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CHALLENGES AHEAD FOR TRADE PROMOTION ORGANIZATIONS IN AFRICA*

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Summary

This study provides an anatomy of the activities of Trade Promotion Organizations (TPOs) in Sub-Saharan Africa, mostly LDCs. Both opportunities and challenges facing TPOs were identified by using a quantitative survey administered online and a structured questionnaire used during phone interviews. The study relied on ITCs' TPO Network and contacts through FERDI and IGC. Of the 40 online invitations, 12 were filled out and of the 20 invitations for phone interviews, 6 were obtained. Almost all answers were from TPOs not covered in previous evaluations. Data from the online survey were compared with results from previous surveys mostly outside SSA. TPOs in SSA are young, relative to those elsewhere (half were started after 2007) and relatively small (average of 25 employees). Strategic objectives from 88 TPOs previously evaluated are systematically compared. ... / ...

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Summary

... / ... Comparisons with the data gathered for this study reveal a higher elasticity of budget size to employee for SSA than elsewhere probably suggesting greater diversification into new supporting activities in SSA than elsewhere.

The study summarizes the challenges and opportunities in each area of operation gathered from the phone interviews (see table 7). The phone interviews revealed that successes were concentrated in the agricultural activities. Word-cloud analysis uncovered convergence of themes (market access, audit, performance). Two challenges facing TPOs in the future are issues relating to the use of the internet and helping firms integrate into value chains (regional or global).

List of Abbreviations

AGOA	African Growth and Opportunity Act
EBA	Everything but Arms
EPA	Export Promotion Agency
EU	European Union
GVC	Global Value Chain
FERDI	Fondation pour les études et recherches sur le développement International
GSP	Generalized System of Preferences
IMF	International Monetary Fund
IGC	International Growth Center
ITC	International Trade Centre
LDC	Least-Developed country (UN classification)
LIC	Low-income country (WB classification)
SSA	Sub-Saharan Africa
TPO	Trade Promotion Organizations
WB	World Bank
WTO	World Trade Organization

Contents

1. Introduction and Overview	4
2. Trade Promotion Organizations: What Have We Learnt?.....	8
2.1. Literature review: export promotion and export growth	8
2.2. Data analysis: Evidence from the World Bank and ITC Surveys	10
3. Methodology to Assess the Challenges ahead for Trade Promotion Organization	14
4. Discussion of Results	15
5. Conclusions.....	23
References	25
Annex 1: Quantitative Questionnaire.....	26
Annex 2: Structured Questionnaire for Phone Interviews	31
Annex 3: Summary of anonymized responses to the structured questionnaire	33
3.1. Background on Export Promotion	33
3.2. Strategic Objectives.....	40
3.3. Coordination	43
3.4. Impact evaluation.....	45

1. Introduction and Overview

The trade landscape has evolved dramatically in the past two decades. Trade, transport and communication costs have plummeted. On the one hand, the process of digitalization has disrupted the established ways of doing business. Most studies point out that the main gain for exporters has been a reduction of search costs, facilitating the matching with potential customers around the world.¹ On the other hand, more than two-thirds of today's trade is in part and components because decreasing trade and communication costs have encouraged the growth of Global Value Chains (GVCs).

Trade Promotion Organizations (TPOs) have been around for a long time for developed and developing countries. In early work appraising their performance (Rhee, Pursell and Ross-Larson, 1984), they were viewed as an important ingredient in the successful export-led growth experience of East Asian countries. They were also viewed as an important ingredient of the 'hands-on' success of the 8 East Asian countries reviewed in the celebrated East Asian Miracle (1993) World Bank report. On the other hand, the performance of TPOs was appraised to be dismal in most non-East Asian countries reviewed by Hogan, Keesing and Singer (1991).

In the more recent reviews, the *raison d'être* of TPOs in developing countries continues to be centered around attenuating market failures (Hausmann & Rodrik, 2003; Cagé & Rouzet, 2015).² These include the market failures coming from coordination costs, asymmetric information, and the risks thereof (see next section for a brief survey of the state of knowledge). So in today's world in an ideal scenario, TPOs help firms get discovered, promote the role of learning by exporting, provide technical assistance and leverage capacity building for firms which are at the stage of maximum unrealized potential.

To date, the core of information on TPOs' practices comes from surveys in samples that barely cover least developed countries (LDCs) and low-income countries (LICs). In the most recent and exhaustive appraisal with 94 countries commissioned by the ITC (Olarreaga et al., 2017), there are only 12 low-income countries. In addition, the surveys have been entirely quantitative, which is valuable because it provides objective quantitative indicators. But only a limited amount of information can be gathered in such quantitative surveys that do not provide information on how these TPOs actually operate.³ These survey-based evaluations cannot inform adequately on the current and upcoming challenges for firms whose ways of doing business are disrupted by the turbulent changes in the global trade policy landscape mentioned above, i.e. the process of digitalization, growing participation in global value chains and the automation of manufacturing.⁴

¹ Jack Ma, founder and executive chairman of Alibaba Group, mentioned in a recent interview that while Alibaba did not intend to enter the US market to compete with Amazon, some of the activities of the conglomerate was to promote Chinese firms' exports to the US.

² As discussed in Belloc & Di Maio (2011), export promotion policies include, among others, export subsidies, export processing zones, trade finance regulation and export promotion organizations.

³ There are only 12 low-income countries in the unbalanced panel covered by Olarreaga et al (2016).

⁴ The automation of manufacturing and the new capital-intensive production paradigms are a result of a combination of new technologies, including 3-D printing, robotics, Internet of things characterizing Manufacturing 4.0)

What then is the role (if any?) of TPOs in this new environment? Have TPOs in SSA evolved to the new trade context of the 21st century? Are there new best practices? Do developing and least developed countries stand to gain from imitating trade promotion institutions from the developed world or should they follow their own path? These are some questions about which we know little and the paper will attempt to deal with.

Answering these questions will inform policy-makers in at least three areas. First, manufacturing-led development, which has been historically desirable as a means to diversify the economy, to provide quality jobs with high wages, might be starting to lose some of its relevance because of the early peaking of the manufacturing share in GDP across SSA and the servicification of the economy (Hallward-Driemeier & Nayyar, 2017).⁵ There is a need to understand how TPOs are dealing with these changes that are paramount to address the challenge of creating jobs for the rapidly growing labor force across SSA.

Second, by facilitating the matching between exporters and importers, the internet has lowered the costs of acquiring information about foreign markets. Today's giant e-retailers are consolidating as oligopolistic actors. In their quest to fully exploit the returns to network usage of their platforms, they include more and more domestic producers in their own supply to make the marketplace more appealing to consumers. The result is that many purely domestic firms are able to serve global markets through these non-traditional export channels.⁶ But to what extent has this taken place in Low-income (LICs) and Least-Developed Countries (LDCs)? How are trade promotion organizations contributing to, and/or adapting to, this trend?

Third, the world lives in a challenging trade policy environment with rising regionalisms and growing criticism by some developed nations on the multilateral trading system. In light of recent developments, TPOs might gain to deepen their regional ties and provide visibility and policy advocacy in a joint effort. The study informs on the state and value of such cooperation initiatives.

⁵ Rodrik (2015) and Cadot et al. (2016) document the early peaking of the manufacturing share in GDP in SSA which is occurring at much lower per capita GDP levels than was the case for Asian countries.

⁶ Lendle et al. (2015) show how online markets help match buyers and sellers far apart through a reduction in search costs. They estimate that the effect of distance on international trade flows is 65 percent smaller on eBay than on offline markets. This implies that transactions that would have never taken place in offline markets because buyers and sellers were too far apart are made possible in online markets. Interestingly the distance-reduction effect of online platforms is stronger where most needed. Indeed, the reduction is larger in low-income countries that import differentiated goods (with more information requirements), when trading partners speak a different language, and when corruption, income inequality and uncertainty avoidance are high in the importing country.

Figure 1 Triangulation



Source: Authors' elaboration.

The paper uses methodological triangulation to study Trade Promotion Organizations in Africa (illustrated in figure 1).⁷ The method relies on a combination of data gathering tools to provide a unified answer to a complex problem. In our case, the two elements that shed light on the current TPO landscape are a quantitative survey and a structured questionnaire. The quantitative survey, which consists of 14 questions, provides relevant statistical information that allows a comparison of the state of TPOs in Africa with those in the rest of the World. The structured questionnaire is a qualitative tool used in phone interviews with CEOs of TPOs to direct the flow of questions raised during the interview. These include: (i) detecting the perceptions of TPOs on the problems firms face at the time of exporting; (ii) the ease of meeting standards; (iii) the role of the digital economy; (iv) the extent and role of regional cooperation projects that TPOs are undertaking in Africa.

Coupled with a thorough review of the literature, the study identifies three sets of challenges for TPOs in Africa that are summarized in the three challenges identified in Table 1.

- Environmental challenges are those faced by the domestic and international macroeconomic situation of the country. Such issues cannot be solved within firms but it constrains their development and actions. These are challenges that firms cannot solve individually.
- Firm-specific challenges pertain to technical assistance in the absence of key firm-specific capabilities.
- Institutional challenges are generated by the lack or malfunction of domestic and international governance frameworks. Such type of challenges not only constrain the environment in which

⁷ The triangulation comes from gathering data using both quantitative and qualitative methods and comparing results. The paper uses a standard quantitative survey complemented by a structured questionnaire.

firms operate but also raises administrative costs and generates uncertainty on what can or cannot be carried out by the firm.

In the study, we argue that there is a role for TPOs in each of the three areas, and document that while some intervene in one area, not all TPOs are covering all challenges identified in table 1.

