

ITC Trade and Market Intelligence

ENHANCING THE TRANSPARENCY OF GLOBAL TRADE AND MARKET ACCESS

NON-TARIFF MEASURES PROGRAMME

ITC and Arab countries take stock of the progress made on regional trade integration



Officials from across the Middle East and North Africa (MENA) took stock of recent progress to lower barriers to trade within the region while charting a course for future regional integration, at a meeting in Marrakesh organized by the International Trade Centre (ITC) last December.

The 11-12 December 2018 gathering, held in collaboration with MENA government agencies and trade and investment, brought together about 50 participants from 11 Arab countries and multiple international organizations.

The event followed on a 2014 high-level regional roundtable on Non-Tariff Measures (NTMs) in Tunisia, where participants formulated recommendations to reduce NTM-related trade costs for businesses seeking to do business across the region. It sought to

review progress made in the intervening years, and to serve as a platform for participants to share ideas and new national and regional initiatives, and to define a shared roadmap for the future.

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Participants agreed that information - access to reliable trade and market information together with quick responses to traders from government enquiry points are necessary for streamlined trade. Several Arab countries plan to digitize customs procedures and go paperless in the coming years. They emphasized the need to simplify procedures and cut customs clearance times. Many called for regionally harmonize efforts made by national governments for trade facilitation at the regional level - especially on issues such as single windows, enquiry points.

New capacity building offer on NTMs presented to universities in the MENA region

With the objective of enhancing knowledge on NTMs and market access conditions as well as improving transparency using various online tools, ITC reached out to university students in the Arab countries and provided them information on NTMs and market access conditions, and using ITC tools to obtain relevant information for analysis and market development. One session focused on the ITC Export

Capacity building on trade agreements and obstacles is also of major interest for Arab countries. In response, ITC delivered multiple workshops to Ministries, Trade Support Institutions and Universities on Export Quality Management in the region over the past years.

More information on the event: <https://ntmsurvey.intracen.org/more/events/arab-states-regional/>

Potential Assessment and using the Export Potential Map tool for research.

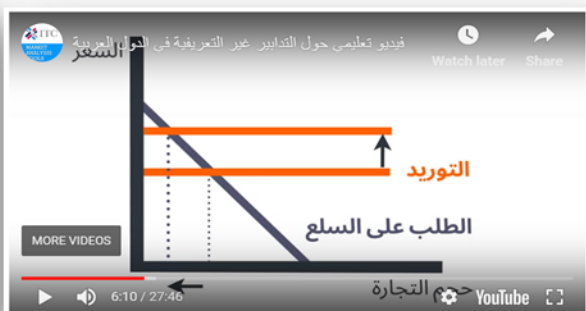
Overall, 510 students from 9 universities across four MENA countries attended the sessions.



New online courses on market access and NTMs for Arab audiences

To have a large pool of people in the MENA region informed on NTMs and market access issues, ITC developed a set of online courses on NTMs, market access and ITC market analysis tools. These courses

come in the form of self-paced courses and video tutorials. Among other, these courses are available in English and Arabic and are accessible here: <http://ntmsurvey.org/ntmarabic>



Import and export procedure guides

Another source of information available for SMEs in the region is a series of ITC guidebooks on import and export procedures for small and medium-sized businesses. Developed in consultation with customs experts, the guides provide practical information to economic operators on the customs and non-customs formalities export or import goods.

The guidebooks are available for MENA countries (Morocco, Tunisia, Jordan and Egypt) in three languages: English, French and Arabic, and are available for download through EuroMed TIFM Portal.

An online platform for interactive step-by-step guide based on the customs guidebook is currently under

development, which will be incorporated with EuroMed Trade Helpdesk and ITC's Global Trade Helpdesk.

PDF Versions of the guidebooks are available here: <http://euromed.macmap.org/euromed/import-procedures>



NTM business survey launched in Pakistan

ITC in collaboration with the World Bank has launched a large-scale business survey in Pakistan. This study will contribute to the Pakistan Trade and Investment Policy Program (PTIPP) led by the World Bank to support Pakistan's efforts to increase regional trade and investment.

The survey of around 1000 companies aims to provide a better understanding of the key regulatory and

procedural obstacles faced by Pakistani exporters and importers. The survey was launched in January 2019 and it is expected to be complete by June 2019. The outcome of this study will assist both the public and private sectors in creating an enabling environment for private sector development and improve export competitiveness of Pakistan.

