HOW STRATEGIC ARE TRADE STRATEGIES ?

TRENDS FOR EFFECTIVE DEVELOPMENT

International
Trade
Centre

How strategic are trade strategies?

Trends for effective development

About the paper

While more than 40% of existing trade strategies identify trade integration and regionalism as crucial policy areas, less than 3% of the strategies are regional. Nor do they fully build on diversification opportunities in services and manufacturing.

This is one of many trends in trade strategies, which are key policy instruments to build competitiveness in regional and global markets. This report analyses trends from ITC's Trade Strategy Map database, the world's largest collection of trade development strategies.

ITC is the joint agency of the World Trade Organization and the United Nations.

Foreword

The surest way to get to a destination is to have a good GPS. This is why for over fifty years the International Trade Centre (ITC) has been supporting partner countries in their strategic thinking about how to use trade as an engine of growth, jobs and poverty reduction. The result is more than 100 trade strategies in over 50 countries and increasingly in regions to ensure greater coherence and development of regional value chains.

In many cases, we have worked with countries to develop fully-fledged national export strategies, while in others we have focused on specific sectors or trade support functions. We can go as deep or wide in a particular sector based on the requirements of our partners.

The aim is to provide home-grown strategy solutions based on a real partnership with our stakeholders in-country. ITC's commitment goes beyond simply providing partners with trade development resources. We ensure that the capacity, knowledge and tools to manage the strategy's implementation remain with the country at their pace. Our focus on country ownership combined with our unique approach to value-chain development means that each strategy we facilitate is unique.

We blend cutting edge data analysis – through ITC's own SME Competitiveness Framework and Export Potential Assessment methodology – together with forward thinking business and market intelligence to ensure relevant, realistic and innovative policy recommendations to support value-chain development. This means that each strategy is tailored to meet specific partner needs, which can range from building productive capacities to developing an enabling business environment or harnessing the power of green trade. And this is all done based on clear domestic consultations including the public and the private sector.

One of the key objectives of ITC's work on trade strategies is to ensure alignment with other strategic initiatives in the country. This has allowed us to build a repository of over 1500 documents dealing with trade and development issues in 169 countries. This freely available repository can be accessed via ITC's Trade Strategy Map at www.tradestrategymap.org. The Map includes hundreds of nationally developed plans and roadmaps for export promotion, as well as United Nations Development Assistance Frameworks, Poverty Reduction Strategy Papers, Diagnostic Trade Integration Studies and ITC-facilitated national and sector export strategies. A set of 38 searchable variables provide key pieces of information about each document, such as the year of approval, the implementation timeframe, the sector priorities, and the specific trade issues addressed.

The database is part of ITC's contribution to the global policy debate on strategic approaches to trade and development. It is a useful tool for policymaking and analysis, and an important platform to increase transparency and provide visibility to existing policy initiatives in developing countries. But above all, the Trade Strategy Map helps to increase coherence and coordination among different strategic initiatives and flies the flag for the importance of mainstreaming trade in national and regional strategies. The alignment between international and national initiatives is already attracting increasing attention within the international community, as it has become a critical theme in the preparation of UN Development Assistance Frameworks.

This paper is the result of analysing the plans and strategies in the database. It provides trends in the development of trade strategies and hints at gaps or inconsistencies in the advice provided in the documents in our repository. As such, the paper provides an assessment of how 'strategic' trade strategies are, thus contributing to achieve greater coherence and maximize impact.

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Acronyms

Unless otherwise specified, all references to dollars ($) are to United States dollars, and all references to tons are to metric tons.

DTIS	Diagnostic Trade Integrated Studies
TSM	Trade Strategy Map
ITC	International Trade Centre
LDC	Least developed country
NES	National export strategy
OECD	Organisation for Economic Co-operation and Development
PRSP	Poverty Reduction Strategy Papers
REC	Regional Economic Community
RTA	Regional Trade Agreement
SDG	Sustainable Development Goal
SITC	Standard International Trade Classification
UNCTAD	United Nations Conference on Trade and Development
UNDAF	United Nations Development Assistance Frameworks
WTO	World Trade Organization

Executive summary

Over the past decade, there has been a worldwide explosion in the number of strategic policy documents dealing with trade and development. The result has often been a confusing scenario of overlapping plans, initiatives and strategies. In an ongoing effort to help policymakers, businesses and researchers to navigate through the complexity of these initiatives, ITC developed the Trade Strategy Map, a repository of nearly 1,500 documents from 169 countries that focus on trade and development. These strategies are used as both tools for strategic policy planning and as legitimate policy instruments.

The database, covering the years 2001–2017, is the first systematic effort of such scale to identify, classify and make such documents easily available to the public. It is part of ITC's contribution to the global policy debate on trade and development strategies. The database is a useful tool for policymaking and analysis; it is also a platform to increase transparency and provide visibility to existing policy initiatives in developing countries.

This paper is the result of a three-year analysis of the 1,454 trade strategies in the database. The patterns that emerge include a relative decline in the mainstreaming of trade in development policies and a trend for international organizations to place increasing emphasis on inclusiveness and sustainability issues. These findings are highly relevant for trade strategy policymaking and should be factored into new trade strategy initiatives.

Key trends

- *Trade strategy policy is on the rise.* Over the past decade, there has been an explosion in the number of country initiatives dealing with strategic trade and development issues. In 2015, the number of active documents reached 729, a five-fold increase since 2004. Analysis of data reveals that traditionally there were more nationally grown strategies than strategies developed by international organizations, or with their support. Since 2013, however, international initiatives have been gaining weight.

  This suggests that national policymakers are increasingly seeking external assistance from specialized agencies that can provide policy advice to support the development of effective export development blueprints.

- *Where are the regional strategies?* While more than 40% of existing trade strategies identify trade integration and regionalism as crucial policy areas, less than 3% of the strategies are regional. Regional strategies tend to focus more on services and core trade topics, such as trade facilitation, quality issues and international standards, or trade information.

  This suggests that policymakers prefer dealing with these topics at the regional level. The international trade community – regional economic communities in particular – should make it a priority to develop more regional trade strategies. Regional trade agreements also provide an adequate context to develop regional strategies that can pave the road for further trade integration.

- *An opportunity for diversification*. Trade strategies tend to focus on a very narrow range of mostly agricultural products, perpetuating existing trade relationships between developed and developing countries. Agriculture accounts for almost a third of the sectors covered. Vegetable products, animal products, textiles, clothing, food, as well as wood products, are the most popular non-services sectors.

  Strategies have begun to place a strong emphasis on modern services sectors. Policymakers should place economic diversification at the centre of every trade strategy and take the opportunity to expand the range of sectors that trade strategies typically prioritize. High value-added sectors with the potential to bring about economic transformation should feature prominently in trade strategies. Sector-specific analysis indicates that more than half of the sectors in the database are services, with business, educational and tourism services being the most frequently prioritized sectors.

- *Trade strategies increasingly deal with a large variety of sustainability issues.* Sustainability and inclusiveness dominate the trade and development policy agenda. Poverty reduction, the protection of the environment, gender and youth issues, as well as vocational training are among the most widely cited topics in trade strategies. Trade finance, regionalism and trade promotion are the most cited core trade topics. Although sustainability topics dominate the agenda, there are key differences between domestic initiatives – more likely to deal with trade topics – and international ones, which focus more on sustainable development. There are also differences within international initiatives, with those involving least developed countries much more likely to focus on trade issues. Regional strategies also place more emphasis on core trade topics than on sustainability or inclusiveness.

  The analysis suggests that the benefits of dealing with sustainability and inclusiveness issues in the context of trade strategies are widely recognized. The analysis also indicates, however, that national policymakers in developing countries have appetite for more core trade issues in trade strategies.

- *Mainstreaming trade issues into national development plans is falling*. The share of documents mainstreaming trade over the total number of documents in the database has fallen from 30% in 2005 to 22% in 2015. International development initiatives mainstreaming trade have declined from 45% to 22%; for domestic initiatives, the figure has increased slightly to 21% from 18%.

  Mainstreaming trade is widely recognized as an important area. The United Nations 2030 Agenda for Sustainable Development identifies trade as one of the horizontal issues that can help achieve the Sustainable Development Goals. For whatever reason, the fall in the share of international initiatives focusing on trade has coincided since the launch of the Aid for Trade initiative in 2005, which set mainstreaming of trade as one of its major goals.

The database can be accessed free at www.tradestrategymap.org.

CHAPTER 1. TRADE STRATEGY USE RISES SHARPLY

Analysis of the 1,454 strategies included in the Trade Strategy Map (TSM) shows that, over the past decade, there has been an explosion in the number of strategic policy documents dealing with trade and development issues.[1] In 2015, the number of active documents reached 729, a five-fold increase since 2004. Every year, countries approve new documents and some of the existing ones become obsolete, or simply outdated, and cease to be 'active'.[2]

Figure 1: Number of active documents between 2004 and 2015
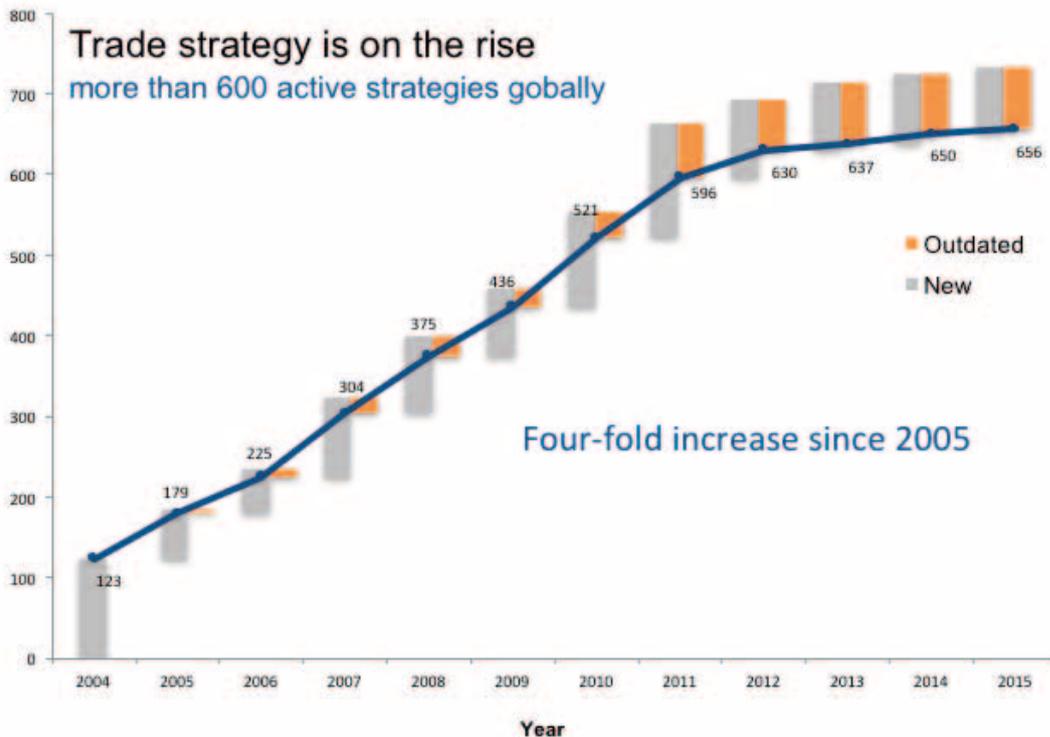
Source: Authors' calculations using ITC's Trade Strategy Map.

