# CENTRAL ASIA REGIONAL TRADE

Preliminary findings and issues for discussion

# Content

- Introduction to trade diagnostics
- Trade competitiveness of Central Asia
- Focus on emerging markets in broader region
- Dynamism of intra-regional trade
- Lessons from other regions
- Trade policy and integration environment in Central Asia

# INTRODUCTION TO TRADE DIAGNOSTICS

# Trade diagnostics

- Analyzing trade performance (***Trade Outcomes Analysis***) along multiple dimensions of competitiveness:
  - **Levels**, **growth** and **market share**;
  - **Orientation** and **diversification**; and
  - **Quality** and **sophistication**
- Emphasis given to trade within CA and with emerging markets in broader region (China, Russia, Turkey, etc.)
- Comparing performance to a set of peer countries:
  - other Central Asia countries; and
  - countries that are strongly dependent on natural resources exports, including a mix of income levels: Chile; Bolivia; Laos.

# Trade diagnostics (cont'd)

- The primary data source for the analysis is COMTRADE;
- Data is generally analyzed over the period 2000-2011;
- Depending on the analysis, 2, 4, or 6-digit level of aggregation used; mostly HS classification;
- Covers overall exports as well as exports **excluding oil, gas, minerals and precious metals**;

- Trade data for Central Asia countries is challenging:
  - not all countries report to COMTRADE;
  - major differences in self-reported and mirror statistics.

# TRADE COMPETITIVENESS OF CENTRAL ASIA

# Exports have increased

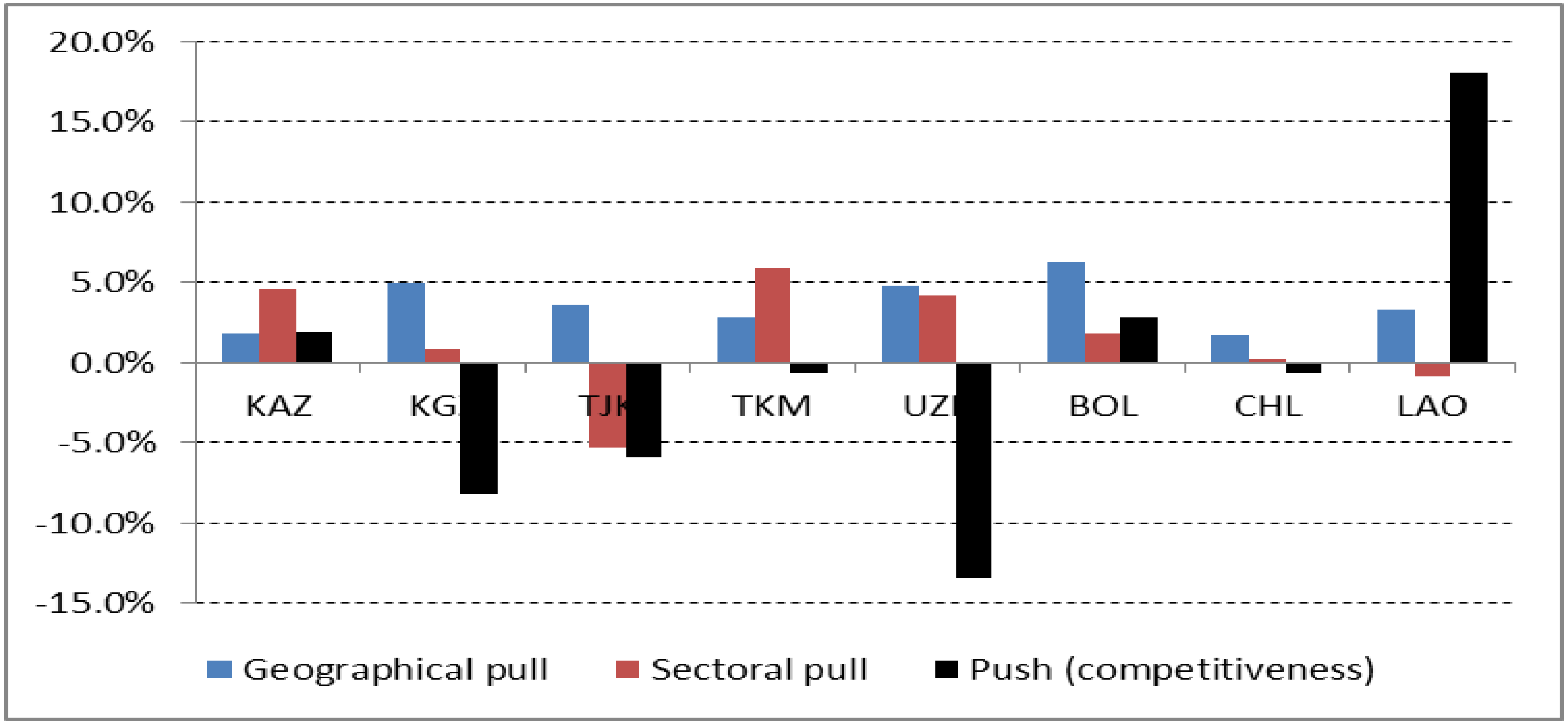
| Exports | KAZ | KGZ | TJK | TKM | UZB |
|---|---|---|---|---|---|
| per capita | 6,000 | 600 | 150 | 4,277 | 500 |
| growth rate | 23% | 20% | 1% | 20% | 18% |
| % of GDP | 50% | 57% | 15% | 78% | 31% |

| Trade | KAZ | KGZ | TJK | TKM | UZB |
|---|---|---|---|---|---|
| % of GDP | 77% | 143% | 73% | 123% | 59% |
| Trend | ↓ | ↑ | ↓ | ↑ | ↓ |

- Exports have boomed in the region (and most countries in it) over the decade
- But still huge differences in level and growth of exports across the region

# But, competitiveness remains poor

- Shift-share decomposition –
- All countries are benefiting from positive pull contribution
- No country (except Kazakhstan) benefited from positive "push" contribution



# Export boom driven by commodities

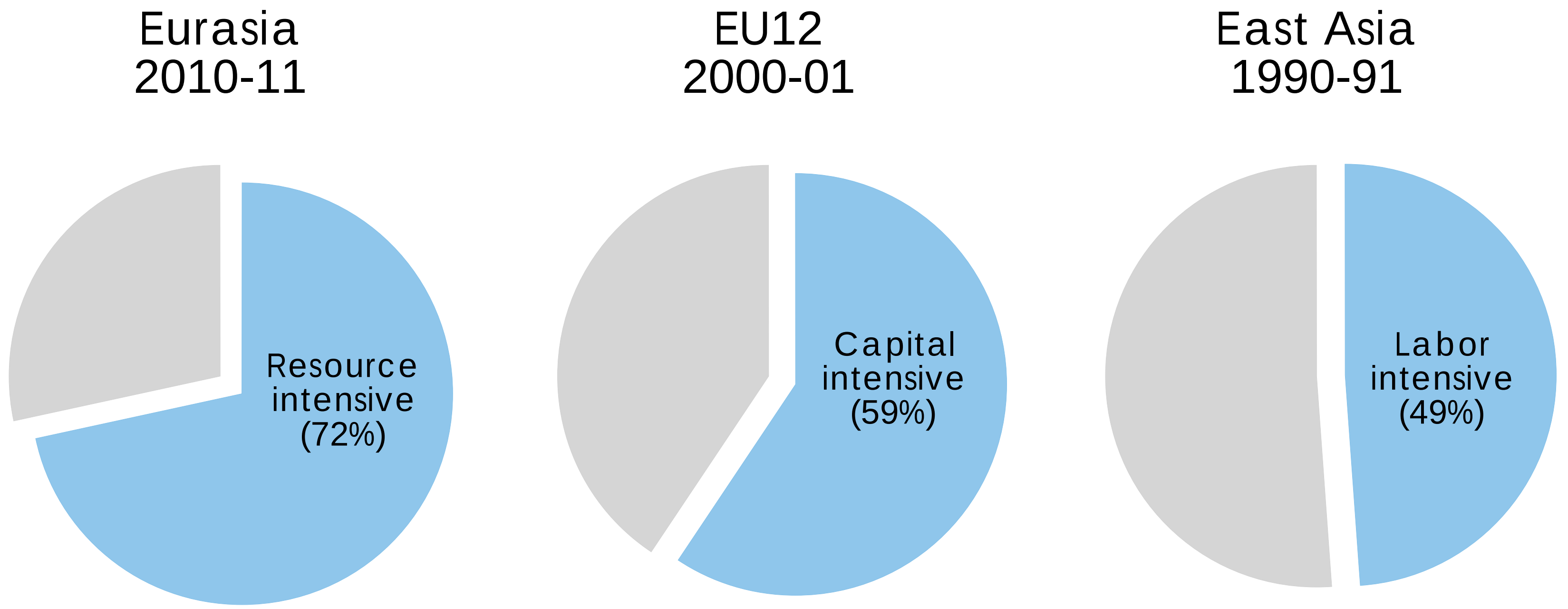
## Growth rates of exports

| Country | Oil and gas | Other minerals | Metals | Rest |
|---|---|---|---|---|
| **KAZ** | **29.4** | **31.5** | **15.9** | **17.3** |
| KGZ | 8.2 | 17.3 | 14.0 | 11.1 |
| TJK | 38.4 | 52.1 | 11.3 | 7.2 |
| TKM | 14.1 | -9.5 | -11.6 | 10.0 |
| UZB | 19.3 | 9.5 | 13.0 | 10.8 |
| BOL | 31.7 | 25.3 | 14.3 | 7.7 |
| CHL | 3.7 | 20.1 | 19.3 | 10.7 |
| LAO | 72.3 | 56.1 | 89.9 | 11.7 |

*Notes: (1) 10 year CAGR, from 2000-2001 average to 2010-2011 average*

# In line with global experience

- Regions integrate into the World with products requiring endowments they have
- Export products, by factor intensity



