

ITC Trade and Market Intelligence

ENHANCING THE TRANSPARENCY OF GLOBAL TRADE AND MARKET ACCESS

WRAPPING UP 2019

AFRICAN TRADE OBSERVATORY

Monitoring and Facilitating Trade and Economic Integration in Africa

The African Trade Observatory (ATO) project was launched in 2019 to facilitate the African Continental Free Trade Area (AfCFTA). This drove the development of the ATO dashboard, the related data transfer system, the technical unit and the tariff negotiation tool.

The ATO has received considerable attention from policymakers since its official presentation at the 12th Extraordinary Summit on AfCFTA in Niamey, Niger, held on July 2019. The ATO project and its activities were presented to the pilot countries in national workshops and at a technical workshop held on the 9th December 2019 in Addis Ababa to which all 13 pilot countries participated.

Africa Trade Observatory dashboard

a mock-up of the online portal has been developed in collaboration with the African Union Commission. The mock-up includes three main modules to compare trade opportunities in Africa, to explore the market access conditions of African partners and to monitor regional trade integration and the implementation of the AfCFTA.



AfCFTA Tariff Negotiation Tool

The AfCFTA Tariff Negotiation Tool is an innovative way to facilitate the negotiation process on tariff liberalization. It facilitates negotiations between state parties, customs unions or regional groupings under the AfCFTA. It is a secure, collaborative platform that enables registered members to define and share their product lists (non-sensitive, sensitive and exclusion lists). It ensures the technical quality of the offers made, increases transparency while safeguarding confidentiality and allows interacting rapidly with one another.

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GLOBAL TRADE HELPDESK

Year overview

The Global Trade Helpdesk (GTH) is a unique portal which integrates trade intelligence from across partner agencies into a single entry-point. It is designed with the needs of MSMEs in mind, to enhance access to crucial trade and business information for the small firms that make up the lion's share of firms worldwide.

2019 has been a year of integration and development for the GTH. The tool now brings together trade statistics, unused export potential figures, tariffs, detailed regulatory requirements, notification of upcoming regulatory changes, trade remedies, international standards, rules of origin, domestic trade procedures, voluntary sustainability standards as well as contact information for trade finance institutions and promotion agencies. Firms can access the platform and find user guidance in [Arabic](#), [English](#), [French](#) and [Spanish](#).

The beta version of the tool, accessible at www.GlobalTradeHelpDesk.org, was first showcased at the ICC World Chambers Congress in Rio de Janeiro in June. Chambers' members welcomed the integrated platform and pledged their support to disseminate it widely among their membership. Business and policymakers working with the WTO Informal Working Group on MSMEs also commended the greater accessibility of trade and market information at a dedicated session during the WTO Public Forum in October.



2019 has also been a year marked by new partnerships and consolidated efforts to enhance data collection. The GTH is engaging with selected countries to improve data coverage and to put in place sustainable data collection efforts. Pilot activities in Paraguay began in June 2019 in close cooperation with the National Trade Facilitation Committee as well as SME and cross-sectoral business associations. In November, officials from the Single Window for Exports, REDIEX, and logistics agents began the first data collection of domestic trade procedures for key sectors in which MSMEs are engaged. Data collection and platform testing activities with the inter-agency network on trade information in Qatar are also ongoing, with the aim of providing comprehensive data coverage.



The GTH is geared toward meeting the information needs of firms of all sizes and wants to hear from you. In partnership with the International Chambers of Commerce (ICC), the GTH is conducting a testing campaign of the beta version of the platform to assess user functionality and identify avenues to improve user experience. Firms are invited to test the platform and provide direct feedback at <http://www.globaltradehelpdesk.org/en>.