For more information: www.ntmsurvey.org/pakistan

Participants express great satisfaction with capacity building trainings in Viet Nam

The 2-day "NTMs and Market Access : key concept and information tools" training held in Hanoi and Ho Chi Minh City last February received very positive feedback from the participants. In total, all 104 people from trade support institutions, private sector and official trade staff expressed great satisfaction with the workshops and declared to have acquired more knowledge and awareness on non-tariff measures through the training.

Following the ITC visit in December 2018 for stakeholder consultation and the design of the NTM capacity-building strategy for 2019, ITC and Vietrade organised these trainings from the 18th to the 22nd March. The workshops focused on introducing key concepts of tariffs and non-tariff measures, as well as



basic concepts of sanitary and phytosanitary measures, Rules of Origin, Trade remedies, etc.

The participants had the opportunity as to apply those concepts on concrete examples on several tools, such as MacMap, e-Ping and Rules of Origin Facilitator.

ITC launches a programme to tackle obstacles to trade in Niger

ITC's NTM programme in Niger was officially launched on the 7th March 2019 in Niamey.

In his opening speech, Mr. Sadou Seydou, Minister of Trade and Private Sector Development, announced the partnership with ITC and mentioned the pillars of the ongoing project. "This programme will help Niger to identify existing national procedures and facilities which need to be strengthen. It will reinforce the interaction between the public and the private sector around trade regulations, procedures and related trade obstacles", said Mr. Saydou.

In parallel with the launching ceremony, the ITC team had the occasion to provide a first round of capacity building sessions on Market Access and Non-tariff measures in Niamey. Hosted by the Ministry of Trade and Private Sector Development, the 2-day training sessions gathered 46 participants. Aiming to promote transparency and awareness of market access conditions tools, the attendees also had the opportunity to become familiarized with tools such as MacMap, e-Ping and Rules of origin Facilitator.

For more information: <https://ntmsurvey.intracen.org/niger>

New Publication: Dominican Republic Company Perspectives

Pre-export procedures are one of the main trade challenges of small businesses in the Dominican Republic, according to ITC interviews with more than 800 local businesses. The good news is that overcoming those hurdles is relatively easy.

The report recommends reinforcing coordination and integration among institutions. Since 2010, ITC has conducted business surveys on non-tariff measures in 43 countries.

To read the full report (in Spanish): <http://www.intracen.org/publications/NTM-Dominican-Republic/>

REPÚBLICA DOMINICANA:
PERSPECTIVAS EMPRESARIALES
SERIE DEL ITC SOBRE LAS MEDIDAS
NO ARANCELARIAS



Centro de Comercio
Internacional

COMISION DE
NORMAS DE TRABAJO

Expanding the TOAM coverage across the ECOWAS region

On February 5, ITC presented the Trade Obstacles Alert Mechanism (TOAM) to the ECOWAS commission, the EU delegation and other international partner agencies (GiZ, UNIDO, WB). This initiative, that represent a key component of the ITC West Africa Competitiveness programme, has been discussed in the framework of the new Western Africa Competitiveness Observatory, an ECOWAS initiative aimed at centralizing trade related information across the region.

The TOAM is an online platform that allows trade operators to submit information queries and obstacles reports in a transparent and efficient manner and receive answers provided by regional and national authorities. Through the TOAM initiative, ITC has already equipped local beneficiaries in the UEMOA



region with skills and tools to facilitate the operationalization of this cutting-edge online reporting system.

Non-UEMOA members of the ECOWAS account for an additional 38% of intra-regional trade in 2018, which export potential is

estimated to be USD 2.2bn. Expanding the TOAM to the whole ECOWAS region will allow strengthening coordination in the resolution of obstacles to trade, in a view to create opportunities along regional value chains and incentivize foreign investments.

GAFTA agreements integrated to the Rules of Origin Facilitator

In 2018, ITC launched the Rules of Origin Facilitator that provides user-friendly access to ITC's database of rules of origin and origin provisions in trade agreements. Combined with the tariff and trade agreements databases that are continuously maintained by ITC's Market Access Map since 2006, it results in a unique market intelligence synergy empowering companies to benefit from free trade agreements worldwide.

