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DSTI/IND/WPGI/M(2007)1

Organisation de Coopération et de Développement Économiques
Organisation for Economic Co-operation and Development

29-Sep-2008

English - Or. French

**DIRECTORATE FOR SCIENCE, TECHNOLOGY AND INDUSTRY
COMMITTEE ON INDUSTRY, INNOVATION AND ENTREPRENEURSHIP**

Working Party on Globalisation of Industry

SUMMARY RECORD OF THE WORKING PARTY ON GLOBALISATION OF INDUSTRY

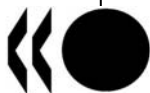
Meeting held at the OECD, Paris, 19-20 November 2007

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JT03251434

TA 88454: 17/09/08 - 26/09/08

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**DSTI/IND/WPGI/M(2007)1
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WORKING PARTY ON GLOBALISATION OF INDUSTRY

AGENDA

Paris, 19-20 November 2007

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¹ Benchmark Definition of Foreign Direct Investment, 4th edition, DAF/INV/STAT(2006)2/REV3.

**SUMMARY RECORD OF THE WORKING PARTY ON GLOBALISATION OF INDUSTRY
OECD, Paris, 19-20 November 2007**

Item 1. Adoption of the agenda

DSTI/IND/WPGI/A(2007)1

1. The Secretariat (Thomas Hatzichronoglou) welcomed all the participants, many of whom had managed to attend the meeting despite the transport strike, and proposed that the agenda be adopted. The agenda was adopted subject to a few amendments relating solely to the order in which items would be discussed. The present summary record, however, will follow the original order of items.

Item 2. Election of the bureau

2. The Secretariat (Thomas Hatzichronoglou) informed delegates that Professor Jean-Hervé Lorenzi who had applied to become chair of the working party had recently withdrawn his application for personal reasons.

3. This being the case, the Secretariat proposed that the chair be given to Mrs. Anne-Christine Strandell from the Swedish delegation and a member of the bureau since the working party was first set up. To establish the new bureau, the Secretariat proposed that the mandate of existing members be renewed and that the name of Mr Tetsuno Fukunaga from the Japanese delegation be added as a bureau member. Once these proposals had been adopted by the working party, the composition of the new bureau was as follows:

- Anne-Christine Strandell (ITPS, Sweden): Chair

Deputy-Chairs:

- Obie Whichard (Associate Director, Bureau of Economic Analysis, Department of Commerce – United States)
- Tetsuno Fukunaga (Director, METI - Japon)
- Professor Lionel Fontagné (University of Paris I – France).

Item 3. Approval of the summary records of the last meetings

**DSTI/EAS/IND/SWP/M(2006)2
DSTI/EAS/IND/SWP/M(2007)1
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4. Thomas Hatzichronoglou explained that the working party would be asked to approve three summary records. The first relating to the meeting held on 16 and 17 November 2006 was very long and would undoubtedly require a more careful reading. The other two were very short and related respectively to the meeting of the working party with experts from the workshop on international investment which took place on 28 March 2007 and the working party's meeting on the following day dealing solely with statistical matters. The Secretariat suggested that delegates who had been unable to read the long summary record of the meeting in November 2006 in its entirety send their comments to the Secretariat by the end of 2007 so that a revised version could be prepared.

5. The Secretariat (Thomas Hatzichronoglou) also informed delegates that since September 2007 DSTI had a new Director, Mrs Susanne Huttner, who had taken over from Mr N. Tanaka following his appointment as Director-General of the International Energy Agency. Furthermore, the unit on globalisation had been transferred from the EAS Division to the Structural Policy Division (SPD) headed by Marcos Bonturi, who would speak to delegates later. Thomas Hatzichronoglou then invited Director Mrs Susanne Huttner to address the meeting.

Item 4. Presentation by the Secretariat

6. Mrs. Susanne Huttner thanked delegates for attending the meeting and announced a number of decisions by the OECD Council regarding the appointment of two new Deputy Secretaries-General and the Organisation's intention to enlarge its membership through the accession of 5 new Member countries: Chile, Israel, Estonia, Slovenia and the Russian Federation. She also recalled that at the last meeting of the Council at Ministerial level Ministers had again stressed the importance of the "Innovation Strategy" project. For Ministers, innovation was a major driver of the economic performance of Member countries.