MARKET ACCESS MAP

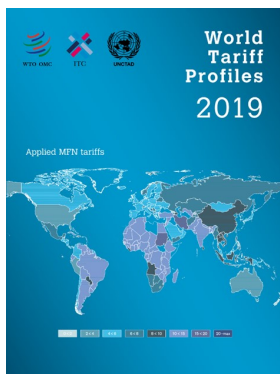
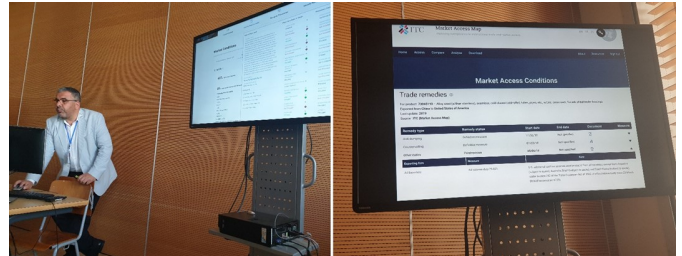
New website launch

The new modern website was officially launched in June. It embodies reinvention of user experience, focusing on navigation of market access conditions as seamless and intuitive as never before. The tool caters to wide-ranging audiences, such as MSMEs, policymakers, advisors, and researchers.

The unveiling event of new Market Access Map took place in June during the annual Global Trade Analysis Project (GTAP) conference in Warsaw, Poland.

Highlights of innovative features. The tool provides immediate information on all market access conditions

applicable for a given product – in a single click. Also, in an effort of unprecedented transparency, the tool allows bulk downloads of tariff datasets of unlimited size.



2019 Publications

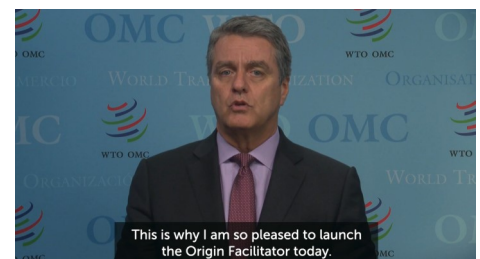
Market Access Map data formed part of 2019 edition of [World Tariff Profiles](#) co-published by ITC, UNCTAD and WTO. Furthermore, Market Access Map's updated tariff protection dataset was launched as part

of [GTAP 10 Data Base](#), which is utilized by thousands of trade modelers worldwide. 2019 edition of World Economic Forum's [Global Competitiveness Index](#) used Market Access Map's tariff indicators as one of the pillars of national business competitiveness.

RULES OF ORIGIN FACILITATOR

Partnership expansion with the World Trade Organisation

ITC joined forces with World Trade Organization (WTO) to further strengthen and roll out the Rules of Origin Facilitator. The launch ceremony took place at the opening of the WTO Committee on Rules of Origin in October 2019 (find the [press release](#) here) attended by member states and observers. The three-pronged collaboration of ITC, World Customs Organization, and WTO aims to make trade agreements, and especially rules of origin, more transparent and easy to use. The focus of ITC-WTO joint work will be on sharing technical expertise as well as new notified data on LDC preferential schemes, and also expanding features of the tool.



<https://youtu.be/L6An1e9atH8>
<https://youtu.be/D4FQkHC9lJs>

Research on rules of origin

A new working paper documenting methodology behind the new ITC rules of origin database was presented and discussed by trade economists at the 22nd GTAP conference in Warsaw. Some first empirical results have been obtained, and a path towards constructing an advanced global

restrictiveness index of rules of origin has been charted. The GTAP conference paper is accessible free of charge at https://www.gtap.agecon.purdue.edu/resources/res_display.asp?RecordID=5827.

EXPORT POTENTIAL ASSESSMENTS

Innovation and cooperation have been at the core of this year's activities. ITC's export potential and diversification assessment methodology continues to evolve with new approaches that measure the

export potential of services, identify diversification opportunities for the development of value chains and link to the ex-ante assessment of the impact of trade policy.

Customizing web tools

Over 2019, two customized web tools were developed: Bahrain's Export Potential Map and Export Potential Map – Greece, commissioned by Export Bahrain and Enterprise Greece, the respective national export and investment promotion agencies. Staff from these institutions received training on the methodology and the new tools in order to make the best use of them in their daily activities.