In the Arab region, ITC has processed 55 trade agreements involving Arab countries for dissemination via ROO Facilitator. Further 22 agreements is scheduled to be processed in 2019.

Texts of all GAFTA agreements are also made available through ROO Facilitator including those available only in Arabic – which have been translated to English.

EUROMED TRADE HELPDESK

TIFM Sixth Focal Points Meeting

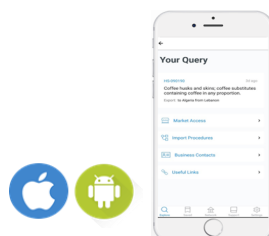
The Sixth Focal Points Meeting on the EuroMed Trade and Investment Facilitation Mechanism (TIFM) was held in Brussels on 13 March 2019. The event was co-shared by the European Commission (EC), the Union for the Mediterranean (UfM), the Hashemite Kingdom of Jordan, and the International Trade Centre (ITC).

The participants, including the focal points of the nine beneficiary countries, took stock of the progress achieved since the launch of EuroMed Trade Helpdesk (<https://euromed.macmap.org>) in 2017 and discussed technical aspects to continuously offer an up-to-date and reliable tool for the users interested in trade within the region and with the EU countries.



EuroMed Trade Helpdesk—Mobile

As many people in the region access information online through their smartphones, ITC has developed a mobile application of EuroMed Trade Helpdesk to make access to



market information easier. This app is available for Android and iOS platforms. With features such as the ability to quickly search information and save for it for offline use, the mobile applications will make trade information available for people on the move and not always connected to the internet.

MARKET ACCESS MAP

Market Access Map's database of forward-looking tariffs now covers more than 85% of global preferential trade

Market Access Map has completed the penultimate phase of constructing a global database of forward-looking preferential tariffs in all preferential trade agreements¹ (PTAs) in the world. Construction of the full database is scheduled to be completed by February 2020 and it will be officially launched during the GTAP Conference 2020 in Japan.

The tariff datasets from previous stages covering a total of 281 PTAs can now be downloaded free of charge on Market Access Map (<https://www.macmap.org/RawDataDownload/FtaDownload.aspx>). As of March 2019, 439 PTAs were in force². This phase has covered the first half of the remaining PTAs, including the EU-Japan Economic Partnership Agreement which took effect on 1 February 2019. The ultimate phase running throughout 2019-2020 will cover the remaining half and any new PTAs that will take effect in 2019.

Once constructed, this database will provide policy makers, researchers and businesses information on current tariffs and any further reductions that are already scheduled in existing agreements. Such



information will create a benchmark for assessing the depth of the liberalization granted by new PTAs. The project is financially supported by Japan's National Graduate Institute for Policy Studies (GRIPS) and the U.S. International Trade Commission (USITC) and started in 2014.

Preferential trade agreements include regional trade agreements, for example NAFTA, and preferential trade arrangements, for example duty-free and quota-free scheme of Chile for least developed countries.

¹ Preferential trade agreements include regional trade agreements, for example NAFTA, and preferential trade arrangements, for example duty-free and quota-free scheme of Chile for least developed countries.

² According to ITC's database of preferential trade agreements available at <http://findrulesoforigin.org/home/agreements>.

EXPORT POTENTIAL ASSESSMENT

Translating export potential into jobs in Tanzania and Ethiopia

Within the framework of an ITC-ILO collaboration "Spotting Export Potential for Employment", ITC has developed a methodology to estimate the employment opportunities associated with a country's untapped export potential. It combines the ITC export potential methodology used to identify a country's sectors and markets with export growth potential with data on production, labour content and input-output analysis to calculate how many jobs would be created if the export potential were fully realized.

It is the first methodology to guide the selection of export sectors with employment potential and quantify jobs in the export sectors themselves (direct jobs), along the associated value chain (indirect jobs) and across the entire economy (induced jobs). Depending on data availability, the methodology allows calculating the number of

jobs to be created disaggregated by gender or other demographic variables.

