



# Digital and Sustainable Trade Facilitation Implementation in the Arab Region Regional Report 2019

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## Preface

The United Nations five Regional Commissions (ECA, ECE, ECLAC, ESCAP and ESCWA) conducted, in 2019, the third Global Survey on Digital and Sustainable Trade Facilitation (formerly the Global Survey on Trade Facilitation and Paperless Trade Implementation) to collect relevant data and information from their respective Member States on the implementation of the WTO Trade Facilitation Agreement and other related measures. The process started on January 2019 and culminated with the development of global and regional database on implementation of trade facilitation measures and the preparation of regional reports on Digital and Sustainable Trade Facilitation.

The Arab regional report was prepared by Souraya Zein, Associate Economic Affairs Officer, Regional Integration Section, under the supervision of Mohammed Chemingui, Chief of Regional Integration Section and the support of Hanaa Saad, Research Assistant, Regional Integration Section, Economic Development and Integration Division, ESCWA. The Report also benefited from the support of the Trade, Investment and Innovation Division at ESCAP, particularly in preparing the analytical template used in the report and in coordinating the survey at the global level.

This report, together with the global report, other regional reports and individual country data, is available at <https://untfsurvey.org>

# 1. Introduction

## 1.1 Background and Objective of the Global Survey on Digital and Sustainable Trade Facilitation 2019

In recent years, many barriers have been removed in international trade, however, time and cost of trading across borders is still significant in many parts of the world. The significant time and cost needed act as a barrier that hinders the growth in international trade. Even though many international agreements have reiterated and stressed on the importance of trade as an engine for growth and as a main facilitator to achieve sustainable development by 2030, however, many countries are still lagging behind. More effort is needed to boost trade, particularly in developing and least developed countries.

By August 2019, the number of WTO Members that have ratified the Trade Facilitations Agreement (WTO TFA) reached 145, among which 10 Arab States<sup>1</sup>. In order to monitor the implementation of the WTO TFA and related trade facilitation and paperless trade measures, the five Regional Commissions of the United Nations have conducted a global survey since 2015. This survey is conducted every two years and sent to all countries, including non-WTO Members. This report presents the results of the 2019 survey administered by ESCWA in the Arab region. It was sent to 22 Arab countries and this report covers the results received from 11 Arab countries from 3 income groups: oil exporting countries, diversified economies and least developed countries<sup>2</sup>.

Reducing trade costs is essential to facilitate and promote trade. However, the reduction should not be limited to tariffs; reducing non-tariff trade costs is equally important. High non-tariff trade costs, like cumbersome bureaucratic procedures and documentation, inappropriate infrastructure and logistics, put an additional burden on traders and may act as barriers to trade. In the next section, the report addresses the measures implemented by Arab countries to facilitate trade and to reduce non-tariff barriers.

## 1.2 Survey Instrument and Methodology 2019

The 2019 UN Global Survey on Digital and Sustainable Trade Facilitation 2019 (formerly the Global Survey on Trade Facilitation and Paperless Trade Implementation) covers 56 trade facilitation measures, categorized in six groups, and that extend well beyond the final list of commitments included in the WTO TFA (Table 1). The first group of “general trade facilitation measures” includes 3 subgroups focusing on: transparency measures, formalities, and institutional cooperation and arrangement. The second group of “digital trade facilitation” measures include 2 subgroups: paperless trade, and cross-border paperless trade. The third group of “sustainable trade facilitation measures” includes four subgroups: transit facilitation measures, trade facilitation for SMEs, agricultural trade facilitation, women in trade facilitation. Three additional and optional groups were added in 2019, namely “trade finance facilitation measures”, “business mobility for trade facilitation measures” and “trade facilitation for e-commerce measures”.<sup>3</sup>

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<sup>1</sup> Bahrain, Djibouti, Egypt, Jordan, Kuwait, Morocco, Oman, Qatar, Saudi Arabia and the United Arab Emirates.

<sup>2</sup> Oil exporting countries include Iraq and Saudi Arabia. Countries with diversified economies include Egypt, Jordan, Morocco, the Syrian Arab Republic and Tunisia. Least developed countries include Comoros, Mauritania, Somalia and Sudan.

Even though the Syrian Arab Republic currently falls under special category of conflict-affected countries, however, in compliance with previous practice, it is included under the category of countries with diversified economies.

<sup>3</sup> The complete survey instrument is available online at <https://untfsurvey.org>

**Table 1: Grouping of trade facilitation measures and correspondence with TFA articles**

Grouping		Question #		Trade facilitation measure in the questionnaire	TFA Articles
		2017	2019		
General TF measures	Transparency (5 measures)	2	2	Publication of existing import-export regulations on the Internet	1.2
		3	3	Stakeholder consultation on new draft regulations (prior to their finalization)	2.2
		4	4	Advance publication/notification of new regulations before their implementation (e.g. 30 days prior)	2.1
		5	5	Advance ruling (on tariff classification)	3
		9	9	Independent appeal mechanism (for traders to appeal customs rulings and the rulings of other relevant trade control agencies)	4
	Formalities (8 measures)	6	6	Risk management (as a basis for deciding whether a shipment will be physically inspected or not)	7.4
		7	7	Pre-arrival processing	7.1
		8	8	Post-clearance audit	7.5
		10	10	Separation of Release from final determination of customs duties, taxes, fees and charges	7.3
		11	11	Establishment and publication of average release times	7.6
		12	12	Trade facilitation measures for authorized operators	7.7
		13	13	Expedited shipments	7.8
		14	14	Acceptance of paper or electronic copies of supporting documents required for import, export or transit formalities	10.2
	Institutional cooperation and arrangement (5 measures)	1	1	Establishment of a national trade facilitation committee or similar body	23
		31	31	Cooperation between agencies on the ground at the national level	8
		32	32	Government agencies delegating controls to customs authorities	
		33	33	Alignment of working days and hours with neighboring countries at border crossings	8.2(a)
		34	34	Alignment of formalities and procedures with neighboring countries at border crossings	8.2(b)
Digital TF Measures	Paperless trade (10 measures)	15	15	Electronic/automated Customs System established (e.g. ASYCUDA)	
		16	16	Internet connection available to customs and other trade control agencies at border-crossings	
		17	17	Electronic Single Window System	10.4
		18	18	Electronic submission of Customs Declarations	
		19	19	Electronic application and issuance of Import and Export Permit	
		20	20	Electronic submission of Sea Cargo Manifests	
		21	21	Electronic submission of Air Cargo Manifests	
		22	22	Electronic application and issuance of Preferential Certificate of Origin	
		23	23	E-Payment of customs duties and fees	7.2
		24	24	Electronic application for customs refunds	

Grouping		Question #		Trade facilitation measure in the questionnaire	TFA Articles
		2017	2019		
	<b>Cross-border paperless trade</b> (6 measures)	25	25	Laws and regulations for electronic transactions are in place (e.g. e-commerce law, e-transaction law)	
		26	26	Recognized certification authority issuing digital certificates to traders to conduct electronic transactions	
		27	27	Customs declaration electronically exchanged between your country and other countries	
		28	28	Certificate of Origin electronically exchanged between your country and other countries	
		29	29	Sanitary & Phytosanitary Certificate electronically exchanged between your country and other countries	
		30	30	Banks and insurers in your country retrieving letters of credit electronically without lodging paper-based documents	
<b>Sustainable TF Measures</b>	<b>Transit facilitation</b> (4 measures)	35	35	Transit facilitation agreement(s) with neighboring country(ies)	
		36	36	Customs Authorities limit the physical inspection of transit goods and use risk assessment	10.5
		37	37	Supporting pre-arrival processing for transit facilitation	11.9
		38	38	Cooperation between agencies of countries involved in transit	11.16
	<b>Trade facilitation for SMEs</b> (5 measures)	39	39	Government has developed trade facilitation measures that ensure easy and affordable access for SMEs to trade-related information	
		40	40	Government has developed specific measures that enable SMEs to more easily benefit from the AEO scheme	
		41	41	Government has taken actions to make single windows more easily accessible to SMEs (e.g. by providing technical consultation and training services to SMEs on registering and using the facility.)	
		42	42	Government has taken actions to ensure that SMEs are well represented and made key members of National Trade Facilitation Committees (NTFCs)	
			43	Implementation of other special measures to reduce costs for SMEs	
	<b>Agricultural trade facilitation</b> (4 measures)	43	44	Testing and laboratory facilities are equipped for compliance with sanitary and phytosanitary (SPS) standards in your main trading partners	
		44	45	National standards and accreditation bodies are established for the purpose of compliance with SPS standards	
		45	46	Application, verification and issuance of SPS certificates is automated	
			47	Special treatment given to perishable goods at border-crossings	7.9



Grouping		Question #		Trade facilitation measure in the questionnaire	TFA Articles
		2017	2019		
	<b>Women in trade facilitation</b> (3 measures)	46	48	The existing trade facilitation policy/strategy incorporates special consideration of women involved in trade	
		47	49	Government has introduced trade facilitation measures aimed at women involved in trade	
			50	Female membership in the National Trade Facilitation Committee	
<b>Trade finance</b> (3 measures)			51	Single window facilitates traders with access to finance	
			52	Banks allow electronic exchange of data between trading partners or with banks in other countries to reduce dependence on paper documentation and advance digital trade	
			53	A variety of trade finance services available	
<b>Business Mobility for trade facilitation</b> (2 measures)			54	Application and issuance of business visa	
			55	Convenience to business people to move across borders	
<b>Trade facilitation for e-commerce</b> (1 measure)			56	Trade facilitation measures to facilitate cross-border e-commerce	

Source: UNRC Survey on Trade Facilitation and Paperless Trade 2017 and UN Global Survey on Digital and Sustainable Trade Facilitation 2019; untfsurvey.org

The questionnaire was sent out by ESCWA secretariat to trade facilitation experts both from government agencies, private sector and academia in Arab countries. Responses were verified by ESCWA staff and countries that are covered by both ESCWA and ECA were double checked for consistency. Measures were verified by staff and whenever the respondent did not provide enough supporting evidence, staff were engaged in identifying supporting evidence to go in line with the rating provided. Answers were rated as: fully implemented measure (rating 3), partially implemented measure (rating 2), pilot stage implementation (rating 1), not implemented (rating 0), don't know (rating 0). The report will focus on the replies received from 11 Arab countries – representing 50 per cent of Arab countries.

## 2. Trade Facilitation Implementation in the Arab region: Overview

### 2.1 Trading across borders

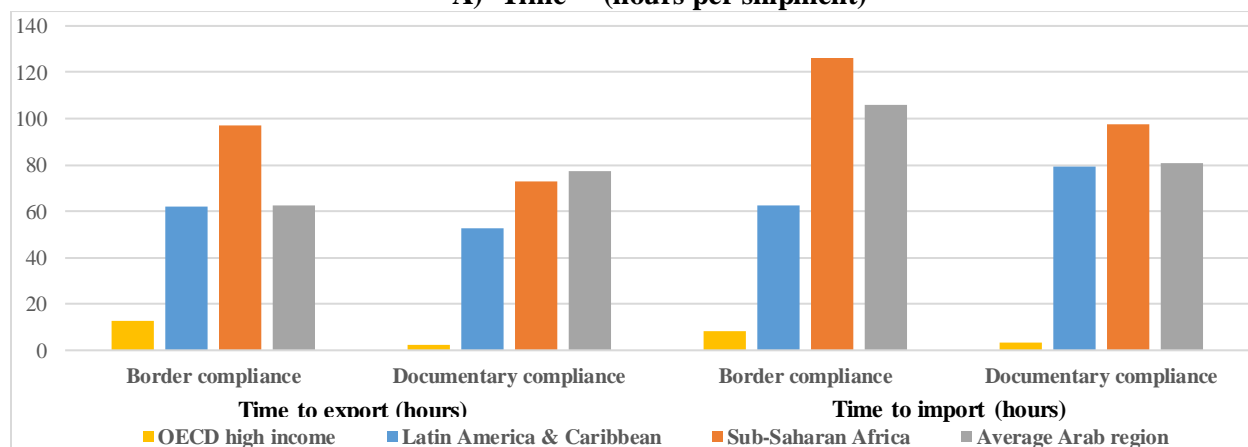
Reducing time and cost of trade are essential for reducing non-tariff trade costs and are important steps to facilitate international trade. The Arab region performs similarly to the Latin America and Caribbean region in terms of time and cost of trade; however, it is lagging well behind the developed OECD high income countries according to the trading across borders in the World Bank's Doing Business ranking<sup>4</sup>. Furthermore, the performance of the Arab region varies when compared to Sub-Saharan African region whereby the Arab region performs better in terms of border compliance but worse in terms of documentary compliance (Figures 1.A & B). This high time and cost of trade affects the competitiveness of the Arab region in international markets.

<sup>4</sup> The World Bank, *Doing Business 2019, Region Profile of Arab World*.