Figure 1 shows the evolution of the number of documents since 2004. In 2001, only one in four countries had a strategic policy document; by 2005, every country had an average of more than three active documents. The growth of strategic planning over the past decade has been widely shared across all regions, but it has been most notable in Africa. In 2015, the countries with the highest number of strategies under implementation were: South Africa (16), Burundi and Rwanda (15), Cameroon (14) and Côte d'Ivoire (13). This is consistent with the observed high interest in strategic planning in Africa.[3] The database contains a

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[1] The Trade Strategy Map (TSM) is a database of documents dealing with trade and development strategic policy issues. It currently includes 1,454 original documents from 169 countries covering the period 2001-17. The documents included in the database have been selected to conform to the following three criteria: (1) topic: a focus on trade and economic development; (2) purpose: a strong policy-planning component that identifies the parties in charge of implementation, and clear goals and objectives; and (3) legitimacy: a legitimate policy tool with some potential practical use. Details of the methodology can be found in Annex I.

[2] The average lifetime of the documents included in the TSM is 6.38 years.

[3] Indeed, most of ITC's export strategies, DTIS papers, UNDAFs and PRSPs predominantly focus on Africa.

relatively low number of documents from Asian countries. This may be partially explained by Asian countries being less inclined to make their strategies public.[4]

Greater participation of international organizations

The documents included in the database can be bundled in two broad categories: domestic documents and international ones. Domestic documents are those directly developed or commissioned by the national authorities of a country.[5] They include national and sector development plans, visions and agendas, as well as other initiatives designed or endorsed by national authorities. International documents, such as ITC's National Export Strategy (NES), its Sector Export Strategy (SES), Diagnostic Trade Integration Studies (DTIS), the United Nations Development Assistance Framework (UNDAF) and the Poverty Reduction Strategy Paper (PRSP), among others, are developed by international organizations, or with their support.[6] Figure 2 shows how the importance of these two groups has evolved since 2005.

Figure 2: Shares of domestic and international documents since 2005
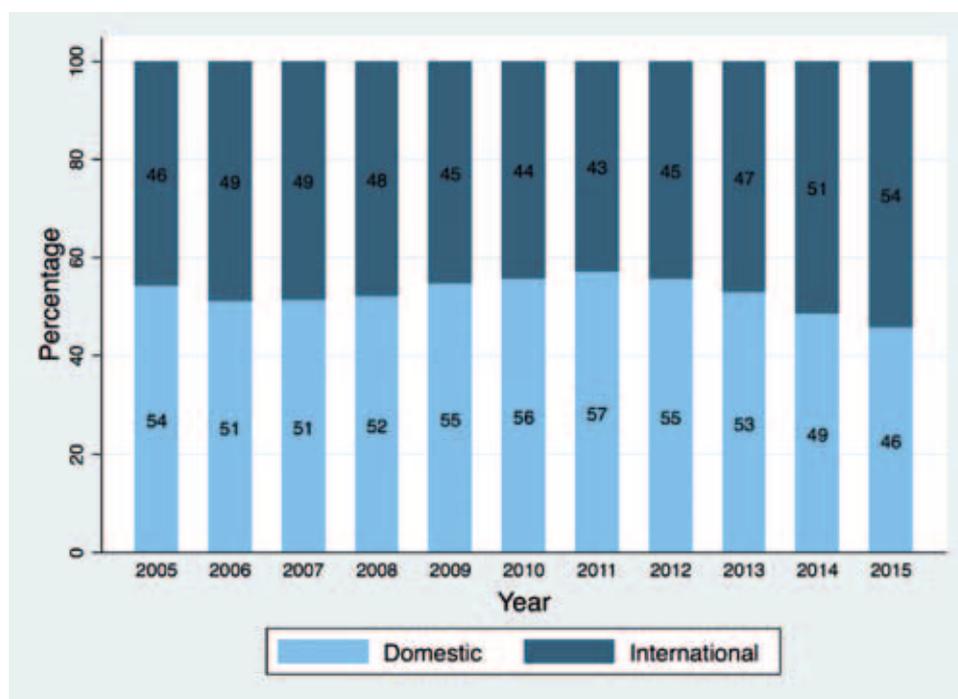
Source: Authors' calculations using ITC's Trade Strategy Map.

The importance of domestic documents – measured as the share of domestic over the total number of documents in the world – has traditionally been above 50%. Since 2014, however, the trend has changed and the share of international documents has been higher, reaching 54% in 2015.[7] This suggests that national authorities increasingly design their export development roadmaps relying on the expertise of international initiatives.

Most documents refer to a single country, but some apply to regional groupings or regions of the world.

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[4] The samples for Oceania and Europe are relatively small. Annex I also discusses the language bias of the database.

[5] When commissioned for international organizations they are classified as international documents.

[6] International documents account for 622 out of the 1,120 documents included in the TSM during the period of analysis (2005-15).

[7] This trend is confirmed by preliminary data until 2017.

CHAPTER 2.   WHERE ARE THE REGIONAL STRATEGIES?

Less than 3% of trade-related development strategies have a regional focus. The vast majority focus on one specific country. As illustrated in Figure 3, between 2005 and 2015, only 31 (around 2.6%) out of the 1,188 documents in the dataset had a regional rather than country-specific focus. The share of regional initiatives is highest in Africa, where they account for almost 4% of trade-related development strategies.

Figure 3: Number of regional and country-specific strategies, 2005–2015
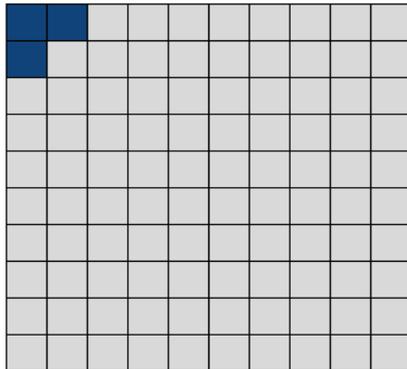
Source: Based on data from ITC Trade Strategy Map.

There are several important differences between regional and country-specific strategies. Regional strategies focus less on manufacturing and more on services sectors than country-specific ones.

Based on the sectors prioritized in each type of strategy, countries prefer to tackle services at the regional level, whereas agriculture and manufacturing seem to be better handled at the country level (see Figure 4). Both regional and country-specific strategies place a relatively similar emphasis on agricultural sectors.

Figure 4: Sector and topic focus of regional and country-specific strategies, 2005–2015
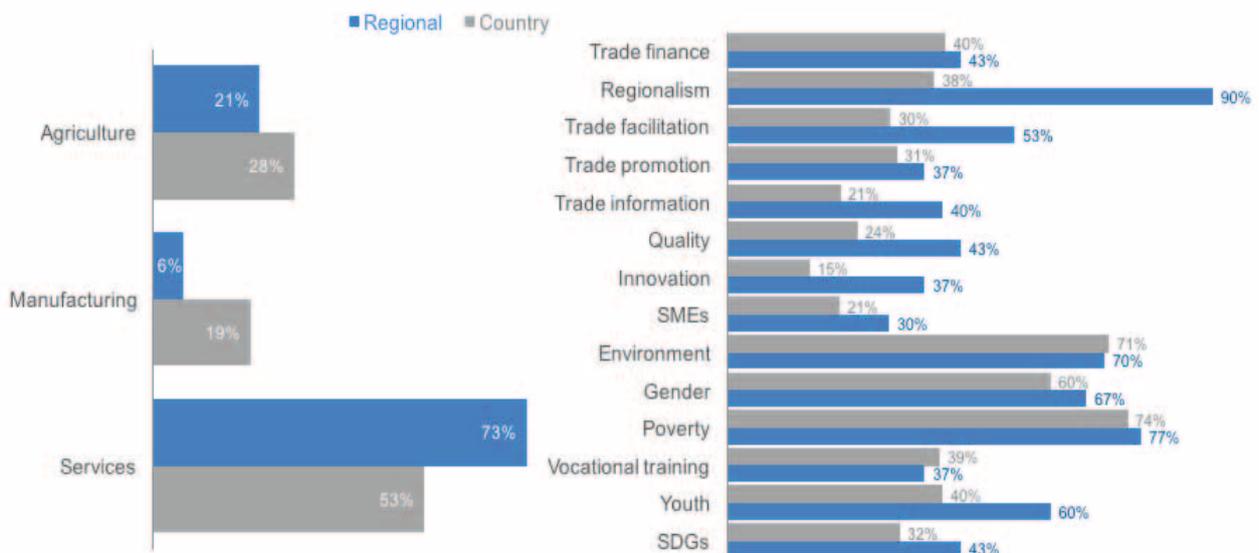
Note: The figure includes all strategies that have been active at some point between 2005-15.

Source: Based on data from the ITC Trade Strategy Map.

Regional strategies place more emphasis on trade-related topics

Regional development strategies are more likely than national or international strategies to deal specifically with trade-related issues. As shown in Figure 4, more than 50% of regional strategies deal with issues related to trade facilitation, for example. The latter includes improving transport and logistic services, enhancing efficiency and transparency of customs procedures, or removing any other barrier to the circulation of goods across borders.

Thirty-seven per cent of regional strategies stress the importance of trade promotion, which involves participating in fairs and other exhibition events abroad to promote domestic products, organizing visiting delegations of buyers and setting up marketing and branding activities.

The difference in focus between between regional and country-specific strategies when it comes to trade topics is particularly significant for innovation, with 37% of regional strategies including it as against just 15% of country-specific strategies, and for quality issues (43% against 24%) and trade information and market intelligence.

Some 40% of regional strategies, but only 21% country-specific strategies, focus on trade information and market intelligence. This topic includes information about potential export markets and products, customs procedures, import requirements, tariffs and other barriers to imports, international certifications and requirements, foreign buyers, business and investment opportunities, as well as statistical evidence and information.

For trade finance there is little variation between the national and regional level. While 40% of country-specific initiatives focus on trade finance and/ or general access to credit, the percentage only increases to 43% in regional strategies. Trade finance strategies include promoting microfinance initiatives, facilitating access to financial services and setting up specialized institutions for export credit and trade finance or strengthening existing ones.

Interestingly, the difference in thematic emphasis between regional and country-specific approaches almost disappears when it comes to inclusiveness, sustainability and other non-core trade issues, such as environmental issues, gender equality, vocational training and poverty reduction, captured in the dataset. As Figure 4 shows, on average, roughly the same number of regional and country-specific strategies emphasise inclusiveness and sustainability issues.