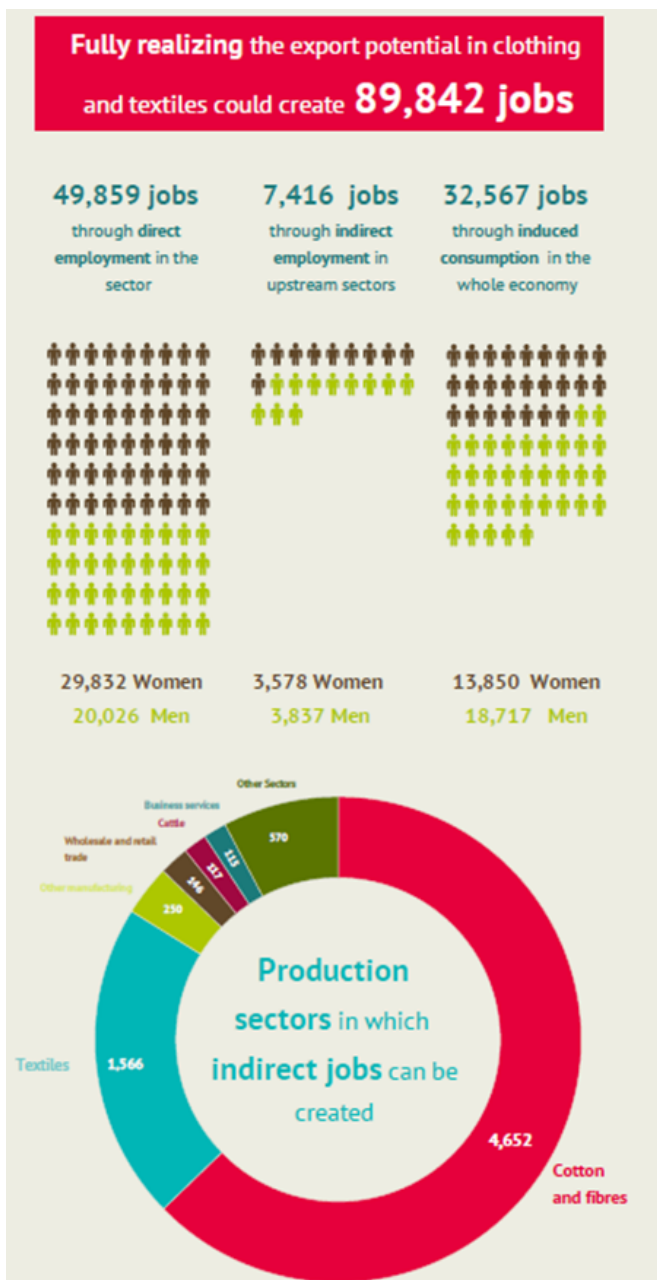
In Ethiopia and Tanzania, the results have informed the selection of priority sectors for a pilot application of the ILO's Skills for Trade and Economic Diversification approach.



ITC & stakeholder discussion at ILO workshop in Addis Ababa, Ethiopia

Results for Ethiopia show that the export potential and the number of jobs created per additional \$ million of exports varies considerably between sectors. Also, while some sectors (e.g. clothing and textiles) create a large number of direct, but few indirect jobs, the opposite is true for others (e.g. agro-processing, which creates a large number of indirect jobs, especially in

the cattle sector). Indirect employment in the same value chain occurs in very different sectors depending on the final export sector – for example, exports of textile and clothing create most indirect jobs in the cotton and fibres sector, while agro-processing creates most indirect jobs in the cattle sector.



Ethiopia's export and employment growth potential

Accounting for job creation potential, distinguishing between different demographic groups, and considering direct, indirect and induced effects can help policymakers identify export sectors with the objective to boost inclusive employment in sectors with relatively high local value addition and wages.

Besides its application in the ITC-ILO collaboration project, the methodology has been piloted in a case study on regional integration in Jordan (available on

<http://www.intracen.org/publication/Turning-export-potential-into-employment-A-case-study-for-Jordan-en/>). Jordan has the potential for overall export growth of \$1.8 billion to markets in the Middle East and North Africa region. Targeted trade advice to help overcome all frictions and fully realize this potential would create more than 85,000 jobs, about a quarter of them for women.

ITC assesses export potential in the Arab States

ITC published the report *Unlocking export opportunities for greater regional integration among Arab States*. This study takes stock of regional integration among LAS member countries examining regional trade complementarity and the prevalence of market frictions. It employs the ITC export potential and diversification methodology to identify sectors with significant untapped potential for regional export growth, and matches these results with ITC business survey information on NTMs to highlight key sectors in which regulatory harmonization would have the greatest impact towards strengthening trade integration. In addition, the study highlights opportunities to enhance regional trade complementarity through targeted diversification with the aim of better aligning the export structure with regional demand.