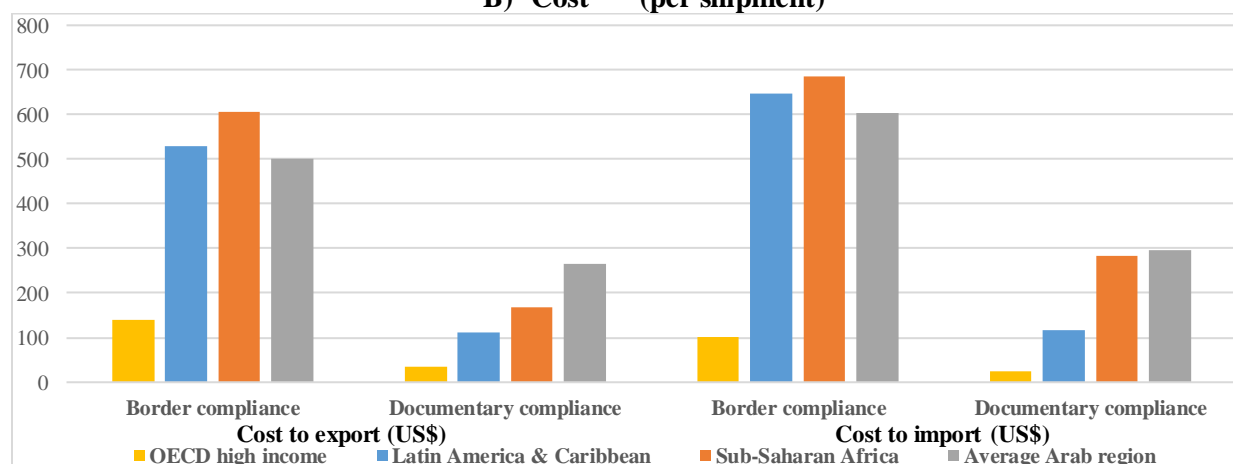
<https://www.doingbusiness.org/content/dam/doingBusiness/media/Profiles/Regional/DB2019/Arab-World.pdf>

**Figure 1: Average time and cost to export and import, Arab\* region compared to other regions, 2018**

**A) Time\*\* (hours per shipment)**



**B) Cost\*\*\* (per shipment)**



Source: The World Bank, *Doing Business 2019, Region Profile of Arab World*.  
<https://www.doingbusiness.org/content/dam/doingBusiness/media/Profiles/Regional/DB2019/Arab-World.pdf>

Border compliance relates to the time and cost associated with compliance with the economy's customs regulations and with regulations relating to other mandatory inspections for the shipment to cross the economy's border, as well as the time and cost for handling that takes place at its port or border. The time and cost for this segment include time and cost for customs clearance and inspection procedures conducted by other agencies.

Documentary compliance relates to the time and cost associated with compliance with the documentary requirements of all government agencies of the origin economy, the destination economy and any transit economies. The time and cost for documentary compliance include the time and cost for obtaining, preparing, processing, presenting and submitting documents.

(\*) Arab region includes all 21 Arab countries except Yemen

(\*\*) The time associated with two sets of procedures—documentary compliance and border compliance—within the overall process of exporting or importing a shipment of goods

(\*\*\*) The cost (excluding tariffs) associated with two sets of procedures—documentary compliance and border compliance—within the overall process of exporting or importing a shipment of goods. Insurance cost and informal payments for which no receipt is issued are excluded from the costs recorded. A shipment is a unit of trade. Export shipments do not necessarily need to be containerized, while import shipments of auto parts are assumed to be containerized.

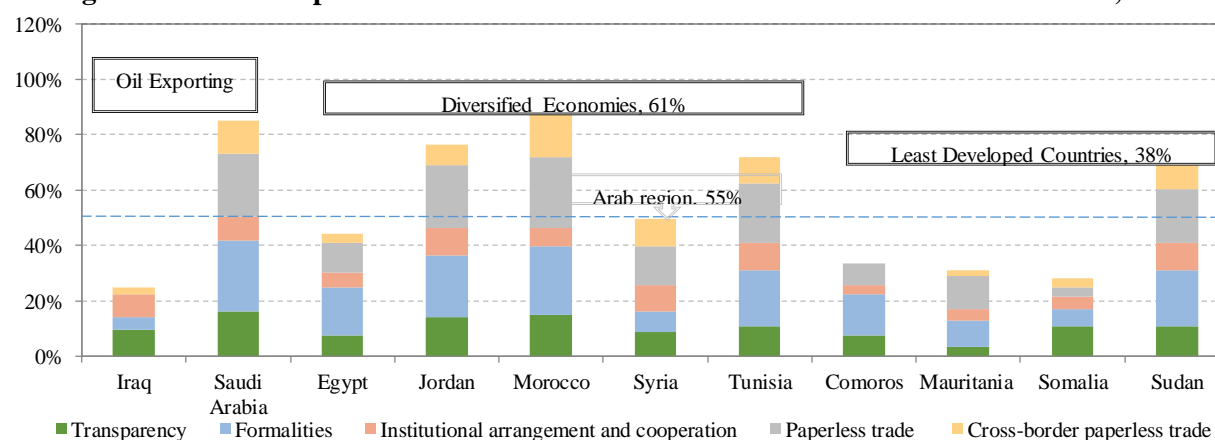
Since 2016, many Arab countries undertook reforms aiming to facilitate trading across borders and to improve the overall doing business environment. Some countries opted for investing in infrastructure (Mauritania, Saudi Arabia and Tunisia) by either upgrading current facilities (Algeria, Bahrain, Jordan, Mauritania and Morocco) or developing new ports (Bahrain and Qatar). Other countries adopted paperless customs clearance system that improved importing and exporting processes (Morocco), reduced the number of documents required for customs clearance (Morocco and Saudi Arabia), introduced single window (Bahrain, Jordan, Oman, Morocco and Saudi Arabia), automated procedures (Bahrain, Egypt, Kuwait, Mauritania and Tunisia), created an online portal (Qatar), increased coordination among state-departments (Algeria)<sup>5</sup>.

However some countries are still facing significant administrative inefficiencies that make trading across borders more difficult. As a matter of example, Yemen is facing inefficient port operation while Egypt is struggling with complex process to obtain and process documents and Tunisia is suffering from inadequate terminal space<sup>6</sup>. Enforcing trade facilitation measures is essential to enhance trading across borders and to optimize the benefits of trade as an engine for sustainable growth.

## 2.2 Overall performance of the Arab region

Focusing on 31<sup>7</sup> trade facilitation measures that were included in previous surveys, the overall performance of the Arab region improved between 2017 and 2019, to reach 55 per cent in 2019. Morocco was the biggest performer in 2019 with an overall implementation rate of 87 per cent, followed by Saudi Arabia and Jordan with 85 per cent and 76 per cent respectively (Figure 2). Arab least developed countries are still lagging behind in terms of implementation of trade facilitation measures, except for Sudan whose implementation rate was around 69 per cent.

**Figure 2: Overall implementation of trade facilitation measures in 11 Arab countries, 2019**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019

<sup>5</sup> The World Bank, *Doing Business 2019, Region Profile of Arab World*.

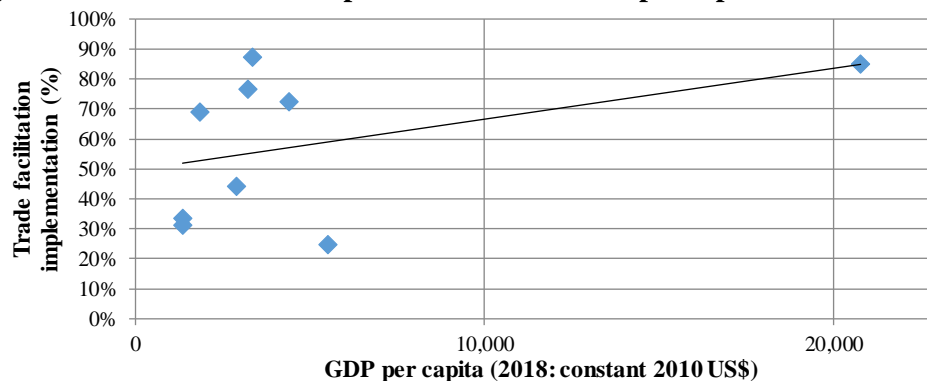
<https://www.doingbusiness.org/content/dam/doingBusiness/media/Profiles/Regional/DB2019/Arab-World.pdf>

<sup>6</sup> Ibid

<sup>7</sup> Among the 53 measures surveyed, three measures including *Electronic Submission of Sea Cargo Manifests*, *Alignment of working days and hours with neighbouring countries at border crossings*, and *Alignment of formalities and procedures with neighbouring countries at border crossings* are excluded for calculating the overall score as they are not relevant to all countries surveyed. Four “transit facilitation” measures are also excluded for the same reason. Additionally, “Trade facilitation for SMEs”, “agricultural trade facilitation”, “women in trade facilitation”, “trade finance facilitation”, “business mobility for trade facilitation measures” and “trade facilitation for e-commerce measures” are excluded as these are newly added groups of measures not included in the original UN Survey.

Implementation rates in individual Arab countries portray a lot of discrepancies. Oil-rich Iraq was the worst performer in 2019, mainly due to political and security unrests in the country. According to the Doing Business Report, Morocco embarked in significant reforms that enhanced its trading across borders which included improving its infrastructure, mainstreaming processes and operationalizing single window for traders<sup>8</sup>. Low-income Comoros, Mauritania and Somalia have low implementation rates (Figure 3) and require significant support to solve their developmental challenges in general and to accelerate implementation of trade facilitation measures in particular.

**Figure 3: Trade facilitation implementation and GDP per capita of 11 Arab Countries**

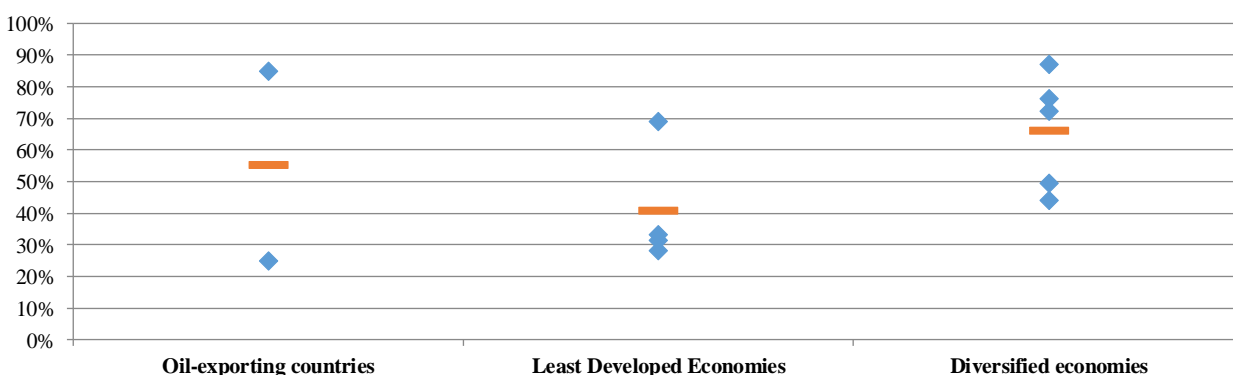


Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019; World Bank, World Development Indicators, accessed 28 June 2019.

### 2.3 Implementation in Sub-Regions

Looking at implementation rates by group of countries, it can be noted that countries with diversified economies recorded the highest rates with fewer discrepancies among countries (Figure 4). Oil exporting countries recorded a wide gap between Saudi Arabia and Iraq, while least developed countries had a relatively low implementation rates except for Sudan. The latter was engaged in a set of reforms that were in line with trade facilitation measures.

**Figure 4: Trade facilitation implementation in Arab sub-regions, 2019**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019

Note: the red lines indicate the sub-regional average while the blue dots refer to individual country within each group

<sup>8</sup> The World Bank, *Doing Business 2019, Region Profile of Arab World*.