The main differences exist for youth integration, the United Nations' Sustainable Development Goals (SDGs) and small and medium-sized enterprises (SMEs). While 60% of regional strategies include youth integration, only 40% of country-specific strategies do. The latter refers to integrating young people into national productive and trading networks, guaranteeing equal treatment to both genders in the labour market, ensuring equal access to social services or improving young people's well-being, safety and security. Some 43% of regional, but only 32% of country-specific strategies, put any emphasis on the SDGs. Interest in SMEs is larger in regional than country-specific strategies.

The above findings suggest a preference of policymakers for dealing with core trade topics through regional trade strategies. The international trade community – regional economic communities (RECs) in particular – should give priority to the development of more regional trade strategies. Regional trade agreements (RTAs) also provide an adequate context to develop regional strategies that can pave the road for further trade integration. Trade strategies are cost-effective building blocks for trade integration.

Some trade topics best addressed at regional level

More than 40% of all trade-related development strategies identify trade integration and regionalism as a crucial area, but – as noted – less than 3% of all the strategies have a regional focus. There is a missmatch between the interest in regionalism and trade integration expressed in country-specific strategies and the actual number of regional strategies that countries engage in. Policymakers in developing countries should develop more regional trade strategies in the coming years to reflect the importance that domestic trade strategies allocate to trade integration.

Why are countries not developing more regional strategies? International organizations in general, and regional integration bodies in particular, should be leading the charge to develop new regional strategies that

can address the needs of countries. There is a recognition that some topics are best addressed at the regional level.

For instance, as shown in Figure 4, regional strategies tend to focus more on services and core trade topics, such as trade facilitation, quality and standards issues, or trade information, because countries perceive that these areas are best dealt with at the regional level. Similarily, Figure 9 shows that when it comes to trade strategies, national authorities are relatively more interested in those features directly linked to trade than in those linked to sustainability. Regional strategies seem to be an adequate instrument to advance the trade agenda also at the national level.

CHAPTER 3. AN OPPORTUNITY FOR DIVERSIFICATION

Place diversification at the centre of every trade strategy

Diversifying exports and broadening the productive structure of a country are two of the goals that policymakers most widely cite when they engage in trade strategy design. One would expect the choice of sectors being prioritized in the strategies to widely reflect these diversification objectives. But this is frequently not the case. As shown in Figure 6, the range of sectors that trade strategies focus on is highly concentrated around relatively "conservative" agricultural and primary products and services. When it comes to selecting priority sectors, policymakers often prefer existing or traditional sectors.

Policy efforts in the Trade Strategy Map documents concentrate on a small group of primary sectors. These include vegetable and animal products, foodstuffs, textiles, clothing and wood products. Textiles and clothing are the only manufacturing sectors that receive a lot of attention across most developing countries, particularly in Asia.

The strong focus of trade strategies on agricultural and primary products can only contribute to perpetuate existing trade patterns between developed and developing countries. Sector analysis by continents confirms these patterns: vegetable products are prioritized across all regions; Asian countries focus on textile and clothing, and Africa and Caribbean countries on primary products. Domestic initiatives are more likely to focus on manufacturing sectors. A stronger emphasis on services, modern services in particular, is a recent positive development that should have an impact on diversification over the coming years. More and better efforts to diversify the range of prioritized goods are needed.

Policymakers involved in trade strategy should adopt a more decisive stand towards diversification. Economic diversification should be at the core of every trade strategy. Services sectors dominate the trade strategy landscape. More attention should be paid to new, high value-added services that can have positive effects on the productivity of other sectors. In goods, agriculture and primary commodities are the dominant priority sectors. Manufacturing sectors such as machinery, plastics and transportation equipment are seldom prioritized, despite their potential to contribute towards diversification.

Trade strategies hinge on services sectors

Between 2005 and 2015, services accounted for 54% of the sectors included in the documents. The remaining 46% consisted of product sectors, with agricultural products representing two thirds of the goods. As Figure 5 shows, the sectoral focus has experienced a gradual process of "servicification". Starting in 2007, and gaining speed after 2010, this process has meant that two out of every three sectors considered for strategic action have been services sectors. Agricultural sectors have traditionally been highly prioritized but their share had fallen to around 20% by 2015. Policymakers' interest in trade strategies dealing with manufacturing sectors has been relatively low throughout the entire period.

Figure 3: Sector focus of the documents
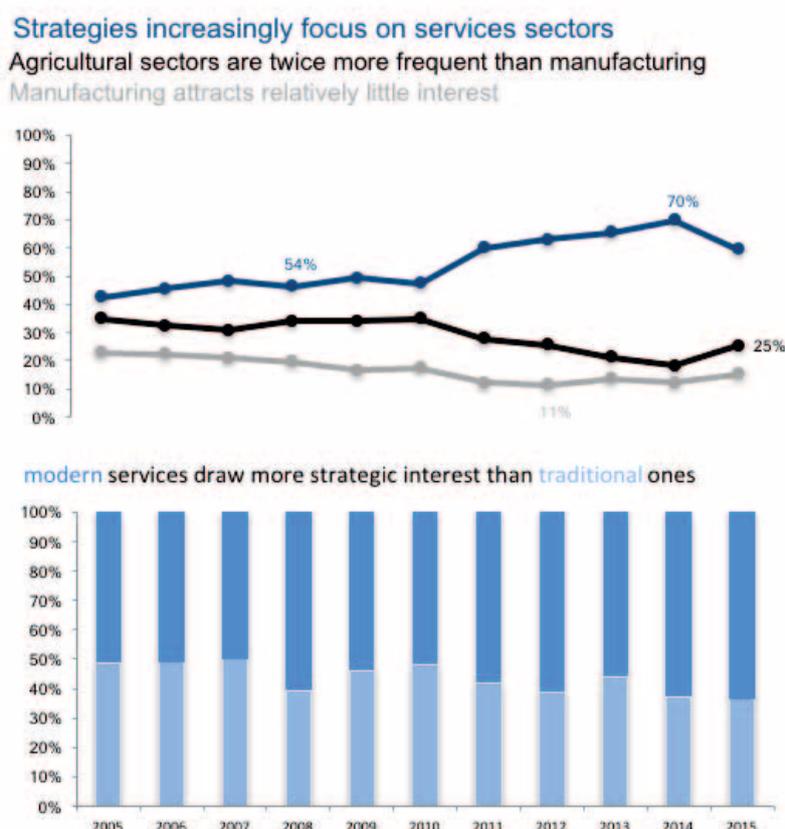
Modern services are gaining increasing weight in policymakers' trade development efforts. These sectors include insurance, finance, information and communications technology (ICT), royalties and license fees and other business services. Traditional sectors – mainly transport, travel, construction, personal, cultural and recreational services are losing weight in the services mix. This is consistent with recent documented trends on trade in services in which exports of modern services are becoming one of the fastest growing sectors in the global economy.[8]

An analysis of the priority products identified in the documents in the dataset shows that most focus on vegetable products, animals and animal products, textiles and clothing and foodstuffs, as well as wood and wood products. These are to a large extent existing primary sectors for the most part with a limited potential for economic transformation. Figure 6, which has been constructed grouping the 21 sections contained in the Harmonized System (HS) classification into 15 categories, presents these trends.[9]

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[8] See IMF (2017) for more on this.

[9] The 15 groups identified are the following:

1. Livestock & animal products: Section I (Ch. 01-05);
2. Vegetable products: Section II (Ch. 06-14) and Section III (Ch. 15);
3. Foodstuffs: Section IV (Ch. 16-24);
4. Mineral products: Section V (Ch. 25-27);
5. Chemicals & allied industries: Section VI (Ch. 28-38);
6. Plastics & rubbers: Section VII (Ch. 39-40);
7. Raw hides, leather & furs: Section VIII (Ch. 41-43);
8. Wood & wood products: Section IX (Ch. 44-46) and Section X (Ch. 47-49);
9. Textiles & clothing: Section XI (Ch. 50-63);
10. Footwear & headgear: Section XII (Ch. 64-67);
11. Stone & glass: Section XIII (Ch. 68-70) and Section XIV (Ch. 71);

Figure 4: Sector focus of the documents in the TSM, 2005–15
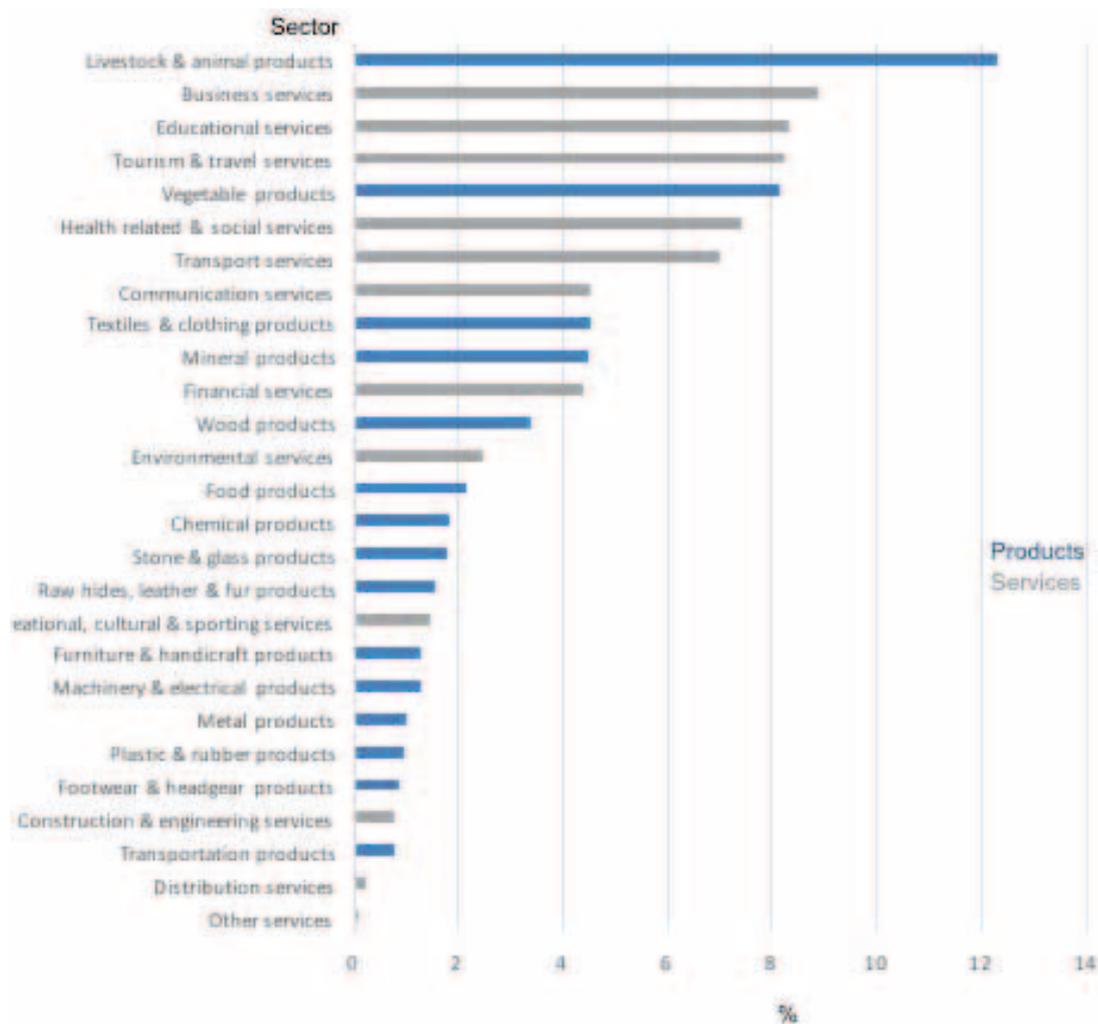
Source: Authors' calculations using ITC's Trade Strategy Map.

