoting Services Trade in ASEAN Member States was held 11–13 September 2017 in Kuala Lumpur, Malaysia.[19] The policy evaluation exercise (see annex E) in the seminar identified the following needs: (1) narrowing the development gaps across the Member States

[19] The focus areas of the seminar, co-organized by the ASEAN–Japan Centre and Malaysia External Trade Development Corporation (MATRADE), were courier and transport services.

will be indispensable for a more effective, ASEAN-wide courier services network; (2) synchronous implementation of cross-border customs cooperation will be needed; and (3) harmonization of a de minimis threshold value across the Member States will be necessary. A policy evaluation exercise for courier services is included in annex A of Paper 6 of this series. With the spirit of “start small and grow big”, a feasible option would be for the ASEAN Member States to boost coordination among themselves on the first three needs, with due consideration to the untapped policy targets (indicated in table 13).

To transform ASEAN into a more integrated platform for manufacturing and services activities, harmonization of business practices for courier services must be paired with the vision of ASEAN as a single customs union. The above-mentioned policy suggestions for courier services are expected to facilitate not just the ASEAN-wide promotion of trade but also the ongoing negotiation for the Regional Comprehensive Economic Partnership involving ASEAN Member States and their dialogue partners (namely, Australia, China, India, Japan, the Republic of Korea and New Zealand). Promoting trade in courier services in the ASEAN region should move to a new dimension of catalyzing the establishment of global value chains. It is therefore hoped that the ASEAN Governments, in collaboration with the private sector, continue to actively engage in further promoting trade in courier services in the ASEAN region and on a more global scale.

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ANNEX A. DEFINITION OF EXPRESS DELIVERY SERVICES[20]

Brunei Darussalam
Brunei Darussalam does not have a formal definition of "courier services" or "express delivery services".

Cambodia
Cambodia does not have a definition of "express delivery services" under its national legislation.

Indonesia
Law Number 38 of 2009 on Posts, Article 1, establishes that a postal operator is a business entity that provides postal services, which consist of several activities, as follows:

- Written communication and/or electronic mail
- Parcel services
- Logistics services
- Financial transaction services
- Postal agency service

Courier services, as stated in Decree No.5/2005 of the Minister of Communications concerning courier services operators, are the services of receiving, transporting and/or delivering packets, money and mail in the form of printed matter, newspapers, literature for the blind and small packets, from senders to receivers for a fee.

Lao People's Democratic Republic
Based on the Lao People's Democratic Republic's Law on Postal Services:

(i) Express services refers to the acceptance, dispatch and delivery of letter post items and post parcels in the form of both ordinary and registered services, but delivery is the first priority, and an additional charge is collected for such services.

(ii) Express mail services refers to the acceptance, dispatch and delivery of letter post items and post parcels, in the form of first priority, with the items able to be tracked and traced at any time, and the postage charge more expensive than the charge for other services.

Malaysia
"Express or courier services" means integrated services for the collection, transmission and delivery of a letter, an envelope, a small packet, a package, a parcel, a wrapper, a container or goods that can be collected, transmitted and delivered in an expedited manner with premium features such as security, tracking, signature, specialization and individualization of services, and acknowledgement, with committed delivery times.

Myanmar
"Courier services/express delivery services" are provided by governmental or non-governmental designated operators who deliver the items on time.

[20] Based on ASEAN's website at http://asean.org/wp-content/uploads/images/2013/economic/aem/file%2007%20compilation%20of%20ams%20definition%20of%20eds%2013th%20ltsswg.pdf.

Philippines

Express and/or messenger services "firm":

- Includes every natural or juridical person that owns, operates, manages or controls in the Philippines, for hire or compensation, with general or limited clientele, whether permanent, occasional or accidental, and for general business purposes any service for the personal delivery to other persons of written messages and any mail matter except telegrams.
- A person or his employee delivering any article owned by the former is not conducting an express delivery and/or messenger services within the context of this circular.

Singapore

Singapore does not have definitions of "courier services" or "express delivery services" in its national legislation. The closest is a definition of "express letters", although that is not equivalent to "express delivery services" as "express letters" does not cover parcels.