Table 1 Challenges and Opportunities facing TPOs

Challenges	Examples	Opportunities for TPOs
Environmental	Power outages, shipping costs, missing linkages between financial structures and firms. Competition with foreign firms. Delays in customs.	Aggregation of economic actors, organization of meetings between partners in export supply chains
Firm-specific	Lack of knowledge on foreign markets, capacity to meet demand, access to new technologies, access to capital and finance.	Creation of web-based market platforms, publication and dissemination of market research, partnerships with foreign firms willing to provide capital investments. Focus on GVCs.
Institutional	Missing export grants, lack of certification bodies and scientific laboratories, missing services, lack of regional cooperation. Overly complicated rules of origin.	Dialogue with partners in the regional economic community, visibility in international events, supply of new export promotion services, size and organization of the agency. Partnership with e-retailers and search engines

Source: Authors' elaboration.

The remainder of the study is structured as follows. Section 2 surveys the academic evidence on the role of export promotion, including a detailed presentation of the ITC database on TPOs. Section 3 presents the methodology used for our analysis. Section 4 offers the insights, in terms of challenges and opportunities that we evaluated for TPOs in Africa using both the quantitative and qualitative surveys. Section 5 concludes. Three annexes complete the study. Annexes 1 and 2 give the details of the quantitative questionnaire and the structured questionnaire followed during the phone interviews. Anonymized summaries organized by themes (strategic objectives, coordination, impact evaluation) covered during the interviews are summarized in annex 3.

2. Trade Promotion Organizations: What Have We Learnt?

2.1. Literature review: export promotion and export growth

International trade is the network of buyers and sellers that are matched to each other (Rauch, 1999). The services of TPOs are built upon information networks about foreign markets where the matching between sellers and buyers has always been a primary concern. Access to TPOs' services might allow incumbent firms to export more, new exporters to survive longer and purely domestic firms to start exporting. Thus, TPOs would help firms overcome fixed and variable costs of exporting, while at the same time reducing search costs and information asymmetry. Their role appears to be particularly important in a development context. As mentioned in the introduction, early studies were critical of TPOs in their objective to increase manufacturing exports (Hogan, Keesing, & Singer, 1991).

Hausmann & Rodrik (2003) criticize what might be called this neo-classical view of economic development seen as access to foreign technology and good institutions. They view development as a period when countries need to discover what they are good at producing. In that context, the *laissez-*

faire equilibrium would be unlikely to produce the first-best outcome because there is too little investment in modern high-productivity sectors. The problem would be particularly exacerbated when technology is easily emulated so entrepreneurs cannot be sure to capture the full rent of their investment, resulting in an under-investment in technology.

Cagé & Rouzet (2015) make a similar point, but they analyze the consequences of information asymmetry when buyers cannot observe the quality of the product before purchase. In their model, exports have an inherent reputation based on the average quality exported by the country of origin. In this case, a variety of high-quality producing firms may not be discovered because they are perceived as having the same reputation as the average quality of their country of origin. Government intervention can then help high-quality firms get discovered. In their model, this outcome is reached by a subsidy that replicates the perfect information outcome.

On the empirical front, several papers have attempted to quantify the impact of TPOs along several margins of trade using firm-level data. Lederman, Olarreaga, & Zavala (2016), using data for firms in selected Latin-American countries, show that export promotion helps non-exporter firms enter foreign markets and increases their prospects for survival with little effect on the intensive margin of exporters. The result is close to Volpe Martincus & Carballo's (2008) analysis of Peruvian firms. In that context, most gains from export promotion were along the extensive margin of trade, i.e. in new entrants in the market for exports. Similarly, Broocks & Van Biesebroeck, (2017) find that export promotion helped Belgian firms to start exporting outside the European Union. However, there are doubts about the long-run effects of these export promotion policies. Cadot, Fernandes, Gourdon, & Mattoo (2015) show that the gains associated with interventions are large in the short-run but that they do not last.

At the aggregate level, the picture is less clear. Using a World Bank survey on 103 TPOs' budgets, Lederman, Olarreaga, & Payton (2010) find that there is an impact of export promotion at the aggregate level of a country's exports. However, they show that there are decreasing returns to the budget, so the efficacy of the policy is greatest for small initiatives. In an effort to go beyond the average effects of export promotion, Volpe Martincus & Carballo (2010) show that the distributional effects of the export promotion policies depends on firm size: they find that small and medium size firms appear to experience higher returns to TPOs' programs.

Olarreaga et al. (2016) extend the study of Lederman et al. (2010) to cover East European countries. They estimate that a 1 percent increase in export promotion budget raises export by 0.074 percent in a sample that has few low-income countries. These preliminary results would suggest that for programs to be visible and generate externalities, they should probably be targeted to large established exporters even if these may be the firms which may least need assistance. These exploratory results call for a better understanding of the tradeoff between helping firms' needs and maximizing spillovers from TPO programs.

2.2. Data analysis: Evidence from the World Bank and ITC Surveys

The information available on TPOs is limited. To date, the only database that allows for clear-cut cross-country comparisons of TPOs is the one introduced by Lederman, Olarreaga, & Payton (2010) and subsequently expanded by Olarreaga, Sperlich and Traschel (2017). The databases were built following 3 survey rounds, the first 2 waves were carried out by the World Bank, while the third one was carried out by ITC. The questionnaire had a comprehensive country coverage in the first 2 waves while the 3rd wave only covers TPOs from European countries. These differences in coverage and countries makes it difficult to extract stylized facts from their study but it is useful to summarize the coverage and main patterns.

Lederman, Olarreaga, & Payton (2010) present summary statistics concerning the key areas dealt in their questionnaire. Here we report stylized facts for exposition purposes. As described by them, the survey covers export promotion in the context of 5 core activities:

- (i) Country image building
- (ii) Export support services
- (iii) Marketing
- (iv) Market research and publications
- (v) Policy advocacy

The most common first strategic objective named by TPOs in 2010 was to increase export across all sectors and destinations (69% ranked it as most important objective, see Table 2). This objective, together with attracting investment from multinationals (29%) and promoting SMEs (32%) was ranked as the most frequent primary interests of TPOs.

Table 2 Strategic Objectives of Trade Promotion Agencies

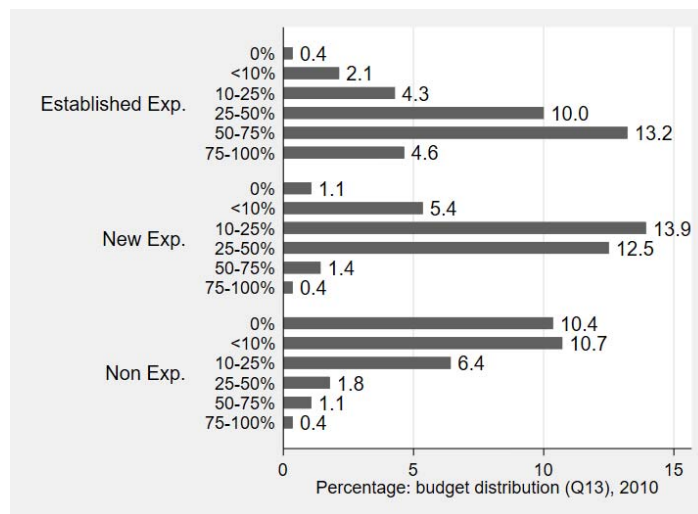
Strategic Objective	Most frequent rank	Frequency
Increase exports across all sectors and destinations	1st	69%
Diversify by encouraging new exports	2nd	25%
Diversify by encouraging new destinations	2nd	29%
Encourage development of industry clusters	6th	25%
Enter Global Supply Chains	4th	24%
Support exports and competitiveness of SMEs	1st	32%
Attract investment by export-oriented multinationals	1st	29%

Source: Olarreaga, Sperlich and Traschel (2017).

Note: The table includes the answer to the question on strategic objectives of the 2010 round of the survey. The choice of the round was dictated by the availability of LDC countries. The question asked to the organization specialist was to rank from 1st to 8th the strategic objectives of the agency. We excluded the “other” category for exposition purposes.

As discussed by Lederman, Olarreaga, & Payton (2010), the typical clients of TPOs are either established exporters or new exporters. In 2010, 17.8% of TPOs answered that between 50% and 100 % of the agencies budget goes to established exporters. The same share of the budget only goes to new exporters in 1.8% of TPOs. The mode value of non-exporters' agency budget share is 10%. The typical clients of TPOs are either small or medium firms (Figure 3). The lion's share of the budget goes towards small and medium firms.

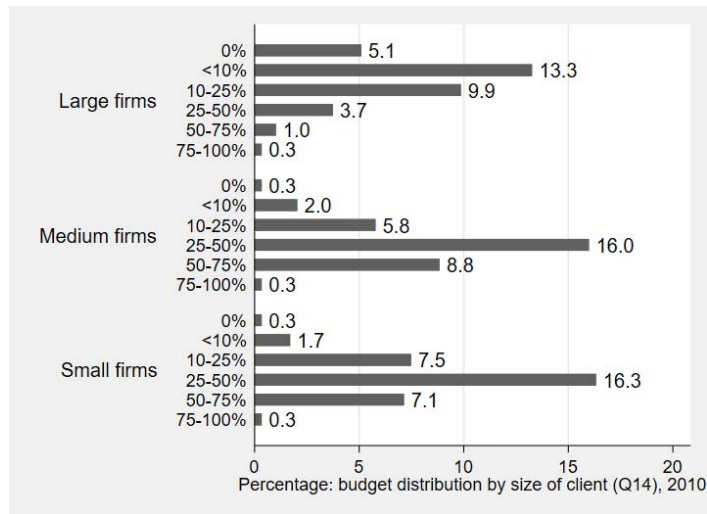
Figure 2 Client Type and Budget Allocation



Source: Olarreaga, Sperlich and Traschel (2017).