The report shows that addressing market frictions to unlock current potential can provide substantial gains in intraregional exports. More than \$12 billion of additional intraregional exports could be possible if NTMs and other relevant market frictions were resolved. Making use of untapped regional export opportunities requires effectively harmonizing regulatory and export procedures and removing other frictions across LAS markets. Eight selected sectors in which NTMs play a considerable role account for 34% of this current untapped potential. Thus, the harmonization of regulatory measures and export procedures in key sectors could have a considerable impact on strengthening integration.

Available at: www.ntmsurvey.org/arabregional2018.



SUSTAINABILITY MAP

EU Market Data Factsheets Summary

In 2018 and 2019, ITC Trade for Sustainable Development (T4SD) Programme implemented a pilot project aimed at assessing the size of the EU market for sustainable products, from the demand side. Commissioned by the European Commission Directorate-General for Trade, the project responds to the 'Trade for All' (October 2015) communication to put forward a 'values-based' trade agenda, aligning EU trade policy with the Sustainable Development Goals. As a pilot project, and in order to test the project approach, the analysis focused on five EU countries: France, Germany, Italy, the Netherlands, and Spain.

Through survey implementation with 550 retailers across the five EU markets, the project gathered various data including sales, volumes, trends, and the depth of different sustainability initiatives across different sectors. Sustainable products were defined as

those typically carrying a claim (label) and/or certification to a recognized sustainability standard (addressing social, environmental, or other sustainability-related issues) or code of conduct. This could include the likes of organic/bio agricultural products, Fair Trade certified (most typically food and beverage), organic/ethical cotton and/or textiles, etc.



98.5%

of retailers in France, Germany, Italy, Netherlands and Spain say **sustainability is a factor in product sourcing**



of retailers have **sustainable sourcing strategies**



The survey also focused on eight broad sector categories including Computers, Clothing, Toys & Games, Beverages, Food, Household & Office Furniture, Mobile Phones, and Printed Materials.

In January 2019, T4SD collaborated with the ITC Trade and Market Intelligence Section to develop the initial “Factsheets”, which provided the first insights

into the data collected, including the reported and predicted growth rates of sustainable products over a five-year period. The Factsheet data is based off preliminary examination of a limited set of questions from the surveys. The final report, containing the full analysis of the collected data, will be published in April 2019.

T4SD Hubs: launch in Viet Nam with host institution

In March, the T4SD Programme launched the T4SD Hubs project in Viet Nam together with its national host, the Vietnam Trade Promotion Agency (VIETRADE). Over 200 participants representing SMEs, policy institutions, development agencies and commercial banks attended the launch events organized by T4SD in Ha Noi and Ho Chi Minh City.

T4SD Hubs provide integrated solutions to SMEs in the implementation of green business practices. Hosted by Trade and Investment Support Institutions (TISIs), the Hubs act as one-stop shops for SMEs to build green business strategies to access green



finance and international markets for sustainable products.

Session at the OECD Forum on Due Diligence in Garment & Footwear Sector

The T4SD Programme in collaboration with the European Commission, UNECE, ILO, The Social and Labor Convergence Program (SLCP), The Initiative for Compliance and Sustainability (ICS) and Amfori hosted the session “Promoting decent work and improving transparency and traceability for sustainable value chains in the garment sector” on 13 February at the [OECD Forum on Due Diligence in the Garment and Footwear Sector](#).

T4SD presented its new multi-year programme jointly implemented with UNECE and ILO with support of the European Commission that builds on the collective expertise of partner organizations to promote decent work and advance transparency and traceability of sustainable value chains in the garment and footwear sector.