# Small exports beyond commodities

## Kazakhstan – all exports

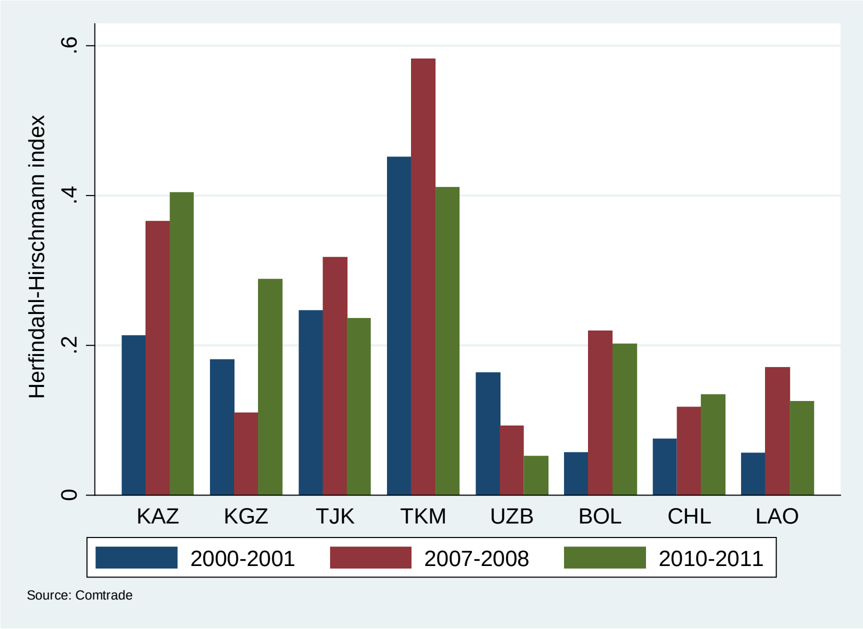
| Rank 2010-2011 | HS6 description | HS6 code | Value | Share | Rank 2000-2001 | Rank 2007-2008 |
|---|---|---|---|---|---|---|
| 1 | 270900 | Petroleum oils and oils obtained from bituminous minerals, crude. | 45,800,000 | 63.2 | 1 | 1 |
| 2 | 740311 | Refined copper :-- Cathodes and sections of cathodes | 2,349,290 | 3.2 | 2 | 2 |
| 3 | 284410 | Natural uranium and its compounds; alloys, dispersions, ceramic products and mixtures | 2,106,108 | 2.9 | | 6 |
| 4 | 271000 | Petroleum oils and oils obtained from bituminous minerals, other than crude | 2,094,235 | 2.9 | 9 | 3 |
| 5 | 720241 | Ferro-chromium :-- Containing by weight more than 4 % of carbon | 1,960,164 | 2.7 | 4 | 4 |
| 6 | 271121 | In gaseous state :-- Natural gas | 1,500,406 | 2.1 | 20 | 7 |
| 7 | 260112 | Iron ores and concentrates, other than roasted iron pyrites :-- Agglomerated | 1,121,976 | 1.5 | 22 | 8 |
| 8 | 270119 | Coal, whether or not pulverised, but not agglomerated :-- Other coal | 928,667 | 1.3 | 5 | 14 |
| 9 | 260111 | Iron ores and concentrates, other than roasted iron pyrites :-- Non-agglomerated | 845,094 | 1.2 | 39 | 20 |
| 10 | 100190 | Wheat and meslin: Seed, White, Other | 735,260 | 1.0 | 3 | 5 |
| Total | | | | 82.0 | | |

## Kyrgyz Republic – all exports

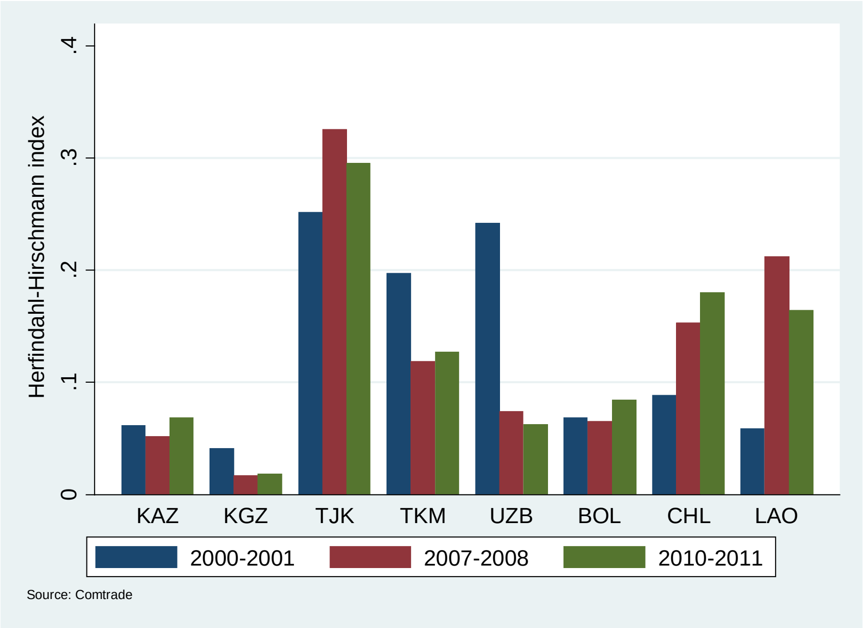
| Rank 2010-2011 | HS6 description | HS6 code | Value | Share | Rank 2000-2001 | Rank 2007-2008 |
|---|---|---|---|---|---|---|
| 1 | 710812 | Gold, Non-monetary :-- Other unwrought forms | 836,879 | 53.1 | 1 | 1 |
| 2 | 271000 | Petroleum oils and oils obtained from bituminous minerals, other than crude | 83,657 | 5.3 | 11 | 2 |
| 3 | 271600 | Electrical energy. (optional heading) | 64,391 | 4.1 | 2 | 5 |
| 4 | 71333 | Beans :-- Kidney beans, including white pea beans | 43,414 | 2.8 | 16 | 7 |
| 5 | 520100 | Cotton, not carded or combed. | 29,380 | 1.9 | 4 | 6 |
| 6 | 620640 | Women's or Girls' Blouses, Shirts, Of man-made fibres | 24,241 | 1.5 | 1158 | 8 |
| 7 | 853922 | Other filament lamps, excluding ultra-violet or infra-red lamps :-- Other, of a power not excee | 17,079 | 1.1 | 7 | 9 |
| 8 | 240110 | Tobacco, not stemmed/stripped | 17,066 | 1.1 | 3 | 11 |
| 9 | 620443 | Dresses :-- Of synthetic fibres | 16,562 | 1.1 | | 20 |
| 10 | 620463 | Trousers, bib and brace overalls, breeches and shorts :-- Of synthetic fibres | 15,662 | 1.0 | 1095 | 16 |
| Total | | | | 72.9 | | |