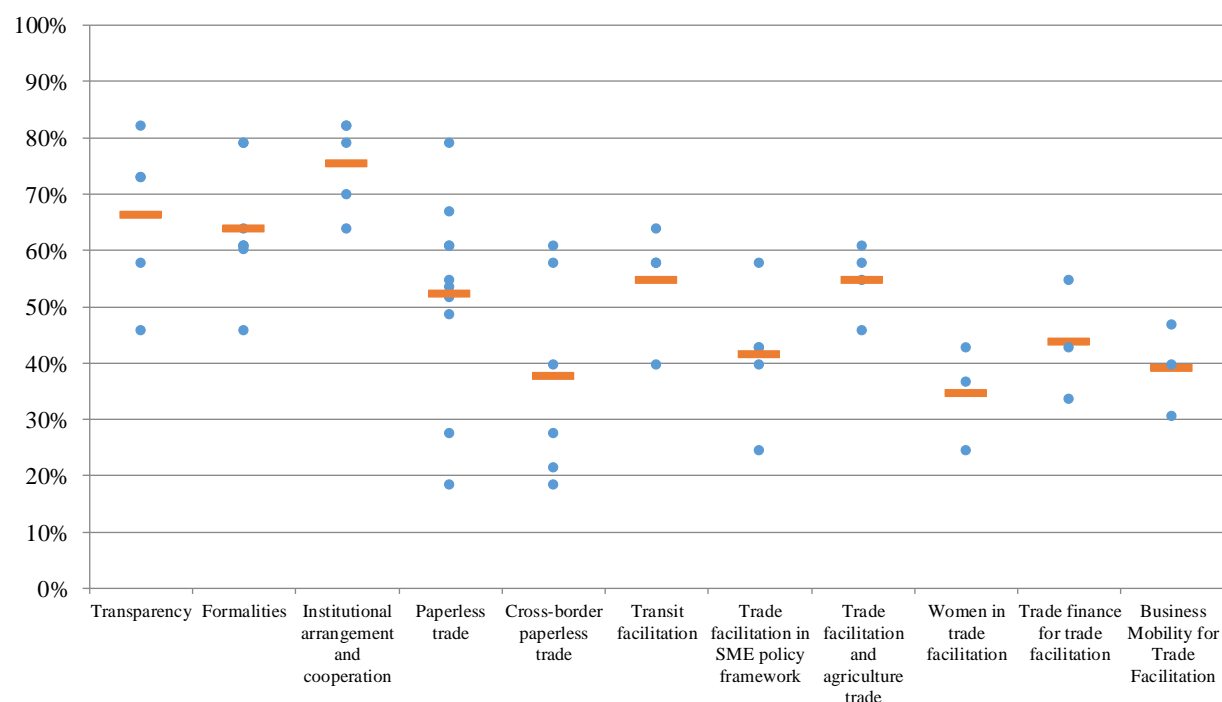
<https://www.doingbusiness.org/content/dam/doingBusiness/media/Profiles/Regional/DB2019/Arab-World.pdf>

## 2.4 Most and Least Implemented Trade Facilitation Measures

On average, transparency measures, formalities and institutional arrangement and cooperation are the most implemented categories in the Arab region, with an average implementation rate between 64 and 75 per cent (Figure 5 and Table 2). *Publication of existing import-export regulations on the internet* and *acceptance of copies of original supporting documents required for import, export or transit formalities* were the most implemented two measures as all countries implemented these measures at different extents (pilot stage to full implementation).

Supporting SMEs, women traders, access to trade finance and business mobility are the lowest performers categories. Their average implementation rates range between 34 and 43 per cent (Figure 5). These categories need a lot of improvement in order to ensure the sustainability and to maximize the benefits from trade facilitation.

**Figure 5 Implementation of different groups of trade facilitation measures: Arab Countries average, 2019**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019

Note: the red lines indicate regional average in each category while the blue dots refer to performance of individual country within each category

Institutional arrangement and cooperation, paperless trade and transit facilitation were the categories with the highest full implementation rate – around 55 per cent – particularly putting in place an *automated customs System*, *customs authorities limit the physical inspections of transit goods and use risk assessment* and having a *National legislative framework and/or institutional arrangements for border agencies cooperation* (Table 2).



The Arab region is clearly lagging behind in terms of cross-border paperless trade, whereby the regional average was around 37 per cent (Figure 5). *Paperless collection of payment from a documentary letter of credit* and *Electronic Application for Customs Refunds* was not fully implemented in any of the Arab countries (Table 2). Furthermore, the region still faces lots of challenges in paperless documentation and processing in general which adds a supplementary non-tariff burden on trade.

**Table 2: Most and least implemented measures in Arab region, 2019**

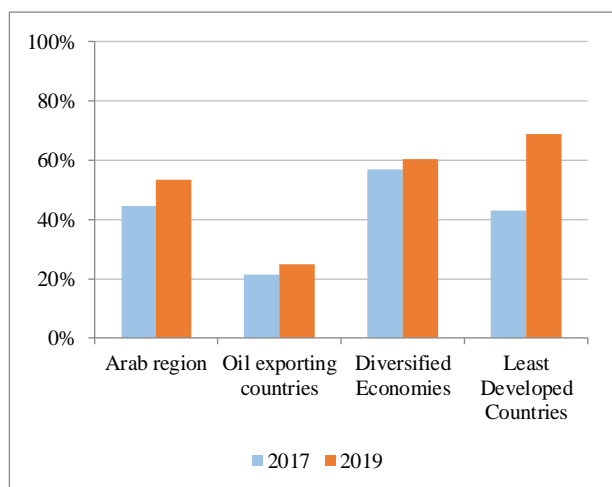
Category	Most implemented (% of countries)		Least implemented (% of countries)	
	Measure	Implemented fully, partially and on a pilot basis (%) / Full implementation (%)	Measure	Implemented fully, partially and on a pilot basis (%) / Full implementation (%)
<b>Transparency</b>	Publication of existing import-export regulations on the internet	100.0 / 45.5	Advance publication/notification of new trade-related regulations before their implementation	54.5 / 27.3
<b>Formalities</b>	Acceptance of copies of original supporting documents required for import, export or transit formalities	100.0 / 27.3	Trade facilitation measures for authorized operators	54.5 / 36.4
<b>Institutional arrangement and cooperation</b>	National legislative framework and/or institutional arrangements for border agencies cooperation	90.9 / 54.5	Government agencies delegating controls to Customs authorities	72.7 / 45.5
<b>Paperless trade</b>	Automated Customs System	90.9 / 54.5	Electronic Application for Customs Refunds	27.3 / 0.0
<b>Cross-border paperless trade</b>	Laws and regulations for electronic transactions	72.7 / 36.4	Paperless collection of payment from a documentary letter of credit	18.2 / 0.0
<b>Transit facilitation</b>	Customs Authorities limit the physical inspections of transit goods and use risk assessment	72.7 / 54.5	Supporting pre-arrival processing for transit facilitation	63.6 / 45.5
<b>Trade facilitation in SME policy framework</b>	Trade facilitation measures targeting SMEs	72.7 / 27.3	SMEs access Single Window	45.5 / 36.4
<b>Trade facilitation and agriculture trade</b>	Special treatment for perishable goods	72.7 / 45.5	Testing and laboratory facilities available to meet SPS of main trading partners	63.6 / 18.2
<b>Women in trade facilitation</b>	Trade facilitation measures to benefit female traders	63.6 / 9.1	Female membership in the National Trade Facilitation Committee	27.3 / 18.2
<b>Trade finance for trade facilitation</b>	Trade finance services available	63.6 / 36.4	Single window facilitates traders to access to finance	36.4 / 27.3
<b>Business Mobility for Trade Facilitation</b>	Application and issuance of business visa	45.5 / 36.4	Trade facilitation measures to facilitate cross-border e-commerce	45.5 / 9.1

Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

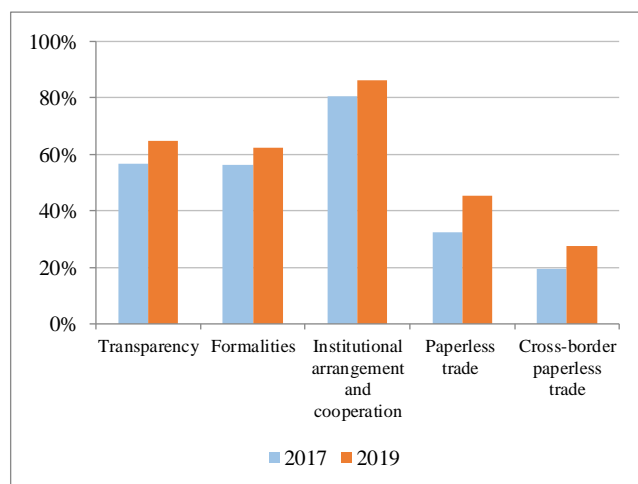
## 2.5 Progress in Implementation between 2017 and 2019

Focusing on the implementation rate of 31 measures that were common between the 2017 and 2019 trade facilitation surveys, only 4 countries from the Arab region completed both surveys, namely, Egypt, Iraq, Jordan and Sudan. The overall implementation rate of these four countries increased from 45 to 53 per cent. The greatest improvement took place in Sudan, where the overall implementation increased from 43 per cent in 2017 to 69 per cent in 2019, making it the highest performer among these 4 countries in 2019 (Figure 6).

**Figure 6: Trade facilitation implementation by Arab regional groups, 2017 and 2019**



**Figure 7: Implementation of different groups of trade facilitation measures in Arab region, 2017 and 2019**

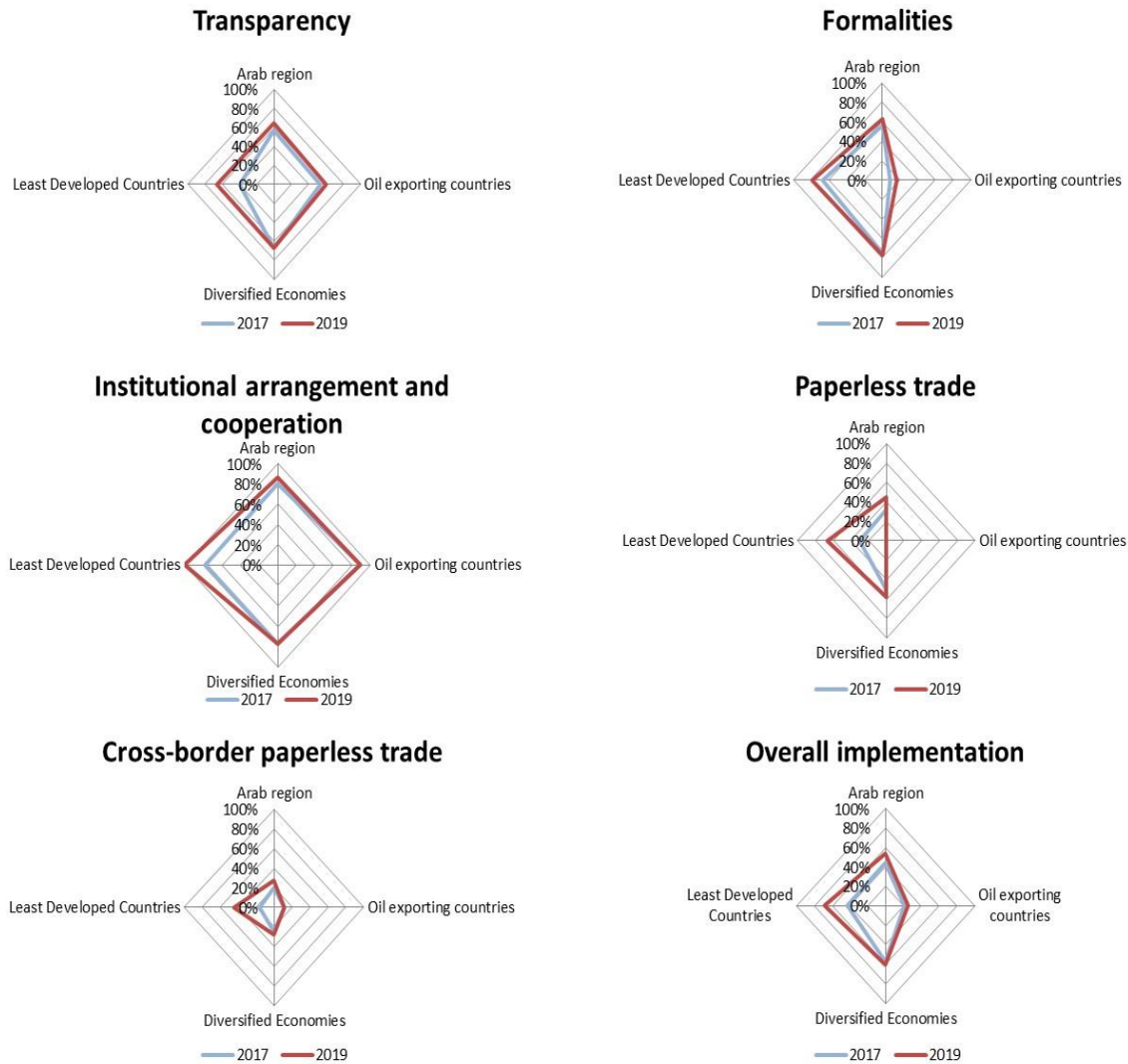


Source: UNRC Survey on Trade Facilitation and Paperless Trade 2017 and UN Global Survey on Digital and Sustainable Trade Facilitation 2019

Note: the comparison focuses on 31 trade facilitation measures and includes only 4 countries, namely Egypt, Iraq, Jordan and Sudan

In terms of trade facilitation measures, this progress was mainly driven by improvements in paperless trade and cross-border paperless trade. The first increased from 9 to 13 per cent, while the second from 3.7 to 5.4 per cent. These two categories were and still are the lowest performers and there is room for a lot of improvement. Institutional arrangement and cooperation witnessed the lowest improvement, increasing from 7.8 to 8.3 per cent only (Figure 7). Figure 8 indicates that most of the improvement in 2019 was driven by improvement in least developed country, Sudan more precisely.