Note: The table includes the answer to the question in the 2010 round of the survey as it is the round which covers Least Developed Countries. The length of the bars represents how often the answer in the vertical axis was given. The longest bar for each of the three categories represents the mode which is the most frequent answer to the question.

Figure 3 Client Size and Budget Allocation

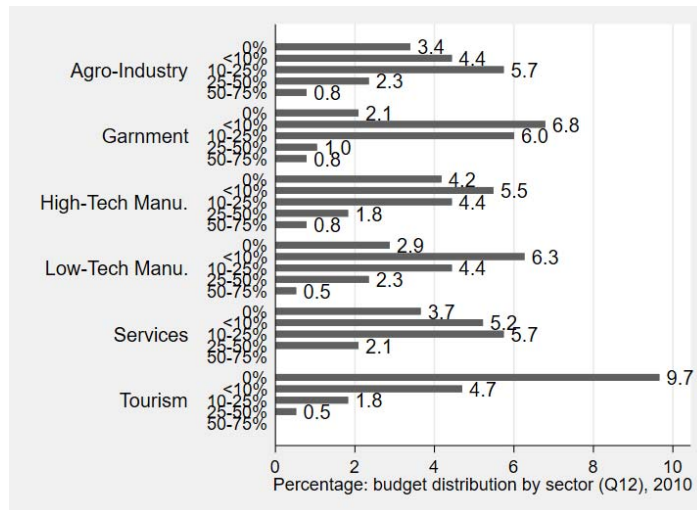


Source: Olarreaga, Sperlich and Traschel (2017).

Note: The table includes the answer to the question in the 2010 round of the survey as it is the round which covers Least Developed Countries. The length of the bars represents how often the answer in the vertical axis was given. The longest bar for each of the three categories represents the mode which is the most frequent answer to the question.

Besides firm size and type of client, it is also important to know the sectoral composition of TPOs efforts. Indeed, the survey provides some key insights on the sectors that are the main focus of TPOs (Figure 4).

Figure 4 Budget Distribution Across Sectors



Source: Olarreaga, Sperlich and Traschel (2017).

Note: The table includes the answer to the question in the 2010 round of the survey as it is the round which covers Least Developed Countries. The length of the bars represents how often the answer in the vertical axis was given. The longest bar for each of the six categories represents the mode which is the most frequent answer to the question.

While agencies have clear strategic objectives, they are often subject to performance indicators. The survey provides key insights on the key performance indicators that managers of TPOs track (Table 3). Not surprisingly, the value of exports comes most often first, together with client satisfaction.

Table 3 Key Performance Indicators

	Mode value	Frequency
Value of Exports	1 st	53%
Number of Exporters	2 nd	28%
Number of Clients	2 nd	25%
Client Satisfaction	1 st	30%
Other	Not important	37%

Source: Olarreaga, Sperlich and Traschel (2017).

Note: The table calculates the most common ranking given to the key performance indicators. The survey asked to rank the objectives from 1st to 5th but allowing for ties.

As expected, the key performance indicators of TPOs are often related. When queried about the most important indicators for their own performance, value of exports is often placed at a level similar to the number of exporters but unrelated with the rank of the number of clients and the number of exporters. Customer satisfaction is in turn positively linked with the number of clients with a weaker relationship with the number of exporters (Table 4).

Table 4 Relationship between Performance Indicators

	Value of Exports	Number of Exporters	Number of Clients	Clients' satisfaction
Value of Exports	1			
Number of Exporters	0.28	1		
Number of Clients	not significant	0.32	1	
Clients' satisfaction	-0.05	0.23	0.45	1

Source: Olarreaga, Sperlich and Traschel (2017).

Note: The table calculates the Spearman rank correlation between the rank of the objectives given by Trade Promotion Organizations in the questionnaire. A positive number indicates that the two objectives tend to be associated at similar levels of importance. A negative number indicates that the objectives are at the antipodes.

3. Methodology to Assess the Challenges ahead for Trade Promotion Organization

To identify the challenges for TPOs in SSA, we use triangulation using two instruments: a quantitative survey and a structured questionnaire. For the structured questionnaire, we sent a first wave of invitations to 50 TPOs (from the email database of ITC) across SSA using the SurveyMonkey platform.

The questions were inspired by the work done by the WB and ITC surveys on TPOs discussed earlier and showcased in Olarreaga et al (2016). Annex 1 lists the 15 questions of the survey. We obtained a response rate of 20 % after sending four waves of reminders and, often following through with personal follow ups. In total, 14 responses were gathered of which 2 contained missing values. Thus, the quantitative sample includes 12 observations, most of which have never been covered in precedent surveys.

To complement the study, the second instrument was a series of qualitative interviews. To that effect we sent personalized invitations to CEOs from TPOs in SSA. From a total of 20 invitations we managed to obtain 7 interviews.

The goal was to go beyond a purely statistical exercise and to focus on the TPOs' actual operational experiences. To that effect, we structured a conversation following 4 main themes:

- (i) Background on the agency: Taxonomy of the clients, export support services, early history.
- (ii) Strategic objectives in the new economy: attitude towards online services, work on global value chains.
- (iii) Regional cooperation: including joint regional initiatives, use and promotion of standards and certificates of origin.
- (iv) Impact evaluation: auditing mechanisms and performance evaluation.

The complete structured questionnaire is outlined in Annex 2. The participating parties, which remain anonymous for confidentiality reasons, answered to the open-ended structured questionnaire without any time restrictions, although we suggested in the invitation that they might need to allocate at least 45 minutes of their time to complete the interview. In fact, the interviews lasted on average less than an hour. Building on their answers, we compiled a list of topics to draw on their experience and identify common issues brought up by several interviewees. These three topics (strategic objectives, coordination, impact evaluation) are regrouped in Annex 3. The benefit of the qualitative approach is to get a handle on topics that either were irrelevant (or left out) when the previous surveys were carried out or were not amenable to collection via a statistical framework.

4. Discussion of Results

The first finding from the 12 observations in our quantitative survey is that TPOs in Africa are relatively young. The average year of entry into operations of the modern incarnations of the agencies is 2003, with half of them being conceived after 2007 (Table 5). Thus, TPOs are at an early step of their functional development but can already look back at more than ten years of experience promoting exports. In terms of personnel, TPO are smaller than in other regions of the World. The average number of employees is 25, with at least one agency having half as many. The relatively small size of TPOs suggests two observations. First, TPOs tend to specialize their supply of services towards well defined services.

Second, resources are potentially under pressure to meet domestic demand for export promotion. This observation is linked with some of the insights gathered in the interviews. TPOs focus their tasks in the most scalable activities and, as far as the interviewed sample of countries in SSA is concerned, they work less with both large firms and non-exporters. This implies that it appears that the core of the work is with the established exporters, and the SMEs. Even though there is variability, we elicit a clear pattern of small agencies with few exceptions for the 12 observations for which we have the data.

Table 5 Summary statistics

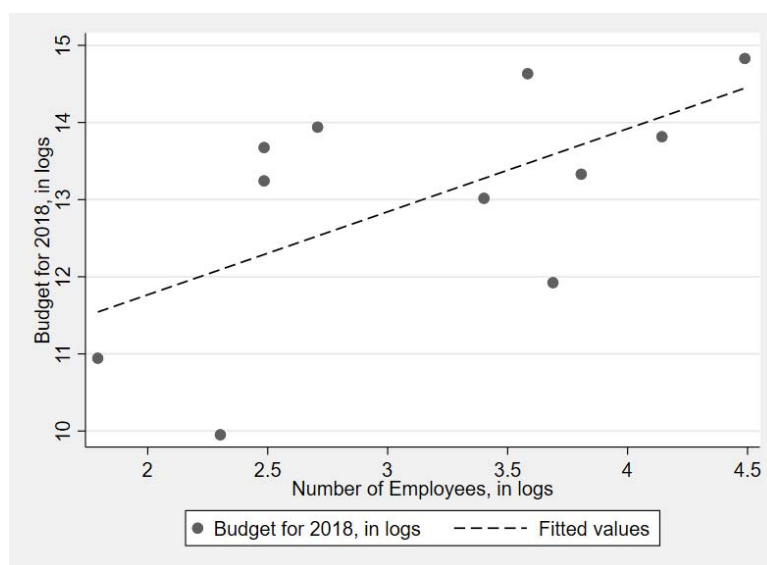
	Year of Inception	Number of Employees	Budget USD
Average	2003	32	0.9 million
Median	2007	28	0.6 million
Standard deviation	11 years	25	0.8 million

Source: Authors' calculations based on a survey of TPOs in Africa, sample of 12 observations.

Concerning the budgets, there is great variability, once again. However, the relationship between the growth rate of budgets and size appears to be close to proportional. On average as TPO grow in size (captured by the number of employees), their budget increases proportionally. According to our estimation (see Figure 5), the elasticity of budgets with respect to the number of employees is of 1.1%. This result might suggest that, in Africa, TPOs are still expanding their budget to increase their supply in their core activities.⁸

⁸ The implicit assumption is that if a TPO ventures in new activities and hence in more complex tasks, the budget should start growing more than proportionally for each additional employee (unless employees for more complex tasks are paid higher salaries than incumbent employees).