7. Over the next two and a half years, the OECD, DSTI and in particular the CIIE should adopt, through horizontal work, a comprehensive and strategic cross-government approach and propose a plan to Ministers to pursue the work beyond the term of the mandate handed down.

8. A master plan for all countries would not appear to be an appropriate way to develop this project in that innovation was a complex phenomenon and each country had its own individual experience. However, it would be possible to identify converging policies, those which were effective or less effective, and those which ensured strong growth and encouraged job creation. It would be necessary to identify best practices, as it were. Engagement would also be required with the actors from all backgrounds, including the private sector and civil society, involved in the innovation process. Under the authority of Deputy Secretary-General Mr Padoan, an advisory committee would be set up together with a panel of experts and high-level advisors from the private sector, various agencies and the financial sector in order to determine the area in which it would be advisable for the OECD to concentrate its efforts through a multidisciplinary policy and by raising critical policy issues.

9. It would also be necessary to develop a database and new indicators that were sufficiently flexible to take account of changes. Mrs. Huttner finished her address by recalling that, for the time being, the resources the Secretary-General had at his disposal for this project were relatively limited and that there would be a need for additional resources and voluntary contributions. She then asked Mr. Marcos Bonturi to address the meeting.

10. Mr. Marcos Bonturi welcomed the election of bureau members and in particular that of Mr. Tetsuno Fukunaga who would be participating for the first time in the working party as a member of the bureau. He recalled the change in the status of the working party, which had changed from a special session on globalisation to a working party on the globalisation of industry (sub-committee status). The new mandate of the working party had been extended. It retained responsibility for methodological issues and the organisation of surveys, but would have greater capacity for analytical work. In this way it could help the CIIE analyse the international aspects of innovation strategy. With regard to the Ministerial mandate on innovation strategy, the CIIE was interested in the industrial aspects of non-technological innovation, the impact of entrepreneurship on innovation, the way in which the emergence of a global value chain affected productivity, and also in value created by intellectual capital. Mr Bonturi ended his address by referring to two high-profile projects that directly concerned the working party: *a*) the attractiveness of innovation-related investment by multinationals, and *b*) a possible project on intellectual property payment flows through licences, a project that could be developed in co-operation with the Chinese authorities.

Item 5. Factors in the choice of location for R&D centres abroad: Case study of Europe
DSTI/IND/WPGI(2007)1

11. Mrs. Frédérique Sachwald from the French Ministry of Higher Education and Research presented her document whose main objective was to identify the factors determining the location strategies of multinationals according to the type of research performed. This study was based on 538 R&D investment projects in Europe between 2002 and 2005. However, after checking whether they had been completed and whether they could be classified by type of project, only 339 of these had been taken into account.

12. Three categories of R&D centre were identified:

a) R&D centres which tailor supply to the local market and which account for the vast majority (local development centres);

b) R&D centres which contribute to the development of new technologies and to innovation at world level (global research laboratories);

c) R&D centres which sub-contract tasks that could be separated from (outsourced) and then reintroduced into the innovation process (global development centres).

13. Econometric tests were used to measure the role of the local market, scientific and technological capacity, as well as value for money. These tests confirmed the importance of taking account of the diversification of the R&D activities of firms abroad in order to understand the determinants of choice of location.

14. The questions raised by this very interesting study related to the identification of certain limitations such as the failure to take account of the size of projects on the basis of their budgets or the need to examine the frequently determining role of innovation cluster effects. Mrs. Sachwald confirmed that the data used could not be used for analytical work. In response to a question by the United Kingdom delegate regarding access to this database, Mr Fabrice Hatem from the AFII (which maintains the database) confirmed that those delegates who so wished could access it freely.

15. The Chair, Mrs. Strandell, asked delegates to consider whether it would be possible to apply the methodology used in this study to their own country, while the Secretariat promised to give Mr. Hatem's details to those delegates who wished to be given access to the database.

Item 6. Do US multinationals engage in sequential choice?
Evidence from new manufacturing operations in Europe **DSTI/IND/WPGI(2007)2**

16. Mr. Raymond Mataloni from the Bureau of Economic Analysis in the US Department of Commerce presented a report which examined the choice of location by US multinationals for new investment in Europe over the period 1989-2003. The study used the discrete choice method to examine how US Firms approached the choice of location procedure and which characteristics they took into account regarding the choice of location.