**Figure 8: Implementation of trade facilitation measures by Arab sub-regions, 2017 and 2019**



Source: UNRC Survey on Trade Facilitation and Paperless Trade 2017 and UN Global Survey on Digital and Sustainable Trade Facilitation 2019

Note: the comparison focuses on 31 trade facilitation measures and includes only 4 countries, namely Egypt, Iraq, Jordan and Sudan

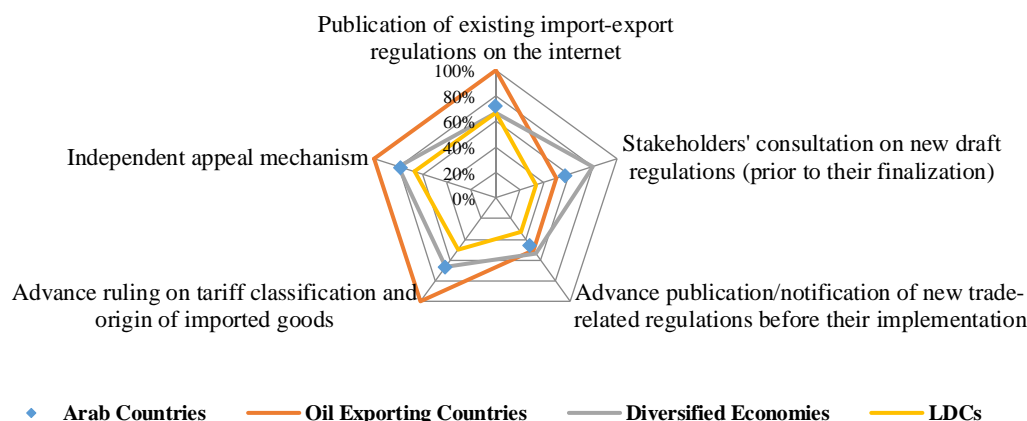
### 3. The Implementation of Trade Facilitation Measures: A Closer Look

#### 3.1 “Transparency” Measures

Focusing on implementation of transparency measures, this category includes five measures that correspond to Articles 1-4 of WTO TFA (Table 1) and Article X of the GATT. The overall implementation rate of transparency category in the Arab region is around 66 per cent (Figure 5). It is mainly driven by high performance of oil exporting countries particularly in the *publication of existing import-export regulations on the internet, advance ruling on tariff classification and origin of imported goods* and putting in place an

*independent appeal mechanism* (Figure 9). *Advance publication/notification of new trade-related regulations before their implementation* has been the least implemented measure across all sub-groups.

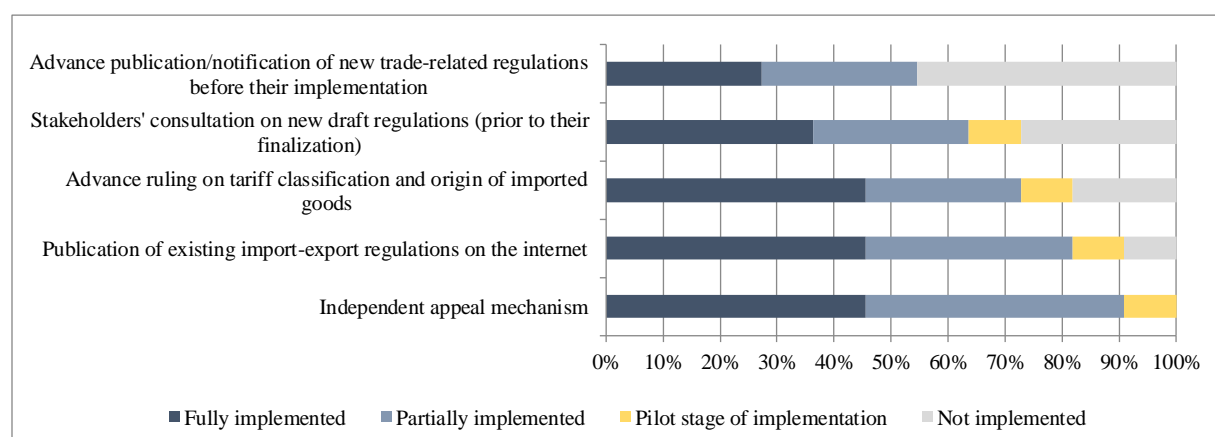
**Figure 9: Implementation of “transparency” measures: Arab average, 2019**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

Having an *independent appeal mechanism* and *publication of existing import-export regulations on the internet* are the most implemented two measures in the Arab region. The first one was totally or partially implemented by 10 countries (91 per cent of countries), while the latter by 9. On the other hand, *advance publication/notification of new trade-related regulations before their implementation* was the least implemented measure with only 6 countries either fully or partially implementing this measure and 5 countries have not implemented it (Figure 10).

**Figure 10: State of implementation of “transparency” measures for trade facilitation in Arab economies, 2019**



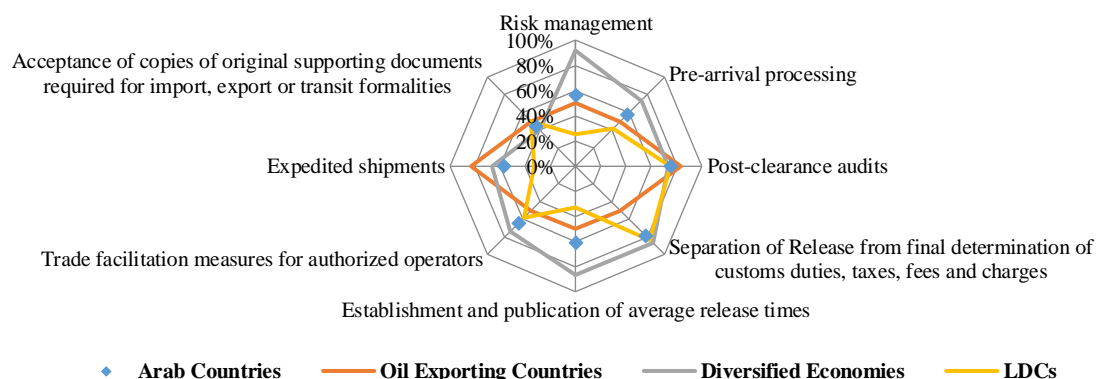
Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

### 3.2 “Formalities” Measures

The second category is formalities and includes eight measures that correspond to Articles 7 and 10 of the WTO FTA (Table 1) and Article VIII of the GATT. It is one of the most implemented categories in the Arab region whereby overall implementation rate reached 64 percent (Figure 5), driven mainly by diversified economies particularly in *risk management*, *separation of release from final determination of*

*customs duties, taxes, fees and charges and establishment and publication of average release times* (Figure 11). *Acceptance of copies of original supporting documents required for import, export or transit formalities* has been the least implemented measures in all sub-regional groups.

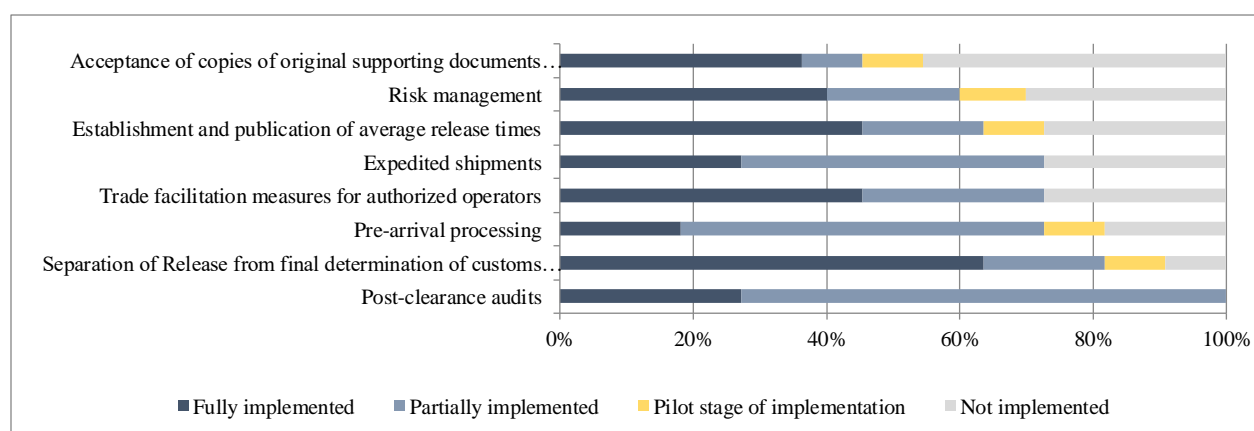
**Figure 11: Implementation of trade “formalities” facilitation measures: Arab countries average, 2019**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

In terms of number of countries fully or partially implementing formalities-related measures, *post-clearance audits* has been either fully or partially implemented by all countries, followed by *separation of release from final determination of customs duties, taxes, fees and charges* which was fully or partially implemented by 9 countries (82 per cent of countries). *Acceptance of copies of original supporting documents required for import, export or transit formalities* and *risk management* were the least implemented two measures, the first one was fully or partially implemented by 5 countries (45 per cent of countries) while the second by 6 (55 per cent of countries) (Figure 12).

**Figure 12: State of implementation of trade “formalities” facilitation measures in Arab economies, 2019**



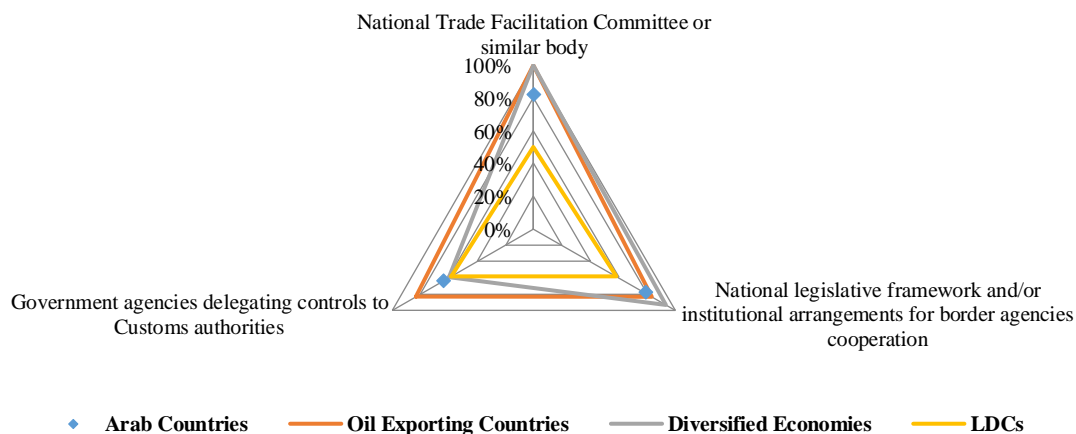
Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.



### 3.3 “Institutional Arrangement and Cooperation” Measures

Institutional arrangements and cooperation category comprises 3 measures that correspond to articles 8 and 23 of the WTO FTA (Table 1). It is the highest performing category in the Arab region with an overall implementation rate of 72 per cent (Figure 5), driven mainly by high performance of all countries, particularly oil exporting countries. *Establishing a national trade facilitation committee or similar body* was the highest performing measure, while *government agencies delegating controls to customs authorities* was the lowest (Figure 13).

**Figure 13: Implementation of “institutional arrangement and cooperation” measures: Arab countries, 2019**

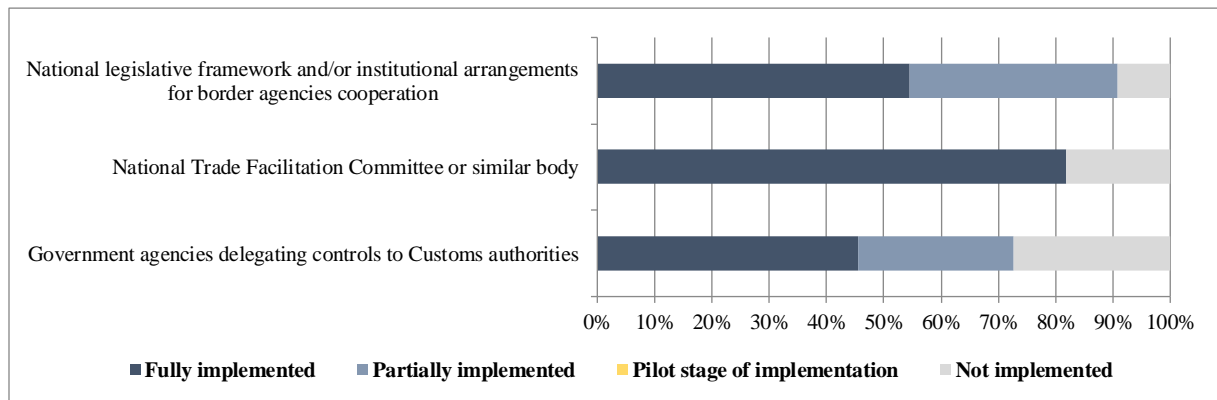


Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

Adopting a *national legislative framework and/or institutional arrangements for border agencies cooperation* was fully implemented by 6 countries (55 per cent of countries) and partially implemented by 4, indicating that further cooperation between different government agencies needs further strengthening (Figure 14). This last point is supported by the relatively low performance of the *government agencies delegating controls to customs authorities* measure, whereby 5 countries fully implemented this measure and 3 partially did. *Establishment of a national trade facilitation committee or similar body* is the most fully implemented measure, with a total of 9 countries (82 per cent). This might be due to the fact that establishing such a committee was a mandatory step for all countries that ratified the WTO TFA<sup>9</sup>. Among the countries covered in the 2019 survey, 4 countries have ratified the WTO TFA, namely Egypt, Jordan, Morocco and Saudi Arabia.