For more information about the activities implemented by the T4SD programme, please contact sustainability@intracen.org

CAPACITY BUILDING

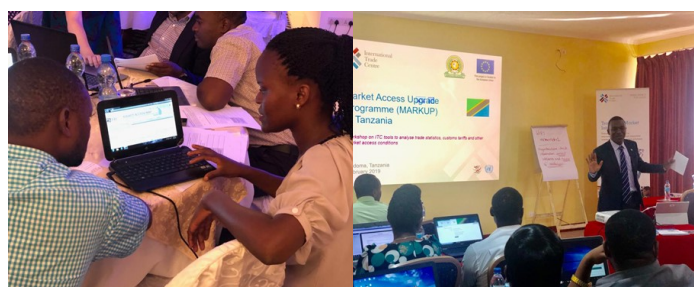
Training on market analysis and research under EAC-MARKUP project

(Tanzania) 11-19 February - Under the Tanzania country window of the European Union funded Market Access Upgrade Programme (MARKUP), Trade and Market Intelligence section (TMI) organised a series of 2-day workshops in three different Tanzanian cities: Dar es Salaam, Dodoma and Zanzibar. The training content was designed to inform participants on international trade statistics and market access conditions such as tariffs and non-tariff measures (SPS and TBT).

The workshop received overwhelming response and was attended by 89 people, out of which 27 were women. They represented government authorities, universities, Trade and Investment Support Institutions (TISIs) as well as trade associations of MARKUP priority products. Based on the results of online workshop evaluation, participants particularly

appreciated the practical aspect and the timeliness of this training given the ongoing African Continental Free Trade Agreement (AfCFTA) discussion.

TMI is planning additional 2 capacity building activities in market analysis: “Preparation of Market Profiles for Tanzanian Agriproducts” and “Training of Trainers” in Tanzania by June 2019.



ITC's certified trainers deliver workshop on market analysis in Nepal

(Nepal) **December** - As part of "Trade related capacity building project in Nepal" funded by USAID, ITC certified trainers from Trade and Export Promotion Centre (TEPC) delivered a trade on market analysis to Nepalese SMEs in Kathmandu last December.

The training focused on identifying attractive markets and market access conditions using ITC tools. In total, twenty participants benefited from this 5 day training.

This is a follow up to ITC's certified trainers program in Nepal from 2017 where 10 trade specialist were trained and certified to deliver training on ITC's market analysis tools. Certified trainers from TEPC and other organisation in Nepal have replicated this training to over 300 individuals in various part of the country – hence contributing to ITC's effort of enhancing national capacity through a network of certified national trainers.



ITC TOOLS UPDATES

Non-Tariff Measures data for the Arab States updated

ITC has compiled a database of NTMs based on national regulations obtained from official national sources with the objective of bringing transparency on trade rules and procedures. ITC carefully reviews legislations and classifies them by type of measure (according to the International Classification of NTMs), product (HS6 level) and destination or origin country.

In 2018, ITC updated NTM data for the following 11 Arab countries:

Algeria	Bahrain	Egypt
Jordan	Kuwait	Lebanon
Morocco	Qatar	Saudi Arabia
Tunisia	United Arab Emirates	

NTM data will also be available through ITC's EuroMed Trade and Investment Facilitation Mechanism (TIFM) portal and mobile application version.

Market Access Map

New 2019 tariff data of Canada, China and the European Union, as well as of 27 other economies are now available on Market Access Map (macmap.org).

In line with its mission to improve transparency in international trade and market access, Market Access Map also updated its database of trade remedies which now covers all measures applied in 2019 by the United States, China, Canada, South Korea, Mexico and the Russian Federation.

Rules of Origin Facilitator additions

Rules of Origin Facilitator (findrulesoforigin.org) has added new data on 100 trade agreements, now counting 230 trade agreements in total. The newly added agreements range from the Greater Arab Free Trade Area (GAFTA) to the recently signed Australia-Indonesia CEPA.

Notably, among the 100 newly added agreements are all 21 PTAs currently applied by the U.S. ranging from the GSP scheme adopted in 1976 to US-Colombia FTA in effect since 2012. This was made possible as a result of financial support from Japan's National Graduate Institute for Policy Studies (GRIPS) and the U.S. International Trade Commission (USITC). The new data will help MSMEs take advantage of tariff reductions under U.S. PTAs and will help researchers improve understanding of barriers posed by product-specific preferential origin requirements.

The acceleration leap in covered agreements was made possible thanks to successful deployment of augmented intelligence (AI) system of information retrieval. The "training" sample of already covered agreements became sufficiently large to transition to automated natural language processing (NLP) performed by intelligent self-training "digital analysts".

Take advantage of these trade agreements now at findrulesoforigin.org!

