



SERVICES POLICY REVIEW



PERU





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ACRONYMS AND ABBREVIATIONS

APEC	Asia Pacific Economic Cooperation
APESOFT	Asociación Peruana de Productores de Software (Peruvian Association of Software Producers)
APC	Asociación Peruana de Consultoría
BCRP	Banco Central de Reserva del Perú (Central Bank of Peru)
BPO	business processing outsourcing
CAN	Comunidad Andina de Naciones (Andean Community)
CCL	Cámara de Comercio de Lima (Chamber of Commerce of Lima)
CIP	Colegio de Ingenieros de Perú (Engineering Board of Peru)
CITE	Centro de Innovación Tecnológica (Centre of Technological Innovation)
CNC	Consejo Nacional de la Competividad (National Competitiveness Council)
CPC	(United Nations) Provisional Central Product Classification
ECLAC	Economic Commission for Latin America and the Caribbean
EPCM	engineering procurement, construction & management
EFTA	European Free Trade Association
FDI	foreign direct investment
FYNCIT	Fondos para la Innovación, Ciencia y Tecnología (Science and Technology Fund)
FTA	free trade agreement
GDP	gross domestic product
GATS	General Agreement on Trade in Services (WTO)
ICT	information and communications technologies
IFRS	International Financial Reporting Standards
IER	Information Economy Report (UNCTAD)
INDECOPI	Instituto Nacional de Defensa de la Competencia y de la Protección de la Propiedad Intelectual (National Institute for the Defence of Competition and the Protection of Intellectual Property Rights)
INEI	Instituto Nacional de Estadística e Informática (National Institute for Statistics and Computer Science)
IIRSA	Iniciativa para Integración de la Infraestructura Regional Suramericana (Initiative for the Integration of Regional Infrastructure in South America)
IT	information technology
ITO	information technology outsourcing
KPO	knowledge process outsourcing
LPI	Logistics Performance Index
MDGs	Millennium Development Goals

MEF	Ministerio de Economía y Finanzas (Ministry of Economy and Finance of Peru)
MERCOSUR	Mercado Común del Sur (Southern Common Market)
MFN	most favoured nation
MINCETUR	Ministerio de Comercio Exterior y Turismo del Perú (Ministry of Foreign Trade and Tourism of Peru)
MINEDU	Ministerio de Educación (Ministry of Education)
MMM	Marco Macroeconómico Multianual (Multi-year Macroeconomic Framework)
MRA	Mutual Recognition Agreement
MTC	Ministerio de Transportes y Comunicaciones (Ministry of Transport and Communications of Peru)
NRS	National Register of Suppliers
OSCE	Organismo Supervisor de las Contrataciones del Estado (Organ for the Supervision of State Contracting)
PACIS	Programa de Apoyo a la Competitividad de la Industria del Software (Programme to Support the Competitiveness of the Software Industry)
PENX	Plan Extratético Nacional Exportador (National Export Plan)
POMs	Planes Operativos de Mercado (Operative Market Plans)
PPPs	public–private partnerships
PRODUCE	Ministerio de la Producción (Ministry of Production of Peru)
PROINVERSION	Agencia de Promoción de la Inversión Privada del Perú (Promotion Agency for Private Investment of Peru)
PROMEX	Programa de Mercados Externos (International Markets Programme)
PROMPERU	Comisión de Promoción del Perú para la Exportación y el Turismo (Export and Tourism Promotion Agency of Peru)
SEACE	Sistema Electrónico de Contratación del Estado (Electronic Procurement System)
SPR	Services Policy Review
SME	small and medium-sized enterprises
SUNAT	Superintendencia Nacional de Aduanas y de Administración Tributaria (National Superintendence for Customs and Tax Administration of Peru)
TCS	Tata Consulting Services
TPP	Trans-Pacific Partnership Agreement
UNCTAD	United Nations Conference for Trade and Development
VAT	value added tax
VUCE	ventanilla unica de comercio exterior (one-stop window for trade procedures)
WTO	World Trade Organization
WEF	World Economic Forum

FOREWORD

The Doha Mandate adopted in 2012 at UNCTAD XIII re-emphasized the importance of the development of, and access to, services, supported by adequate regulatory and institutional frameworks, which are important for sound socioeconomic development. It called upon UNCTAD to continue its work on services and assist developing countries and economies in transition in promoting the development of key services sectors and determining the right policy mix, including trade policy and strategic liberalization, which can lead to the improvement of domestic service provision and increased trade. Services Policy Reviews are an important component of this work.

A Services Policy Review examines economic and trade policy aspects of selected services sectors identified by the Government and provides an evidence-based approach to policymaking on services by reviewing policy, regulatory and institutional issues and options with a view to assisting the beneficiary in developing a coherent and comprehensive strategic framework for services. In close partnership with the Government, research undertaken by UNCTAD and at the national level is integrated into the results of national stakeholder consultations to yield policy recommendations for action.

The Government of Peru identified the following four services sectors to form the focus of this Services Policy Review: computer-related services, focusing on outsourcing; engineering services, emphasizing aspects related to consulting; accounting and bookkeeping services, focusing on outsourcing; and logistics services. These services have the potential to contribute significantly to diversifying Peruvian exports and, in the case of logistics services, promoting export competitiveness.

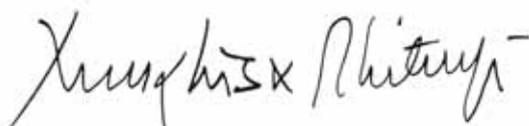
This Services Policy Review highlights the fact that the main obstacles affecting the growth of Peru's services supply include the following: difficulties in accessing financing, particularly for small and medium-sized enterprises; infrastructure shortcomings, particularly with respect to telecommunications and transport; lack of access and absorption of technology; and limited cooperation between the academic and business sectors.

Proposed recommendations for maximizing development benefits from services sectors include the following, among others:

- Complement the current trade promotion strategy with supply-side measures to support the development of a competitive services offer, with special attention to smooth integration with other policies such as for industrial development, competition, consumer protection and intellectual property.
 - Adopt education policies at the university level to produce well-prepared professionals, aligned with the current needs of service industries, for instance by encouraging local universities to improve their programmes and obtain international certification and appropriate accreditation for engineering programmes and by designing a scheme to certify the experience and skills of young engineers.
 - Enhance commercial intelligence programmes for small and medium-sized enterprises, to include access to financing and capacity-building on trade and fiscal factors affecting export potential.
 - Proposed recommendations for improving the contribution of the specific sectors analysed in this Services Policy Review include the following, among others:
 - Strengthen the institutional framework to support micro and small enterprises in the computer-related services sector.
 - Develop operative market plans for computer-related services, including interlinkages with growing services and services that demand computer-related services such as retail services, in order to identify further opportunities for the sector.
 - Promote partnerships between smaller and bigger accounting firms.
 - Develop a long-term plan for the logistics services sector, changing the traditional modal orientation to a comprehensive view including transportation, infrastructure, services and logistics.
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- Develop a policy framework to strengthen domestic supply and exports of engineering services by strengthening educational offers of engineering specialties in the mining and energy sectors (including gas, petroleum and electricity) and civil engineering.

My hope is that the analysis and recommendations of this report will make a constructive contribution to the development of Peru's services economy and trade.



Mukhisa Kituyi
Secretary-General of UNCTAD

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