17. The study showed that US firms tended to use a sequential procedure in which the host country was initially selected on the basis of a set of characteristics and then a region within that country was selected in accordance with a set of different criteria. The study showed that characteristics which increase productivity such as proximity to producers, availability of highly skilled workers, industrial clusters and the existence of extensive transport infrastructure are more important than other characteristics relating to price factors such as the availability of cheap land or low wages.

Item 7. The international location of headquarters of multinationals: the Swedish experience**DSTI/IND/WPGI(2007)3**

18. Mrs. Anne-Christine Strandell from the Swedish Institute of Growth Policy Studies (ITPS) presented an analysis of the location of headquarters of multinationals in Sweden. The situation in Sweden, which had fuelled a major public debate, concerned the offshoring of the headquarters of Swedish multinationals. The proportion of multinationals surveyed whose headquarters had moved abroad had risen since 1990 and particularly between 1997 and 2004. The offshoring of headquarters was associated with the offshoring of other strategic functions such as R&D.

19. It was not possible to distinguish a clear trend among Swedish firms regarding the offshoring of headquarters. In most cases such offshoring occurred when a Swedish firm was taken over by a foreign firm and primarily for tax reasons. In 2006 there were 1842 firms in Sweden under non-European foreign control. Among them, 709 had headquarters in Europe, 237 in the United Kingdom and 107 in Switzerland.

20. Another major conclusion drawn in the document presented was that foreign firms locating in Sweden were swift to invest in R&D. This observation also applied to cases where Swedish firms were taken over by non-residents.

Item 8. Future Investment location: what does the *World Investment Report* suggest?**DSTI/IND/WPGI(2007)4**

21. Mr. Torbjörn Fredriksson from UNCTAD presented a number of conclusions from the *World Investment Report* regarding issues relating to the location of investments by multinationals, while Mr Fabrice Hatem in a second address presented the findings of a prospective survey.

22. Mr. Fredriksson stressed the complexity of the analysis of attractiveness regarding different countries, industries, objectives and factors that play a determining role in the final choice, on the one hand, and the problems posed by the use of different data sources on the other. The global data available showed that in 2006 direct investment rose by 38% to 1 300 billion US dollars and was expected to rise to a new record level in 2007. The United States was globally the first ranked host country, although China was the leading host country among developing countries. Asia received 70% of direct investment by all developing countries.

23. Mergers and acquisitions played a dominant role in developed countries and a minor role in developing countries. In terms of attractiveness *per se*, greenfield projects were concentrated in China and India, while mergers and acquisitions were concentrated in the United States and the United Kingdom.

24. A review of the 100 largest multinationals showed that 10 multinationals out of the first 20 in the list had chosen Europe as location and 3 had chosen Asia, whereas Europe and Asia had been chosen by an equal number (6 and 6) of the first 20 multinationals from the South (emerging countries) in the list.

25. Mr. Fabrice Hatem then presented the conclusions drawn from a prospective survey of multinationals conducted by UNCTAD on the future location of their R&D investment for the period 2007-2009. Around 1 500 non-financial multinationals were contacted and 200 replied. This work was then completed with the assistance of a panel of experts. Around 70% of firms expected their foreign investment to grow and a third forecast growth of over 30%. The main dominant functions of internationalisation were production and distribution, although there had been sharp growth in other functions such as logistics and R&D and headquarters. The increase in jobs due to such investment was increasingly unrelated to production but rather to tertiary support functions. The main criterion for the location of investment was market access, notably in terms of size and growth. The geographical

preference of investors for the near future was primarily Asia. This choice mainly concerned greenfield investment.

**Item 9. The location of domestic and foreign production affiliates
by French multinational firms**

DSTI/IND/WPGI(2007)5

26. Mrs. Isabelle Méjean presented the findings of a CEPPII study (France) carried out in collaboration with Thierry Mayer and Benjamin Nefussi. The main issue addressed was the extent to which foreign investment by French firms had a negative impact on investment in France. To this end, a sample of foreign investments was compared with a sample of domestic investments.

27. Restricting its scope to the manufacturing sector, the study used individual data describing over 13 000 start-ups of productive activity in France and 3 000 investments in 87 foreign countries over the period 1992-2002.

28. This comparison sought to identify the reasons for which a given French firm would decide to be located abroad rather than in France. To do this, the study used a conditional nested logit model in two stages to explain *a)* the decision to invest abroad rather than in France, and *b)* the choice of foreign country. The determinants of this second decision related to the size of the market in each possible location and the additional fixed costs which an investor would have to face. The determinants of the choice between investing in France or abroad were primarily the profits that could be made in each case, the productivity of the firm, and the variables measuring the additional fixed cost of a foreign investment.