Innovating methodologies

The existing export potential method for goods has been adapted to capture the export potential of services. A forthcoming technical paper describes how the new method overcomes some of the challenges with data gaps in services trade and indicates the most promising markets for any country's services exports. The team furthermore developed an innovative approach that allows comparing a country's export potential under sanctions and free of sanctions.

Developing external partnerships

Export potential assessments have been at the core of longstanding initiatives with external partners. With the International Labour Organization (ILO), the team has identified the export and employment potential of men and women across economic sectors in Ethiopia and United Republic of Tanzania. Since 2014, ITC supports the identification of promising value chains in over 60 developing countries on behalf of the Dutch Centre for the Promotion of Imports (CBI).

Informing internal projects

Internal cooperation has been fostered by applying the export potential and diversification assessment methodology to inform the inception phases of multiple large-scale ITC projects. In collaboration with the Office for Asia-Pacific, the team analysed current trade and export potential of Lao PDR and Iran, as well as related employment potential. The methodology was modified to take into account the trade and financial sanctions that affect Iran. In partnership with ITC's

Sector and Enterprise Competitiveness section, the team has worked towards identifying export opportunities for 13 ACP (the African, Caribbean and Pacific Group of States) pilot countries in three focus sectors: cotton and fashion, coffee, and coconuts and kava and cocoa and chocolate. For the UK Trade Partnerships Programme, export potential of 11 countries and two regions was identified.

Reaching out to users

In 2019, Export Potential Map has seen an average of 5,349 monthly visits, a 62% increase from 2018. Among the users are big companies, like Citi Bank and renowned institutions like EXIM banks or the

Commonwealth Secretariat. Articles citing export potential figures have been published in the Wall Street Journal and Bloomberg.

Several training programs have brought export potential to the field. In Egypt and Kyrgyzstan, participants were trained on how to develop market information products. Users also have the possibility now to improve their understanding of Export Potential Map with the help of video tutorials.



"Thank you so much for the information accessible on the site as its very difficult for small business to access market information when it comes at a charge" – Entrepreneur / business owner from South Africa

SUSTAINABILITY MAP

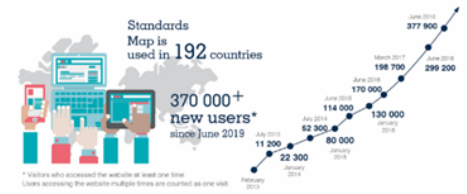
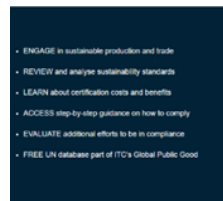
NEW Sustainability Map platform to increase transparency and connectivity in international value chains

A new version of ITC's Sustainability Map (www.sustainabilitymap.org) has been launched in October alongside the 6th Trade for Sustainable Development (T4SD) Forum. The latest release of Sustainability Map provides new concrete and scalable solutions related to tools, technical assistance and advisory services applicable to every stage of the value chain, from micro, small and medium-sized enterprises to retailers and brands.

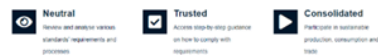
The platform also enables public sector officials to navigate global trends on sustainable production and consumption and understand their impact on the competitiveness of their key sectors and domestic exporters.

New features of Sustainability Map:

- The new “[Standards Map](#)” module is easier to navigate and has simplified language and revised data presentation. Standards Map enables users to engage in sustainable production and trade by exploring comprehensive, verified and transparent information on standards for environmental protection, worker and labour rights, economic development, quality and food safety, as well as business ethics. The module allows users to explore over 250 standards initiatives applicable to more than 80 sectors and 180 countries and self-assess their sustainability-related performance.