# Growing concentration in products …

## All exports - products

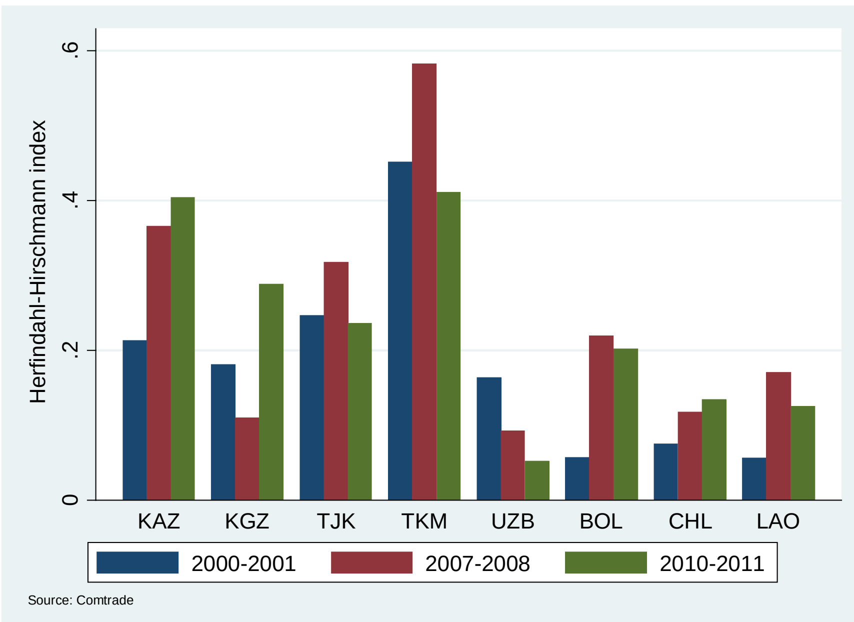



## Non-mineral exp. - products

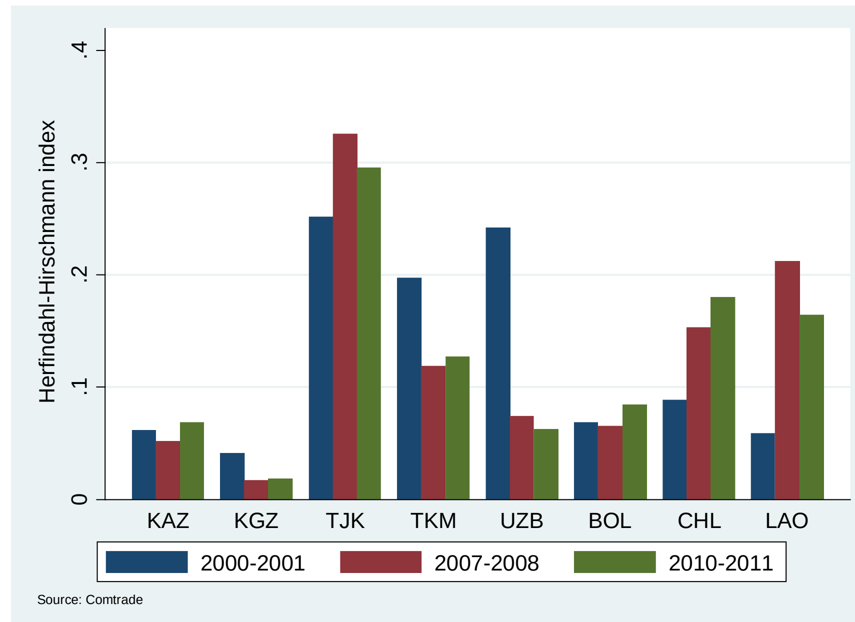


# … and in markets

## All exports - markets




## Non-mineral exp. - markets

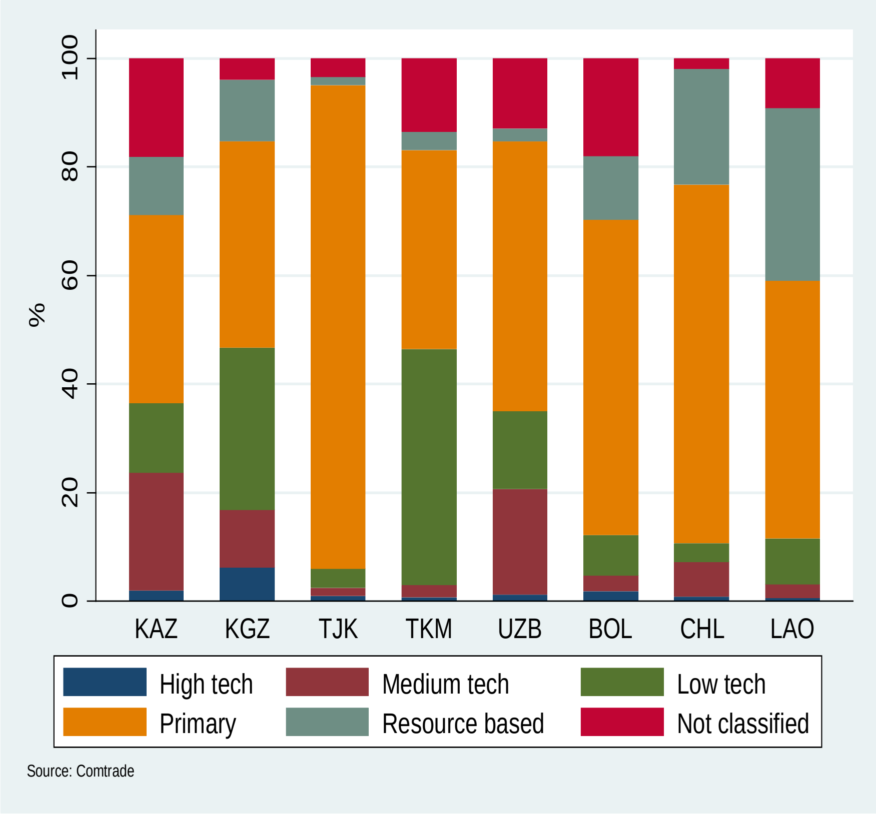


# No dynamism in products and markets

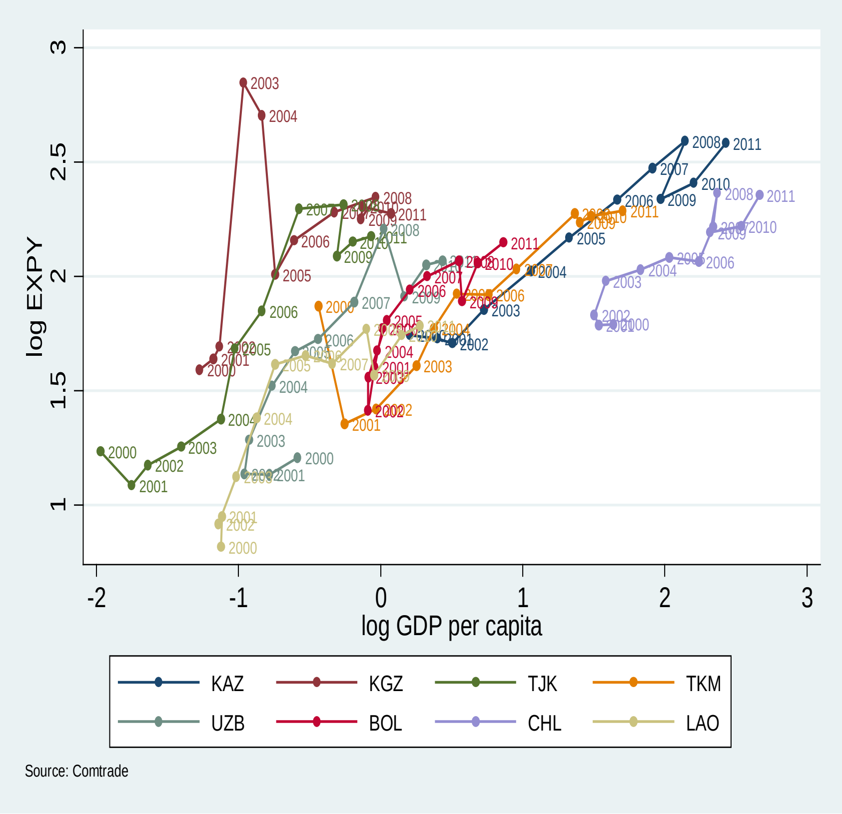
| | KAZ | KGZ | TJK | TKM | UZB |
|---|---|---|---|---|---|
| **Number of products** | | | | | |
| 2000-01 | 517 | 179 | 111 | 110 | 370 |
| 2010-11 | 506 | 297 | 158 | 130 | 478 |
| | | | | | |
| **Number of markets** | | | | | |
| 2000-01 | 73 | 39 | 46 | 50 | 59 |
| 2010-11 | 79 | 48 | 45 | 55 | 65 |

# Commodities exported, manufactures imported

## Lall technology classification – non-mineral exports

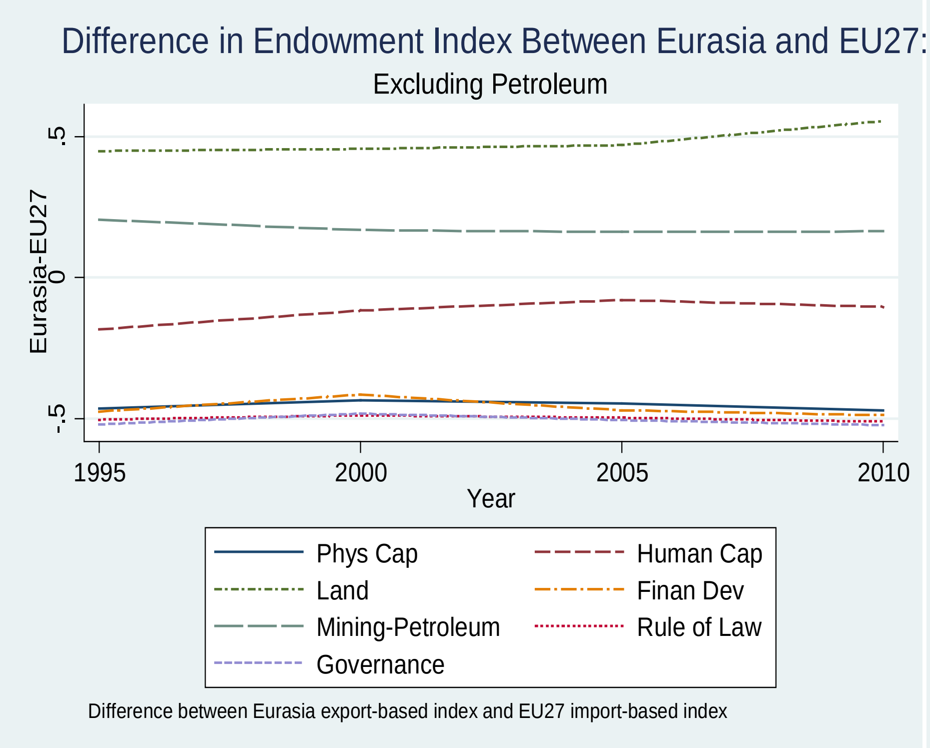


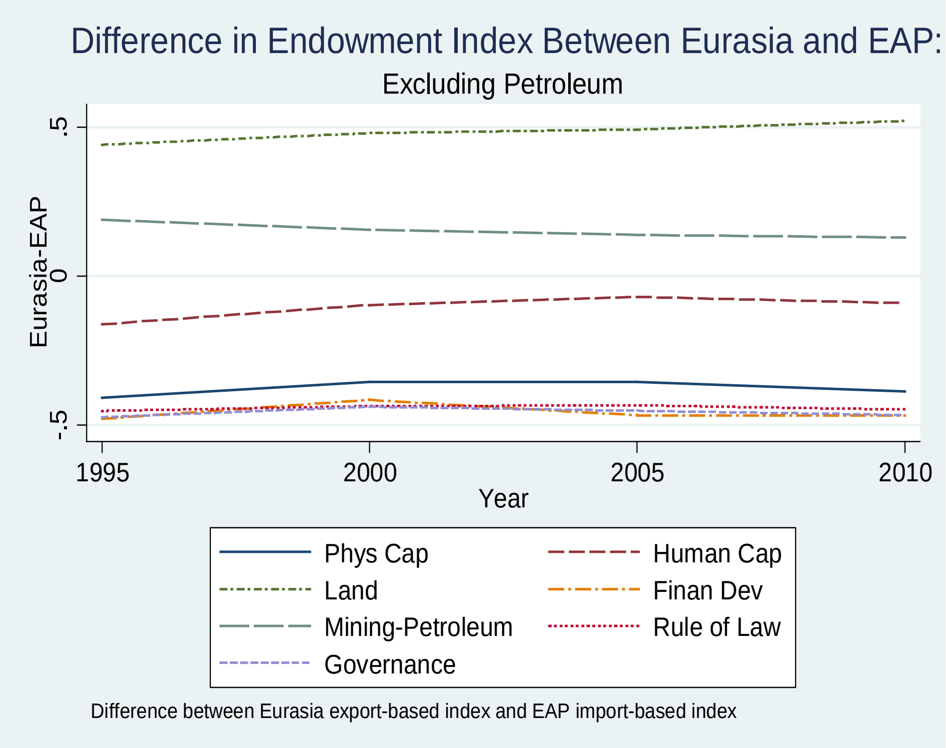

## Export sophistication – all exports



# Reflecting CA endowments

- "Surplus" in land and resources;
- "Deficit" in physical and institutional capital