29. The findings showed that the probability of a firm locating in a given country is a rising function of its access to that market and of the supply of intermediate goods to which the firm would have access. Firms that invested heavily in intangibles (e.g. marketing, advertising, R&D, etc.) tended to invest more heavily abroad. In contrast, per capita GDP was not in itself an attractive factor, all things being equal. Likewise, cluster effects were observed: firms that already had financial links in a foreign country were more likely to reinvest in that market. The propensity of firms to invest in France was also attributable to the intensity of the financial links forged by French firms in their own country.

Item 10. The location of investment and multinationals linked to innovation

DSTI/IND/WPGI(2007)6

30. Mr Thomas Hatzichronoglou explained to delegates that in accordance with the Ministerial mandate on innovation strategy, priority had been given in the project on factors in the choice of investment location by multinational firms to an examination of investment related to technological innovation.

31. Three types of multinational activities or functions were primarily considered to relate to innovation : *a)* high-tech activities, *b)* R&D activities and *c)* decision centres relating to innovation.

32. At this stage in the work, and before seeking to identify the determining factors in the choice and role of policies, it was important to obtain some empirical results regarding the location of the multinationals mentioned earlier within the OECD area. The source used to obtain these results on the activity of multinational firms was the OECD Secretariat's international survey of the activity of multinational firms.

33. With regard to the location of high-tech activities relating to manufactured goods, the results showed that the United States and Japan, once due account had been taken of their size, attracted proportionately more investment in high-tech sectors than the European Union or Canada. However, wide disparities could be seen in Europe. The foreign affiliates in the high-tech sector with the highest turnover

were to be found in Ireland (by virtue of the IT industry – hardware) and those with the lowest turnover in Poland. However, Ireland's performance was attributable to a transfer of technology by US multinationals to their affiliates in Ireland and did not necessarily reflect an autonomous technology and innovation effort. In contrast, the United States was the most attractive country in practically all other high-tech sectors.

34. In the case of services, the United Kingdom and the United States were the most attractive countries for IT and financial services.

35. With regard to research and development (R&D), the United States and Japan again appeared to be the most attractive countries for multinationals. The R&D activities of foreign affiliates in the OECD area were concentrated at 70% of total industrial R&D in three sectors: pharmaceuticals, automobiles and electronics. Germany was the main magnet for manufacturing R&D in Europe. Mr. Hatzichronoglou then presented the main problems relating to the information available, which posed severe limitations on the analysis and interpretation of the location of R&D centres.

36. Data regarding decision centres were not yet available, undoubtedly due to the lack of a precise definition of what constituted an innovation-related decision centre and of how it might differ from the headquarters of a multinational.

Item 11. Replies to the OECD questionnaire on the attractiveness and location of direct investment

DSTI/IND/WPGI(2007)7

37. Mr. Thomas Hatzichronoglou summed up the replies made by delegations to a questionnaire sent out by the Secretariat regarding the availability of additional data that would permit a better analysis of the attractiveness of certain innovation-related activities of multinationals. The aim was to estimate the share of turnover and R&D of foreign affiliates in high-tech sectors between 1995 and 2005 which was attributable to new activities and that which related solely to a change of ownership due to acquisitions.

38. Eight countries (United States, Germany, France, Sweden, Japan, Canada, Belgium and the United Kingdom) responded positively while making certain distinctions in terms of sector and reference period.

39. The Secretariat had also asked whether it would be possible to distinguish (at least in terms of the total and not necessarily at the sectoral level) between parent companies under foreign control and parent companies controlled by residents in the declaring country. Twelve countries said that such a distinction could be made.

40. Furthermore, six countries said that they could supply time series on the number of multinational headquarters by sector of activity and by country of origin in the case of foreign groups.

41. Eight countries said that they had data regarding the turnover and R&D expenditures of foreign affiliates and headquarters.

42. Two important comments were made in the course of the discussion. Firstly, it was important to ensure that headquarters, which are usually legal entities, were also decision centres. With regard to the development of R&D centres, UNCTAD proposed that a more detailed analysis be made to determine what happened in terms of R&D and innovation in cases where national R&D centres came under foreign control.