<sup>9</sup> World Trade Organization, Article 23.2 of the Trade Facilitation Agreement.

**Figure 14: State of implementation of “institutional arrangement and cooperation” measures for trade facilitation in Arab economies, 2019**

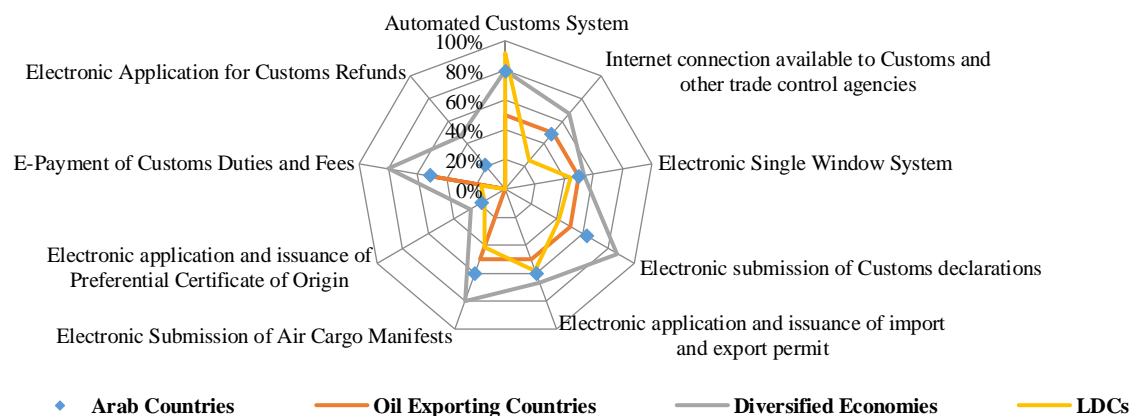


Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

### 3.4 “Paperless Trade” Measures

The paperless trade category comprises 9 measures, some of them correspond to Articles 7.2 and 10.4 of the WTO FTA (Table 1). This category was moderately implemented in the Arab region with an overall implementation rate of 52 per cent (Figure 5). This implementation is mainly driven by an above-average performance of countries with diversified economies. Putting in place an *automated customs system* and *electronic submission of customs declarations* were the most implemented measures, while *electronic application and issuance of preferential certificate of origin* and *electronic application for customs refunds* were the least implemented measures (Figure 15).

**Figure 15: Implementation of “paperless trade” measures: Arab countries average, 2019**

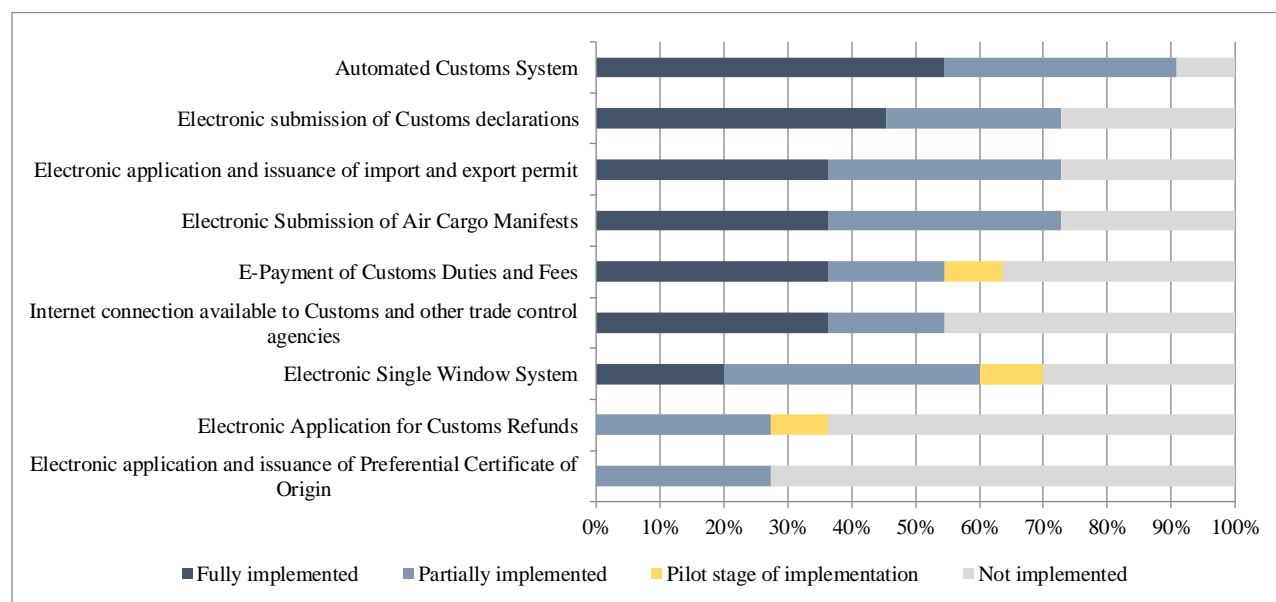


Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

Putting in place an *automated customs system* is the most implemented measure with 10 countries either fully or partially implementing this measure (91 per cent of countries). However, less than half of the countries have implemented the other 8 measures. Having in place an effective ICT infrastructure is a prerequisite for the successful implementation of these measures, and is a main challenge for many countries, particularly least developed ones. In this regard, the measure related to *internet connection available to customs and other trade control agencies* was fully or partially implemented by 6 countries.

*Electronic application and issuance of preferential certificate of origin* and *electronic application for customs refunds* were not fully implemented by any countries and were partially implemented by only 3 countries (27 per cent of countries), indicating that not only ICT infrastructure might be a challenge in the region, but also reliance on paper documents is still widely spread. *Electronic single window*, an essential step for facilitating trade, measure was fully implemented by 2 countries and partially implemented by 4 (Figure 16).

**Figure 16: State of implementation of “paperless trade” measures in Arab economies, 2019**

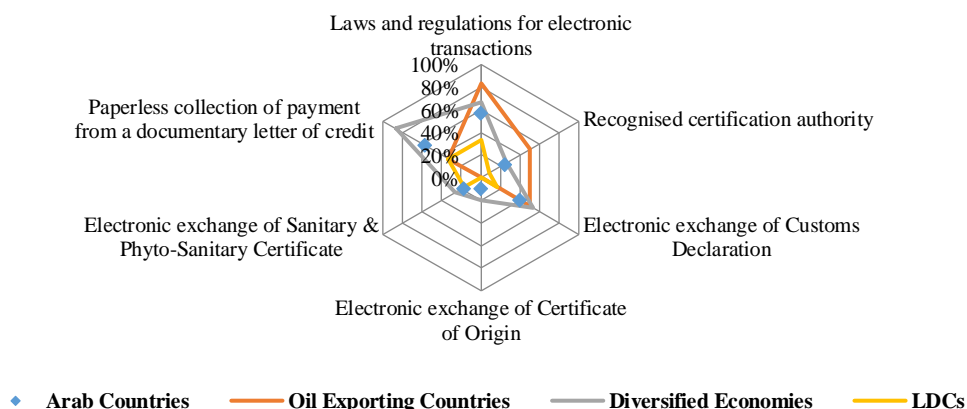


Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

### 3.5 “Cross-Border Paperless Trade” Measures

Cross-border paperless trade category includes 6 measures and is one of the least implemented category in the Arab region with an overall implementation rate of 37 per cent (Figure 5). Countries with diversified economies were the highest performers. *Laws and regulations for electronic transactions* is an essential measure to build the legislative framework for cross-border paperless trade. It is one of the most implemented measures in the Arab region. However, having a *recognized certification authority*, another essential step for cross-border paperless trade, is one of the least implemented measures in the region (Figure 17).

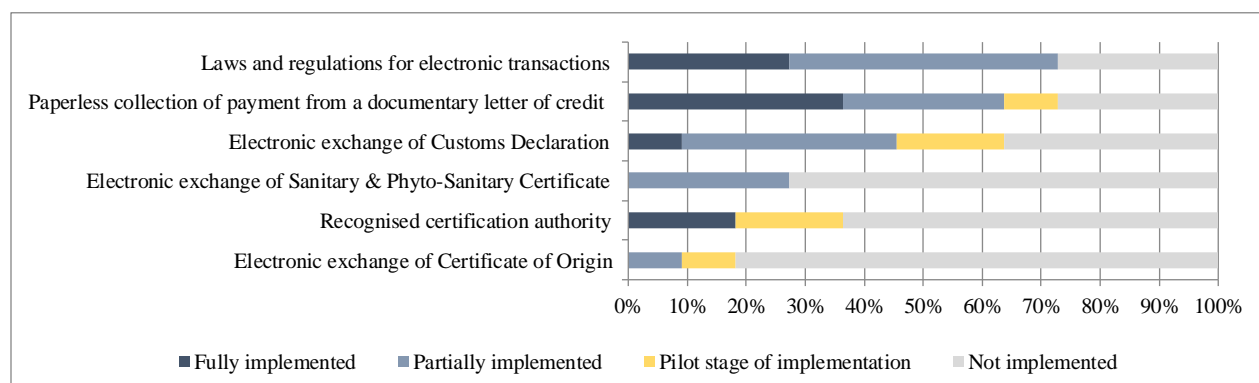
**Figure 17: Implementation of “cross-border paperless trade”: measures: Arab countries average, 2019**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

*Laws and regulations for electronic transactions* and *paperless collection of payment from a documentary letter of credit* were fully or partially implemented by 8 and 7 countries respectively. However, in practice, these measures are not strongly enforced as *electronic exchange of certificate of origin* was partially implemented by 1 country only, making it the least implemented measure in the entire survey (Figure 18). Similarly, *electronic exchange of customs declaration* and *of sanitary & phyto-sanitary certificate* were poorly implemented whereby 4 and 3 countries partially implemented these measures, respectively.

**Figure 18: State of implementation of “cross-border paperless trade” measures in Arab economies, 2019**

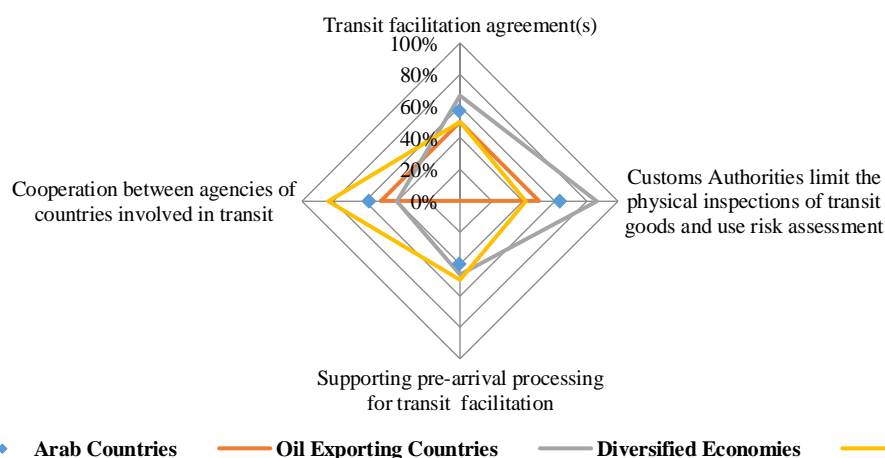


Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

### 3.6 “Transit Facilitation” Measures

The category “transit facilitation” comprises of 4 measures, some of them correspond to Articles 10.5 and 11 of the WTO FTA (Table 1). This category was moderately implemented in the Arab region with an overall implementation rate of 55 per cent (Figure 5), driven mainly by high implementation of countries with diversified economies and least developed ones. This category is important to drive regional and international trade and is affected by the extent of Arab regional integration. *Customs authorities limit the physical inspections of transit goods and use risk assessment* is the most implemented measure, while *supporting pre-arrival processing for transit facilitation* is the least implemented (Figure 19).