Figure 5: TPO budgets versus number of employees in Africa

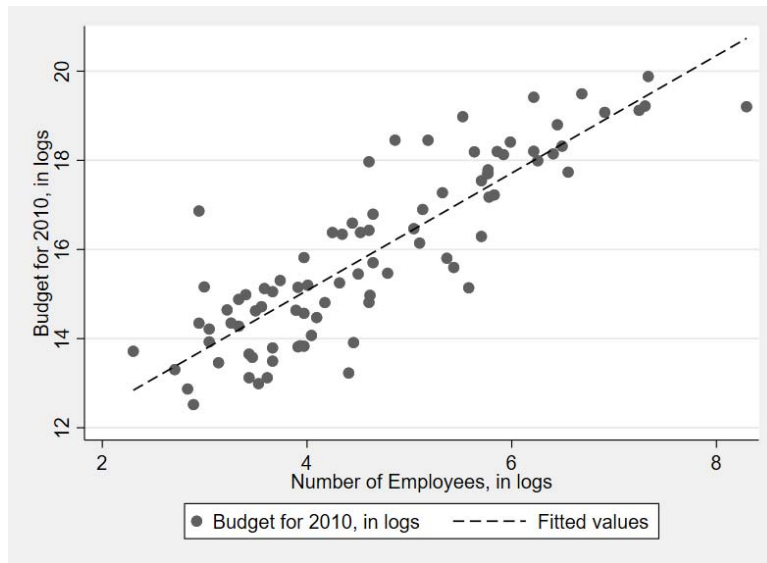


Source: Authors' calculations based on a quantitative survey.

Note: Budgets in USD The slope of the regression line is 1.1, indicating a 1.1 % increase in budget as the number of employees increases by 1%.

How does this (small-sample) pattern compare with the same information from other countries? Do African TPO budgets grow--relative to the number of employees--at the same pace as TPOs in other regions? Figure 6 shows that for a sample of 88 countries surveyed by the WB, the elasticity of budgets with respect to the number of employees was 1.4%, with an average budget of 4.2 million USD and an average number of employees equal to 269 (see Table 6 for details). The higher slope of 1.4 % (Figure 6), shows that the budget increases more that proportionally with the number of employees, suggesting the inclusion of new and more sophisticated activities. So this small sample suggests less diversification into new activities for SSA TPOs relative to those elsewhere. The two slopes are compared in Figure 7.

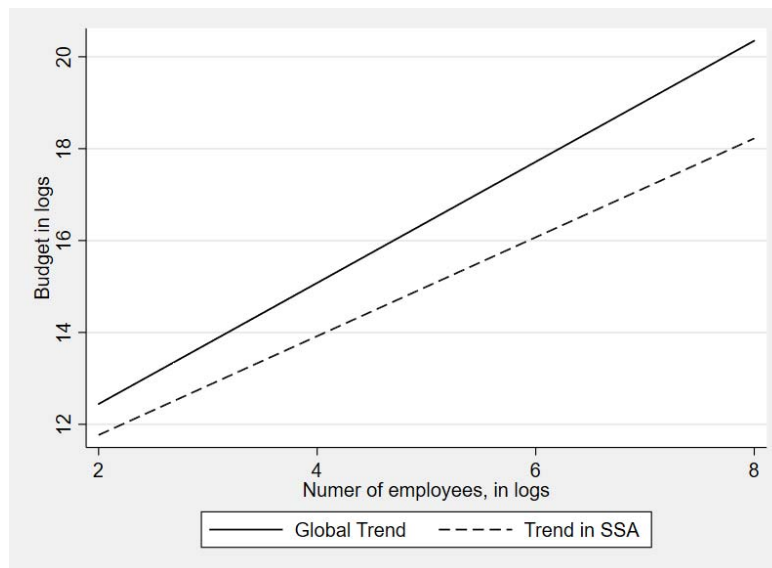
Figure 6: TPO budgets versus number of employees in rest of the world, 2010



Source: Authors' calculations based on a quantitative survey from the World Bank (Lederman et Al. 2016).

Note: Cross section for 2010. Budgets in USD The slope of the regression line is 1.4, indicating a 1.4 % increase in budget as the number of employees increases by 1%.

Figure 7 Comparison between the Global Trend and the Trend in SSA



Source: Data from figures 5 and 6 above.

Note: The graph shows fitted values.

Table 6 Budget and number of employees, rest of the world statistics

	Year of Inception	Number of Employees	Budget (USD)
Average	1988	269	4.2 million
Median	1997	88	5.5 million
Standard deviation	21 years	510	7 million

Source: Authors' calculations based on a quantitative survey from the World Bank (Lederman et Al. 2016).

Note: We take into account only the year 2010.

TPOs in Africa are also younger (2003 in Table 5 compared with 1988 in Table 6), a fact that was also stated during our structured interviews. They are often the offspring of older organizations that were either closed or merged with other government departments. Sometimes the IMF or the WB (see subject 6) vouched for reducing personnel during restructuring programs. Often the TPOs were born to fill a task for which no other actor was suitable.

From the structured questionnaires, we can identify the themes and problems that TPOs have pointed out as the most important. Word-clouds are a useful tool for identifying both the themes covered and those ignored. In spite of having several questions on e-commerce and global value chains, none of the TPOs indicated a core of activities centered on these two topics. The word-cloud analysis of subjects in Figure 8 shows a convergence of themes. The themes range from Market access, to genuine concerns about their performance (audit, performance). Some TPOs appear to be more focused on market intelligence while others always put the firms at the core of their answers.

Online markets and the active pursuit of e-commerce platforms for export promotion appear only rarely in the answers and this is a point where TPOs appear to be lacking capabilities. Only 2 of the interviewed TPOs declared and outlined a clear e-commerce strategy. However, both TPOs declared that the projects were at their first steps. The role of the digital tools is mostly confined for communication and dissemination of information. One of the problems for the development of e-commerce might be the limited development of light logistics companies such as postal services and DHL (see Subject 5 in Annex 3).

While most LDCs benefit from favorable tariff schemes such as Everything but Arms (EBA), and the African Growth and Opportunity Act (AGOA), LDCs are particularly concerned by exporting capabilities because the relative export revenue can be higher when entering markets such as the United States and the European Union. However, a common concern is that some of the standards to enter those markets are particularly stringent. For small firms with limited capacity, many TPOs argue that the standards are very difficult to meet. The topic has been pointed by each of the interviewees (see Annex 3 for details). Programs like the Centre for the Promotion of Imports should work heavily on the ease of adopting technical and sanitary requirements.

Among the most important barriers, TPOs tend to appeal to environmental, firm-specific and institutional factors. One of the most common environmental themes was shipping costs which are considered to be high. Customs procedures are also perceived as cumbersome and many TPOs feel that barriers to trade are very high even between regional partners (Subject 1, Annex 3).

At the firm-level we see the lack of market information, the difficulty to satisfy high demand levels, and meeting packaging/technical and sanitary standards. Most TPOs provide market information but cannot really help firms reach higher capacity levels without investment. To that effect, a common strategy has been to target niche markets where supply constraints are lower.

Institutional barriers are also important for the topic of certification which falls often outside the duties of the TPO. One possibility could be to ease the relationship between TPOs and certification bodies with a direct administrative link between them. The second most listed concern is the access to finance and financial structures willing to assist new exporters. Because of these challenges, we often find that TPOs concentrate their efforts on already established exporters seeking to consolidate their markets or accessing new ones. A more consistent financial framework for micro-firms could deal with the issue.

Under the cooperation hood, there are many projects under the way. Regional cooperation appears to be in the top of the agenda for TPOs. Joint export promotion might help to better leverage resources and rationalize the costs of organizing missions and participate to trade fairs. However, the interviews did not uncover ideas for common labeling schemes and promotion of common strategic products at the regional level.

Most success stories belong to firms in the Agro-Industrial sector. Here there appear to be two main paradigms. First is the realization of deals for large volumes. Second is the promotion of a niche for product that is not well known and for which there is a lot of value added. Given the factor endowments of the continent, the strategy appears to be sound, especially as the future of manufacturing-led development is uncertain. As pointed out by Hallward-Driemeier & Nayyar (2017), manufacturing-led development, which traditionally has been thought of as delivering productivity gains and job creation for unskilled labor, is under threat. The old paradigm relied on the international market to achieve economies of scale and benefit from a thriving global demand. Today we witness a slowdown of trade, Global Value Chains are concentrated among a small club of countries and in developed countries the rise of robotics has made many manufacturing labor-saving activities going against the comparative

advantage in unskilled labor tasks in some countries. The rise of automation implies that former labor-intensive production processes are now being changed to capital-intensive activities.

In sum, the TPOs are faced with challenges in their ways of doing business. From our survey and interviews, table 7 identifies challenges and opportunities in each of the areas of operations that are key to TPOs.

Table 7 Summary of Messages from Structured Interviews

Area	Challenge	Opportunity
Country image building	Young TPOs on average, lack of international network.	Strong regional presence and joint export promotion programs on the way. Leverage informal migration networks
Export support services	Advent of digital technologies not fully exploited, few programs active in manufacturing, mandatory and voluntary standards, persistently high shipping costs and border delays.	Leverage of web-interfaces to sell abroad and to find export-oriented local firms.
Marketing	Advent of digital technologies, role of intermediate goods	Migration informal networks, collaboration with online retailers, active use of social media.
Market research and publications	Complicated supply and global value chains.	Creation of web-based marketplaces, ease of diffusing communication, using search engines to identify local supply capabilities. Specialization in niche products.
Policy advocacy	Trade policy multilateral landscape, lack of participation in Global Value Chains, border delays.	Regional level opportunities, promotion of voluntary standards and common labeling strategies.

Source: Authors' elaboration based on structured interviews.