43. The Secretariat, after taking account of the availability of data and the comments regarding headquarters and R&D centres, proposed to distribute a questionnaire after the meeting to collect these data, while bearing in mind the problems over confidentiality and administrative costs.

44. Countries that were unable to reply to the question on the availability of such data would be asked to forward the data to the Secretariat.

Item 12. OECD publication : *Relocation and employment: trends and impact* (Oral presentation)

45. Mr. Thomas Hatzichronoglou informed delegates of a number of changes to this publication compared with the previous version which had been discussed and which had been proposed for declassification at the meeting in November 2006. These changes concerned certain econometric calculations suggested by delegates (endogenisation of the production variable in the employment equations). Furthermore, the part dealing with policy had been shortened (some of the discussion had been placed in an annex), while the final title of the document no longer mentioned policy implications but simply said impact.

Item 13. OECD workers in the world economy: increasingly vulnerable? DSTI/IND/WPGI(2007)12

46. Mr. Alexander Hijzen from the OECD Directorate for Employment, Labour and Social Affairs presented this document which was an excerpt (chapter 3) from the *2007 OECD employment outlook*.

47. This study attempted to address growing public concern in certain OECD Member countries that free trade had a negative impact on employment, while policy makers were concerned with the way in which the benefits of globalisation are distributed.

48. Mr. Hijzen recalled certain major changes that had been brought about by globalisation, notably the importance of emerging countries with a vast supply of low-wage employment, the diffusion of IT technologies, increased competition and the volatility of wages.

49. Globalisation affected the structure of demand for labour both at the sectoral level (changes in specialisation) and in terms of qualifications. The cost of labour market adjustment was mainly borne by low-skilled workers. However, it was difficult to show how globalisation affected the elasticity of demand for labour. Some simulations suggested that the relocation of production could significantly increase the volatility of employment and wages.

50. Globalisation increased the urgency with which a comprehensive strategy had to be developed to ensure that the benefits of globalisation were widely distributed, while maintaining a system of free trade.

51. After this presentation a discussion ensued regarding the impact on employment of other aspects of globalisation such as mergers and acquisitions, the migration of low-wage workers, etc. These factors needed to be taken into account when assessing future work.

Item 14. The Eurostat project on international sourcing: the Danish result (Oral presentation)

52. This item was not discussed as the Danish delegate had been unable to take part in the meeting due to the transport strike.

Item 15. The Canadian survey on international sourcing (DSTI/IND/WPGI(2007)9)

53. Mrs. Brenda Hutchinson of Statistics Canada presented the Canadian survey on international sourcing. This survey had been developed following a number of meetings organised in Canada with the aim of measuring the global value chain and the impact of offshoring on Canadian industries.

54. The mandate handed down from those meetings was to ensure international comparability, notably with the United States and Europe, by conducting a survey. Mrs. Hutchinson presented a questionnaire which had been tested and which concerned changes in commercial practices in the world economy. It was aimed at identifying the profile of the firm replying to the questionnaire in terms of its global size and structure, its impact on Canadian employment and its quality. As part of this survey, information was requested on a series of variables concerning international operations (*e.g.* total sales, number of jobs, total cost of production, values of intermediate inputs, etc.), as well as variables concerning the functions of the firm (*e.g.* distribution, logistics, marketing, accounts, R&D, etc.). Firms were also asked about changes in commercial operations, whether or not these functions had been transferred inside or outside Canada, the reasons for these transfers and the barriers to the transfer of these functions.

55. Information was also asked about who took decisions, what were the plans for the future sourcing of commercial activities and the extent to which the latter could be transferred inside Canada or abroad.

56. A regional distribution was proposed for many operations (concerning variables or functions) and an international geographical distribution abroad.

57. Some questions would be addressed to groups of firms. A long discussion followed this interesting presentation and other countries also presented their experience in preparing surveys on international sourcing.

**Item 16a. Trends in the activity of Japanese multinationals abroad
and foreign affiliates in Japan**

DSTI/IND/WPGI(2007)10

58. Professor Ito Koji from the Japanese delegation presented the main trends in the activity of Japanese multinationals. These results showed that the cumulative flows of foreign direct investment between 1996 and 2006 had risen by a factor of 14. The main sectors investing abroad were the financial sector, the electrical sector and the transport sector. The main destination was the United States, although the number of Japanese affiliates in Asia (primarily ASEAN countries) and China had grown strongly. The number of firms which had expanded their activities abroad while at the same time increasing their domestic employment was higher than that of firms which had developed their activities abroad but which had reduced the number of domestic staff. The total factor productivity (TFP) of firms one year after developing activities abroad showed that their expansion abroad had not had a negative impact on domestic activity.