KEY FEATURES



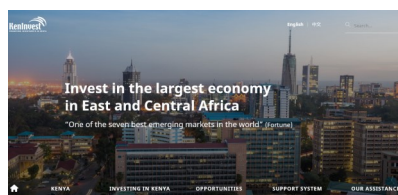
- The new “[Market Trends](#)” module provides interactive graphs and charts with information on the certified area, production volumes and number of producers that comply with some of the major sustainability standards covering eight commodity products and forestry.
- Sustainability experts and organizations committed to sustainable production and trade along value chains can now get featured in the “[Virtual Network](#)”. This module connects suppliers, sustainability-conscious buyers, practitioners and support organizations along value chains. It currently has over 60'000 registered users.
- The “Virtual Network” now features the content and functionalities of the ITC SustainabilityXchange platform, a capacity-building platform for sustainable value chains. The SustainabilityXchange will be decommissioned by the end of 2019.

INVESTMENT PROMOTION PORTALS

In 2019 the team completed the design and launched four national portals:

- 3 bilingual (Chinese-English) investment promotion portals for Ethiopia, Kenya and Zambia
- 1 trilingual (Chinese-English-Portuguese) trade investment & investment promotion portal for Mozambique

ITC trained and coached staff of the investment promotion agencies in each of the above countries on the sustainable management of the portals and provided them administrative and content creation manuals for the operation of the portals.



Why Kenya ?

The contents of the portals are geared towards covering the information needs of the foreign investor during the complete investment journey, from the moment of prospecting the target country to the stage of running actual business operations. The information provided includes: investment incentives, installation and living in the country, starting a business, hiring a workforce, land & property management, tax incentive calculations, investment protection, industrial parks, support programmes, amenities, bilateral agreements, logistics & infrastructure, digital libraries, success stories, investment-ready company profiles, target sectors, export & import regulations, environmental regulations, productivity indicators, key economic indicators, reasons to invest, double taxation agreements, export processing zones, business news and upcoming events and latest investment-related publications.

NON-TARIFF MEASURES PROGRAMME

European businesswomen in trade: from goods to services, what are the challenges?

"Moving past rhetoric and grounded in the realities of selected sectors, this study takes us a step closer to understanding that gender inequalities in international trade are often the result of structural differences and goes beyond trade policy."

**Arancha Gonzalez, Executive Director,
International Trade Centre**

Gender equality and women empowerment have been at the centre of the agenda of the European Commission and ITC since long time. From policy to research, the theme has been seen as crucial to achieve a more equal and fair economic environment for all, both in the European Union and in the rest of the world.

Following this vision, in 2019, the European Commission has joined forces with ITC to investigate the role of EU women-led companies in trade and the challenges they face when exporting outside the EU. Specifically, this project aimed at collecting gender-disaggregated data on women employment, management and leadership in EU exporting firms and the challenges they faced when exporting to countries outside the EU. The study focused on women-led firms from EU Member States involved in agriculture and manufacturing, excluding arms and minerals. During the study, 9121 companies have been contacted by phone and 1118 exporters participated. The survey was carried out in 12 Member States, namely Belgium, Bulgaria, Croatia, Czech Republic, Germany, Ireland, Italy, Latvia, the Netherlands, Poland, Spain and Sweden.

The study found out that women are under-represented in agriculture and manufacturing, in fact only one in five companies in the EU in these sectors is owned; led or managed by a woman and, in almost half of the companies surveyed, women account only for 30% of the active workforce. In addition, women-led companies tend to be smaller and present in sectors with lower export growth potential, as textiles and clothing sector. Regarding the obstacles identified, on the one side, size and industry are drivers of inequalities in dealing with non-tariff measures or entering government procurement tenders outside the EU. On the other side, disadvantages experienced by women-led firms in accessing skills, finance from commercial banks and business networks are not linked to size or industry.

"As the International Trade Centre's study showed is that when women lead the companies, the equality is much better."