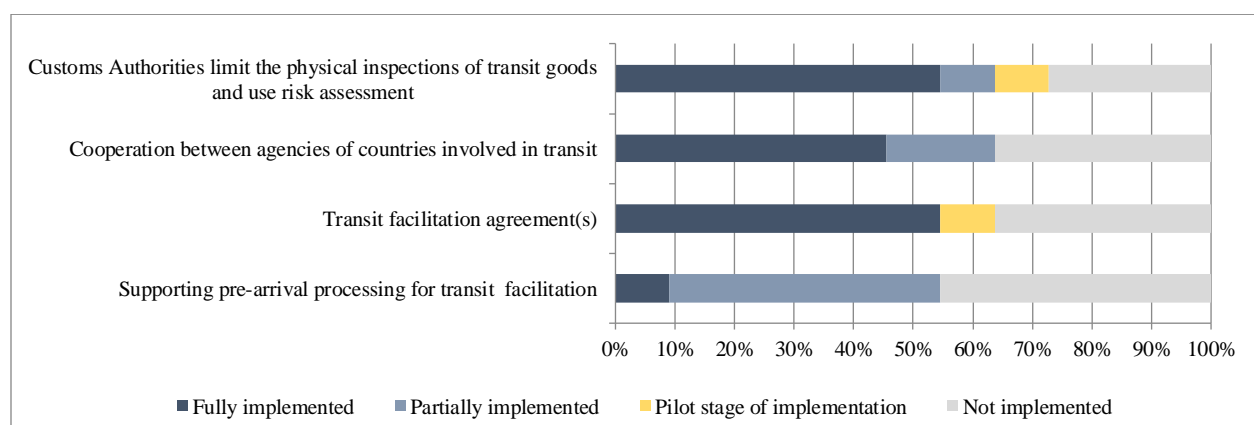
**Figure 19: Implementation of “transit facilitation” measures: Arab countries average, 2019**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

In the Arab region, this category is implemented to a good extent. Six countries have concluded *transit facilitation agreements* while 7 countries indicated that there is full or partial *cooperation between agencies of countries involved in transit*. However, formalities related to transit facilitation are still significant in the region, this is displayed with the low number of countries fully *supporting pre-arrival processing for transit facilitation* (only 1 country) (Figure 20).

**Figure 20: State of implementation of “transit facilitation” measures in Arab economies, 2019**



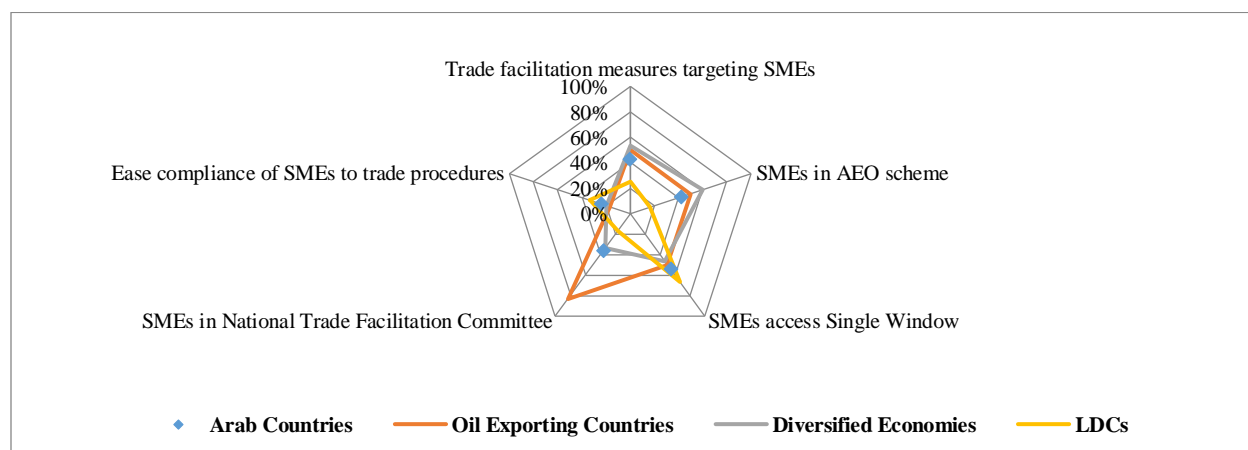
Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

### 3.7 “Trade Facilitation for SMEs” Measures

“Trade facilitation for SMEs” includes 4 measures. It is one of the low implemented categories in the Arab region, with an overall implementation rate of 41 per cent (Figure 5), driven mainly by oil exporting countries. While *SMEs access to single window* is the most implemented measure in this category, however this support does not include supporting SME traders, since the measure on *ease compliance of SMEs to trade procedures* is the least implemented one (Figure 21).



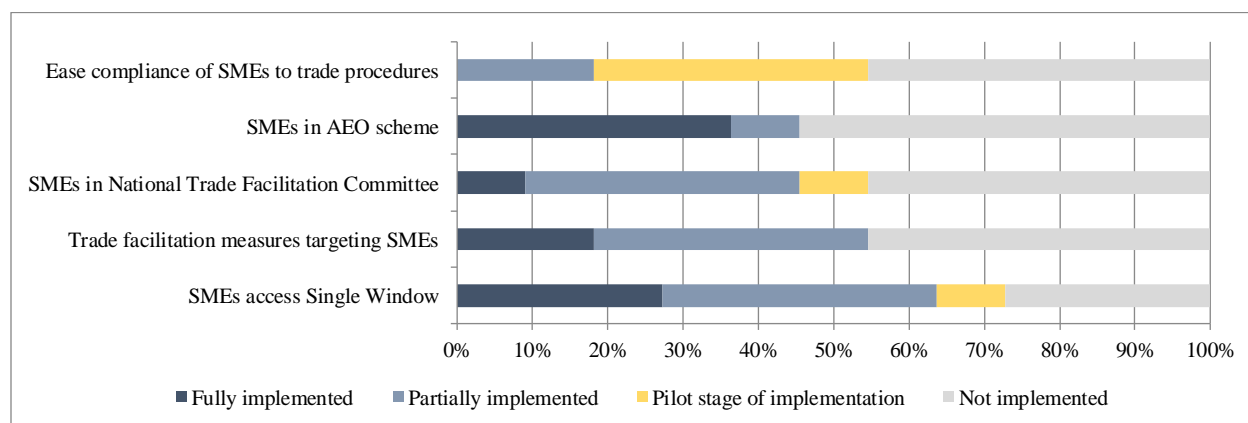
**Figure 21: Implementation of “trade facilitation for SMEs” measures: Arab countries, 2019**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

While only 2 countries (18 per cent of countries) fully introducing *trade facilitation measures targeting SMEs*, only one country have included *SMEs in National Trade Facilitation Committee*. This low implementation in addition to low support provided to SMEs, either by authorizing *SMEs to participate in the AEO scheme* (4 countries fully implemented this measure) or through *ease of compliance for SMEs regarding trade procedure measures* (no country have implemented this measure), imply that support to SMEs in trade facilitation is still insufficient (Figure 22). SMEs play an important role in sustainable economic development.

**Figure 22: State of implementation of “trade facilitation for SMEs” measures in Arab economies, 2019**

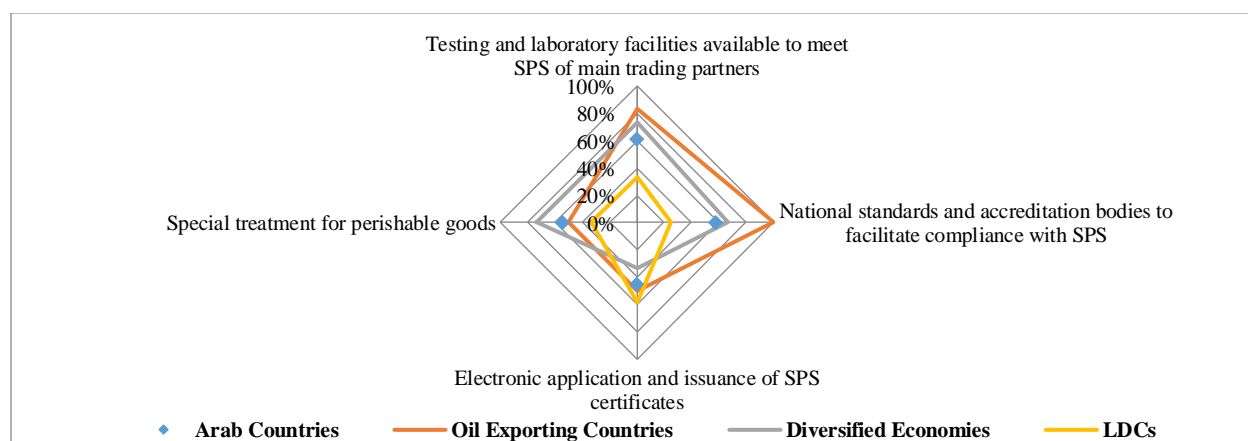


Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

### 3.8 “Agricultural Trade Facilitation” Measures

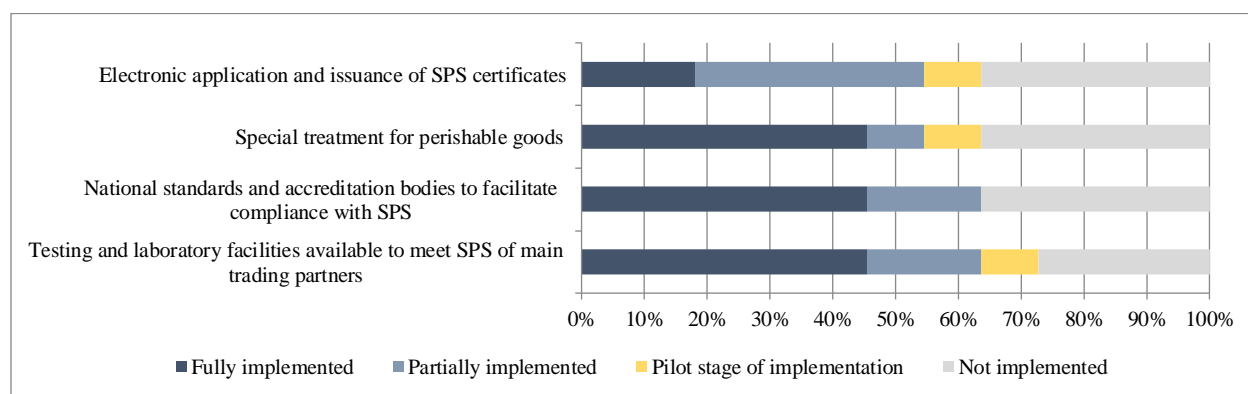
The “agricultural trade facilitation” category includes 4 measures and is moderately implemented in the Arab region with an overall implementation rate of 55 per cent (Figure 5), driven mainly by oil-exporting countries. *Testing and laboratory facilities available to meet SPS of main trading partners* is one of the most implemented measures for all countries except least developed ones, while *electronic application and issuance of SPS certificates* is the least implemented measure (Figure 23).

**Figure 23: Implementation of “agricultural trade facilitation” measures: Arab countries average, 2019**



*Electronic application and issuance of SPS certificates* is fully implemented by only two countries (18 per cent of the countries), exhibiting another low commitment to paperless measures. The other three measures are fully implemented by 5 countries and partially implemented by 1 or 2 countries, indicating a moderate commitment to trade facilitation in the agricultural sector (Figure 24).

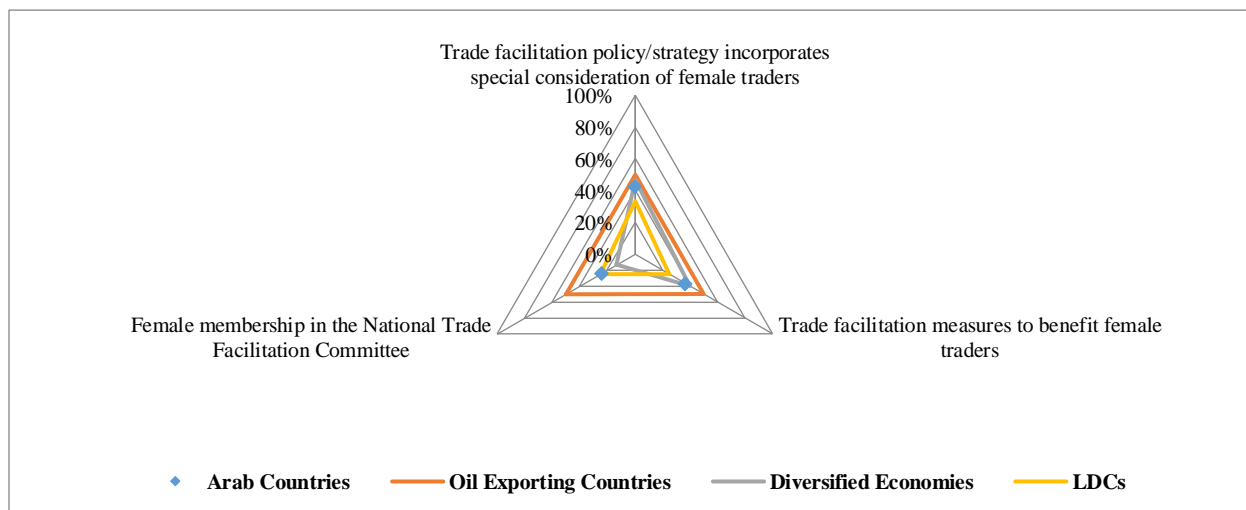
**Figure 24: Level of implementation of “agricultural trade facilitation” measures in Arab economies, 2019**



### 3.9 “Women in Trade Facilitation” Measures

“Women in trade facilitation” category is the least implemented category in the Arab region with overall implementation of 34 per cent (Figure 5). All three measures included in this category were relatively poorly implemented, demonstrating the absence or the poor enforcement of a mechanism that empowers and supports female traders (Figure 25).