Definition of "express letters":

- Express letter means a local express letter or an international express letter, or both.
- Express letter service means a local express letter service or an international express letter service or both.
- International express letter means a letter

  (a) originating from a sender in Singapore and intended for delivery to a destination outside Singapore at a rate faster than the published delivery standard for air mail letters dispatched by the public postal licensee; or

  (b) originating from a sender outside Singapore and intended for delivery within the same working day in Singapore.
- Local express letter means a letter originating from a sender in Singapore and intended for delivery within Singapore within the same working day.
- International express letter service means a service for the conveyance of international express letters.
- Local express letter service means a service for the conveyance of local express letters.

Thailand

Thailand does not have definitions of "courier services" or "express delivery services" in its current national legislation. The Thai Government has stated that it is in the process of drafting the new Postal Act and will inform ASEAN's Logistic and Transport Services Sectoral Working Group of the definition after the new Act is in place.

Viet Nam

According to Article 4 (2) of Decree No. 128/2007/ND-CP dated 2 August 2007 on delivery service, "express delivery service" means providing delivery service in an expedited and reliable manner. Express delivery service also includes premium features such as collection at the address of the sender, delivery at the hand of the receiver, tracking, changing the address of delivery while the package is on the way, notice of the delivery timing and other added-value features.

Annex B. Forty-eight large foreign affiliates engaged in courier services in ASEAN, 2015 (continued)

	Name of ASEAN affiliate abroad	Host country	Estimated sales ($ million)	Name of ASEAN investing company	ASEAN home country
1	Singapore Post Ltd	Singapore	653	Alibaba Investment Ltd	Hong Kong, China
2	SCG Nichirei Logistics Co, Ltd	Thailand	356	Nichirei Logistics Group Inc	Japan
3	FedEx Philippines	Philippines	321	Federal Express (FedEx)	United States
4	Federal Express Services (M) Sdn Bhd	Malaysia	141	FedEx Corp	United States
5	TTK Asia Transport (Thailand) Co, Ltd	Thailand	124	Toyota Tsusho Corporation	Japan
6	Seiwa Pioneer Logistics Co, Ltd	Thailand	106	Seiwa Kaiun Co, Ltd	Japan
7	TNT Express Worldwide (Singapore) Pte Ltd	Singapore	94	FedEx Corp	United States
8	Sankyu Laem Chabang (Thailand) Co, Ltd	Thailand	87	Sankyu Inc	Japan
9	Hitachi Transport System (Asia) Pte Ltd	Singapore	81	Hitachi Transport System, Ltd	Japan
9	Bangpoo Intermodal Systems Co, Ltd	Thailand	81	Mitsui O.S.K. Lines, Ltd (MOL)	Japan
11	SBS Logistics Singapore Pte Ltd	Singapore	69	SBS Holdings, Inc	Japan
12	Sagawa Express Thai Container Distribution Service Co, Ltd	Thailand	64	SG Holdings Co, Ltd	Japan
13	Sagawa Express Singapore, Pte Ltd	Singapore	63	SG Holdings Co, Ltd	Japan
14	Hi-Tech Nittsu (Thailand) Co, Ltd	Thailand	62	Nippon Express Co, Ltd	Japan
14	Mahaporn Transport Co, Ltd	Thailand	62	Tonami Holdings Co, Ltd	Japan
16	K Line (Thailand) Ltd	Thailand	57	Kawasaki Kisen Kaisha, Ltd	Japan
17	Tri-Net Logistics (Asia) Pte Ltd	Singapore	55	Mitsui & Co, Ltd	Japan
18	Dia Merchandise Co, Ltd	Thailand	48	Mitsubishi Corp	Japan
19	TNT Express Worldwide (M) Sdn Bhd	Malaysia	46	FedEx Corp	United States
20	TNT Express Worldwide (Thailand) Co Ltd	Thailand	42	TNT Express Worldwide NV	Netherlands
21	--	Singapore	35	Federal Express (FedEx)	United States
22	Sankyu (Singapore) Pte Ltd	Singapore	34	Sankyu Inc	Japan
23	Mitsubishi Corporation LT (Thailand) Co, Ltd	Thailand	33	Mitsubishi Corp LT, Inc	Japan
24	NNR Global Logistics (Thailand) Co, Ltd	Thailand	32	Nishitetsu Global Logistics, Co, Ltd	Japan
25	--	Viet Nam	30	Deutsche Post	Germany
26	NNR Global Logistics (S) Pte Ltd	Singapore	27	Nishitetsu Global Logistics, Co, Ltd	Japan
27	Vantec World Transport (Thailand) Co, Ltd	Thailand	25	Hitachi Transport System, Ltd	Japan
28	Nusantara Infrastructure Tbk PT	Indonesia	24	Eagle Infrastructure Fund Ltd	Hong Kong, China
29	Sankyu-Thai Co, Ltd	Thailand	20	Sankyu Inc	Japan