Cecilia Malmström, European Commissioner for Trade

The results of the survey conducted, joint with an accurate review of gender-related provisions in free trade agreements, are available in the publication [**From Europe to the World: Understanding Challenges for European Businesswomen**](#), presented on the 30th of September in Brussels during the event "Trade for Her" by Commissioner **Cecilia Malmström**, EU Commissioner for Trade, and **Arancha González**, Executive Director, International Trade Centre. Other speakers included **Roberto Azevêdo**, Director General, World Trade Organization; **Guy Ryder**, Director General, International Labour Organisation; **Vera Songwe**, Executive Secretary of the United Nations Economic Commission for Africa; **Christian Ewert**, President, amfori; **Denise Stubbs**, Director, Thokozani Wines, South Africa.



Preliminary results of business survey in Viet Nam unveiled in Hanoi

On the 19th and 20th November, the International Trade Centre and Vietrade organized a stakeholder meeting involving public agencies, development partners and the private sector. The goal was to discuss the first results of the large-scale survey on NTMs in goods and services in Viet Nam.

Some preliminary findings:

- Out of the 1028 companies exporting goods interviewed, 38% face difficulties with NTMs.
- For both the agricultural and the manufacturing sector, the conformity assessment represent a major hurdle to export.
- Tourist Visa and regulations restricting the movement of foreign are a considerable barrier to the tourism sector competitiveness.

The next step will be to conduct in depth bilateral consultation with the main stakeholders to turn the survey results into concrete actions to boost Vietnam's export competitiveness. The full report will be published at the first semester of 2020.

More about the non-tariff measures programme in Viet Nam [here](#).



New Publication

Getting more women to trade beyond the European Union will require policies that go beyond trade. Policies are needed to get women to set up and grow their businesses in high-growth potential industries, enter export markets, and enjoy equal rights and

opportunities in the labour market. Trade policymakers can be part of the solution, by leveraging the platform provided by free trade agreements.

This report captures the links between women, companies they lead or work for, and trade outside the EU. Among the 1,118 firms surveyed in 12 EU countries, women are under-represented at all levels, and face various challenges.

Read the full report [here](#).

We thank the local partners for their strong support, all of our capacity building participants for their enthusiasm in helping us increase awareness of the trade obstacles and the governments of Denmark and Bahrain, the World Bank and the European Union for the funding of ITC NTM activities.

TRADE MAP

20 years Trade Map

Trade Map has been helping SMEs in accessing valuable trade data for 20 years. As ITC celebrated the Trade Map anniversary in September 2019 by unveiling the Arabic version of Trade Map. In 2020, Trade Map is planning to expand the monthly data coverage, especially for African countries.

20 YEARS TRADE MAP

Then vs. now

Trade Map was born in 1999 and introduced at ITC's first World Export Development Forum in Annecy, France. Every year new functionalities and information have been added and the application is now available in 4 different languages.

CAPACITY BUILDING

Trainings on Rules of Origin

ITC, WCO, and WTO have adopted the Facilitator as their official tool for trainings on rules of origin. TMI has delivered trainings on rules of origin for policymakers, trade professionals and customs officials in Saudi Arabia, Vietnam, Morocco, Ethiopia, Kyrgyzstan, Bhutan and Tanzania.

Market Profile training Bhutan

Bhutan (25-29 November) - The Trade & Market Analysis section delivered a market profile training on how to find, understand and analyse trade information and market access conditions using the ITC Tools. 33 representatives from different governmental agencies and other institutions participated in the workshop. The workshop was part of a broader 3-year programme led by ITC and came after the finalisation of the Bhutan trade information portal set to launch early 2020.



Remote mentoring Saint Lucia

Saint Lucia (September—November) - ITC and Export Saint Lucia jointly organized a remote mentoring programme in preparation of a face-to-face market profile workshop in Castries, Saint Lucia, 14-18 October 2019. 8 government officials participated in three weeks of online learning, followed by the workshop, after which they drew up full Market Profiles on (number) high potential products under the guidance of ITC experts. The outputs are expected to be shared with external audience including Saint Lucia private sectors.