**Item 16b. Outline of new indicator: “global shipment index of the
manufacturing industry”**

DSTI/IND/WPGI(2007)8

59. Mr. Kazuhiko Manaka from METI (Japan) then described the development of a global shipment index of the manufacturing industry which took account of trends in total output by industrial sector of all locations where Japanese firms were producing. To this end an index of domestic manufacturing output had been devised and another for production by Japanese foreign affiliates.

60. Most of this presentation consisted in a description of the technical aspects of the construction of this index.

61. The results showed that the transport infrastructure, and to a lesser extent electrical machinery, significantly boosted local sales abroad was substantial.

Item 17. Progress report on the research on globalisation at Statistics Netherlands

62. This item was not discussed due to the absence of the Netherlands delegate.

Item 18. Sustainable production and multinationals (Oral presentation)

63. Mr. Karsten Olsen from the Secretariat made a brief presentation of the project in progress at the CIIE on sustainable production in the manufacturing industry. The lack of quantitative data to assess the cost of such production at world level was an obstacle for firms and governments which sought to promote such programmes. Some indicators had been constructed, but there had been little progress with regard to interrelationships between the environment, the economy and the social aspects of sustainable development.

64. The Secretariat proposed that in an initial stage delegates should explore the possibility of collecting data on the R&D activity of multinationals in relation to the environment, reducing pollution and the effort to limit the amount of natural resources and energy needs in the production process..

Item 19. The revised version of the *OECD Benchmark Definition of Foreign Direct Investment: Globalisation indicators* (Oral presentation)

65. Mrs. Ayse Bertrand from the Directorate for Financial and Enterprise Affairs (DAF) explained to delegates what the purpose of the recently revised *OECD Benchmark Definition of Foreign Direct Investment* was. It was a manual dealing with all the methodological aspects relating to international investment.

66. This revision work had been conducted by the Group on international investment statistics, and validated by the Investment Committee, and stressed the need for closer links between foreign direct investment data and data on the activity of multinational firms. A special chapter in the *OECD Benchmark Definition of Foreign Direct Investment* was devoted to globalisation indicators. All this work should assist in the next revision of the *OECD Benchmark Definition of Foreign Direct Investment*.

Item 20. Preparation of the publication *OECD Globalisation Indicators* (Oral presentation)

67. Mr. Thomas Hatzichronoglou recalled that three Directorates had played an active role in preparing the *OECD indicators of economic globalisation*: DSTI, DAF and STD. Two other Directorates would also be contributing to the next edition due to be published in 2008: the Directorate for Employment and Social Affairs (DELSA) and the Environment Directorate. Mr Hatzichronoglou then briefly presented the contents of the new edition and asked delegates to inform the Secretariat of any new indicators they would like to see included in this publication.

Item 21. How to measure Global Value Chains (Oral presentation)

68. Mr. Lee Gill from Industry Canada briefly presented Canadian work on global value chains which dealt with their scale, the role of government and issues that had not yet been resolved.

69. Global value chains encompass all activities needed to bring a product from the design stage to its end use. They can be grouped together in a single firm or distributed between different firms that are in many cases located in different territories. They were created out of a desire to increase efficiency, improve access to procurement sources and to access new markets.

70. Mr. Gill then provided figures showing the growth in global value chains in relation to exports, investment stocks and the activities of foreign affiliates. The main role of government would be to encourage the opening of markets, to allow firms to take all the opportunities presented and to facilitate adjustments by lowering barriers and removing obstacles.

71. Mr. Gill ended his presentation by listing a series of questions to which answers should be found, namely how to identify the share of production that might be relocated, how to define sectors with comparative advantages, the growth in value chains, the way in which SMEs could adjust to this new situation and the implications for employment and growth.

21b. Date of the next meeting

72. It was decided that the next meeting would be held on 8-10 October 2008.

**Participants list for the Working Party on Globalisation of Industry/
Liste des participants pour le Groupe de travail sur la mondialisation
de l'industrie**

Paris, 19-20 novembre 2007 / Paris, 19-20 November 2007

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DSTI/IND/WPGI/M(2007)1

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