5. Conclusions

Drawing on a quantitative questionnaire buttressed by phone interviews, this study proposes an anatomy of the state of TPOs in a small number of countries in SSA. It bridges a gap between earlier studies that have paid less attention to the trade promotion landscape in Africa. We document that African TPOs tend to be smaller, both in terms of personnel and budget, compared with the average statistics of the Lederman et al. (2016) database that included mostly Latin America countries. Two other two statistics shed light on the anatomy of the TPOs covered in the study. First, they are relatively young institutions. Second, their resources do not yet cover the more complex tasks performed by TPOs in more developed economies. In fact, personnel and budget expand at an almost proportional rate, suggesting that TPOs are still in phase of expanding their existing capabilities.

Turning to the future, our study identifies two challenges. First, covering the issues linked with the digital economy seems to have trouble taking off. While the internet is very often used by the TPOs to communicate with their clients and counterparts abroad, the interviewed TPOs are not yet performing joint ventures with e-commerce platforms. Second, a similar lack of coverage applies to integrating GVCs in TPOs activities where two problems appeared from several structured interviews: (i) relatively

high shipping costs, and; (ii) complicated customs procedures. Even though multinationals choose African economies as investment platforms, the core of the work seems to be on upstream capabilities which by definition carry less value-added to the local economy. This is a broader issue linked to the stage of industrialization in the region. It could be the focus of future ITC activities.

The study also spotted that regional interaction with other agencies appears to be growing rapidly, as most TPOs collaborate with regional partners. In the UEMOA, an ITC project provides TPOs with a common network that can hopefully increase the effects of export promotion abroad. Regional economic communities such as the European Union have several networks which arrange missions and joint trade fairs.

Regarding the evaluation mechanisms governing the TPOs, the survey suggest a split result. Some TPOs have sophisticated auditing mechanisms and try actively to measure their relevance, while others do not have any mechanism in place. While some tasks are expensive to perform, a proper evaluation system can help to increase the efficiency and effectiveness of TPOs.

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Annex 1: Quantitative Questionnaire

Q1. How many employees work in your agency?

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Q2. What is your annual budget for the current year (2018)?

Amount	
Currency	

Q3. Among the following options, which one is the most accurate in describing the legal and/or organizational status of the agency?

Sub-unit of a ministry (if yes, specify which one)	
Autonomous or semi-autonomous agency reporting to a ministry (if yes, specify which ministry)	
Joint public-private	
Private	
Other (elaborate)	

Q4. Please rank the following mandates from 1 to 5, 1 being the most important and 5 the least important. Leave blank if you have no direct responsibilities in one of the areas.

	1st	2nd	3rd	4th	5th
Export Support and Promotion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investment Promotion (inward)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Export Financing/Insurance/Fiscal Incentives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism Promotion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify both the ranking and the responsibility)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Specify here

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Q5. Does your agency have a Board of Directors (BOD)? If yes, please specify how many members sit in the Board and its composition. Leave blank if your agency does not have a BOD.

How many members sit on the BOD?	
Of these, how many represent the private sector?	
Of these, how many are Cabinet-level public officials?	
Which Ministries do they represent?	

Q6. Rank the following strategic objectives from the most important (1st) to the least important (8th). Leave blank if the objective is not part of your strategy.

	1st	2nd	3rd	4th	5th	6th	7th	8th
To increase exports across all sectors and destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To diversify exports by encouraging new products (specify in the box at the bottom of the question)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To diversify exports by encouraging new destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To encourage the development of industry clusters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To help firms enter global supply chains	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To support exports of small and medium enterprises (SMEs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To attract investments by export-oriented multinational corporations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other not mentioned here (specify in the box at the bottom of the question)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Specify other objectives or products promoted.								
<input type="text"/>								

Q7. What was the total budget of the agency (**please specify the currency**) over the last 7 years?

Currency	
Budget 2017	
Budget 2016	
Budget 2015	
Budget 2014	
Budget 2013	
Budget 2012	
Budget 2011	

Q8. Please provide the sources of your agency's budget.

	not a source of budget	less than 10%	between 10% and 25%	between 25% and 50%	between 50% and 75%	between 75% and 100%
Public	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private sector contributions (other than fees for services)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fees charged for services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bilateral donors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Multilateral donors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify which source of budget)						
<input type="text"/>						

Q9. Please provide the percentage of the total budget that is spent on the following client typologies (consider the budget across all activities).

	not a part of budget	between 0 and 10%	between 25 and 50%	between 50 and 75%	between 75 and 100%
New or occasional exporters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Established exporters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-exporters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q10. Please provide the percentage of the total budget spent on the following client categories (Please consider the budget across all activities, and consider your definition of firm size).

	not a part of the budget	between 0 and 10%	between 10% and 25%	between 25% and 50%	between 50% and 75%	between 75% and 100%
Small firms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medium-sized firms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Large firms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please, write here your definition of small, medium and large firms

Q11. Regarding grants to exporters, please rank the following training programs from 1 to 9, 1 being the most important and 9 the least important. Leave the space blank if you do not offer grants to exporters.

	1st	2nd	3rd	4th	5th	6th	7th	8th
Finding an agent overseas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing and promotion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pricing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Packaging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transportation or logistics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Standards and certification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trade finance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dealing with customs and other governmental agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Specify here:

Q12. Do you interact with other export promotion agencies in your regional economic community (AMU, CEN-SAD, COMESA, EAC, ECCAS, ECOWAS, IGAD,SADC, etc.)?

- Yes
- No
- Other (please specify)

Q13. Do you have a common strategy for labeling products in your regional economic community (AMU, CEN-SAD, COMESA, EAC, ECCAS, ECOWAS, IGAD, SADC, etc.)?

- Yes
- No
- Other (please specify)

Q14. Are there impact measurement mechanisms in place within the organization?

- Yes
- No
- Other (please specify)

Q15. What are the key performance indicators (KPIs) of your agency? Please rank the following KPIs from 1 to 5 in order of their importance, 1 being the most important and 5 the least important. Leave the spaces blank if there are no KPIs.

	1st	2nd	3rd	4rd	5th
Number of new exporters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value of exports (value of new deals)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of clients (either that managed to export or not)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Client satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (specify in the box below)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Specify your KPI

Annex 2: Structured Questionnaire for Phone Interviews

1. Background on Export Promotion

Q1.1: What are the main formal and informal channels of export promotion in your country?

Through: (export promotion agencies; sectoral associations; online retailers)

Q1.2: Please describe us your typical client. *(Small firms, medium-sized firms, new exporters, established exporters)*

Q1.3: Which are the biggest obstacles that exporters face in your country? Rank the top three *(financial constraints, compliance with international standards, knowledge of foreign markets, logistic constraints, enforcement of contracts)*

Q1.4: What have been the major changes in your way operating in the last 10 years? *(reform of the trade promotion agency, adoption of new technologies by local firms, change of trade/political landscape, connectivity of the clients, new types of clients)*

Q1.5: Please give us three success stories of firms you have recently helped. *Why do you think those firms were successful?*

Q1.6: How do the services you provide differ when working with small and large firms? *(How, in what scale, more customized, cheaper, more expensive, scalable)*

2. Strategic Objectives

Q2.1: What role, if any, plays the digital economy in attaining your strategic objectives? *(interaction with e-retailers in your country, interaction with e-retailers abroad, online communication, online services for costumers)*

Q2.2: Do you have a relationship with the large e-retailers (such as Jumia, Amazon, Ebay) in your country or abroad? If yes, what kind of firms do you put in touch with the e-retailers?

Q2.3: Do you provide technical assistance for firms wishing to use the digital marketplaces?

Q2.4: What is your strategy to help small firms participate in Global Value Chains? How does it differ from the strategy for traditional exporters? *(investment, promotion of export processing zones, collaboration with upstream or downstream suppliers)*

3. Coordination

Q3.1: How do you interact with other agencies in your regional economic community? *(Cooperation, competition, joint export promotion, joint organization of events; joint trade fairs)*

Q3.2: Do you promote the use of voluntary standards for your *exporters*? *If yes, what advantages does compliance with such standards give? (sustainability, environmental, such as FSC, fairtrade, Laos Organic, etc.)*

Q3.3: Does your country have any preferential schemes for market access in developed economies? *If yes, what services do you provide to your customers to achieve compliance?*

4. Impact evaluation

Q4.1: Is there a formal process for evaluating your agency? *If yes, how often does it take place? Who is the main monitoring body of your agency?*

Q4.2: How is the performance of your agency evaluated? *(no process, customer satisfaction, random draw of participating firms, benchmarking, please describe it)*

Annex 3: Summary of anonymized responses to the structured questionnaire

3.1. Background on Export Promotion

Subject 1: In general, we are the export promotion organization of reference. Our role is to work with existing exporters, and would-be exporters, we help them with compliance on SPS, technical regulation and international market requirements. We also give mentoring and business advisory. There are other institutions too. For example there is the food authority which tests requirements for local and external market. We help firms is to meet voluntary and mandatory standards. The ministry of justice dictates the legal framework.

Most of the time the clients are similar, the biggest challenge is access to export credit and access to machinery. There is also compliance of technical standards and packaging. In our country we cannot test the level of toxicity, we need to send it for laboratory abroad. We deal both with exporters and potential exporters, there is an enterprise department that deals with micro-firms (outside of TPO) proving mentorship. We try to link them to markets to graduate from the informal to the formal sector. We have a business development support services (6 months, after we assess the progress of the business).

In my opinion the first barrier to export one is access to finance. Second is access to equipment and machinery and the third one is market compliance. The access of machinery is linked to the access to finance. Packaging and labeling are an issue too.