Market Analysis Tools in Sierra Leone

Sierra Leone (28 October - 01 November) - The Sierra Leone Investment and Export Promotion Agency (SLIEPA) concluded a four-day workshop on ITC Market Analysis Tools in Freetown, Sierra Leone, for 25 trainees including SLIEPA Staff, Members of Farmers' Cooperatives and Staff of other Trade Agencies. The training will allow the participants to carry out evidence-based market analysis resonating with international trade statistics to enhance good decision-making.



Niger hosts "Training of Trainers" on market access and non-tariff measures

From the 2nd to the 5th December, 15 participants (including 12 men and 3 women) joined the multi-day Training of Trainers (ToT) in "Market Access and Non-tariff measures - basic concepts and information tools" in Niamey conducted by the International Trade Centre. The attendees coming from both the public sector and the private sector will play an essential role of contributing to build a trade expertise in the country.

The second session of the ITC Trainers of Trainers program will take off again in early February 2020.



CAPACITY BUILDING 2019

2019 was an intense and great year for TMI's Capacity Building program. Through Training-of-Trainers workshops, webinars, in-person trainings combined with online preparatory courses, information sessions and events, ITC greatly expanded the use of its Market Analysis Tools. Students, professionals and journalists throughout the world developed additional capabilities to gain access to global markets and do in depth market research applying the latest information available.



ITC TOOLS UPDATES

Procurement Map optimization

With **Procurement Map**, users can easily access to detailed information over 150 000 public tenders. This year, the Government Procurement Agreement (GPA) of WTO and RTA Regional Trade Agreement (RTA) information for 41 countries was updated. It enables to support SMEs to easily understand international trade agreements related to the public procurement market.

In 2019, the Procurement Map database has been completely redesigned to improve response time and to provide users with access to more than 7 million contract awards. In 2020, ITC will continue improving the tool by adding new functionalities and new data.



Market Price Information portal new information sources

After Thomson Reuters and USDA daily market prices already available in MPI, the following two new price sources having been added: Mexican local market prices reported by Sistema Nacional de Informacion e Integracion de Mercados and South African market prices reported by Cape Town market. In 2020, ITC will continue adding new sources of price information with the objective of providing users with a World price database for agricultural products.

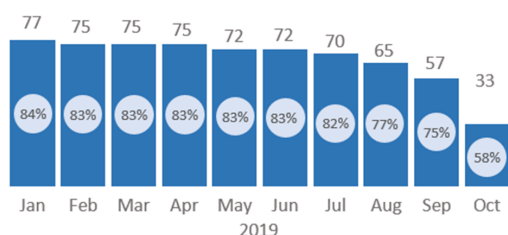
Rules of Origin Facilitator updates and additions

Rules of origin of 350 preferential trade agreements are now searchable in Rules of Origin Facilitator, making it the world's largest database of product-specific rules of origin. In addition, users can browse information on more than 900 trade agreements that are in force, in the making, or were terminated.

Facilitator's new [online EU export guide](#) takes businesses through key aspects of placing goods on the European market under preferential programs, such as GSP "Everything But Arms". Further guides and explainers will be made available throughout 2020.

The Facilitator's [Agreements](#) facility now allows to 'google' more than 500 texts of trade agreements, including AfCFTA and CPTPP. The interactive feature will help MSMEs quickly access the legal basis of rules of origin as well as scan for other benefits secured in preferential trade agreements by their governments.

Trade Map 2019
DECEMBER DATA AVAILABILITY



Bars: Number of countries available
Circles: Share of global trade accounted for

Trade Map data coverage

A third update of the Trade Map trade indicators for 2018 last October increases the countries covered to 147. By 19 December its monthly trade data will cover 83% of global trade up until July and will already count 33 countries covered up until October, representing 58% of global trade for that month.

Export Potential Map

Export Potential Map updated its results in November with new base years for trade flows of 2014-2018 and projections for 2024 based on growth forecasts from the IMF.