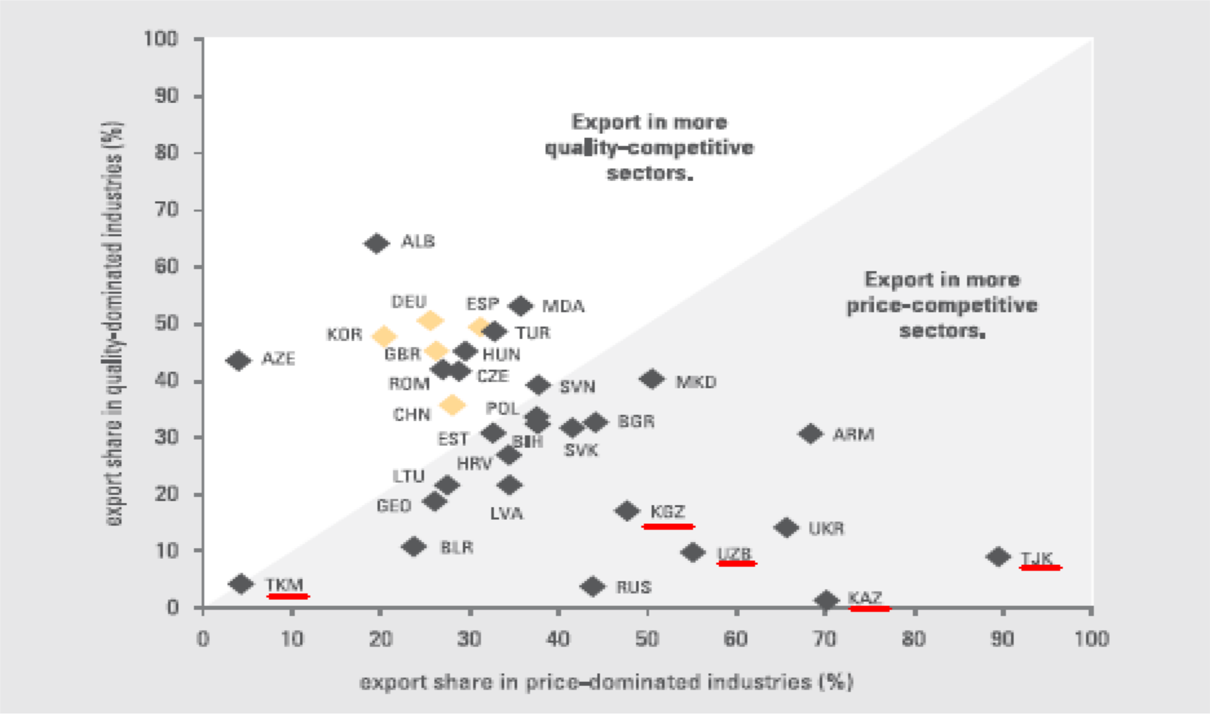


# With CA competing in prices not quality

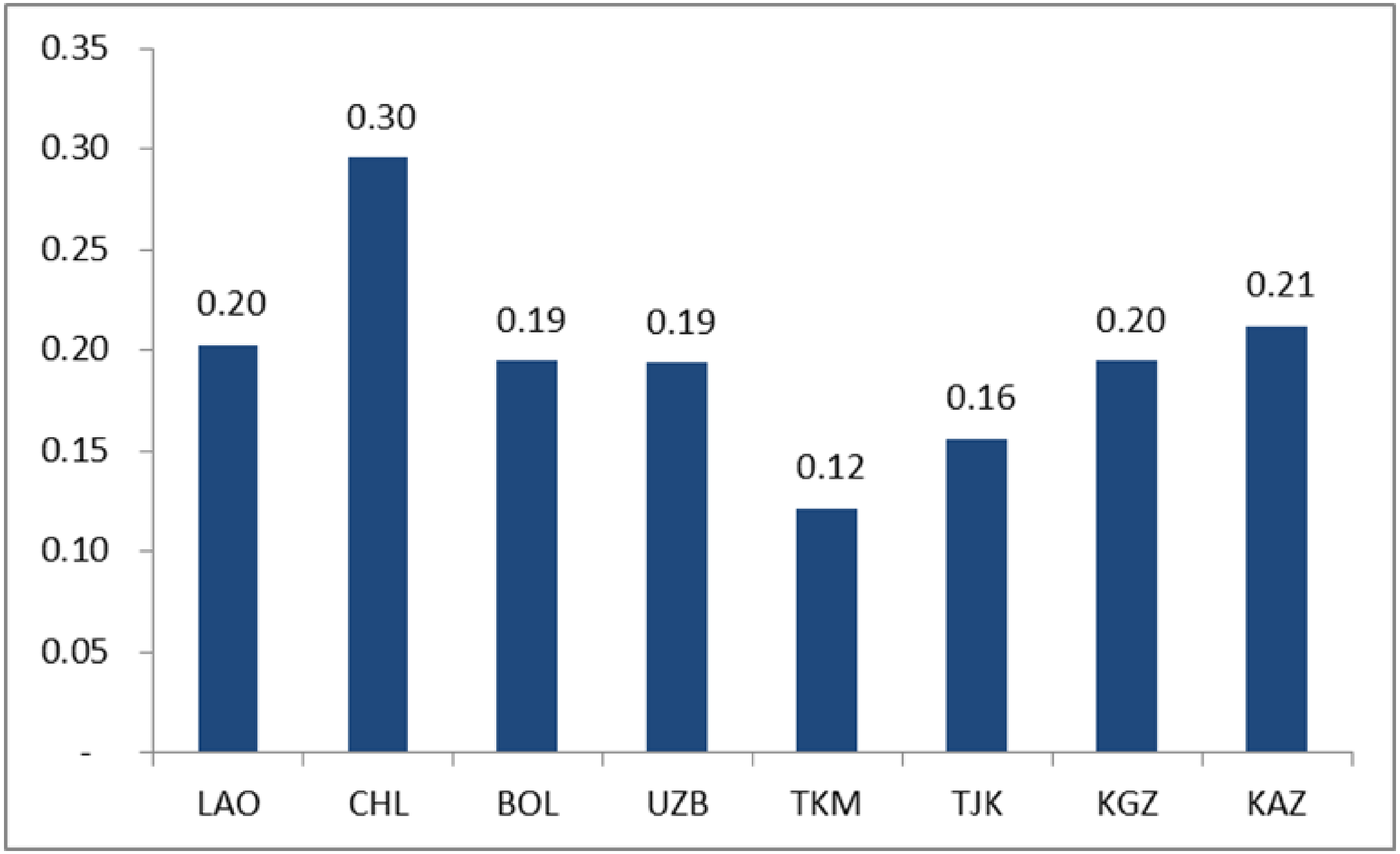
- Exports appear to be competing on price rather than quality

**Export Shares of Eastern European and Central Asian Countries in Industries That Compete on Quality and on Price, 2006**