Some differences can be appreciated in the sectoral focus across regions, although vegetable products are prioritized in all.[10] Asia focuses mostly on textiles and clothing, Europe on foodstuffs and Oceania on animals and animal products, while Africa, South America and the Caribbean tend to place a higher focus on primary products.[11] Asian countries prioritize sectors with higher value added.

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12. Metals: Section XV (Ch. 72-83);
13. Machinery & electrical products: Section XVI (Ch. 84-85);
14. Transportation: Section XVII (Ch. 86-89);
15. Furniture, handicrafts & other manufactures: Section XVIII (Ch. 90-92), Section XIX (Ch. 93), Section XX (Ch. 94-96) and Section XXI (Ch. 97).

[10] The sum of the bars in the graph does not match the total number of documents contained in the TSM. This is the case because some documents do not focus on any sector and some documents focus on more than one sector.

[11] Figure 16 in Appendix III presents the number of strategies in the TSM that focus on specific Standard International Trade Classification (SITC) Divisions (Revision 4). The six most frequent sectors fall under SITC Section 0 (Food and Live Animals): vegetables and fruits; fish, crustaceans, molluscs and aquatic invertebrates; coffee, tea, cocoa and spices; miscellaneous edible products and preparations; cereals and cereal preparations; live animals. This is not surprising given that most countries included in the TSM are developing or least developed countries. Strategies also focus on: cork and wood; textile yarn, fabrics, made-up articles; articles of apparel and clothing accessories; textile fibres.

Trade strategies developed by international organizations tend to have a higher focus on services sectors than those developed by national ones.

Figure 7 compares the sector focus between national and international documents. For products, both are relatively similar in terms of their focus on vegetable products, animal and animal products, textiles and even mineral products. However, when it comes to sectors with an arguably higher value added, like chemicals, machinery, transportation, furniture and plastics, the focus is higher in national documents than in international documents.

Figure 5: Sector focus of national and international initiatives
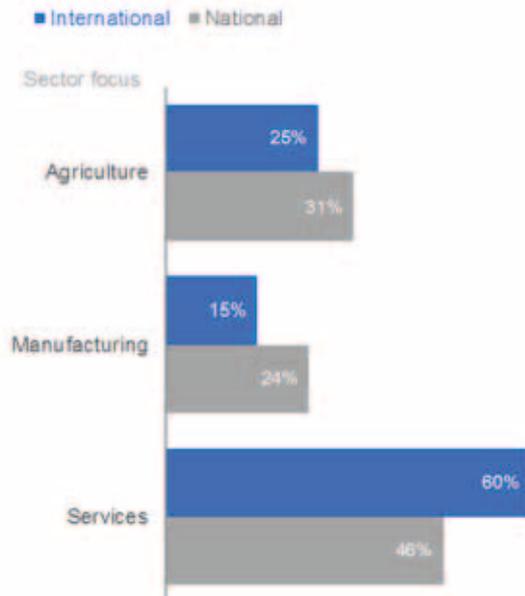
Source: Authors' calculations using ITC's Trade Strategy Map.

CHAPTER 4. MAKE TRADE STRATEGIES ABOUT TRADE AGAIN

Sustainability topics capture the trade agenda

Trade strategies can also be analysed through the lens of the topics that they typically cover. Of the 1,160 strategies analysed between 2005 and 2015, only 40 did not specify any topic. At least one of the 14 topics used for screening in the strategic map was cited in 96% of the strategies. A total of 6,073 topics are mentioned in the strategies. Figure 8. presents a summary to help to understand the nature of the documents included in the database. The large majority of the topics cited in the documents have to do with inclusiveness and sustainability issues.

Figure 6: Thematic focus of the documents in the TSM, 2005–2015
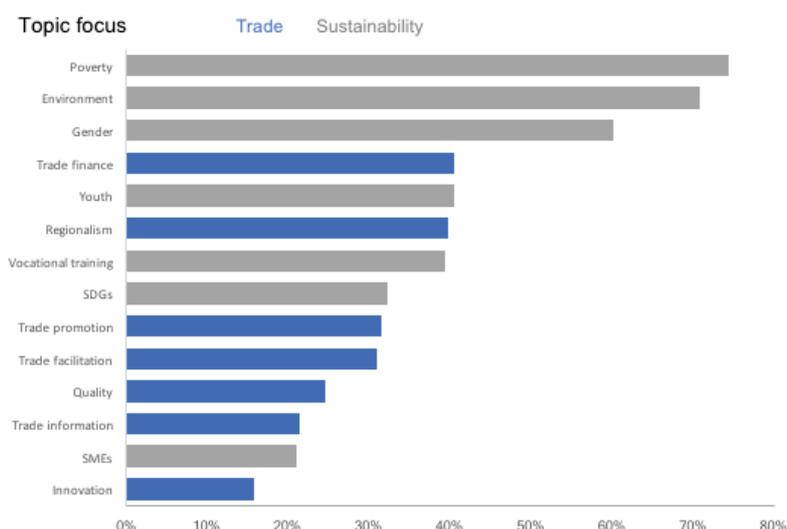
Source: Authors' calculations using ITC's Trade Strategy Map.

There are noteworthy differences between those documents developed domestically and those where international organizations have been involved.

As shown in Figure 9, the latter are more likely to deal with poverty reduction, gender equality, youth integration and the SDGs. One of the largest differences between domestic and international documents is in regional integration. Policymakers in national administrations are, on average, more inclined to deal with trade topics, in particular innovation, quality management and trade finance. Vocational training also attracts large interest at the domestic level. Generally, international documents largely concentrate on sustainability-related issues while also addressing key problems affecting the trade performance of the country. To a large extent this reflects the spirit of the role that trade is intended to have as an enabler of the SDGs.

Figure 7: Topic coverage in the TSM, 2005–2015
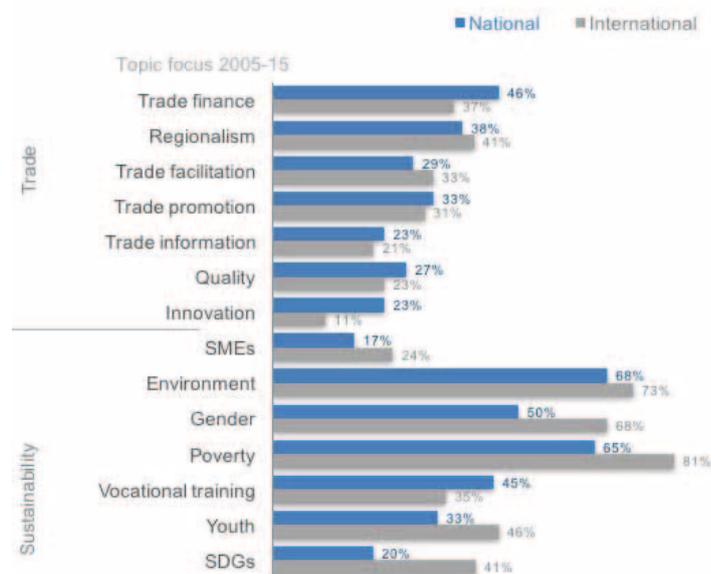
Source: Authors' calculations using ITC's Trade Strategy Map.

Although the period of analysis is still short, some preliminary implications for policymaking can be outlined based on the above patterns in trade strategy.

Mainstreaming of trade issues into development plans is falling

Trade mainstreaming, measured as the share of documents that mainstream trade over the total number of documents in the Trade Strategy Map, declined between 2005 and 2015. The United Nations Development Programme (UNDP) has defined trade mainstreaming as the process of integrating trade into national and sectoral development planning in a coherent and strategic manner.[12]

The joint OECD/WTO assessment of Aid for Trade distinguishes between 'full' and 'partial' trade mainstreaming.[13] Trade is considered to be 'fully' mainstreamed in a national development plan when well-developed, trade-related priorities and implementation plans are included.

Trade is only 'partially' mainstreamed when trade is mentioned in the national strategies, but no operational objectives or action plans are included in the trade strategies.[14] In the map, trade mainstreaming can be measured by the number of documents that place a particular emphasis on trade. This is captured by the 'focus in trade' variable (15) in Table 1.[15]

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[12] This definition includes all aspects of policymaking, implementation and review of the plans. See UNDP (2011) for further details.

[13] See OECD/WTO (2009) report.

[14] According to the OECD/WTO *Aid for Trade at a glance 2011* report, countries either fully (55%) or partially (41%) mainstream trade in their development strategies. Substantial differences across regions prevail. While all Asian countries have either fully (67%) or partially (33%) mainstreamed trade in their development strategy, in Africa 7% of countries have not mainstreamed trade at all.

[15] While all documents included in the TSM deal to some extent with trade, some documents do so in a much deeper way; for example, identifying specific trade-related priorities that need to be addressed or setting trade-specific plans of action for policy reform. Although it has been largely a matter of the judgement of the authors to determine when a particular document qualifies as a trade mainstreaming document, variable (15) can be considered a proxy for the trade mainstreaming potential of a policy document.