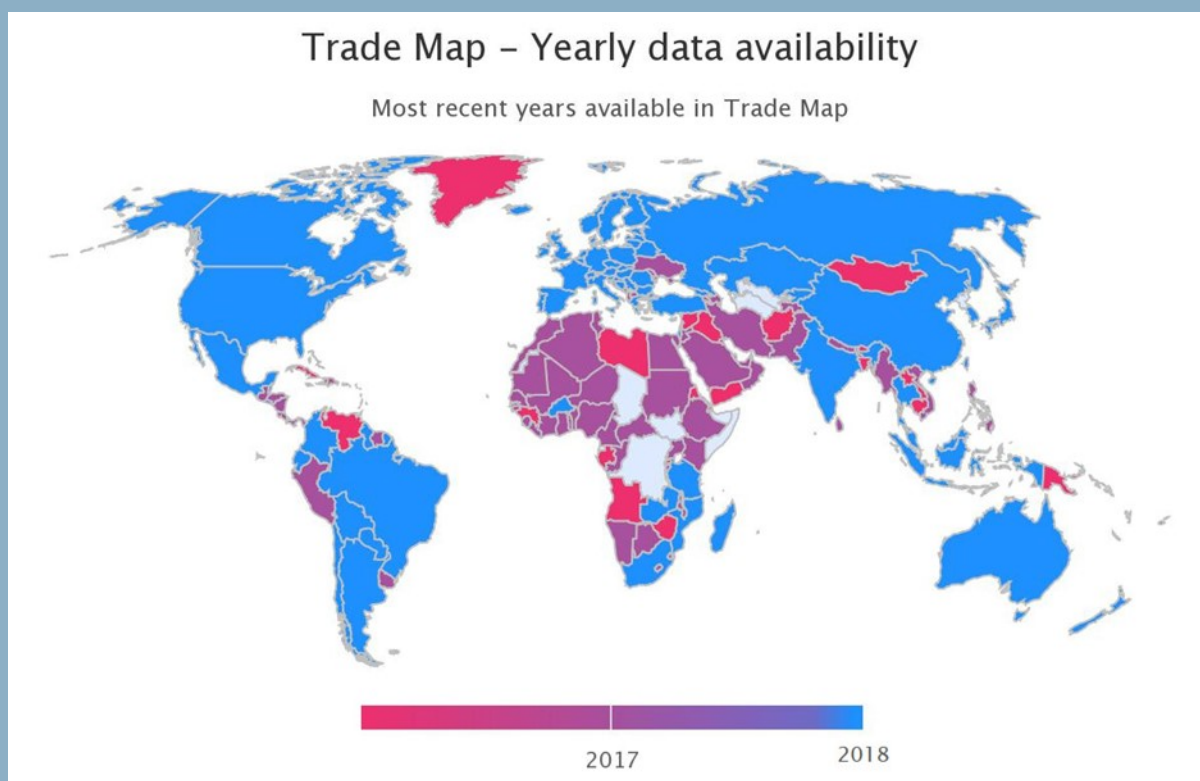
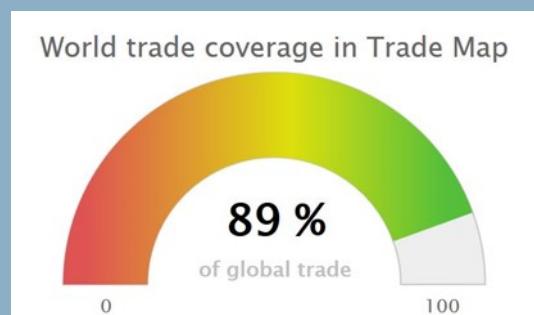


Trade Map: best 2018 coverage in the world

[Trade Map](#) is more than ever the leader in trade flows database in the world. The database is constantly updated with the latest trade data from all over the world.

As of end of March 2019, trade in goods for 2018 data is available for [74 countries](#), which count for 89% of global trade.

In addition to the most recent data, Trade Map also provides you with the maximum details. For each reporting country, the trade data broken down by partner country is available from the most aggregated level until the tariff line level.



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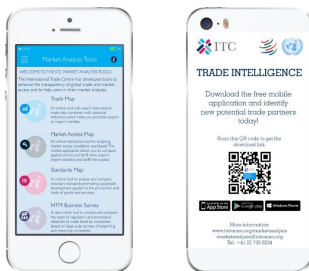
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