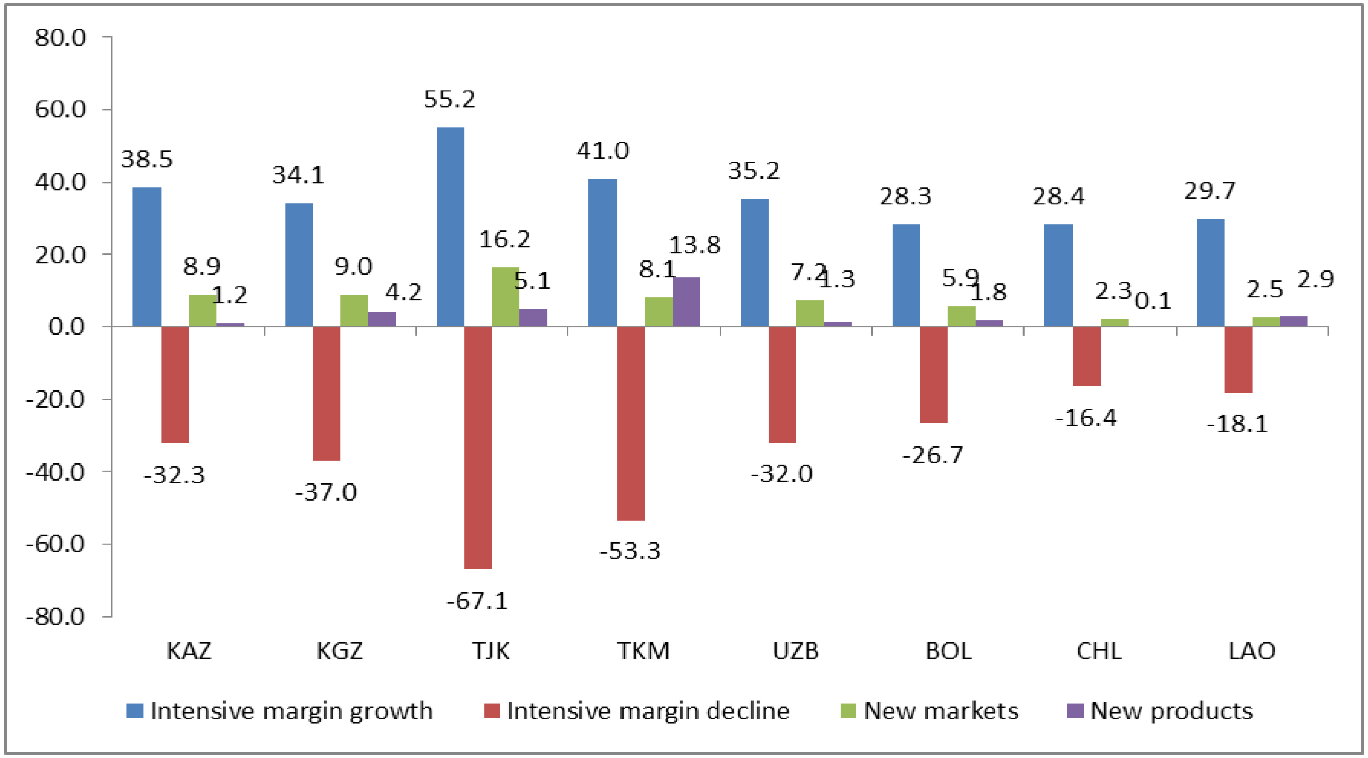
# Resulting in low survival of exports

- 2-year survival rates of exports



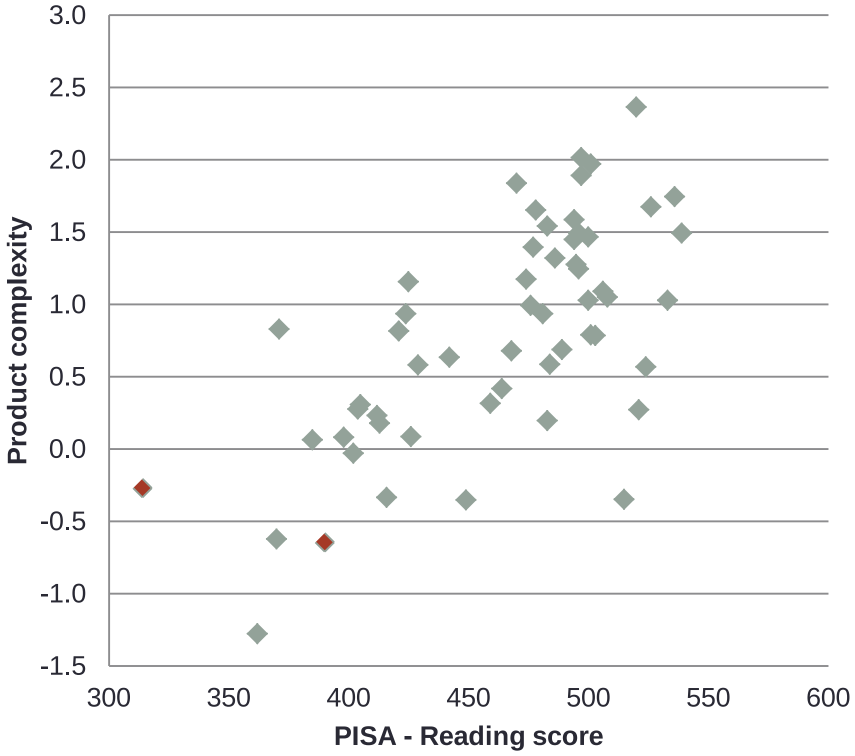
# Summary

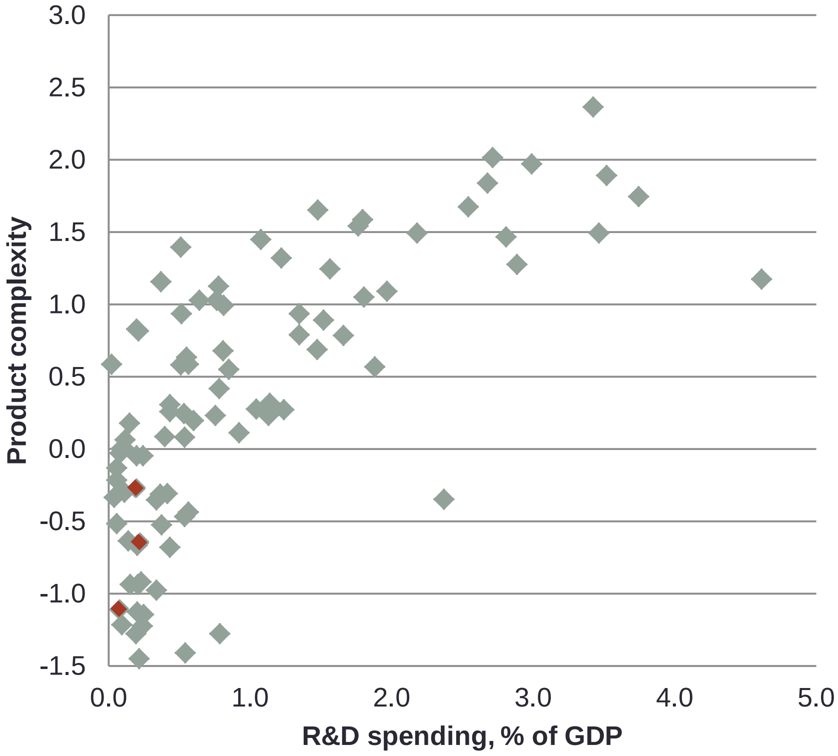
- Exports growth decomposition, (2000-2011), non-minerals



# Summary

Diversifying endowments could lead to greater product and market diversification



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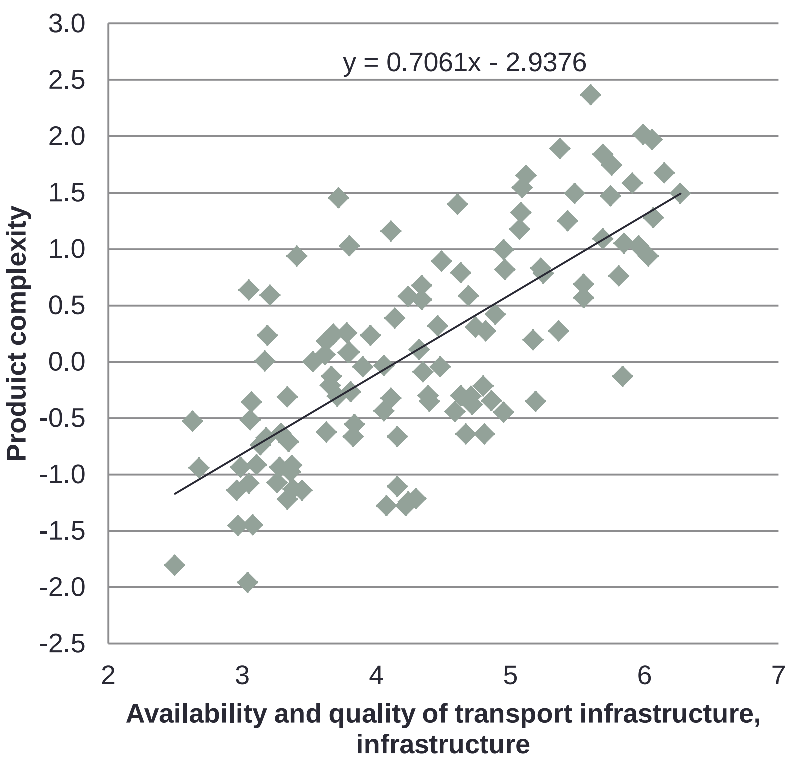
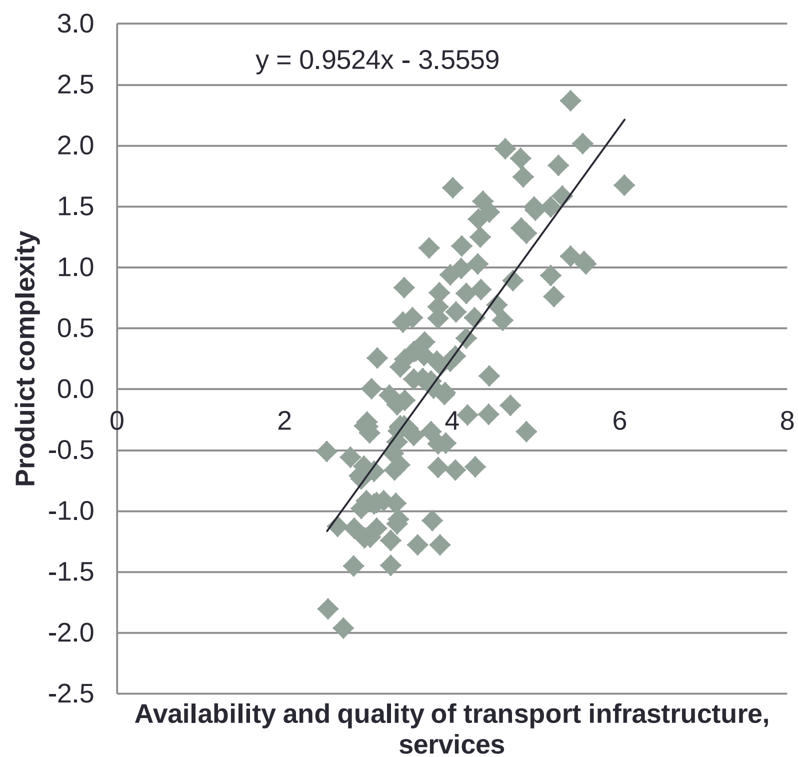
Diversifying endowments could lead to greater product and market diversification



# FOCUS ON EMERGING MARKETS IN BROADER REGION

Central Asia trade with Russia, China, Turkey, India, Pakistan and Afghanistan

# Trade with emerging markets

- China, Russia and Turkey are emerging as important trading partners of the region
- Unexploited opportunities in trade with India and Pakistan
- Once again, very differing patterns:
  - Kazakhstan and Uzbekistan have expanded trade significantly with a few of the partners
  - Kyrgyz to a much lesser extent
  - Tajikistan and Turkmenistan have only been able to improve export to one destination (Turkey and China, respectively)
- In general, trade sophistication is at or below the average export sophistication of the countries

# Trade diagnostics - CA

- Trade complementarity indices with emerging markets
  - All exports

| | AFG | CHN | IND | PAK | RUS | TUR |
|---|---|---|---|---|---|---|
| KAZ | 5.8 | 25.1 | 37.8 | 19.4 | 4.9 | 21.3 |
| KGZ | 8.5 | 10.1 | 20.3 | 16.5 | 14.7 | 17.6 |
| TJK | 4.0 | 7.8 | 6.3 | 8.8 | 6.8 | 9.1 |
| TKM | 29.6 | 8.9 | 8.6 | 27.8 | 4.1 | 16.9 |
| UZB | 18.2 | 12.9 | 12.9 | 27.5 | 16.0 | 24.7 |

  - Non-minerals

| | AFG | CHN | IND | PAK | RUS | TUR |
|---|---|---|---|---|---|---|
| KAZ | 5.4 | 13.5 | 13.4 | 12.9 | 8.5 | 17.8 |
| KGZ | 7.9 | 15.6 | 16.3 | 20.3 | 24.0 | 21.3 |
| TJK | 2.1 | 5.5 | 5.2 | 8.8 | 6.0 | 8.2 |
| TKM | 0.6 | 5.0 | 4.5 | 8.3 | 6.3 | 8.9 |
| UZB | 1.9 | 13.9 | 10.5 | 16.2 | 16.3 | 18.6 |