Figure 8: Trade mainstreaming in the TSM
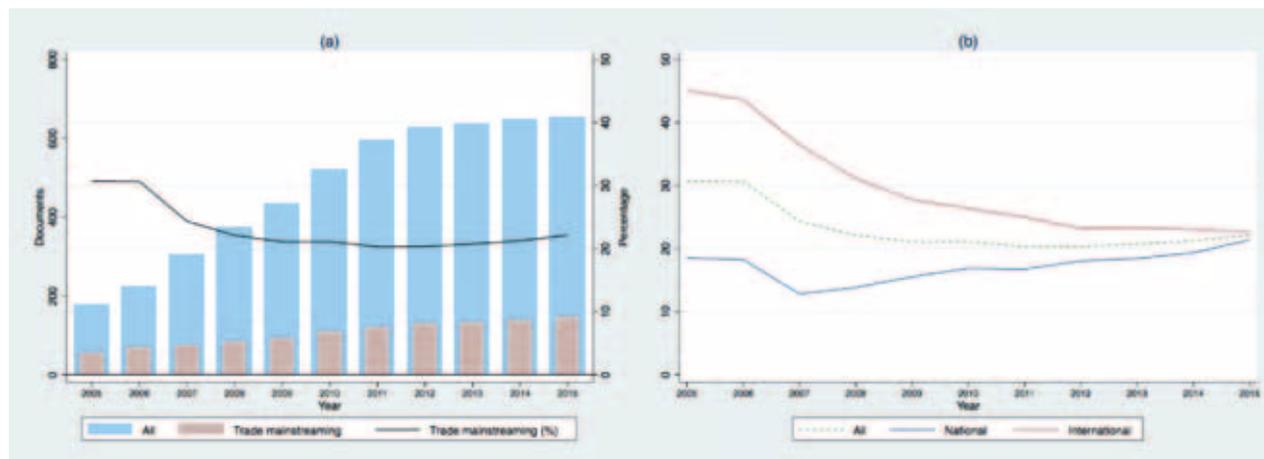
Source: Authors' calculations using ITC's Trade Strategy Map.

Mainstreaming of trade issues into development plans is falling in relative terms, even if in absolute terms it has increased over the past decade. In 2005, only 55 documents fully mainstreamed trade. By 2015, there were already 145, as shown in Figure 10(a). As the total number of planning documents has increased over time, the share of trade-mainstreaming documents has been eroded, averaging 21% between 2008 and 2015 from a peak of 30% in 2005.

International initiatives mainstreaming trade have declined from 45% to 22%, while domestic ones have slightly increased from 18% to 21% between 2005 and 2015, as Figure 10(b) shows. Interestingly, the beginning of the decline coincides with the launch of the Aid for Trade initiative in 2005, which has the mainstreaming of trade into development plans as one of its main goals.

Why are international initiatives less about trade mainstreaming? There could be different explanations for this. The first one is that trade mainstreaming is finally getting traction at the domestic level and hence international organizations do not need to continue drawing attention to the topic. This is consistent with the slight increase of trade mainstreaming observed in national policies. However, the size of the increase does not seem large enough to justify the observed decline in initiatives developed by international organizations.

Other explanations could have to do with fiscal federalism. As shown in Figure 9, domestic initiatives (regardless of trade mainstreaming) are naturally more likely to deal with core trade topics, which could indicate that trade issues are best addressed at the domestic level. The widely observed trend in international initiatives towards focusing on inclusiveness and sustainability issues, rather than trade issues, could also be a factor.

It is time to strengthen the trade mainstreaming policy agenda. Figure 10 (b) also shows that mainstreaming trade into national development plans and strategies is still far from being a standard practice. Generally, less than a quarter of the initiatives can be considered trade mainstreaming. Does this suffice? Policymakers should ensure that their trade development strategies are consistent with their national development plans and priorities. Mainstreaming of trade issues is cruicial. The United Nations the 2030 Agenda for Sustainable Development recognizes trade as one of the horizontal issues that can help achieve the 17 SDGs.

Figure 9: Sector and topic focus of trade mainstreaming initiatives, 2005–2015
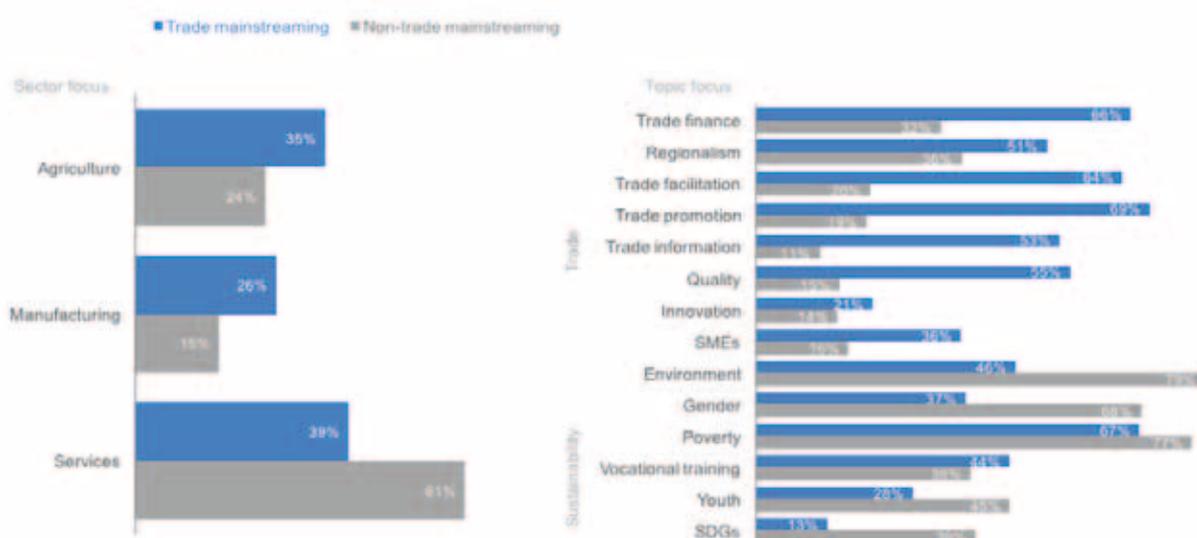
Source: Authors' calculations using ITC's Trade Strategy Map.

Do we need to rethink the trade mainstreaming agenda? As shown in Figure 11, there are significant differences in the sector and topic focus between initiatives that mainstream trade and those that do not. Trade mainstreaming initiatives are much more likely to focus on goods (61%) than services. Policies where manufacturing sectors have a pivotal role account for a remarkable 26% of the total.

As one could expect, the emphasis on core trade topics of those initiatives mainstreaming trade is much higher than for others. With the exception of vocational training, sustainability topics receive relatively less attention in trade mainstreaming initiatives.

International initiatives in LDCs more likely to focus on trade

Over the past decade, least developed countries (LDCs) have been the primary focus of international organizations engaged in trade-related strategic planning. The relatively higher level of involvement of international organizations in LDCs was probably intended to compensate for a relatively weaker institutional environment and strategic planning capacity in these countries.

As shown in Figure 12, policymakers in LDCs have developed a slightly smaller number of trade strategies than their peers in other developing countries. But an LDC has on average two more international strategies than a non-LDC.

Figure 10: Trade strategy in developing countries, 2005–2015
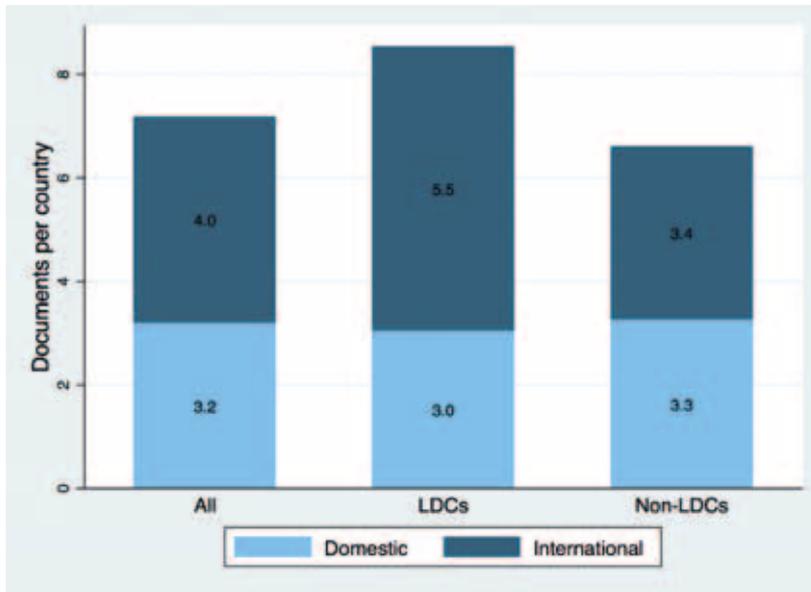
Source: Authors' calculations using ITC's Trade Strategy Map.

The choice of priority sectors in international initiatives varies significantly between LDCs and non-LDCs. As shown in Figure 13, LDCs are more likely to prioritize agricultural and manufacturing sectors. However, very few documents in LDCs deal with industrial sectors, and transportation equipment is neglected altogether. LDCs have less interest in foodstuffs than other developing countries. Almost half of the documents in LDCs identify tourism as a priority sector. On average, non-LDCs prioritize more services sectors than LDCs.

Figure 11: Sector and topic focus of international initiatives in LDCs and non-LDCs, 2005–2015
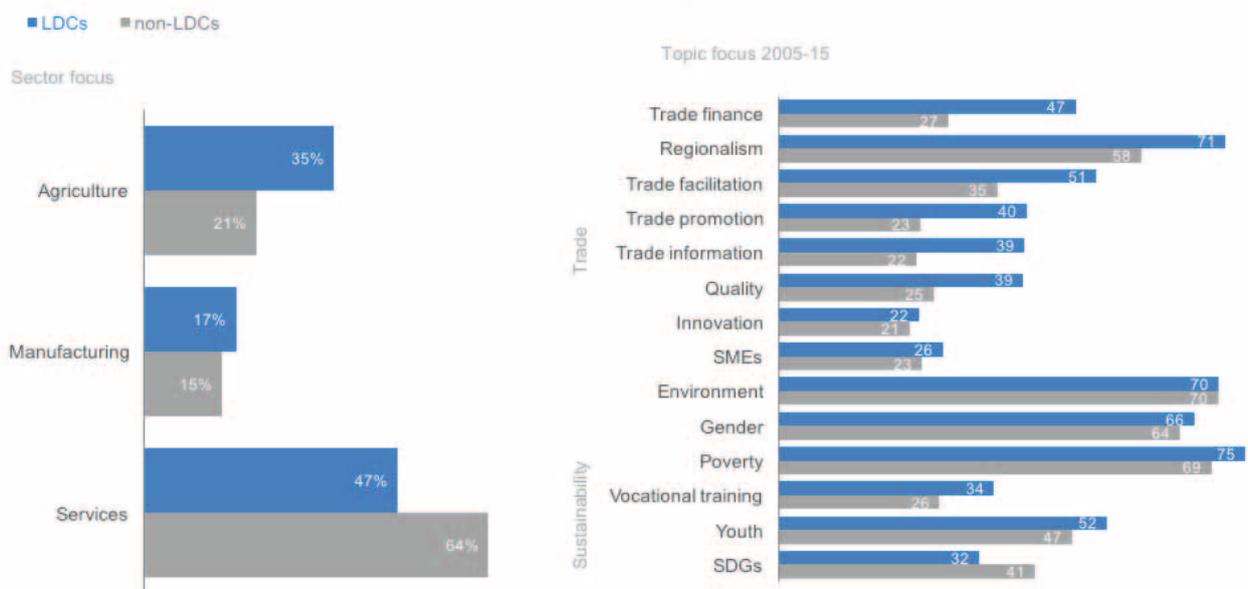
Source: Authors' calculations using ITC's Trade Strategy Map.