For us, the problems always remain the same. We were established not long time ago.⁹ Getting access to markets and participate in international events. We have made progress on that, we have gathered the market information. The challenges in terms of access to finance, the interest rate and collateral requirements are very large.

Some international organizations provide some financial opportunities. For the technical issues, we see that Europe, ADBI, want us to meet the capacity and the requirements, we hope to overcome these challenges. There is light at the end of the tunnel. We have an information development platform that we are doing by sector, so we can build on that for creating a network of information and data sharing.

The bulk of the requests is from small businesses, they need the knowledge and they need the training. They want to know how to improve the packaging, etc.

⁹ Year omitted to preserve confidentiality.

Subject 2: We are the formal way of doing export promotion for Non-Traditional Exports. It was created more than 20 years ago under another entity¹⁰ to diversify the economy from traditional products which are natural resources. We were created to promote non-traditional exports.

From inception we have applied various tools from supply side point of view (taking stock on what production capabilities are there and providing information), arranging B2B meetings, product development, exhibitions and trade missions.

There are three types of clients. First, the established exporters, which are well prepared and who might just need information in particular markets and a little training. Second, those who are in the middle, are the firms who export between 20k USD and 1million USD, these are the majority of the companies. We provide them information directly and they show up to enter new markets. Third group, domestic firms for which we do capacity building.

There are constraints that are at the firm level and some that are at the country level.

Firm level constraints:

- Inability to reach high volumes. Most often, producers can only offer some of what the foreign demand is willing to provide. (example, in a market the buyer requests 50k of shoes but we can only provide 10k)
- Meeting standards for food items.
- Packaging, there is a need to do more training concerning the packaging.
- The companies indicated that there is a lack of market information, the firms do not know much about what is happening in foreign markets.

External constraints:

- Last year there it was a reduced supply of power that makes firms have difficulties while producing.
- When of our neighbors, a large country, is difficult to access because of NTMs.
- Shipping costs are high and have stayed high for a while in our country.

Fundamentally nothing much has changed in the way we operate. Now, what is changing it is the way we report the impact. We work on identifying firms who are not exporting but are in the same sectors as some of the exporters. Now we are looking at the impact of our activities. We looked, as asked by the Ministry, at the growth rate of exports of firms we have helped in the past.

Subject 3: Export promotion activities in our country are delivered mainly through government ministries, departments and agencies. The agency is responsible for participation export promotion activities and events. The private sectors under sub-sectoral associations (such the fish, flowers) play a

¹⁰ Script and year adjusted to protect confidentiality.

complementary role. Sub-sector associations play a key role in lobbying government to create an enabling business environment.

We have a clientele of almost 900 SMEs. The categorization of SMEs is based on the number of employees as per ITC classification. However, at the moment we are considering only the number of employees. Within this classification, we have introduced the concept of export readiness assessment aimed at having a better understanding of its clients in terms of being able to carry out export business.

Among the obstacles faced by the exporters include financial constraints in terms of high cost of capital (is ranked as the top), followed by inadequate infrastructure for export development which relates to compliance with international standards and knowledge of foreign markets

The major changes in the way of operating in the last 10 years has been in the reform of the Organization in terms of re-focusing efforts on producing for the export market as well as connectivity of our clients to foreign buyers. Originally, the organization tended more to trade promotion events and less on export development efforts.

Our main success have been:

Support to more than 1400 farmers' to connect with the export value chain. Efforts focused on improvement of post-harvest handling and successful bulking of 17.5 tons of sesame seeds for the export market.

Provided support to an exporter of cured vanilla beans to connect with an importer in Germany and South Africa.

Under the export readiness program which included export mentorship, an exporter of shea butter has been connected to a buyer in the USA. The exporter has managed to send samples for laboratory testing. Business discussions are still underway.

For large firms, we usually work with them on trade promotion. For small firms, we offer services ranging from export readiness assessment, disseminate export market information, training, and trade promotion events. The services being provided are scalable based on the available resource envelop as well as the desire to have results and impact.

Subject 4: Pour la promotion des exportations, il y a les revendeurs en ligne sur internet et il y a les chambres consulaires. Nous faisons la promotion des échanges, mais on n'a pas de produits que l'on exporte. Nous encourageons les entreprises à exporter. Nous organisons des événements, pour la promotion des exportations, pour les inciter à exporter.

Nous sommes plutôt une association de personnes qui veulent rapprocher les entreprises. On est dans la promotion des rencontres entre les entreprises en interne et on externe. On existe depuis les années 90.

Nous faisons la promotion des manifestations, comme les foires de production en Afrique du nord, avec des entreprises étatiques, parapubliques et privées. On engage avec des entreprises qui exportent déjà et qui souhaitent exporter vers des nouveaux marchés. Produits et services, 40% exportent déjà.

La plus grande barrière à l'exportation c'est l'engorgement du port. Le trafic est là, c'est le problème de la logistique. À cause de l'engorgement les opérations d'import et d'export prennent beaucoup de temps. Le port est très sollicité. Le monde est très ouvert aujourd'hui. Je ne crois pas qu'il y a d'autres barrières fondamentales pour nos entreprises.

Beaucoup a changé dans les 10 dernières années, la configuration de notre équipe a changé. Avec internet on peut facilement contacter nos partenaires. Ça c'est le plus grand changement.

Mais les domaines où les entreprises ont du succès sont le cacao, le café et une entreprise qui agit dans les activités portuaires. On a fait deux foires en Afrique du Nord (2010,2016) qui ont eu beaucoup de succès.¹¹

Nous facilitons le rapprochement des entreprises. Il faut promouvoir les échanges et aider les entreprises à trouver du financement, favoriser le transfert de technologies. On accompagne les entreprises à l'intérieur et à l'extérieur pour les rencontres B2B. Nous ne sommes pas focalisés sur un produit, c'est vraiment le service de facilitation.

La tendance c'est toujours d'exporter en France. Le marché Chinois c'est plus pour l'import que pour l'export. Pour l'export en Chine il y a le bois, la manœuvre. Il y a les Chinois qui participent à la création d'infrastructures, ils sont bien installés dans le pays. Au niveau du commerce, les Chinois ne sont pas si intéressés par nos produits.

¹¹ Country omitted to preserve confidentiality.

Subject 5: Nous sommes l'organisme de référence pour la promotion des exportations au niveau institutionnel et opérationnel. On dépend du ministère du commerce. Il y a d'autres structures, comme les organisations de commerce. Toutefois, nous sommes une agence de l'État et nous avons un mandat public.

Nous aidons surtout les PME, les grandes entreprises ne nous concernent pas tellement. On ne travaille que très rarement avec les grandes. Le plus souvent c'est des PME voir de très petites micro-entreprises. Beaucoup sont dans le secteur agricole où on retrouve des entreprises individuelles ou dans la transformation des produits artisanaux.

Pour nous des PME sont des entreprises de petite taille avec pas beaucoup de personnels. Mais il y a aussi des entreprises avec un personnel plus important, 30-40 travailleurs qui ont des capacités financières et peuvent s'engager pour des programmes que nous pouvons leur offrir. Parfois il y a les très petites, qui ont souvent des produits très intéressants, des start-ups avec 1 ou 2 personnes.

Il a un mixte entre exportateurs et non-exportateurs. L'essentiel de nos clients, ce sont des entreprises qui exportent déjà, qui cherchent soit à se consolider ou à découvrir des nouveaux marchés. Nous travaillons avec l'agence de développement et d'encadrement des PME, avec qui les entreprises font souvent un cursus avant d'utiliser nos services. C'est là que parfois deviennent prêtes à l'exportation, nous faisons parfois la liaison avec cette agence. Si l'entreprise est prête pour exporter, on lui aide à trouver le bon marché.

On ce qui concerne les barrières à l'exportation, ce n'est pas une question de connaissance des marchés. Les trois barrières sont :

1. Capacité financière, c'est la première. De cette capacité, on peut faire dépendre une offre importante et l'habilité à s'engager.
2. La problématique de la logistique, qui est aussi liée à la capacité financière.
3. Les questions de normes, les standards, le respect du marché.

Quels sont ces normes ?

Ce n'est pas une question de connaissance des normes, mais de les intégrer dans le processus de fabrication et mise en marché. Parfois c'est couteux et contraignant. Parfois c'est difficile d'avoir les autorisations, par exemple avec les produits horticoles pour entrer dans l'UE. Nous aidons les entreprises à labéliser leurs produits.

L'agence a été créée il y a plus que 10 ans. Nous n'avons pas un passé très long. Mais il y a une évolution de notre offre, de l'accompagnement non-financier et de la mise en relation. Maintenant on connaît mieux les marchés. On dispose des outils pour communiquer entre les entreprises et on offre des produits spécifiques aux marchés de destination. On arrive à faire la différence entre le marché Chinois et Corée, alors qu'avant il fallait faire des recherches. Des produits comme l'amande, qui ont eu beaucoup de succès, nous ont aidé à voir comment répliquer l'expérience.

Au niveau de l'amande, on a des résultats positifs et la consolidation des marchés. Des entreprises qui sont présentes. 10'000 tonnes, il y a 4 ans, seulement 5'000. Les domaines agricoles se portent bien avec de la communication et de la certification. Il y a une bonne présence dans l'UE.

Le domaine cosmétique a été très fructueux. Elles ont commencé il y a 5 ou 6 ans et maintenant elles sont championnes dans ce domaine.

Subject 6: Nous sommes l'organisme spécialisé dans la promotion des exportations. L'agence est jeune, pas encore 10 ans.¹² Il a une situation de crise nationale, le budget de l'état est focalisé sur d'autres sujets. Nous sommes là pour combler un vide parce qu'après la disparition de l'ancienne agence de promotion des exportations 90 l'agence n'a pas été remplacée. Il n'y avait pas vraiment d'arguments pour le fermer, à l'époque on pensait qu'il fallait le fermer pour réduire les effectifs de l'État. C'était un programme de restructuration qui était voulu par la Banque Mondiale et par le FMI.