# Some promising developments

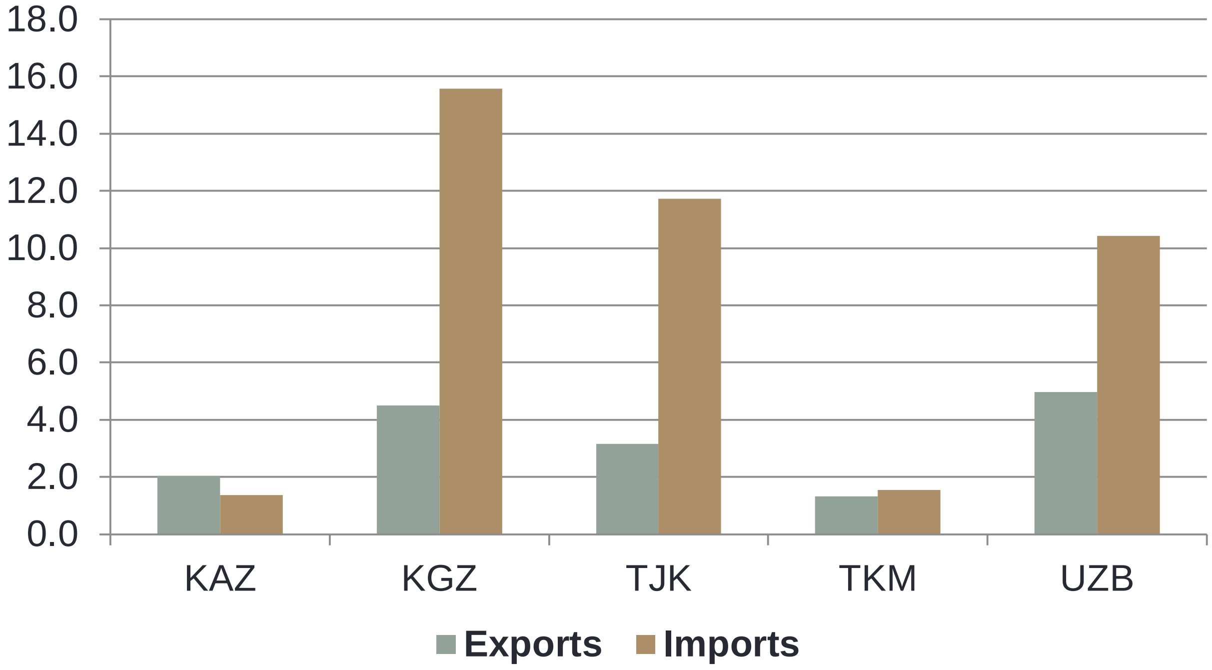
- Some improvements:
  - Movement up the value-added in some countries (Uzbek exports of copper wire to Turkey, machinery exports of Turkmenistan, some non-traditional exports from Tajikistan, Kyrgyz textiles to Russia, Kazak machinery moving parts to Turkey)
- Stronger survival rates:
  - 2-year survival rates above 30% for Russia, China and Turkey
  - Though much smaller for South Asia
- Potential close linkages in value-chains
  - Uzbekistan, Turkmenistan, Kyrgyz Republic and Tajikistan in cotton-textiles-apparel value chain with Russia, China and Turkey
  - Kazakhstan in the grains and oilseeds value chain with Russia and Afghanistan.

# DYNAMISM OF INTRA-REGIONAL TRADE

Trade within Central Asia region

# Intra-regional trade is very low

- Again, reflecting their endowments
- Exports and imports to CA, as % of total exports and imports



# And grew slower than overall trade

- Growth rate of exports and imports

| | KAZ | KGZ | TJK | TKM | UZB |
|---|---|---|---|---|---|
| Total exports | 25% | 20% | 1% | 20% | 16% |
| Exports to CA | 22% | 5% | 2% | 11% | 9% |
| | | | | | |
| Total imports | 19% | 25% | 14% | 17% | 16% |
| Imports from CA | 16% | 13% | 8% | 40% | 18% |

# Sophistication is somewhat better

- Sophistication of exports to regional partners:
  - is well ahead of overall average EXPY for Kyrgyz Republic, Tajikistan and Turkmenistan
  - is similar to the average EXPY for Kazakhstan
- Over the last decade:
  - Sophistications has increased for all countries
  - Some reversal of sophistication of Kyrgyz exports to CA in recent years and of Uzbek exports to Kazakhstan and Turkmenistan

# Complementarity is low

- Trade complementarity indices within Central Asia
  - All exports

| | KAZ | KGZ | TJK | TKM | UZB |
|---|---|---|---|---|---|
| KAZ | | 11.1 | 8.9 | 3.4 | 13.3 |
| KGZ | 12.7 | | 15.9 | 10.5 | 13.6 |
| TJK | 7.1 | 6.0 | | 4.8 | 7.3 |
| TKM | 9.1 | 27.8 | 14.6 | | 10.1 |
| UZB | 13.4 | 28.7 | 19.8 | 8.1 | |

  - Non-minerals

| | KAZ | KGZ | TJK | TKM | UZB |
|---|---|---|---|---|---|
| KAZ | | 11.3 | 14.1 | 7.4 | 16.0 |
| KGZ | 18.8 | | 20.0 | 16.6 | 16.8 |
| TJK | 5.3 | 4.7 | | 4.4 | 5.6 |
| TKM | 5.2 | 5.9 | 8.4 | | 5.3 |
| UZB | 11.7 | 15.1 | 10.1 | 8.5 | |

# Survival rates are higher, but vary

- 2-year survival rates

| | KAZ | KGZ | TJK | TKM | UZB |
|---|---|---|---|---|---|
| | | | | | |
| Highest | KGZ – 44% | KAZ – 44% | UZB – 32% | UZB – 33% | KAZ – 35% |
| Lowest | TKM – 23% | TKM – 11% | TKM – 17% | KGZ – 11% | KGZ – 24% |

# No strong evidence of value-chains

- Meat industry:
  - Regional value-chains may be developing involving Kazakhstan, the Kyrgyz Republic
  - This relationship was largely absent in 2005
- Grains and seeds:
  - Kazakhstan is en exporter rather than part of a value-chain;
  - Limited interaction between Uzbekistan and Kazakhstan.
- Cotton-garments-textiles:
  - A value-chain could be forming involving Uzbekistan, Tajikistan and the Kyrgyz Republic
  - Turkmenistan is more closely integrated with countries outside of the region

# LESSONS FROM OTHER REGIONS

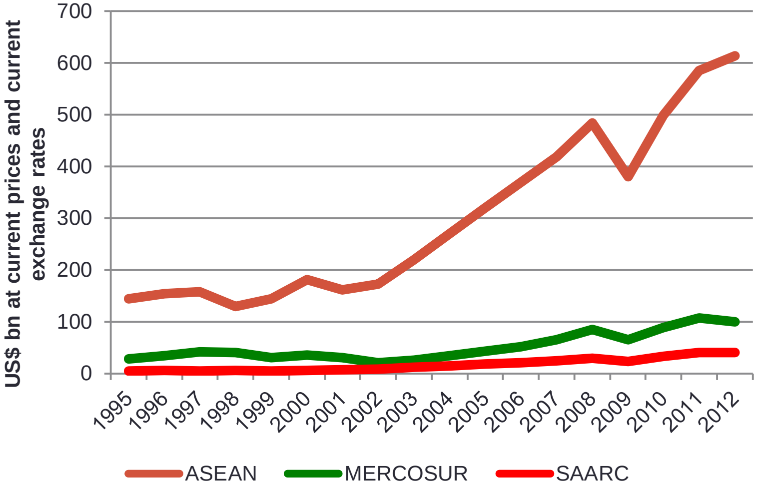
ASEAN and SAFTA

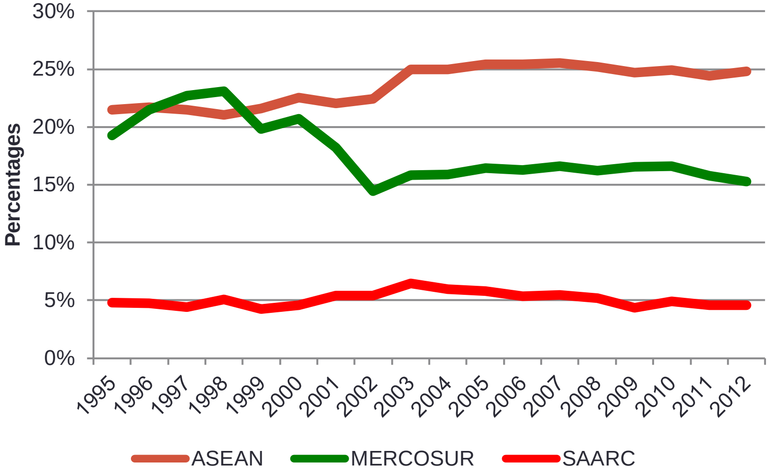
# ASEAN

- Basic information
  - Established 1967 by five countries (five have joined since)
  - 1992 AFTA
  - Schedule of preferential tariff reductions
  - Gradual phasing out of “sensitive” and “exclusion” lists
  - 2008 ATIGA consolidated all existing ASEAN commitments related to trade in goods into one framework, covering tariff liberalization, elimination of non-tariff barriers, rules of origin, trade facilitation, customs procedures, standards and SPS measures.
  - By 2015, AFTA shall be replaced by the ASEAN Economic Community, encompassing a single market and production base.

# ASEAN

- Trade levels significantly higher compared to other similar initiatives



# ASEAN

- Complementarity of goods traded
  - TCI for intra-regional trade of ASEAN members was: Indonesia (48); Cambodia (13); Myanmar (30); Malaysia (63); Philippines (60); Singapore (63); Vietnam (39).
  - China worked as an engine for ASEAN regional integration despite not being part of ASEAN - its growing demand for energy, raw materials and manufactured items has supported specialization in ASEAN members.
- Unique political structure
  - “ASEAN way” - caution, pragmatism, consensus-based decision-making and noninterference in others’ internal affairs
- Extent of tariff reductions
  - Comprehensive coverage (90% of goods)
  - Limited exemptions (1.6% of all tariff lines)

# ASEAN

- Non-tariff measures
  - AFTA has been effective at eliminating NTMs as the agreement. General features of NTM abolition:

  (1) Verification of information on NTMs;

  (2) Prioritization of products/NTMs;

  (3) Developing specific work programs; and

  (4) Obtaining a mandate from ASEAN Economic Ministers to implement the work program.
- Trade facilitation
  - 2008 Asean TF Work Program including a Single Window
- Stimulate regional FDI
- Foster the creation of regional value chains

# SAFTA

- Basic information
  - Established 2004 by seven countries (one joined since)
  - Schedule of tariff reductions
- Lower complementarity
  - the TCI for intra-regional trade of ASEAN members was: Bhutan (34); India (56); Sri Lanka (23); Maldives (42); Nepal (31); Pakistan (32)
- Political structure challenging
  - Frequent trade disruptions for political reasons
- Proliferation of PTAs
  - This may have undermined the performance of SAFTA