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Annex B. Forty-eight large foreign affiliates engaged in courier services in ASEAN, 2015 (concluded)

	Name of ASEAN affiliate abroad	Host country	Estimated sales ($ million)	Name of ASEAN investing company	ASEAN home country
30	Shinano Kenshi Trading Co, Ltd	Thailand	20	Shinano Kenshi Co, Ltd	Japan
31	Best Cold Chain Co, Ltd	Thailand	19	Yokorei Co, Ltd	Japan
31	--	Singapore	19	Deutsche Post	Germany
31	--	Singapore	19	Federal Express (FedEx)	United States
34	Nittusu Shoji (Thailand) Co, Ltd	Thailand	16	NITTSU Shoji Co, Ltd	Japan
35	Yamato Asia Pte Ltd	Singapore	15	Yamato Holdings Co, Ltd	Japan
36	UTI (Global Logistics), Inc	Philippines	13	DSV de Sammensluttede Vognmaend AF 13-7 1976 A/S	Denmark
37	Sumisho Global Logistics (Thailand) Co, Ltd	Thailand	12	Sumisho Global Logistics Co, Ltd	Japan
38	Hitachi Transport System (Thailand), Ltd	Thailand	11	Hitachi Transport System, Ltd	Japan
39	Nissin Transport (Singapore) Pte Ltd	Singapore	10	Nissin Corp	Japan
39	Hankyu Hanshin Express (Singapore) Pte Ltd	Singapore	10	Hankyu Hanshin Express Co, Ltd	Japan
39	MBE Malaysia	Malaysia	10	Mail Boxes Etc	United States
39	--	Philippines	10	United Parcel Services (UPS)	United States
39	--	Philippines	10	Deutsche Post	Germany
39	--	Viet Nam	10	TNT (TPG)	Netherlands
39	Pegasus Global Express (Thailand) Co, Ltd	Thailand	10	Pegasus Global Express Co, Ltd	Japan
46	Alps Logistics (Thailand) Co, Ltd	Thailand	9	ALPS Logistics Co, Ltd	Japan
46	Suzuyo (Thailand) Ltd	Thailand	9	Suzuyo & Co, Ltd	Japan
46	Hankyu Hanshin Express (Thailand) Co, Ltd	Thailand	9	Hankyu Hanshin Express Co, Ltd	Japan

Source: AJC, based on data from Toyo Keizai Shimposha, UNCTAD, Thomson Reuters and fDiMarkets.

Note: These 48 firms are not necessarily the largest. They are provided for illustrative purposes. Sales are estimated in the following manner: First, the ratio of sales to the size of foreign affiliates (investment value, capital size, employment size, etc.) is calculated for available foreign affiliates in each ASEAN host economy; second, the ratio is applied to the affiliates for which size is available from the sources given; and third, some adjustment is made to eliminate unreasonable estimates by researching information on the affiliates in question. There are likely to be some, sometimes large, errors and readers should use these data with utmost caution.

Annex C. Nine large ASEAN affiliates abroad engaged in courier services, 2015

	Name of ASEAN affiliate abroad	Host country	Estimated sales ($ million)	Name of ASEAN investing company	ASEAN home country
1	Blue Dart Express Ltd	India	81.9	DHL Express Singapore Pte Ltd	Singapore
2	Quantum Solutions (Australia) Pty Ltd	Australia	15.3	Singapore Post Ltd	Singapore
3	Mailforce Document Solutions Pty Ltd	Australia	0.7	Fuji Xerox Asia Pacific Pte Ltd	Singapore
4	Quantium Solutions (Japan) Inc	Japan	0.3	Quantium Solutions International Pte Ltd	Singapore
5	Konsortium Logistik Pvt Ltd	Hong Kong, China	-	Tropical Dimension Sdn Bhd	Malaysia
6	First Flight Couriers Ltd	India	-	Temasek Holdings (Pte) Ltd	Singapore
7	Polar Air Cargo Inc	United States	-	DHL Express Singapore Pte Ltd	Singapore
8	Shenzhen 4PX Express Co Ltd	China	-	Quantium Solutions International Pte Ltd	Singapore
9	Tin Thanh Express JSC	Viet Nam	-	Investor Group	Singapore