Notre structure est en partie handicapée. Les consultants qui l'avaient projeté ont demandé qu'il y ait un fond de promotion des exportations. En l'absence d'un fond de promotion des exportations, la structure est handicapée. Il y a un organisme qui s'occupe de la promotion du tourisme déjà mais rien pour les exportations.

Ici, il n'y a pas de culture des exportations. Il a le tourisme qui a son agence, mais on voit que cela flirte avec l'idée de l'exportation. Il faut éviter les dépenses oui, mais à quel prix ? On n'a pas encore beaucoup de visibilité.

Le budget se compose du personnel fonctionnaire à 100%. Avant on était mieux soutenu par l'état pour le budget spécial de l'investissement. En absolue cela ne représente pas grand-chose. Il y a le fonctionnement de la structure, qui est un autre quart du budget. Il reste 50 % du budget qui sont les activités : études de marché et gestion de la participation des opérateurs dans les foires.

L'organigramme nous donne trois sous-directions, le CCI nous a donné l'organigramme de référence. Il y a le programme d'appui aux entreprises, il y a la facilitation du commerce et la sous-direction, études de marché.

Il n'y a rien d'interdit, mais a priori nous ne faisons pas d'assistance individuelle. Nous avons développé des activités pour des groupes d'opérateurs, PME qui veulent savoir sur les marchés étrangers et voir ce qu'il y a comme demande.

Est-ce qu'elles souhaitent exporter ? Il y a les deux, celles qui veulent consolider sur le marché étranger, il y a des opérateurs qui n'ont jamais exporté. Nous devons faire des activités qui touchent tout le monde vu nos moyens.

¹² Text modified to preserve confidentiality.

Il y a quelques années nous avons fait 3 jours d'atelier pour nouveaux exportateurs et exportateurs établis. Il y avait aussi les établissements financiers.

Le thème de l'atelier, pour permettre de répondre aux besoins, secteur par secteur. Les entreprises savent dire ce qu'il a le problème. On a fait un projet du plan d'action. Nous n'avons pas pu le mettre entièrement en œuvre. On le fait partiellement.

Il y avait 33 activités dans l'atelier, des actions institutionnelles, le développement des filières, facilitations du commerce et mise en œuvre de l'AGOA. Faciliter l'importation de matériel médicaux, créer un système d'information, certificats d'origine, partenariat entre les acteurs dans le secteur des exports. Promouvoir l'usage des semences améliorées, établir un système du code de bar, inciter le commerce électronique, respecter le SPS.

On arrive à participer à certaines foires, l'année dernière pas de fond pour la participation donc pas de plan. C'est un fond géré par le ministère, si le ministère ne nous approche pas, il n'y aura rien. Il y a des manifestations, par exemple l'exposition universelle, nous avons fait la participation de 2015. Pour Doha on commence à préparer. En dehors du financement international, on devrait s'attendre qqch de la part des acteurs économiques.

Les barrières les plus importantes à l'exportation sont 3. L'information. Savoir quoi exporter et où exporter. Bien sûr, il a des habitués et ceux qui exportent pour la première fois.

L'acheminement des produits, le financement et les obstacles techniques au commerce. Nous avons un partenariat avec le CCI pour faire face à cela. Dans l'atelier il y a eu un secteur financement. On a un dialogue avec certaines banques de la région mais rien de concret.

Le secteur agro-forestier est sous-exploité. Il y a plus d'une centaine de variétés de produits qui sont peu connues.

On a vu une jeune dame émigrée en France, elle montrait la transformation d'un produit agricole.

Il y a un réseau international ? Non, nous n'en sommes pas encore là, faute de moyens. Mais nos activités, avec le conseil d'administration et le regroupement des acteurs économiques. Parfois on est appelé en conséquence des choses. Il faudrait une présence individuelle mais il n'y a pas de moyens.

Notre bilan n'est pas formidable. C'est possible de faire plus. On est intéressé au marché américain. Il y a des produits mais il y a certain qui produise du textile mais on n'est pas dans la logique des grandes exportations dans l'AGOA. Dans les textiles, mais on a du problème à faire le packaging, nous participons toutes les années aux rencontres de l'AGOA.

Nous pensons que les autorités devraient comprendre qu'il faut nous soutenir mais ce n'est pas de cas. Dans les PMA, les unités de mise en œuvre du cadre intégré jouent un rôle important. Le cadre intégré devrait aider à intégrer le commerce international (OMC). Chez nous le projet a plus de 10 ans, on les renforce mais beaucoup vient du fond d'affectation, une autre partie viens des caisses de l'État. Dans la

gestion du cadre intégré, il faut prendre en compte cela. Notre programme entre les OPC des PMA, cadre intégré renforcé mais quelle est la logique ? Il faut se poser la question.

En ce qui me concerne, je suis un élève du CCI, avec les séminaires du développement des exportations. Cette activité est en cours, cela a une portée inestimable. Nous allons pouvoir aborder tous les secteurs, toujours avec les acteurs qui peuvent rentrer dans ce secteurs-là. Cela doit être assimilé.

On a fait une étude de base pour montrer le potentiel de l'élevage dans notre pays. On a tout au plan de matière premières, on a de la demande mais on ne l'exploite pas. On doit améliorer la situation de la balance commerciale. Nous avons projeté dans le cadre d'un atelier national. La fédération des exportateurs de viande était à la table. Voilà, il y avait les vétérinaires, pour la santé animale, pour le pâturage.

On a une dizaine de produits que l'on voudrait promouvoir. Encore une fois, les moyens sont limités.

3.2. Strategic Objectives

Subject 1: This is a very good point. We are revising our services portfolio with the help of ITC. One of the things we need to review is the digital economy and introduce the e-commerce platform. So domestic businesses will be linked with international markets. We do not have yet formal relationships with e-commerce platforms.

We firms requesting to join GVCs, but getting them linked with the right partners overseas it is complex. We have a database, today for example, an entity in Belgium is improving SPS and label requirements for vegetables in value chains. We want to bring that entity to meet the Gambian producers to see if we can meet the standards.

Subject 2: The digital economy does not play a role. We have tried to diffuse the knowledge about opportunities in foreign markets electronically but it does not work. The way we target the border areas, where we see the opportunities, some of the companies will not act on the information unless you go there and show them. Otherwise they will not risk taking the risk. We do workshops where we knowledge on the rules for duties, certificates, how the chamber of commerce may help, etc.

Right now, there are one or two companies in our country that are selling online through electronic platforms. We do not know how well they are doing. We know they promote local products but not much more.

We would like to venture in the digital market places we are not doing it, but we need to do it. It is important to work in this area.

We discuss very often firms entering GVCs but it does no happen very often. Except in the cotton industry and the leather industry. In those two there it were some discussions but we did not do much to participated, for GVCs just the two products can be done. Cotton goes into China (most) and

Germany. Leather, crocodile skin goes to Asia, Germany, Switzerland and the UK. These are not finished products, these are semi-processed leather. There are some firms that finish the leather domestically, but none have taken full advantage of the availability of the raw material. The industry has not yet developed. Not much has been done in this aspect.

Subject 3: We are using an online buyer platform to access buyer information for exportable products. This information is shared with registered exporters who directly get in touch with the buyers for business. We have an Export readiness online assessment tool. In 2017 we launched the Export Readiness program, which helps SMEs improve their export performance. As part of the program we developed an online assessment tool which companies complete and provide detailed information about their company performance. The use of email and social media is growing. Although the social media platforms are still quite informal we have found them very effective because they are easily accessed on the phones.

We do not have a formal relationship with large e-retailers either. However we are currently in the process of recruiting human resource who will provide technical assistance for firms wishing to use the digital marketplaces.

In 2017, we launched the Export Readiness program which helps SMEs improve their export performance and participate in the Global Value Chains. As part of the program the company is assessed using an online assessment tool - and then the company is visited at their premises. Once the company is confirmed to meet the criteria, then they are trained in various areas depending on the assessment results. Finally, the company is involved in a trade mission or trade fair to link them to buyers. The program also involves continuous follow up because some issues may not necessarily need training.

Subject 4: Les entreprises sont souvent déjà bien connectées sur internet. Le travail que nous faisons c'est plutôt l'organisation pour accompagner les entreprises à l'étranger. À travers le net on peut chercher ce dont on a besoin. Nous n'avons pas de partenaires de commerce électronique mais de clients en tant que tels.

On n'a pas de lien formelle avec les plateformes du e-commerce particulier, par contre il y a Amazon et d'autres sites qui sont populaires.

En ce qui concerne les chaînes de valeur agrégée, dans notre pays dans le secteur Agro-Industriel il y a un développement, on travaille là-dessus. Le gouvernement essaie de travailler dans l'Agro-Industriel et le textile. Il y a un débat sur la transformation des matières premières, mais c'est très timide. La transformation du coton est envisagée. Il y a une stratégie pour la mise en place des chaînes de valeur, bois, coton, café.

Subject 5: Il y a plein d'initiatives dans ce domaine, nous-même avons une plateforme de commerce électronique. Notre objectif c'est de mettre en place les produits, il y a une vingtaine d'entreprises déjà présentes.

Il y a beaucoup de plateformes de commerce électronique qui existent déjà dans notre pays et nous sommes en train de vouloir travailler avec elles. Elles ont l'avantage de permettre aux entreprises d'être visibles sur des marchés lointains. Ceci dans l'Artisanat, l'agriculture et les produits de la mer.