Market Access Map

The new data integrated in Market Access Map includes 2019 tariffs for more than 140 countries, all trade remedies applied by more than 70 countries in 2019, including new additional duties as a result of trade tensions.

TRADE AND MARKET INTELLIGENCE: COMING UP IN 2020

AFRICAN TRADE OBSERVATORY

The mockup of the dashboard will continue to be developed, in parallel of a data transfer system that is being designed to ensure the data will remain comprehensive and up-to-date. A plug-in application will be tested and followed by technical workshops with policymakers, the private sector and ATO focal points.

INVESTMENT PROMOTION PORTALS

The team will continue to work together with Myantrade, the national trade promotion agency of Myanmar, to complete the upgrade of their information services and website, which includes an overall modernization of the client service portfolio and the methodologies for information collection and its processing and dissemination to exporters and foreign buyers, including through Myantrade's regional offices.

In collaboration with the Government of Bhutan's Ministry of Economic Affairs, launching the Bhutan Trade Information Portal, which features a foreign importer-oriented module showcasing Bhutan and Bhutanese products and exporting companies, and a customized interface for dynamic searching of trade & business information. Through this interface, Bhutanese companies will be able to obtain information on export potential indicators, trade agreements, customs tariffs, tariff preferences, non-tariff measures, export procedures, world trade flows, latest WTO notifications, voluntary standards, contact details of local export-related service providers and a series of additional information resources for entrepreneurship and internationalization.

EXPORT POTENTIAL ASSESSMENTS

To even better meet the demands of users we will develop a data download module for Export Potential Map and expand the offering on investment and trade policy. Applications will include an assessment of Lao PDR's graduation from Least Developed Country (LDC) status, the development of a customized tool Export Potential Map – Iran and targeted capacity building programs. It is envisaged to increase visibility of the growing portfolio of the Studies team through closer collaboration with partners within the UN and beyond.

MARKET ACCESS MAP

The full global database of tariff reduction commitments in all existing preferential trade agreements (PTAs) will be completed. The 'forward-looking' tariffs will cover the time horizon until 2050 and will provide long-term foresight for businesses in terms of strategic planning. The novel database will also improve the quality of trade policy work, as the tariff cuts in existing PTAs will no longer need to be simulated – the tariff cuts data will be real.

Data on internal taxes will be integrated, as well as customs fees and other charges. As applied tariffs steadily decline in the presence of regional trade agreements and unilateral liberalization, taxes and other fees emerge as a key source of government revenue and a major factor impacting the landed cost of internationally shipped goods.

A new visualization module will simplify the complex 'spaghetti bowl' of preferential trade agreements. It will help businesses and policymakers navigate the maze of trade agreements and spot new unexplored markets offering preferential access.

NON-TARIFF MEASURES GENDER SURVEY

This year the challenges faced by women in trade in services will be investigated as a natural integration of the previous project, which exclusively focused on agriculture and manufacturing. The Member States selected to implement the survey and collect the necessary data are the same as the ones of the previous exercise on goods.

The project will build on the expertise of ITC on trade in services and non-tariff measures, in order to increase knowledge on a sector that received less attention by researchers and policymakers, despite its importance in the global economy.

The project will tentatively cover four main sectors, namely Distribution, Information and Communication Technology (ICT), Professional and Business Services, and Construction, aiming at collecting data of around 900 exporting companies.

GLOBAL TRADE HELPDESK

In 2020, the GTH will continue to refine the platform in line with user feedback from the testing campaign. The objective is to optimize data coverage, ensure access to key types of information and enhance user features. The GTH Initiative will continue to work with its partner agencies to ensure that the tool reaches its target audience of firms across the globe. To further enhance the accessibility of information, the tool will also be translated into Russian. The tool will be launched at the WTO Ministerial Conference in Kazakhstan in June 2020 as a key deliverable for MSMEs.

NON-TARIFF MEASURES

Two Business Survey reports are coming up on Seychelles and Pakistan.

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