Source: AJC, based on data from Toyo Keizai Shimposha, UNCTAD, Thomson Reuters and fDiMarkets.

Note: These nine firms are not necessarily the largest. They are provided for illustrative purposes. Sales are estimated in the following manner: First, the ratio of sales to the size of foreign affiliates (investment value, capital size, employment size, etc.) is calculated for available foreign affiliates in each ASEAN host economy; second, the ratio is applied to the affiliates for which size is available from the sources given; and third, some adjustment is made to eliminate unreasonable estimates by researching information on the affiliates in question. There are likely to be some, sometimes large, errors and readers should use these data with utmost caution.

ANNEX D.

SPECIFIC SCHEDULE OF COMMITMENTS FOR "COURIER SERVICES" UNDER AFAS (9TH PACKAGE, SIGNED IN NOVEMBER 2015) BY ASEAN MEMBERS

Legend for this annex:

(1) means Mode 1 (cross-border supply of services); (2) means Mode 2 (consumption abroad); (3) means Mode 3 (commercial presence); (4) means Mode 4 (movement of natural persons).

The meaning of the alphabetical classification in the right-hand column of each specific commitment table is as follows.

N: none (no restriction)

U: unbound (no mention or no promise of liberalization)

A: limitations on the number of service suppliers whether in the form of numerical quotas, monopolies, exclusive service suppliers or the requirements of an economic needs test

B: limitations on the total value of service transactions or assets in the form of numerical quotas or the requirement of an economic needs test

C: limitations on the total number of service operations or on the total quantity of service output expressed in terms of designated numerical units in the form of quotas or the requirement of an economic needs test21

D: limitations on the total number of natural persons that may be employed in a particular service sector or that a service supplier may employ and who are necessary for, and directly related to, the supply of a specific service in the form of numerical quotas or the requirement of an economic needs test

E: measures which restrict or require specific types of legal entity or joint venture through which a service supplier may supply a service

F: limitations on the participation of foreign capital in terms of maximum percentage limit on foreign shareholding or the total value of individual or aggregate foreign investment" (Part III: Specific Commitments, Article XVI: Market Access, subparagraph 2).

Under AFAS, the restriction types A, B and C are actually not used by the ASEAN Member States in the sector "Courier Services". In addition to these six types of market access restrictions, the following two restrictions are observed.

G: Government approval requirement; and

H: tax or fee payment requirement.

[21] Subparagraph 2(c) does not cover measures of a Member that limit inputs for the supply of services.

Brunei Darussalam

Sector or Subsector	Limitation on Market Access	A–H classification of MA	Limitation on National Treatment	A–H classification of NT	Additional Commitments
Courier Services (CPC 7512)	(1) None (2) None (3) Joint venture corporation with Bruneian individuals or Bruneian-controlled corporations or both the aggregate foreign shareholding in the joint venture corporation shall not exceed 70% foreign equity.	(1) N (2) N (3) EF70	(1) None (2) None (3) None	(1) N (2) N (3) N	

Cambodia

Sector or Subsector	Limitation on Market Access	A–H classification of MA	Limitation on National Treatment	A–H classification of NT	Additional Commitments
Courier services (CPC 7512)	(1) None (2) None (3) None	(1) N (2) N (3) N	(1) None (2) None (3) None	(1) N (2) N (3) N	

Indonesia
No commitment made in courier services

Lao People's Democratic Republic

Sector or Subsector	Limitation on Market Access	A–H classification of MA	Limitation on National Treatment	A–H classification of NT	Additional Commitments
B. Courier Services Multimodal courier services (CPC 75121)	(1) None (2) None (3) None	(1) N (2) N (3) N	(1) None (2) None (3) None	(1) N (2) N (3) N	