The choice of topics, as shown in Figure 13, is much more pro-trade in LDCs than in other developing countries. Trade topics are much more present in international initiatives in LDCs. Sustainability issues do not experience much variation across the different types of developing countries.

International initiatives on trade strategy should re-focus on core trade issues. International initiatives in LDCs are much more likely to focus on core trade issues than in non-LDCs, indicating that policymakers in LDCs rely more on external expertise when it comes to trade strategy. Preliminary analysis indicates that LDCs are the main focus of international organizations' documents, perhaps because LDCs have relatively weaker strategic planning capacities. LDC policymakers have produced fewer documents than other developing countries.

CONCLUSION

The paper has presented the Trade Strategy Map, a database of 1,454 documents dealing with trade and development issues in 169 countries. The map is the result of three years of research during which thousands of documents have been analysed and screened using a three-criteria filter. These criteria are: (1) topic: they have a strong focus on trade and economic development; (2) purpose: they are a tool for strategic planning; and (3) legitimacy: they are a legitimate policy instrument.

The map includes hundreds of nationally developed plans and roadmaps for export promotion, as well as UNDAFs, PRSPs, DTIS studies and ITC-facilitated national and sector export strategies. A set of 38 variables provides key pieces of information about each document, such as the year of approval, the implementation timeframe, the sector priorities, the specific trade issues addressed, etc. Each of these variables can be used as a search criterion on the TSM website.

For the purpose of this paper, the documents in TSM have been examined in order to identify key patterns in the nature of content of strategic thinking around trade and development. The six key patterns outlined below are highly relevant for trade strategy policymaking and can contribute to enhancing the design of new trade strategy initiatives.

- First, the use of trade and development strategies has been on the rise over the past decade. The increase has been widespread across all continents, but it is particularly significant in Africa, where the largest number of policy documents per country is found. Traditionally a domestic issue, trade strategy is increasingly an area where policymakers seek external assistance from specialized agencies.

- Second, documents in the database show that policy efforts are concentrated in a small group of primary sectors. Services increasingly dominate the landscape. Among non-services sectors, vegetable and animal products, foodstuffs, textiles, clothing and wood products are the most frequently prioritized. Textiles and clothing are the only manufacturing sectors that receive a great deal of attention across most developing countries, particularly in Asia.

- Third, there are important differentiating traits between domestic and international strategy documents, both in their sectoral and content focus. National policymakers tend to prioritize relatively higher value-added sectors with industrialization potential (e.g. machinery). International initiatives are more likel to focus on agricultural sectors and pay less attention to industrial sectors. In the documents, the topics most commonly dealt with by international organizations are poverty reduction, gender equality and youth integration. National policymakers, however, concentrate more on vocational training, quality management and trade promotion.

- Fourth, trade mainstreaming – measured by the share of documents that place a particular focus on strategic trade issues – has been falling during the past decade. Trade mainstreaming is a higher priority for national policymakers, particularly in LDCs, than for international organizations.

- Fifth, while more than 40% of existing trade strategies identify trade integration and regionalism as crucial policy areas, less than 3% of the strategies are regional.

- Sixth, the number of documents active in a country relates to its size and level of economic development. The larger a country – both in terms of population and GDP – the more documents its national administration develops. Wealthier countries are more likely to develop their own national plans and strategies.

The increase in the number of initiatives on trade strategy over the past two decades is already generating a debate on policy coherence and coordination of implementation. Coordinating the implementation of strategies is one of the key challenges ahead of policymakers. Ensuring coherence among the different domestic strategies and the multilateral ones is also an area that is likely to attract the attention of policymakers in coming years. The Trade Strategy Map and the findings presented in this paper can contribute to achieving greater coherence among strategic initiatives and to maximizing their impact.

APPENDICES

Appendix I. Constructing the Trade Strategy Map

The number of strategic trade-related development projects has grown worldwide at a considerable rate over the past two decades. In an ongoing effort to help policymakers, businesses and researchers to navigate through the complexity of these initiatives, ITC has developed the Trade Strategy Map (TSM), a repository of almost 1,500 documents from 169 countries that focus on trade and development and are tools for strategic policy planning and legitimate policy instruments.

Why does the world need a repository of trade strategies? National trade strategies are increasingly perceived as key instruments to boost export performance. This realization has triggered over recent decades a proliferation of initiatives that, under different names and following different methodologies, aim to provide countries with a roadmap to export development. A confusing scenario of often-overlapping plans, roadmaps, initiatives and strategies has arisen in many countries. Policymakers in developing countries need further clarity and a better understanding of the relative value of the different initiatives and their methodological underpinnings.

To the best of our knowledge, this is the first systematic effort of such scale to identify, classify and make easily available to the public a large amount of strategic policy documents dealing with trade and development issues. The dataset aims to advance the policy dialogue on trade strategy. It is intended to particularly appeal to three main audiences: (1) policymakers; (2) funders, technical assistance agencies, and international organizations dealing with trade-related technical assistance; and (3) academics.

- Policymakers have a tool to understand better the different policies that developing countries have adopted for trade-related strategic planning. The map also provides them with an overview of alternative export strategy services and methodologies. It ultimately helps policymakers to learn from one another's policies and to develop new trade-related policies that better suit their concrete needs.

- Funders, cooperation agencies and international organizations engaged in trade-related technical assistance can obtain in a one-stop repository the full picture of existing trade and development plans and strategic priorities of any developing country. The database increases transparency and provides a useful platform to increase the visibility of existing planning initiatives.

- Academics can use the map to conduct policy-oriented research. It provides insights into the policies tried by different countries in their specific contexts over a long period, as well as a set of variables for ease of comparative policy analysis. The information can be particularly useful for quantitative policy impact studies. While the dataset greatly facilitates comparisons among different export strategies, it is in principle not intended for benchmarking or ranking purposes.

The Trade Strategy Map dataset was constructed as follows:

Three filtering criteria

Identifying what documents to include has been the most crucial step in developing the dataset. After examining thousands of potentially relevant policy documents dealing with trade and development issues, a three-criteria filter has been used to determine whether a document should be included.[16]

The documents included in the TSM satisfy the following criteria:

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[16] The three-layer filter has been inspired by ITC's best practice in the area. ITC's best practice on export strategy calls for a high degree of country ownership and inclusiveness in the formulation of strategies. An export strategy is considered to be inclusive and country-owned when it is approved by national authorities, when its design has involved a large group of public and private stakeholders and when it is aligned with existing national plans.

- *TOPIC: Focus on trade and economic development.* This criterion ensures that selected documents deal primarily with trade issues from a development perspective. Some documents tackle these topics explicitly, for instance by providing a thorough analysis of the main difficulties that exporters face in a given country and discussing the alternative ways to address them.[17] Other documents are included because they have a more indirect significance for trade and economic development in a country. This is the case, for example, of *L'étude Prospective du Secteur Forestier en Côte d'Ivoire*.[18] The inclusion of this type of documents – largely a matter of judgement – has increased the heterogeneity of the TSM.[19]

- *PURPOSE: Aim to serve as tools for strategic policy planning.* This criterion ensures that the documents included are results-orientated; in other words, only documents that aim to have an impact on policy are included.[20] Documents satisfying this second criterion have some type of strategic component, plan of action or roadmap towards implementation with a specific timeframe; they identify parties in charge of the implementation and their allocated resources and/or specify clear priorities, goals and objectives.[21] Documents containing some or all of the above elements have been included, but purely analytical studies which, even when rigorous, are missing the policy dimension, have not been included.[22]

- *LEGITIMACY: Are a legitimate policy instrument.* This criterion ensures that the documents are lawfully intended for policymaking purposes. As a general rule, the documents included have a sufficient degree of legitimacy to guide or influence policy.[23] The initiatives designed, approved and/or endorsed by national authorities are considered to be sufficiently legitimated by default. Those developed by private actors and international institutions are included when they have had or are likely to have a strong influence on national policies.[24]

Applying the above criteria ensures that the map contains documents that are relevant to policymakers, funders, technical assistance agencies and academics dealing with trade-related technical issues.

The documents included in the TSM

The map includes a total of 1,454 documents covering 169 countries from 2001 to 2017.[25] The vast majority of the documents refer to individual countries.[26] However, the database contains 32 documents referring to groupings of countries, such as the Economic Community of West African States (ECOWAS) or the Common Market for Eastern and Southern Africa (COMESA). All 54 African countries, as well as the 36 countries in South America and the Caribbean, have been included. There are 52 Asian countries, 16 from Oceania and 11 European ones. Figure 14 shows the country coverage of the strategic map.

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[17] This is the case for many of the national development plans that developing countries produce.

[18] Although the document does not directly address issues related to trade, it outlines a plan of action for the sustainable development of the forestry sector of Côte d'Ivoire. It directly deals with issues related to biodiversity, demography, infrastructure, agriculture, fishery, mining and energy. The document was considered sufficiently relevant to be included in the dataset.

[19] As a general rule, documents have been included when deemed sufficiently relevant for policymakers working on trade and development issues. The map includes a number of variables to allow for refined searches.

[20] On results orientation, see the Paris Declaration on Aid Effectiveness (2005), the Accra Agenda for Action (2008) and the Busan Partnership for Effective Development Co-operation (2011).

[21] The presence of an action plan alone has not necessarily been considered sufficient evidence of meeting this condition.

[22] Not all Diagnostic Trade Integration Studies (DTISs) and Poverty Reduction Strategy Papers (PRSPs) strictly meet this condition; they have, however, been included as it has been considered that the initiatives to which they belong intend to meet this condition.

[23] Despite their heterogeneity, Poverty Reduction Strategy Papers (PRSPs), United Nations Development Assistance Frameworks (UNDAFs), Diagnostic Trade Integration Studies (DTISs), National Export Strategies (NESs) and Sector Export Strategies (SESs) are considered to be sufficiently legitimated.

[24] This includes research centres, consultancy firms, chambers of commerce, firm associations.

[25] Some documents dating back to 1993 have also been included. Most of these are earlier versions of documents developed between 2001 and 2017.

[26] This includes all 153 ITC Programme Countries, plus Croatia, Romania and Cayman Islands. Note that no strategies have been found for Brunei Darussalam and Cayman Islands.

Figure 12: Country coverage in 2017

Source: https://www.tradestrategymap.org/

Primary sources of information

Most of the documents included in the dataset have been obtained from official websites. These include the websites of national governments and their relevant ministries, as well as international or regional organizations. For example, the World Bank's website provides access to PRSPs.[27] ITC's Export Strategies have been made available to the public for the first time. Many government sources and officials have been contacted as well, particularly those in countries where ITC has conducted an Export Strategy.