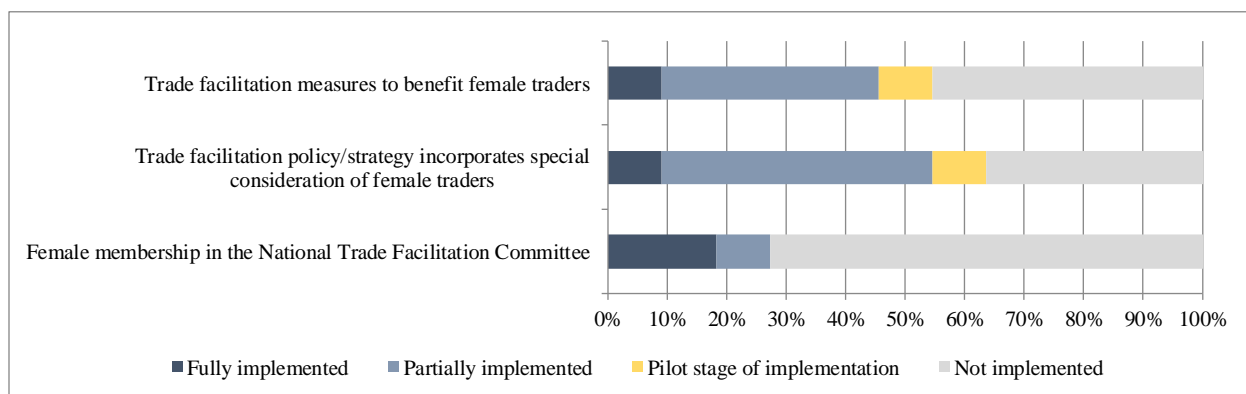
**Figure 25: Implementation of “women in trade facilitation” measures: Arab countries average, 2019**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

*Female membership in National Trade Facilitation Committee* is the most implemented measure, with only 2 countries fully implementing this measure. The other two measures, *trade facilitation policy/strategy incorporates special consideration of female traders* and *trade facilitation measures to benefit female traders* were fully implemented by only one country (Figure 26). Most of the Arab countries are lagging behind in terms of gender equity and female empowerment in trade facilitation policies.

**Figure 26: State of implementation of “women in trade facilitation” measures in Arab economies, 2019**



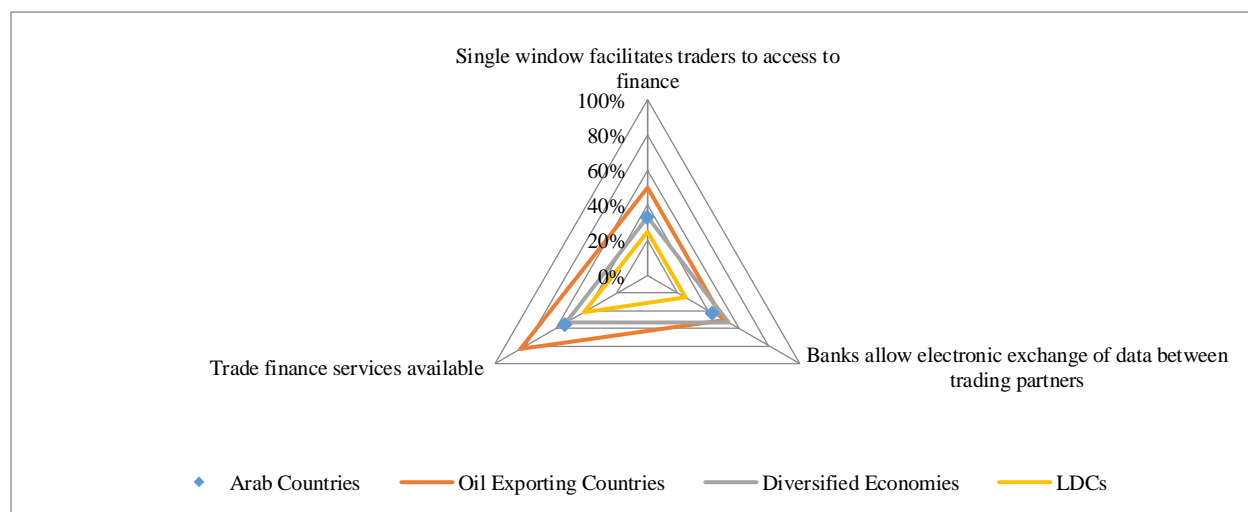
Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

### 3.10 “Trade Finance for Trade Facilitation” Measures

“Trade finance for trade facilitation” category includes 3 measures and is moderately implemented in the Arab region with an overall implementation is 43 per cent (Figure 5). It is an essential category to provide traders with access to finance and support them expand their trade. This category needs further support in the Arab region as a whole, particularly in countries with diversified economies and least developed ones. *Trade finance services available* is the most implemented measure indicating that countries

are cognizant of the need to provide financial services tailored for trade. However, the implementation is still low as indicated by the low implementation of single window for traders and banks allowing electronic exchange of data between trading partners (Figure 27).

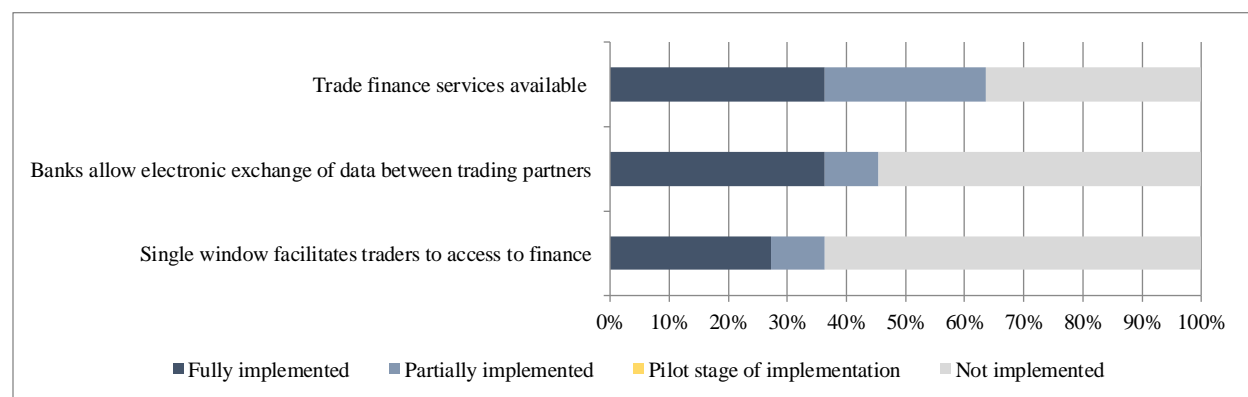
**Figure 27: Implementation of “trade finance for trade facilitation” measures: Arab countries average, 2019**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

In this category, the measure on *Trade finance services available* was fully implemented in 4 countries and partially implemented in 3 (27 per cent of the countries), while the measure on *Single window facilitates traders to access to finance* was fully implemented in 3 and partially implemented in only one country (Figure 28). Developing trade finance services is a need for the Arab region and need to be further pursued.

**Figure 28: State of implementation of “trade finance for trade facilitation” measures in Arab economies, 2019**

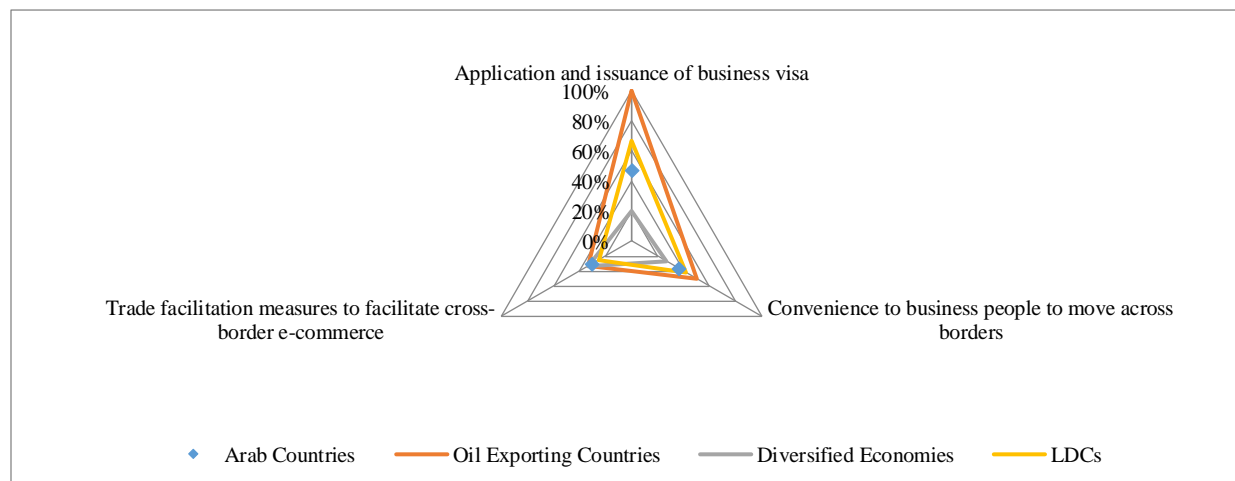


Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019

### 3.11 “Business Mobility for trade facilitation” Measures

The category on “Business Mobility for trade facilitation” comprises 3 measures and is one of the least implemented category in the Arab region with an overall implementation rate of 39 per cent (Figure 5). Oil exporting countries are the highest performers, particularly in terms of *application and issuance of business visa*. *Trade facilitation measures to facilitate cross-border e-commerce* is the least implemented measure for all countries, with an average implementation rate of 30 per cent (Figure 29).

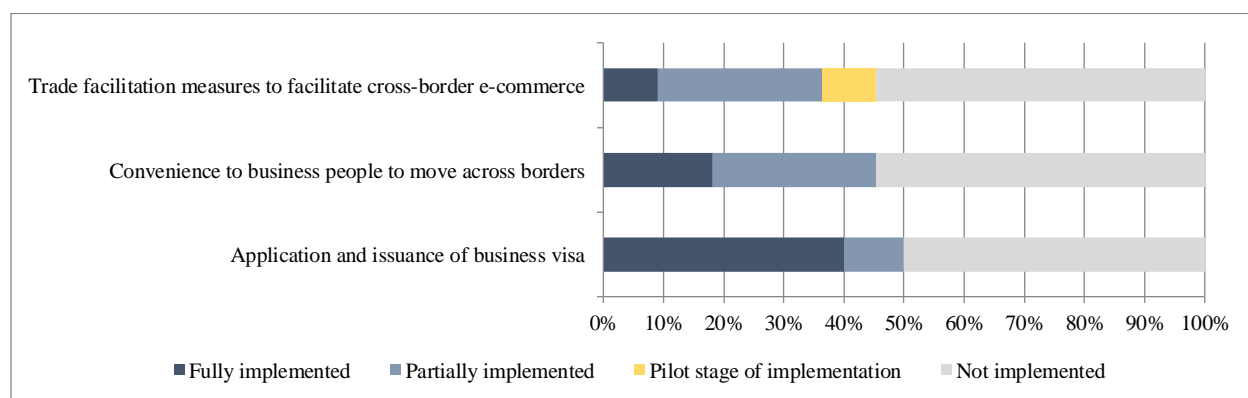
**Figure 29: Implementation of “Business Mobility for trade facilitation” measures: Arab countries average, 2019**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

In the Arab region, 4 countries indicated that they have fully implemented the *application and issuance of business visa* measure and only 1 has fully implemented the measure on *trade facilitation measures to facilitate cross-border e-commerce* (Figure 30). Facilitating the movement of businesspersons is an important component for trade facilitation and to boost international trade. Therefore, the Arab region needs to address these measures and to move forward in their full implementation.