Malaysia

Sector or Subsector	Limitation on Market Access	A–H classification of MA	Limitation on National Treatment	A–H classification of NT	Additional Commitments
Courier services (CPC 7512)	(1) None (2) None (3) Foreign equity shall not exceed 51 per cent.	(1) N (2) N (3) F51	(1) None (2) None (3) None	(1) N (2) N (3) N	

Myanmar

Sector or Subsector	Limitation on Market Access	A–H classification of MA	Limitation on National Treatment	A–H classification of NT	Additional Commitments
Courier Services (CPC 7512) a. Multimodal courier services (CPC 75121) b. Other courier services (CPC 75129) (Courier services and respect of Documents & Parcels excluding Letters and Postcards)	(1) None (2) None (3) Commercial Presence of foreign service suppliers and/or providers are permitted in accordance with the Foreign Investment law (2012), the Republic of Union of Myanmar. The investment may be carried out in any of the following forms (i) carrying out an investment by a foreigner with one hundred per cent foreign capital on the business permitted by the Commission; (ii) carrying out a joint venture between a foreign and a citizen or the relevant Government department and organization; (iii)carrying out by any system contained in the contract which approved by both parties.	(1) N (2) N (3) E	(1) None (2) None (3) a. Foreign service suppliers and/or providers have to comply with existing Laws, rules and regulations concerning investment, taxations, immigration and labor. b. Foreign organizations and persons are not allowed to own land in Myanmar. However, land may be acquired on long-term lease, depending on the individual circumstances.	(1) N (2) N (3) E	

Philippines

Sector or Subsector	Limitation on Market Access	A–H classification of MA	Limitation on National Treatment	A–H classification of NT	Additional Commitments
B. Courier Services	(1) Commercial presence is required (2) None (3) None	(1) E (2) N (3) N	(1) None (2) None (3) None	(1) N (2) N (3) N	

Singapore

Sector or Subsector	Limitation on Market Access	A–H classification of MA	Limitation on National Treatment	A–H classification of NT	Additional Commitments
B. Courier Services Courier Services in respect of documents and parcels, excluding letters and postcards	(1) None (2) None (3) None	(1) N (2) N (3) N	(1) None (2) None (3) None	(1) N (2) N (3) N	

Thailand

Sector or Subsector	Limitation on Market Access	A–H classification of MA	Limitation on National Treatment	A–H classification of NT	Additional Commitments
B. Courier Services Bicycle courier services for food delivery (part of CPC Version 1.1: 64340)	(1) None (2) None (3) As indicated in 3.1 of the horizontal section	(1) N (2) N (3) EF70	(1) None (2) None (3) None	(1) N (2) N (3) N	

Viet Nam

Sector or Subsector	Limitation on Market Access	A–H classification of MA	Limitation on National Treatment	A–H classification of NT	Additional Commitments
Courier Services (CPC 7512**) *Express delivery services9, i.e. services consisting of collection, sorting, transport and delivery, whether for domestic or foreign destination, of: (a) Written communication10, on any kind of physical medium, including: - Hybrid mail service; - Direct mail. Except for the handling of items of written communication the price of which is less than: - 10 times the tariff for the handling of a standard domestic letter in the first weight level for domestic shipments; - US$9 for international shipments; provided that the gross weight of these items is less than 2,000 grams. (b) Parcels11 and other goods. * Handling of non-addressed items	(1) None (2) None (3) None	(1) N (2) N (3) N	(1) None (2) None (3) None	(1) N (2) N (3) N	Services and services suppliers of any other Member shall be accorded treatment no less favorable than the treatment accorded to the Vietnamese Post Office or its subsidiaries for its competitive activities.