The systematic search of documents has been undertaken in English, French, Spanish, Russian and Portuguese.[28] Some documents that were originally written in other languages – for example, Arabic – have also been included. The choice of specific languages to perform the search implies a 'language bias' in the identification of documents.[29] Future updates will address this bias by enlarging the range of languages used.

Variables used in the TSM

There is a record of every document in the dataset. Each recorded entry contains a total of 40 descriptive variables, including 26 binary variables. A complete list of the variables used in the dataset is provided in Table 1.

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[27] See http://go.worldbank.org/CSTQBOF730.

[28] Research was conducted during 2012 and 2013.

[29] The TSM might omit documents that have not been found because they are in other languages.

Table 1: List of variables in the TSM

(1)	Regions	(15)	End	(29)	National Export Council
(2)	Country code	(16)	Document description	(30)	Resource allocation
(3)	Country name	(17)	Poverty reduction	(31)	Participatory process
(4)	Name	(18)	Gender equality	(32)	Last update
(5)	Document	(19)	Youth integration	(33)	Action plan
(6)	Sector type	(20)	Environmental sustainability	(34)	Trade facilitation
(7)	Sectors	(21)	Regional integration	(35)	Public
(8)	ITC codeLink	(22)	Trade finance/access to credit	(36)	Regional Document
(9)	International code	(23)	Trade information/market intelligence	(37)	Link
(10)	Year	(24)	Quality management	(38)	Small and medium-sized enterprises
(11)	Counterpart	(25)	Technical vocational education and training	(39)	Innovation
(12)	Document type	(26)	Country ownership	(40)	Sustainable development goals
(13)	ITC facilitated	(27)	Trade promotion		
(14)	Start	(28)	Focus on trade		

Searches can be performed on any of the fields included using the online version of the dataset – www.tradestrategymap.org. The choice of variables aims to facilitate user analysis of the heterogenous documents included in the dataset. The complete list of the countries and regional groupings included in the strategic map and their respective ISO codes are available in Appendix II.

Appendix II. Description of the variables used in the TSM

The following variables have been included in the TSM:

(1) Country name. This is the name of the country according to the official denomination of the United Nations Statistics Division.

(2) Country code. It identifies the country using the ISO-Alpha 3-letter code commonly used by the United Nations.

(3) Document name. It provides the official name of the document as in the original. When the document is available in more than one language, the original language in which the document was drafted has been used.

(4) Year. It is the year in which the strategy entered into force, as specified in the document. In most cases this year matches the year of approval, although it is often prior to the actual implementation timeframe of the strategy.[30] Some documents do not clearly specify a date of entering into force or approval. In these cases, a date has been inferred from the content of the documents.

(5) Brief description. This is a brief description of the content, characteristics, guiding principles and objectives of the strategy outlined in the document.

(6) Counterpart. This refers to the institution or actor directly responsible for the design and approval of the strategy. Generally, it corresponds to the local national authority in charge of the initiative (even when assisted by external actors).

(7) Link. This specifies the link to an electronic copy of the strategy document.

(8) Type of document. It identifies the type of document out of the following alternatives: NES-ITC, SES-ITC, DTIS, PRSP, UNDAF, national document, other. NES-ITC and SES-ITC identify the ITC-facilitated National Export Strategies and Sector Export Strategies. Diagnostic Trade Integration Studies, Poverty Reduction Strategy Papers and United Nations Development Assistance Frameworks are grouped under DTIS, PRSP and UNDAF. All documents directly elaborated, endorsed or commissioned by an official national or subnational authority fall into the national document category. Finally, all initiatives driven by other institutions without an explicit endorsement by the local government have been identified with the term 'other'.

(9) Timeframe. This variable specifies the implementation timeframe when the document clearly states it (either in the title or within the text) or it corresponds to the timeframe suggested by the document itself. When a clear time bracket is not indicated, it has been inferred whenever possible from the dates set for the implementation of single actions or projects contained in the strategy. For example, the Diagnostic Trade Integration Study of the Central African Republic, although not stating an explicit timeframe of implementation, contains initiatives to be carried out between 2007 and 2015. Hence, it was assigned a timeframe of 2007-2015. When such an inference is not possible (as there are no clearly planned future actions), it has been assigned a cut-off date five years after entering into force.[31] For example, a document endorsed in 2007 was assigned a 2007-2012 timeframe in the absence of information that could lead to infer its implementation period.

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[30] Year follows the Gregorian calendar. When the documents referred to alternative calendars, the dates have been converted to the Gregorian calendar.

[31] Some strategies originally drafted according to non-Gregorian calendars (e.g. the Ethiopian calendar) required a two-step process to adjust the date. Firstly, the timeframe stated in the original document has been converted to the Gregorian calendar. The second step consisted in picking two unambiguous boundaries for the timeframe. For simplicity, the starting boundary of the timeframe contained in the database corresponds to the earlier year reported in the converted version of the document, while the ending boundary coincides with the later one. An example will help clarify the process adopted. The Growth and Transformation Plan of Ethiopia was elaborated according to the local Ethiopian Calendar. The implementation timeframe for the plan was 2003-2007, according to Ethiopian fiscal years. The year 2003 in the Ethiopian calendar corresponds to July 8th 2010-July 7th 2011 of the Gregorian Year; similarly, the year 2007 corresponds to July 8th 2014-July 7th 2015. A 2010-2015 timeframe has been reported in the database, corresponding to July 8th 2010-July 7th 2015.

(10) Sector priorities. This entry is filled out when the document clearly specifies the economic sectors that are strategic for the achievement of the objectives of the initiative. The entry is left blank when the sector priorities are not clearly described. The wording has been kept as close as possible to the original in the document, or the English translation when necessary.

(11) SITC Division Priorities. The entry uses the Standard International Trade Classification (SITC) two-digit code corresponding to the sector priorities identified in the document (for sectors falling under the SITC Rev. 4 classification 2006). Where the sector prioritized was from the services sector, or the SITC two-digit codes were not applicable, this variable has been left blank.

(12) Last update. This corresponds to the last update of the information regarding the documents included for the country.[32]

(13) Regional scope. It determines whether the document refers to a region (or a group of countries) or to a single country. This variable takes the value of 1 when the document has a regional scope and 0 otherwise.

(14) ITC-facilitated. This variable takes the value of 1 when the document has been designed and/or implemented with the assistance of the ITC. It differs from the sum of the ITC NESs and SESs because not all strategies facilitated by ITC are National or Sector Export Strategies. There are also regional and gender strategies. Hence, this binary variable identifies a larger set of documents than the one filtered using the *Document Type* variable (i.e. setting the *Document Type* equal to NES-ITC and SES-ITC).

(15) Trade focus. This variable takes the value of 1 when trade is the main focus of the document and 0 otherwise. A distinction needs to be made between this variable and the first criteria for inclusion of a document in the dataset (i.e. a trade and economic development focus). While all documents included deal to some extent with trade, some documents do so in a much deeper manner. It has been largely a matter of judgement of the authors to decide whether a given document's focus on trade can be considered sufficient to qualify as a 1 in the 'trade focus' variable.[33] This variable ultimately aims to identify those documents that mostly focus on trade issues and as such can be considered as trade mainstreaming.

(16) Action plan. It determines whether an action plan is present in the document. For an action plan to be considered present, the document has to provide a chart identifying at least some of the following: 1) specific actions to be carried out along a pre-determined timeframe in order to implement the policy objectives; 2) institutional bodies responsible for ensuring the realization of the mentioned actions; 3) resources allocated for each of these actions; 4) policy objectives which each policy action feeds into. This variable takes the value of 1 when the document contains a clear plan of action and 0 otherwise.

(17) Poverty reduction. It determines whether the document deals with issues related to poverty reduction. This can refer to analysing the characteristics and causes of poverty as well as outlining the contribution of the strategy to reducing poverty, creating income or generating employment.

(18) Gender equality. It determines whether the document deals with issues related to gender equality and is policy engendering. This can refer to integrating women into the national productive and trading networks, guaranteeing equal treatment to both genders in the labour market, ensuring equal access to social services or improving women's well-being, safety and security.

(19) Youth integration. It determines whether the document deals with issues related to the integration of youth into society and, in particular, into production processes and trading networks. It can refer to the providing of specific technical and vocational training to young people, ensuring access to general education and other social services or improving well-being, safety and security of children and youth.

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[32] When a new document is added for Argentina, for example, the date for all the existing documents for Argentina will be updated.

[33] All export strategies and DTISs primarily focus on trade, while most PRSPs do not, although they have a trade and development component.

(20) Environmental sustainability. It determines whether the document deals with issues related to environmental sustainability. This can refer to climate change mitigation and adaptation, reducing emissions of pollutants or minimizing the impact of human activities on the environment.

(21) Regional integration. It determines whether the document deals with issues related to regional integration. This can refer to increasing trade integration or broadening and deepening the scope of social and economic cooperation with neighbouring countries.

(22) Trade finance/access to credit. It determines whether the document deals with issues related to trade finance or general access to credit. This includes promoting microfinance initiatives, facilitating access to financial services, setting up specialized institutions for export credit and trade finance or strengthening existing ones.

(23) Trade information/market intelligence. It determines whether the document deals with issues related to trade information or market intelligence. This includes information about potential export markets and products, customs procedures, import requirements, tariffs and other barriers to imports, international certifications and requirements, foreign buyers, business and investment opportunities, statistical evidence and information.

(24) Quality management. It determines whether the document deals with issues related to quality management. This can refer to fostering product innovation and quality improvement, complying with standards and certifications or responding to customers' specific needs.

(25) Technical, vocational education and training (TVET). It determines whether the document deals with issues related to TVET. This includes promoting technical and vocational training courses at all levels, setting up new TVET centres or strengthening existing ones.

(26) Trade facilitation. It determines whether the document deals with issues related to trade facilitation. This includes improving transport and logistic services, enhancing efficiency and transparency of customs procedures or removing any other barrier to the circulation of goods across borders.

(27) Trade promotion. It determines whether the document deals with issues related to trade promotion. This includes participating in fairs and other exhibition events abroad to promote domestic products, organizing inward delegations of buyers, setting up marketing and branding activities.

(28) National Export Council (NEC). It determines whether the document provides for a high-level committee to manage the implementation of the strategy and, more generally, promote national exports. In particular, this variable indicates documents which set up a completely new institution or specifically assign both these roles to an existing one. Please note that 'National Export Council' is only one of the names which can be assigned to this institution, without prejudice to the outcome of this variable.

(29) Resource allocation. It determines whether the document contains a detailed allocation of resources among the different axes of intervention outlined in the strategy.

(30) Participatory process. It determines whether the elaboration and design of the strategy have been carried out through a participatory process, i.e. through the use of consultations and/or workshops with the public and stakeholders. This has been inferred exclusively from the content of the document itself, without resorting to additional research to verify the accuracy of the information therein contained.

(31) Country ownership. It determines whether the strategy has been fully promoted, endorsed and approved by national authorities at all levels. This has been inferred exclusively from the content of the document itself, without resorting to additional research to verify the accuracy of the information therein contained.