# SAFTA

- Extent of tariff reductions
  - Limited, each country maintains a sensitive list with limited progress in their eliminations
- Non-tariff measures
  - While the agreement does have provisions to deal with paratariffs and NTMs, there is no explicit commitment required of countries
- Trade remedy measures
  - Easy access to trade remedy measures proves a problem to SAFTA as it effectively nullifies the tariff concessions reached under the agreement.
- Trade facilitation
  - Not adequately represented in SAFTA (only through bilateral agreements)

# TRADE POLICY AND INTEGRATION ENVIRONMENT

Preliminary findings of stocktaking exercise

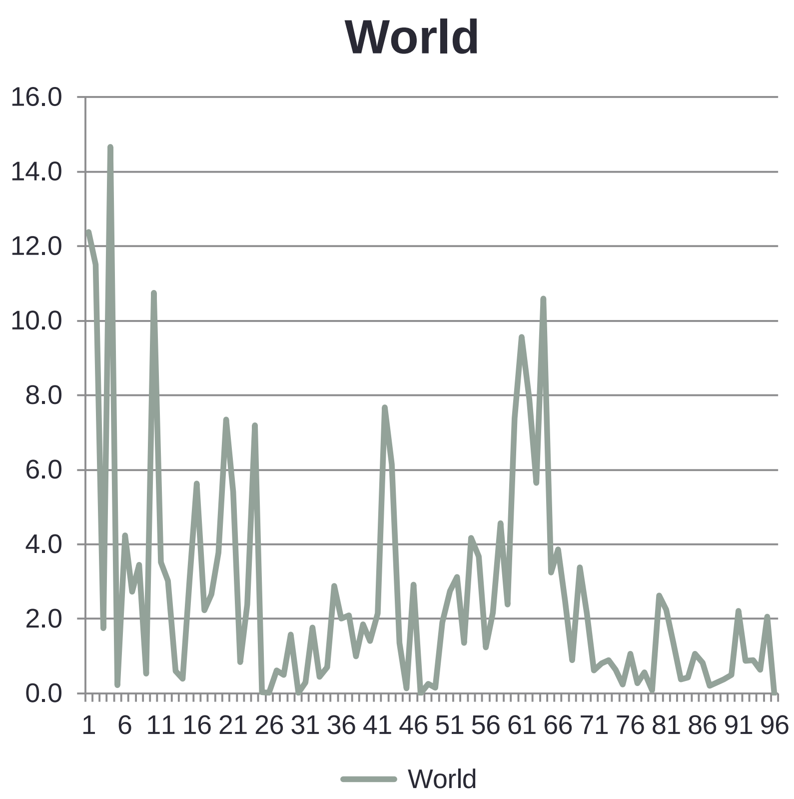
# Tariffs are not excessive,

| Simple average | LMIE | EU-27 | KAZ | KGZ | TJK | UZB |
|---|---|---|---|---|---|---|
| Raw Materials | 6.2 | 0.8 | 5.7 | 3.2 | 2.9 | 10.6 |
| Intermediate goods | 4.0 | 0.7 | 6.7 | 2.3 | 4.0 | 9.1 |
| Consumer goods | 5.8 | 1.7 | 9.1 | 4.5 | 5.3 | 18.0 |
| Capital goods | 2.4 | 0.4 | 3.2 | 1.9 | 3.3 | 7.1 |
| Total trade | 4.4 | 1.1 | 6.5 | 3.3 | 4.4 | 11.9 |

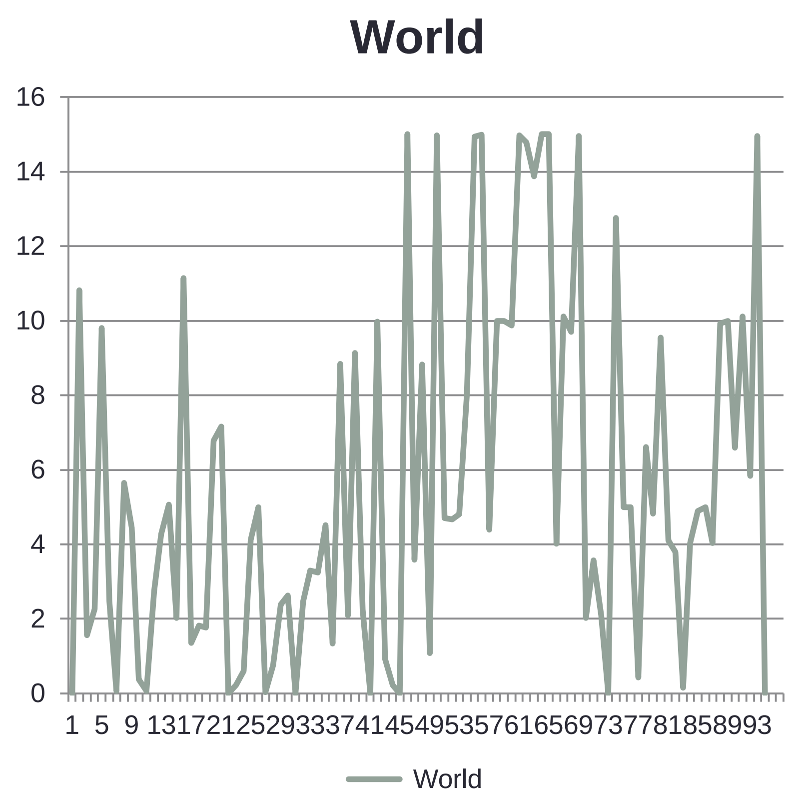
| Weighted average | LMIE | EU-27 | KAZ | KGZ | TJK | UZB |
|---|---|---|---|---|---|---|
| Raw Materials | 5.7 | 0.3 | 0.8 | 3.2 | 2.9 | 4.8 |
| Intermediate goods | 3.3 | 0.2 | 4.9 | 1.2 | 3.3 | 4.1 |
| Consumer goods | 3.9 | 0.8 | 3.9 | 2.7 | 7.6 | 11.0 |
| Capital goods | 2.5 | 0.2 | 2.8 | 2.0 | 3.7 | 8.3 |
| Total trade | 3.5 | 0.4 | 3.6 | 2.4 | 5.9 | 7.4 |

# But, higher than OECD and dispersed

## OECD tariff profile




## Tajik tariff profile



# Higher rates with new growth poles

| Rate: Weighted average | Kazakhstan | | | Kyrgyz Republic | | |
|---|---|---|---|---|---|---|
| | World | China | Turkey | World | China | Turkey |
| Capital goods | 2.8 | 3.8 | 6.4 | 2.0 | 1.6 | 4.4 |
| Consumer goods | 3.9 | 11.9 | 11.2 | 2.7 | 7.9 | 6.0 |
| Intermediate goods | 4.9 | 12.4 | 11.1 | 1.2 | 3.9 | 2.2 |
| Raw materials | 0.8 | 7.8 | 5.4 | 3.2 | 6.9 | 0.5 |
| Total Trade | 3.6 | 9.0 | 9.3 | 2.4 | 5.3 | 5.1 |

# Higher rates with new growth poles

| | China | | | | EU | | | |
|---|---|---|---|---|---|---|---|---|
| Exports from: | All | Food | Petrol. | Rest | All | Food | Petrol. | Rest |
| Russia | 3.17 | 10.59 | 1.66 | 7.09 | 1.20 | 10.02 | 0.75 | 2.21 |
| Georgia | 4.13 | 12.04 | 3.58 | 3.74 | 2.67 | 6.37 | 1.63 | 2.93 |
| Kazakhstan | 10.31 | 67.13 | 24.20 | 27.13 | 0.61 | 12.20 | 0.21 | 1.44 |
| Tajikistan | 42.79 | 69.26 | 19.75 | 38.00 | 3.72 | 8.26 | 0.01 | 2.92 |
| Kyrgyz Republic | 10.77 | 12.12 | 4.52 | 10.98 | 5.24 | 8.73 | 2.08 | 4.83 |
| Uzbekistan | 66.67 | 68.49 | 20.39 | 78.23 | 2.83 | 8.70 | 0.43 | 2.90 |
| Turkmenistan | 35.22 | 84.22 | 19.74 | 76.62 | 1.75 | 6.99 | 0.94 | 3.77 |
| Azerbaijan | 3.29 | 77.46 | 22.51 | 53.19 | 0.25 | 7.56 | 0.09 | 3.41 |
| Armenia | 6.18 | 8.22 | 0.45 | 6.10 | 2.97 | 4.94 | 0.02 | 2.90 |
| Ukraine | 7.76 | 14.39 | 4.02 | 8.07 | 2.18 | 7.81 | 1.63 | 2.23 |

# Restrictions to trade continue to exist

- Licensing of foreign trade activities
  - Alcohol and tobacco imports in Tajikistan;
  - Scrap or non-ferrous metals exports from Kyrgyz Republic