Sources: http://myservices.miti.gov.my/widget/web/guest/protocol/-/56_INSTANCE_cxTW8VKZiDDD
For Brunei Darussalam, http://www.miti.gov.my/miti/resources/AFAS_9_Consolidated_Schedule_-_BD_SOC_(CCS_78).pdf
For Cambodia, http://www.miti.gov.my/miti/resources/AFAS_9_Consolidated_Schedule_-_CA_HC_(AFAS__5).pdf
For Indonesia, http://www.miti.gov.my/miti/resources/AFAS_9_Consolidated_Schedule_-_ID_SOC_(CCS_78).pdf
For Lao People's Democratic Republic, http://www.miti.gov.my/miti/resources/AFAS_9_Consolidated_Schedule_-_LA_SOC_(CCS_78).pdf
For Malaysia, http://www.miti.gov.my/miti/resources/AFAS_9_Consolidated_Schedule_-_MY_SOC_(CCS_78).pdf
For Myanmar, http://www.miti.gov.my/miti/resources/AFAS_9_Consolidated_Schedule_-_MM_SOC_(20140312).pdf
For Philippines, http://www.miti.gov.my/miti/resources/AFAS_9_Consolidated_Schedule_-_PH_SOC_(21Aug2015).pdf
For Thailand http://myservices.miti.gov.my/documents/10180/f0c1be7c-124f-47bf-b4f9-2fd6300ab7d1
For Singapore, http://www.miti.gov.my/miti/resources/AFAS_9_Consolidated_Schedule_-_SG_SOC_(20130509).pdf
For Viet Nam, http://www.miti.gov.my/miti/resources/AFAS_9_Consolidated_Schedule_-_VN_SOC_(20150911).pdf

ANNEX E. POLICY EVALUATION FOR COURIER SERVICES

A policy evaluation was undertaken at the Third Seminar on Promoting Services Trade in ASEAN Member States, held 11–13 September 2017 in Kuala Lumpur, Malaysia. Table E1 shows the result of the evaluation, however subjective it may be, for realization of a "multiple equilibria" (or "many capitals") situation (see Paper 6 on trade in transport services) through the promotion of courier services. A wide disparity is observed across the ASEAN Member States. Table E2 lists further policy options needed.

Table E1. **Subjective evaluation for realization of a "multiple equilibria" situation**

	Trade in Courier Services: National level	Trade in Courier Services: ASEAN-wide
Brunei Darussalam	8	6
Cambodia	5	9
Indonesia	7	8
Lao People's Democratic Republic	4	4
Malaysia	9	9
Myanmar	..	..
Philippines	9	9
Singapore	10	8
Thailand	6	6
Viet Nam	6	6
Average	6.4	6

Source: Survey results at the Third Seminar on Promoting Services Trade in ASEAN Member States, 11–13 September 2017, Kuala Lumpur, Malaysia.
Note: Scale = 1 (least agreeable) to 10 (most agreeable).

Table E2. **Further policy options needed**

	Further Policy Options Needed (in-country level / neighbor-country level / ASEAN level)
Brunei Darussalam	(not provided)
Cambodia	[in-country level] Courier service in Cambodia is at a lower stage of development. It needs more investment and cooperation with advanced technology companies to move courier services of Cambodia up to the advanced level. [neighboring-country level] We should cooperate with our neighboring countries in developing our courier industry and better connecting with them. [ASEAN-wide] ASEAN should find ways for better cooperation in courier services in the new world context of digital economy.
Indonesia	(not provided)
Lao People's Democratic Republic	[in-country level] Ministry of Post and Telecommunication and Ministry of Public Works and Transport should work jointly and good cooperation. [neighboring-country level] Customs declaration must be improved to facilitate the movement of courier product between neighboring countries. [ASEAN-wide] The same case as the neighboring-country level.
Malaysia	(not provided)
Myanmar	(not provided)
Philippines	(not provided)
Singapore	[in-country level] Maintain current level of courier services liberalization. [neighboring-country level] Harmonize de minimis threshold with Malaysia and Indonesia. [ASEAN-wide] Harmonization of de minimis threshold for e-commerce transactions in ASEAN.
Thailand	(not provided)
Viet Nam	- Implement cross-border transport policy to conduct either synchronously or efficiently due to the gap among countries in terms of economic development level, science and technology application, and management capacity. - Require the involvement of different sectors and agencies such as transport, customs, border-guard, immigration and quarantine to harmonize common regulations as well as cooperation among line agencies.

Source: Survey results at the Third Seminar on Promoting Services Trade in ASEAN Member States, 11–13 September 2017, Kuala Lumpur, Malaysia.
Note: Original memorandum style (as reported in the survey by ASEAN Member States) is retained

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