**Figure 30: State of implementation of “Business Mobility for trade facilitation” measures in Arab economies, 2019**



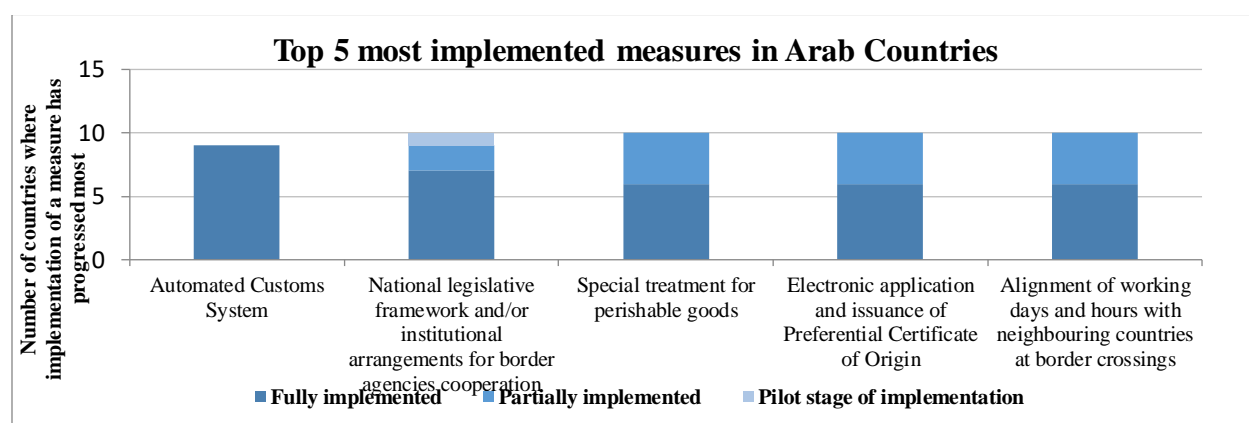
Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019



### 3.12 Progress and Challenges in Implementation

Looking at the entire Arab region, the 5 most implemented measures fall in the most implemented categories discussed above. Institutional arrangement and cooperation and paperless trade are the most implemented categories. In this same regard, putting in place an *automated customs system* is the most implemented measure, with 9 countries with full implementation, followed by adopting a *national legislative framework and/or institutional arrangements for border agencies cooperation* with 7 countries, *electronic application and issuance of preferential certificate of origin* and *alignment of working days and hours with neighbouring countries at border crossings* with 6 countries each (Figure 30).

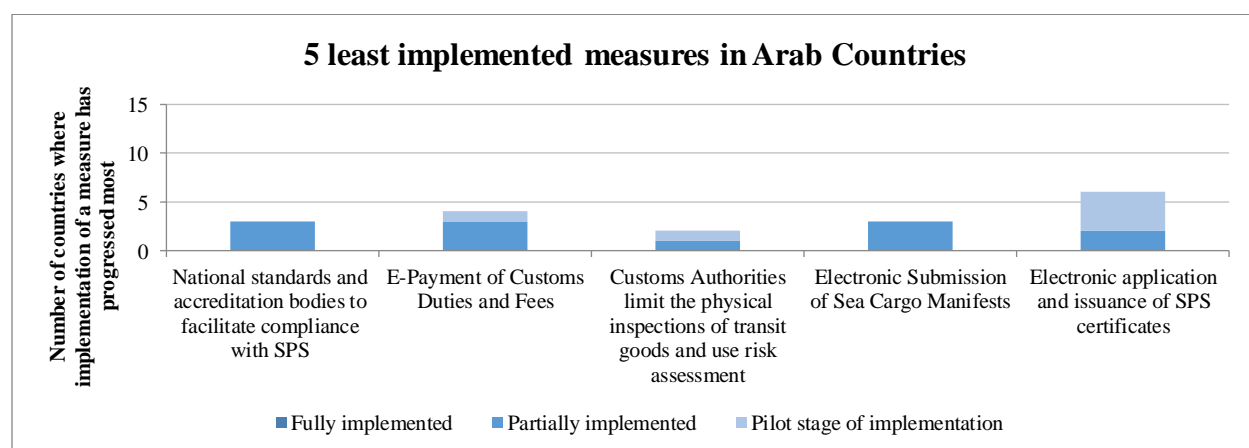
**Figure 31: Trade facilitation measures most fully implemented in Arab countries (11 countries)**



Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

On the other hand, the region needs to strengthen its efforts and needs a lot of support to move ahead with the implementation of other measures that aim at enhancing trade facilitation. Paperless trade category includes highly implemented measures and the least implemented ones. Furthermore, “trade facilitation and agriculture trade” and “transit facilitation” categories include lowest implemented measures in the region. None of the Arab countries have fully implemented any of the 5 least implemented measures. Partial implementation is also low and ranges between 1 and 3 countries (Figure 32).

**Figure 32: Trade facilitation measures least implemented in Arab countries (11 countries)**

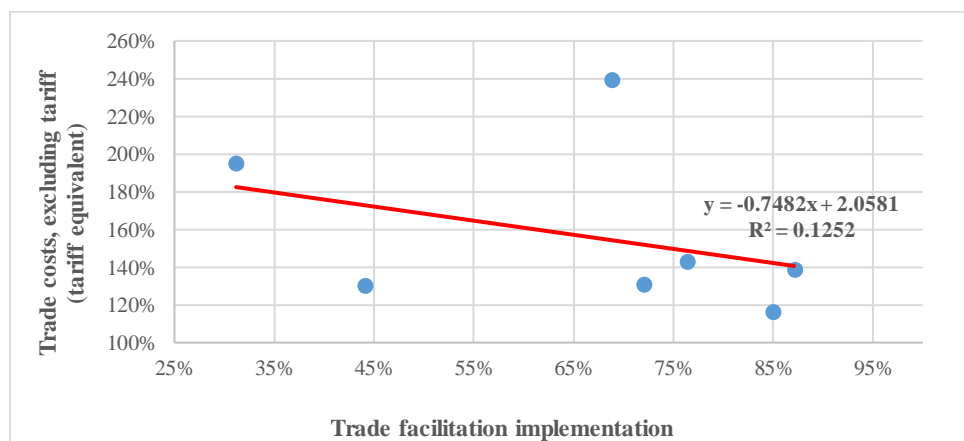


Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

### 3.13 Trade costs

Based on the implementation of the 31 core trade facilitation measures, figure 33 displays the relationship between trade facilitation implementation and trade costs. The figure presents a negative relationship between the two variables implying that implementation of trade facilitation measures improves as trade costs decrease.

**Figure 33: Trade facilitation implementation and trade costs for Arab economies**



Notes: Countries' trade costs are based on average comprehensive bilateral trade costs with Germany, China and the USA and expressed as ad valorem equivalents (%)

Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019, and ESCAP-World Bank Trade Cost Database (updated July 2019), available at: <https://www.unescap.org/resources/escap-world-bank-trade-cost-database>

The 2019 survey indicated that Arab countries have taken some serious measures to facilitate trade. The overall implementation rate for the region, based on 31 main measures, improved between 2017 and 2019, however, this increase was not evenly distributed across countries and across measures. Institutional arrangement and cooperation, transparency measures and formalities are the most implemented categories, whereas cross-border paperless trade measures need significant improvement.

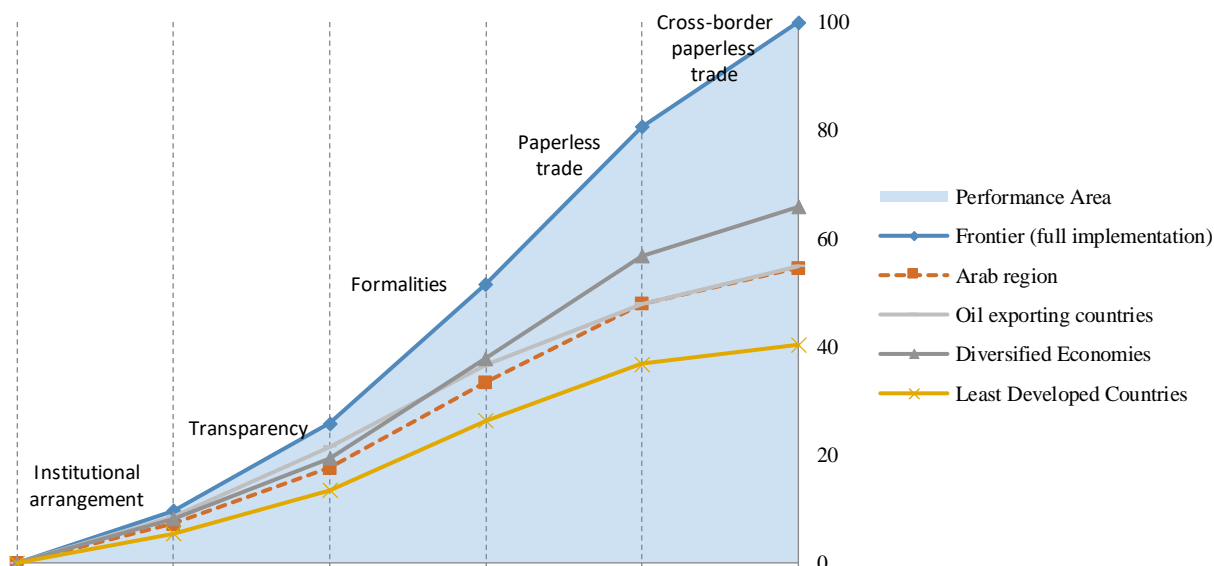
Most of the countries need support in operationalizing single windows and to review the measures that would maximize the benefit of single windows. Most least developed countries need support to move forward in the implementation of trade facilitation measures. These countries need support to put in place the required legislative frameworks and ICT measures to enhance digitalization of trade.

### 3.14 Trade facilitation ladder

Figure 34 presents the step-by-step process for the implementation of trade facilitation. It begins with putting in place the appropriate institutions and arrangements, followed by enforcing transparency in terms of introducing new laws and regulations or change in processes. The third step includes reviewing existing formalities and putting in place new ones that enhance trade facilitation. This step is directly linked to paperless measures and use of automation to speed-up processes. The successful implementation of steps three and four would culminate in the last step with the enforcement of cross-border paperless trading system. This step will be based on an efficient single window system and an electronic exchange of trade

documents at the borders<sup>10</sup>. Digitalization is an important step as it decreases non-tariff costs and the time needed to process documents, which would enhance competitiveness and increase international trade.

**Figure 34: Moving up the trade facilitation ladder towards seamless international supply chains**



Note: the figure shows cumulative trade facilitation implementation scores of Asia-Pacific sub-regions for 31 common trade facilitation measures included in the survey. Full implementation of all measures =100.

Source: UN Global Survey on Digital and Sustainable Trade Facilitation, 2019.

## 4. Conclusion and Way Forward

Since 2016, many Arab countries undertook reforms aiming to facilitate trading across borders and to improve the overall doing business environment. Some progress was recorded in terms of border compliance, however, more efforts need to be mobilized to enhance time and cost of documentary compliance.

Based on the third Global Survey on Digital and Sustainable Trade Facilitation conducted in 2019, and focusing only on 31 main trade facilitation measures in 11 Arab countries, the average implementation rate is around 55 per cent in 2019. Morocco was the biggest performer in 2019, followed by Saudi Arabia and Jordan. Arab least developed countries are still lagging behind in terms of implementation of trade facilitation measures, except for Sudan whose implementation rate improved significantly in 2019. Iraq was the worst performer in 2019, while low-income Comoros, Mauritania and Somalia have low implementation rates and are struggling with developmental and trade-related challenges.

On average, transparency measures, formalities and institutional arrangement and cooperation are the most implemented categories in the Arab region, with an average implementation rate between 64 and 75 per cent. *Publication of existing import-export regulations on the internet* and *acceptance of copies of original supporting documents required for import, export or transit formalities* were the most implemented

<sup>10</sup> This step-by-step process is inspired from and generally consistent with the UN/CEFACT step-by-step approach to trade facilitation towards a single window environment.

two measures as all countries have either fully or partially implemented these measures or are being implemented on a pilot basis.

The Arab region still faces lots of challenges in paperless documentation and processing in general which adds a supplementary non-tariff burden on trade. Cross-border paperless trade category is one of the least implemented category in the Arab region with an overall implementation rate of 37 per cent. *Electronic application and issuance of preferential certificate of origin* and *electronic application for customs refunds* were not fully implemented by any country and were partially implemented by only 3 countries, indicating that reliance on paper documentation is widely present in the region and that automation of trade measures is not strongly enforced. Supporting SMEs, women traders, access to trade finance and business mobility are also the lowest performers categories. Their average implementation rates range between 34 and 43 per cent. These four areas are still immature in the Arab region, more support needs to be directed towards these sectors in order to enhance the role of trade as an engine for growth.