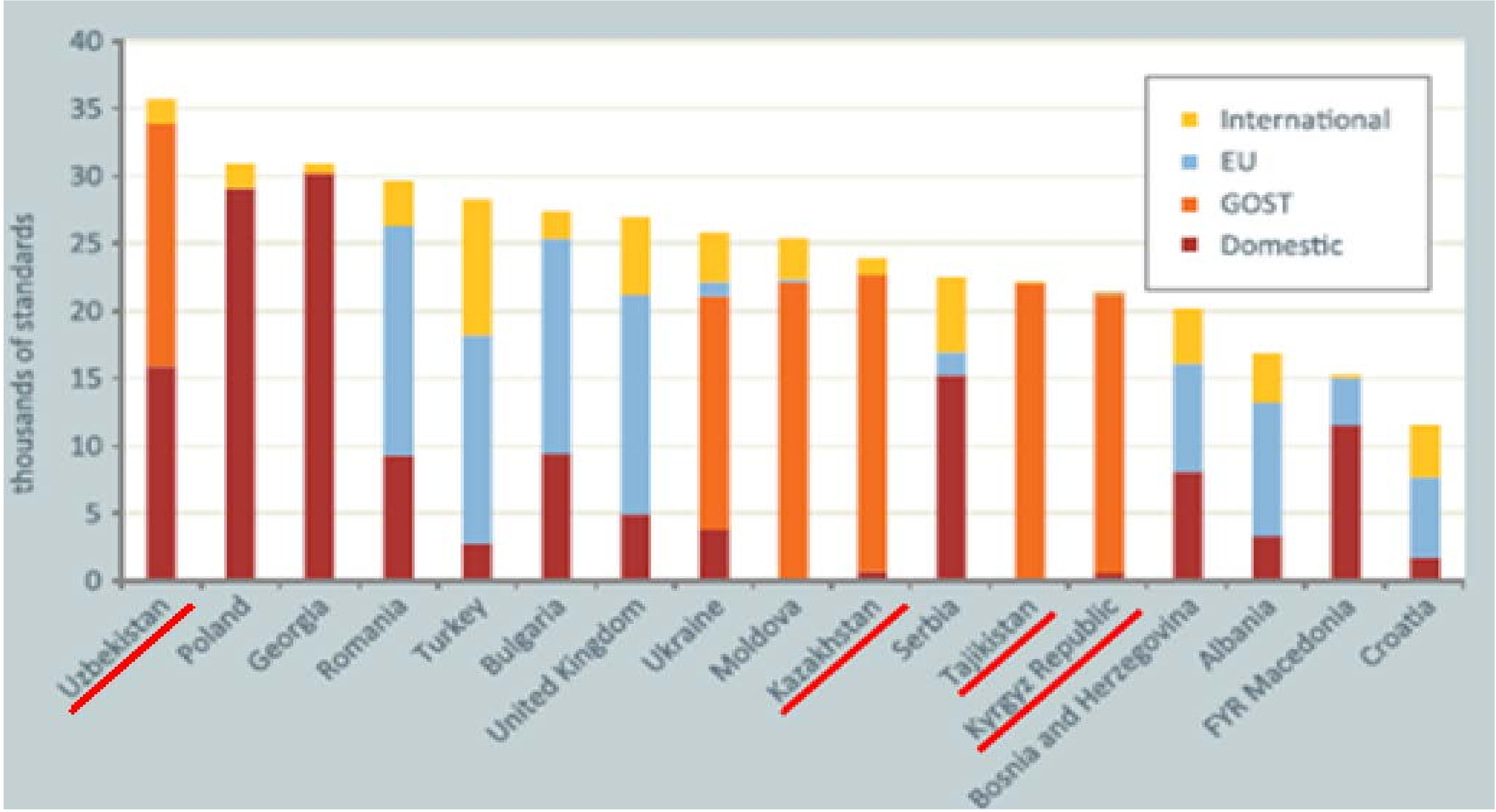
- Quantitative restrictions on trade
  - Import substitution policies
  - Ensure availability for domestic market

# Non-tariff measures also affect trade

- Uneven tax treatment of imports and domestically produced goods:
  - Different rates
  - Levies applied only to imports
  - Restrictions in public procurement
- TBTs and SPS
  - Sanitary and phyto-sanitary,
  - Veterinary and non-technical regulations,
  - Mandatory conformity assessment
  - Technical regulations.

# Standards could restrict trade

Predominance of mandatory standards, not compatible with international



# Some countries are tackling NTMs

- Recent developments in Kazakhstan largely along the good practices discussed earlier
  - Database of non-tariff measures created
  - Basic analysis of measures conducted
  - Assessment ongoing
  - Plans for the future
    - Based on assessment results identify the measures to be discontinues
    - Consider publication of the results and database

# No lack of integration initiatives

| Free-trade agreements | KAZ | KGZ | TJK | TKM | UZB |
|---|---|---|---|---|---|
| Common Economic Zone | x | | | | |
| Eurasian Economic Community | x | x | x | | |
| CIS FTA | x | x | x | | x |
| CIS FTA 2011 | x | x | x | | |
| Economic Cooperation Organization | x | x | x | x | x |
| GUUAM | | | | | x |
| | | | | | |
| Kazakhstan | | x | | | |
| Kyrgyz Republic | x | | | | x |
| Tajikistan | | | | | |
| Turkmenistan | | | | | |
| Uzbekistan | | x | | | |
| | | | | | |
| Russia | | x | | | |
| Armenia | x | x | | x | |
| Georgia | x | | | x | |
| Ukraine | x | x | x | x | x |
| Moldova | | x | | | |

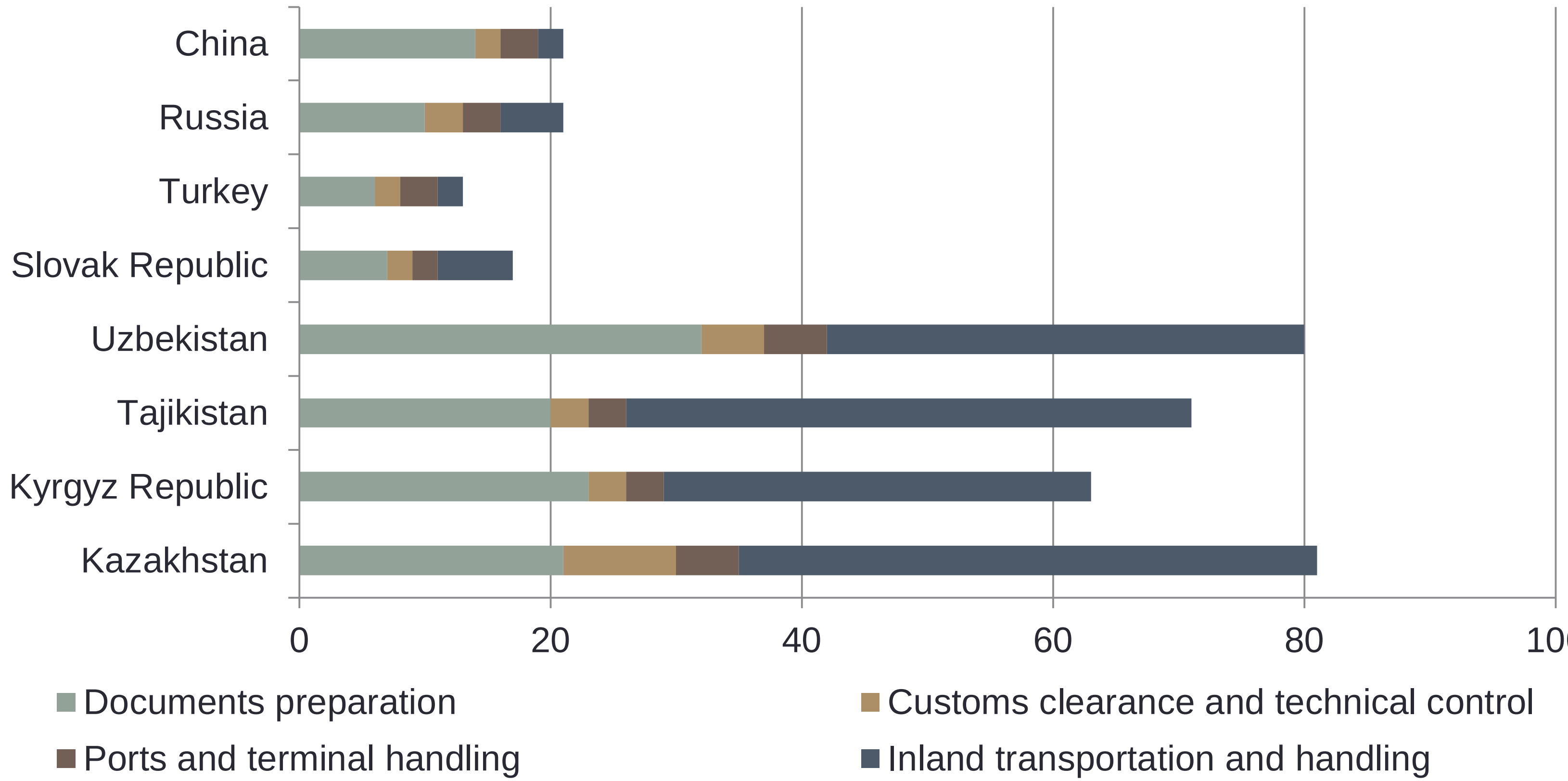
# Trade facilitation

- High transport costs and long and unpredictable transport times for international shipments to and from the regional countries.

| | KAZ | KGZ | TJK | UZB | ECA | OECD |
|---|---|---|---|---|---|---|
| **Documents to export** | 9 | 8 | 11 | 13 | 7 | 4 |
| **Time to export** | 81 | 63 | 71 | 80 | 26 | 10 |
| **Cost of export procedures** | 4,685 | 4,160 | 8,450 | 4,585 | 2,134 | 1,028 |
| | | | | | | |
| **Documents to import** | 12 | 10 | 11 | 14 | 8 | 5 |
| **Time to import** | 69 | 75 | 72 | 99 | 29 | 11 |
| **Cost of import procedures** | 4,665 | 4,700 | 9,800 | 4,750 | 2,349 | 1,080 |

# Being landlocked matters, so do rules

Composition of time to export



# And institutions (private and public)

Logistics Performance Index - LPI

| | KAZ | UZB | KGZ | TKM | TJK |
|---|---|---|---|---|---|
| LPI rank | 86 | 117 | 130 | 114 | 131 |
| Customs | 73 | 118 | 84 | 119 | 147 |
| Infrastructure | 79 | 120 | 90 | 101 | 138 |
| Int'l shipments | 92 | 127 | 147 | 137 | 135 |
| Logistics competence | 74 | 117 | 129 | 111 | 130 |
| Tracking and tracing | 70 | 105 | 132 | 126 | 143 |
| Timeliness | 132 | 101 | 135 | 65 | 146 |

# Formalizing informal trade

- Relative costs still provide “incentives” for informal trade:
  - Trade taxes for “cross-border” trade are still lower compared to regular rates in some countries;
  - Similarly, overall transport costs are lower as borders remain permeable.
- Still, sizable flows:
  - Kazakhstan – directly from China and via Kyrgyz Republic
  - Uzbekistan – via Kyrgyz Republic
- Presentation to CAREC given in 2012 lays the elements of a potential strategy for the informal trade

# The agenda ahead?

- How should the trade environment evolve?
  - What role for WTO?
  - How to deepen relations with emerging markets?
- Is it time to be bold?
  - Expand coverage …
  - Approach NTMs from a regional perspective …
  - Reinvigorate trade facilitation …
  - Introduce good international practice …
- How can the World Bank best support this process

# THANK YOU!