Au niveau public, on voudrait agréger l'information des acteurs économiques pour mieux référencer les produits faits dans notre pays. Il y a 4 ou 5 sites web qui font du commerce en ligne. Le challenge est la logistique parce que les volumes ne sont pas énormes. On travaille avec DHL et la poste pour être au courant de la situation.

Avec ces plateformes on a des relations fonctionnelles, les entreprises sont intéressées par ces activités. Elles veulent maximiser leur l'impact. Avec certaines plateformes on a des relations de coopération et des accords administratives. Par exemple, on a signé avec une entreprise, une convention pour faire le recensement des entreprises et identifier celles qui ont une vocation à l'exportation.

La demande vient de nous et des entreprises elles-mêmes, qui veulent utiliser les moyens de communication digitale. Nous les accompagnons avec une équipe de digitalisation qui s'occupe de ces thématiques.

Très souvent il y a des grandes entreprises étrangères qui souhaite s'installer dans le pays, qui ont une capacité beaucoup plus grande que les entreprises qui leur sont autour. Nous essayons de créer un cadre. C'est compliqué parce que les entreprises locales sentent que c'est une concurrence difficile « je ne dirai pas déloyale » parce que souvent soit on les pousse à sortir du marché, soit à devenir des sous-traitants.

C'est des questions complexes, les grands groupes et les paysans dans l'agriculture. Nous cherchons à ce qu'il y ait une collaboration où elles peuvent tous y bénéficier.

Souvent on essaie que les PME s'installent plutôt sur des marchés de niche, sur les marchés globaux, elles peuvent avoir des difficultés à cause de leurs capacités de production.

Subject 6 : Pour l'économie digital...dire qu'elle se développe même petit à petit c'est trop dire. Nous sommes conscients qu'il faut l'intégrer dans notre travail, à un moment donné il faut avoir un portail. Nous sommes en train de le faire.

Nous avons fait les séances de l'AGOA, pour les pays qui ont certaines conditions pour le marché américain. Lors de cette assemblée on a fait une base de données.

Mais nous l'avons fait notre base de données à la main. On a recruté un jeune homme pour exploiter ces informations et numériser l'information.

3.3. Coordination

Subject 1: Yes, we have exchange visits, we initiated an MOU with two countries.¹³ We want to start exchanging visits with them.

It is very important to promote voluntary standards, we want to engage with CBI (<https://www.cbi.eu/>, center for the promotion of imports). But for we are not yet part of it, we try to get funding to implement that program. Once we have the funding we can implement the program without CBI.

The certificates of origin are released by the chambers of commerce. There is everything but arms and the AGOA. In the case of EBA, there are market opportunities, but we cannot access them because we do not have the capacity and we do not meet the technical requirements. In the EU it is very stringent so there is no point in the GSP because of the technical regulation.

Subject 2: We have an MOU with one TPO in one country and we are soon expanding to have MOUs with two other countries. The major problem has been the implementation of the MOUs. But the rate at which promotion activities in each other of the countries has been very irregular. It happens spontaneously. But it should have happened a long time of this. Each TPOs provides support to each other, but the actual activities have been very irregular. There is also almost no budget for the joint projects.

The certification like fair-trade and organic, it is coming down to some specific products. For organic issues, you come down to products like Honey. Some companies do it because is good for them. It boils down to specific sectors, some of it was because of ITC intervention to do the training and the production that has boosted the exports from that sectors.

Most of the leather goes to Singapore, and we use the GSP for that. They use it all the time. We are really taking a step up, we educate the exporters on trade agreements and what kind of documents they need. We have the “exporter handbook” that provides information, on consignment for COMESA, for Europe, etc.

Subject 3: Interaction has been mainly through co-operation in organizing joint promotion events within the East African Community partner states because of the existing market potential with the regional markets.

We promote niche exports markets for organic products and products under the fair-trade arrangement as are some of the strategies organized farmers groups can work closely with the global value chains. Secondly such schemes promote traceability as well as provide food safety assurance to the consumers.

Our country is a signatory to several regional, unilateral and multilateral trade agreements. Such agreements provide free market access for products originating here provided that certain conditions

¹³ Countries omitted to preserve confidentiality.

are met. Services provided include the development of the Exporters' Guide which gives information on preferential markets, creation of awareness and information sessions sharing.

Subject 4: En interne (dans le pays) on a souvent eu des relations avec d'autres agences. En externe pas encore mais il y a une réflexion au niveau sous régional pour une agence de promotion des échanges. Il y a une volonté de faire quelque chose, la promotion des échanges au niveau sous régional va commencer.

En ce qui concerne la certification, nous n'avons pas encore eu à être contacté de façon formelle. Mais si nous faisons la promotion à l'extérieur, nous demandons aux entreprises d'être à jour avec l'agence de certification.

La labélisation, cela doit marcher d'une manière ou de l'autre dans l'Agro mais vous savez notre industrie est embryonnaire, donc les produits manufacturiers sont là mais pas encore aussi au niveau de standard.

Subject 5: Oui, la coopération internationale c'est une possibilité. C'est de façon ponctuelle. Par exemple, s'il y a une foire dans un pays voisin on se met en contact. On participe au réseau de promotion d'exportation au sein de l'UEMOA.

Qui organise ? Comment les ressources sont gérées ? Chacun prend en charge ses propres dépenses, il n'y a pas un fond commun. Mais au niveau logistique et institutionnel on contribue.

Au niveau sous-régional, on travaille sur la certification commune mais nous n'avons pas encore un projet pour avoir une action commune dans un domaine. On a les mêmes dynamiques régionales, souvent on exporte les mêmes produits, même clients, même GSP. Nous avons les mêmes avantages, on devrait aller dans une convergence dans l'approche politique.

Non, on ne fait pas de standards volontaires, on s'occupe des labels obligatoires. Les certifications volontaires, on ne les fait pas encore. Certains secteurs, par exemple le BIO on essaie de le faire mais on n'est pas encore au point. Il y a les labos dans notre pays, pour certaines certifications peut-être il faudrait le faire à l'étranger.

Subject 6 : Nous avons un réseau des OPC. Les problématiques PMA sont un peu différentes que celles pour les pays en voie de développement. Chaque pays paie une cotisation.

On aurait dû avoir une stratégie commune régionale depuis longtemps. Les OPC sont en train d'utiliser le réseau pour remplir le vide laissé par les états membres. Nous sommes là, nous avons des questions pratiques que nous souhaitons promouvoir.

Nous pouvons définir des produits stratégiques pour une exportation commune, on pense que l'on a des produits communs, on devrait les promouvoir collectivement. S'occuper du transport.

La coopération bilatérale existe avec certains pays PMA et développés. On est avec la Suisse, L'Allemagne, qui sont les deux intéressés, le Danemark.

Pour les certifications, cela se passe là où cela passe. Il y a un observatoire du commerce, il y a des problèmes dans l'acheminement des marchandises. Nous avons la vocation à intervenir dans ce type de situations mais nous n'avons pas les moyens pour faire du cas par cas.

3.4. Impact evaluation

Subject 1: We do not have a mechanism per-se, we did the benchmarking with ITC. We are a government entity, but we have a board of directors.

Subject 2: The ministry cares mostly about the general growth the non-traditional exports, he wants to know how those sectors are doing and where we stand. We look also in what markets, Last years, we did three markets research. We were able to identify the opportunities but lacked the resources to carry out the mission in the foreign country of choice.

The exporter audit is done every year, this year we are not doing it because nothing has changed in the last years. The report serves as the basis to identify the NTEs. Every year the challenges change, so we provide recommendation to the Ministry. We have constraints on the resources, so we cannot do the audit. We prefer to focus on market information.

Subject 3: The process of monitoring and evaluating of government agencies is by National Planning Authority and Office of the Prime Minister.

The performance is evaluated in 4 ways:

1. In our Strategic Plan, we have an M&E framework which we use to evaluate our performance against targets.
2. The national Planning Authority also evaluate our performance against our Strategic Plan
3. Performance is evaluated through customer satisfaction.
4. ITC benchmarking.

Subject 4: On a un rapport d'activité, on évalue ce qui a marché, ce qui n'a pas marché. Après les événements on fait des enquêtes, 10-15 personnes qui répondent et nous disent ce qui a marché, ce qui n'a pas marché. Il n'y a pas d'autres mécanismes puisque notre association est indépendante.

Subject 5: Il n'y a pas un mécanisme strict pour évaluer notre impact. Nous travaillons avec l'agence de la statistique. Sinon, on a un contrôle de la gestion budgétaire. Le conseil d'administration a demandé d'avoir une procédure d'impact.

Chaque année on fait un état de lieu, on observe les meilleurs résultats et on les communique au ministère. Mais c'est de nature politique, suivant les exigences commerciales, économiques et

d'exportation. Chaque année on a un rapport avec le nombre d'entreprises que l'on a aidé. On regarde surtout l'impact sur la valeur et sur le volume des exportations.

Subject 6 : Nous ne sommes pas encore là, à l'évaluation de la performance. Nous suivons le benchmarking du CCI. On est peu et souvent nous devons traiter des choses plutôt urgentes. On ne peut pas s'arrêter, donc ce n'est pas facile. Nous savons qu'il faut travailler sur la transparence. Le conseil d'administration est représenté par plusieurs secteurs. Il y a un dialogue entre les opérateurs grâce à notre existence.

“Sur quoi la fondera-t-il l'économie du monde qu'il veut gouverner? Sera-ce sur le caprice de chaque particulier? Quelle confusion! Sera-ce sur la justice? Il l'ignore.”

Pascal



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