(32) Least developed country. It determines whether the country implementing the strategy is a least developed country. The classification follows the list published by the UN Office of the High Representative for Least Developed Countries, Landlocked Developing Countries and Small Island Developing States (UN OHRLLS).

(33) Land-Locked Developing Country. It determines whether the country implementing the strategy is a land-locked developed country. The classification follows the list published by the UN Office of the High

Representative for Least Developed Countries, Landlocked Developing Countries and Small Island Developing States (UN OHRLLS).

Appendix III. Countries and regional groupings included in the TSM

Table 2: Countries included in the TSM

ISO Code	Country	ISO Code	Country	ISO Code	Country
	Afghanistan		Equatorial Guinea		Panama
AGO	Angola	GRD	Grenada	PER	Peru
	Albania		Guatemala		Philippines
ARE	United Arab Emirates	GUY	Guyana	PLW	Palau
	Argentina		Honduras		Papua New Guinea
ARM	Armenia	HRV	Croatia	KOR	Republic of Korea
	Antigua and Barbuda		Haiti		Paraguay
AZE	Azerbaijan	IDN	Indonesia	PSE	Occupied Palestinian Territory
	Burundi		India		Qatar
BEN	Benin	IRN	Iran (Islamic Republic of)	ROU	Romania
	Burkina Faso		Iraq		Russian Federation
BGD	Bangladesh	JAM	Jamaica	RWA	Rwanda
	Bahrain		Jordan		Saudi Arabia
BHS	Bahamas	KAZ	Kazakhstan	SDN	Sudan
	Bosnia and Herzegovina		Kenya		Senegal
BLR	Belarus	KGZ	Kyrgyzstan	SGP	Singapore
	Belize		Cambodia		Solomon Islands
BOL	Bolivia (Plurination State of)	KIR	Kiribati	SLE	Sierra Leone
	Brazil		Saint Kitts and Navis		El Salvador
BRB	Barbados	KOR	Republic of Korea	SOM	Somalia
	Brunei Darussalam		Kuwait		Serbia
BTN	Bhutan	LAO	Lao People's Democratic Republic	SSD	South Sudan
	Botswana		Lebanon		Sao Tome and Principe
CAF	Central African Republic	LBR	Liberia	SUR	Suriname
	Chile		Libya		Swaziland
CHN	China	LCA	Saint Lucia	SYC	Seychelles
	Côte d'Ivoire		Sri Lanka		Syrian Arab Republic
CMR	Cameroon	LSO	Lesotho	TCD	Chad
	Democratic Republic of Congo		Morocco		Togo
COG	Congo	MDA	Republic of Moldova	THA	Thailand
	Colombia		Madagascar		Tajikistan
COM	Comoros	MDV	Maldives	TKM	Turkmenistan
	Cape Verde		Mexico		Timor-Leste
CRI	Costa Rica	MHL	Marshall Islands	TON	Tonga
	Cuba		The former Yugoslav Republic of Macedonia		Trinidad and Tobago

CYM	Cayman Islands	MLI	Mali	TUN	Tunisia
	Djibouti		Myanmar		Turkey
DMA	Dominica	MNE	Montenegro	TUV	Tuvalu
	Dominican Republic		Mongolia		United Republic of Tanzania
DZA	Algeria	MOZ	Mozambique	UGA	Uganda
	Ecuador		Mauritania		Ukraine
EGY	Egypt	MUS	Mauritius	URY	Uruguay
	Eritrea		Malawi		Uzbekistan
ETH	Ethiopia	MYS	Malaysia	VCT	Saint Vincent and the Grenadines
	Fiji		Namibia		Venezuela (Bolivarian Republic of)
FSM	Micronesia (Federated States of)	NER	Niger	VNM	Viet Nam
	Gabon		Nigeria		Vanuatu
GEO	Georgia	NIC	Nicaragua	WSM	Samoa
	Ghana		Nepal		Yemen
GIN	Guinea	NRU	Nauru	ZAF	South Africa
	Gambia		Oman		Zambia
GNB	Guinea-Bissau	PAK	Pakistan	ZWE	Zimbabwe

Table 3: Regional groupings included in the TSM

Regional Groupings	Country Members
COMESA	Egypt, Seychelles, Democratic Republic of Congo, Sudan, Libya, Rwanda, Swaziland, Zimbabwe, Eritrea, Mauritius, South Sudan, Burundi, Malawi, Comoros, Djibouti, Ethiopia, Kenya, Madagascar, Uganda, Zambia.
UEMOA	Benin, Burkina Faso, Côte d'Ivoire, Guinea-Bissau, Mali, Niger, Senegal, Togo
ECOWAS	Benin, Burkina Faso, Côte d'Ivoire, Cape Verde, Ghana, Guinea, Gambia, Guinea-Bissau, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone, Togo
ECCAS	Angola, Burundi, Central African Republic, Cameroon, Democratic Republic of Congo, Congo, Gabon, Equatorial Guinea, Sao Tome and Principe, Chad
Pacific Forum	Kiribati, Marshall Islands, Nauru, Palau, Papua New Guinea, Solomon Islands, Tonga, Tuvalu, Vanuatu, Samoa

Appendix IV. Trade strategy, country size and economic development

An interesting perspective of the possible uses of the strategic map can be obtained by analysing how the average number of documents in a country relates to its size and level of economic development. Figure 15 plots the average number of documents per country against its level of GDP per capita. Similarly, Figure 16 shows the relationship between the average number of documents and the size of the country – measured by the size of its economy.[34]
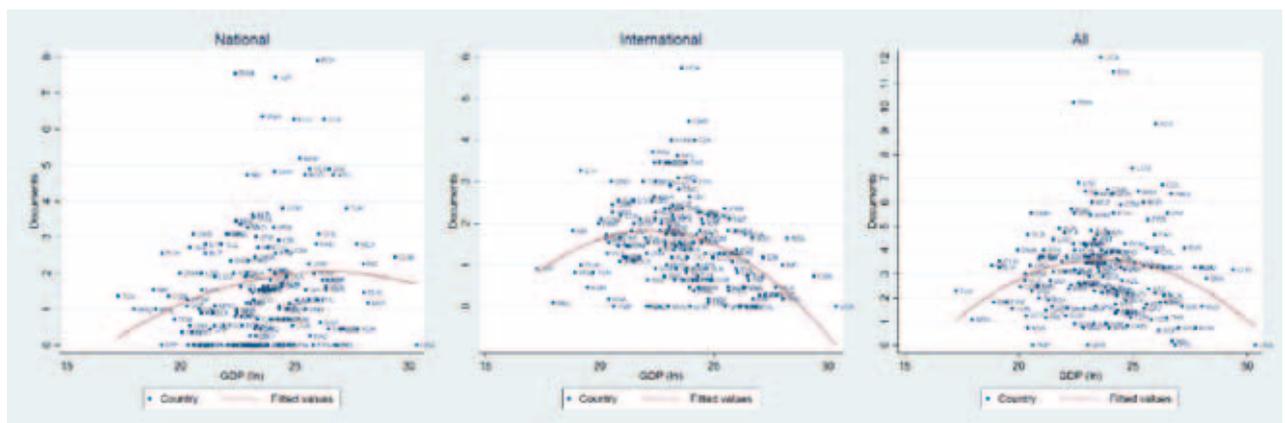
Figure 13: Average number of documents and GDP per capita since 2005
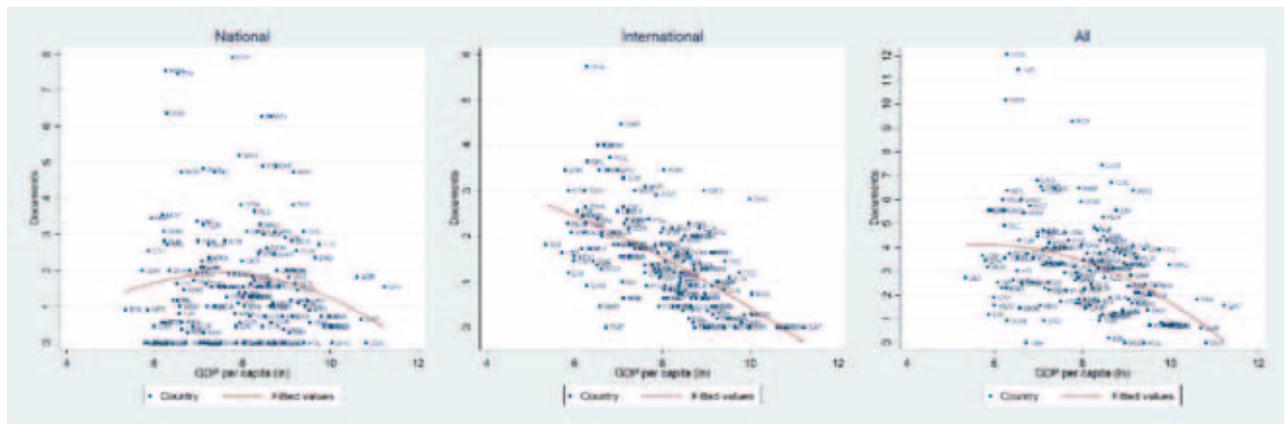
Source: Authors' calculations using ITC's Trade Strategy Map and World Bank's World Development Indicators.

Weak institutions and a limited pool of professionals in the strategy field mean that less-developed economies seek support from international organizations to develop solid trade-related strategies. As would be expected, countries with relatively higher levels of GDP per capita have a larger domestic capacity to initiate trade strategies and therefore tend to rely less on international organizations. In reality, richer economies only turn to the expertise of international consultants and organizations to tackle specific issues within a document, rather than to develop the entire document.

Figure 14: Country size and the average number of documents since 2005

Source: Authors' calculations using ITC's Trade Strategy Map and World Bank's World Development Indicators.

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[34] Figure 18 in Appendix III shows the scatter plot of the average number of documents against the population of the countries.

The average number of documents in a country and its relative size tend to be positively associated. Small countries tend to have fewer documents than larger ones – especially of the national type. However, larger country size does not necessarily imply more documents. Beyond certain GDP and population thresholds, the distribution of documents follows a trumpet-shaped pattern with some countries having more documents than others. On average, larger countries are more likely to have more national documents and fewer international ones.

Table 4: Number of documents, country size and wealth: summary of findings

		National	International	All
SIZE	GDP	+	±	±
	Population	+	±	+
WEALTH		±	-	-

Table 4 summarizes the patterns revealed above. The size of the country, measured both in terms of economic activity and population, is positively associated with the number of documents developed nationally. Wealthier countries are more likely to develop their own national plans and strategies, but this is only up to a certain level of income. Once the income level exceeds a certain point, they start to have relatively fewer documents. Two possible reasons may explain this bell-shaped curve: (1) as countries get richer, they also get better organized and plan more efficiently; hence, they probably develop fewer but more effective documents, and (2) richer countries prefer not to disclose their strategic planning documents.
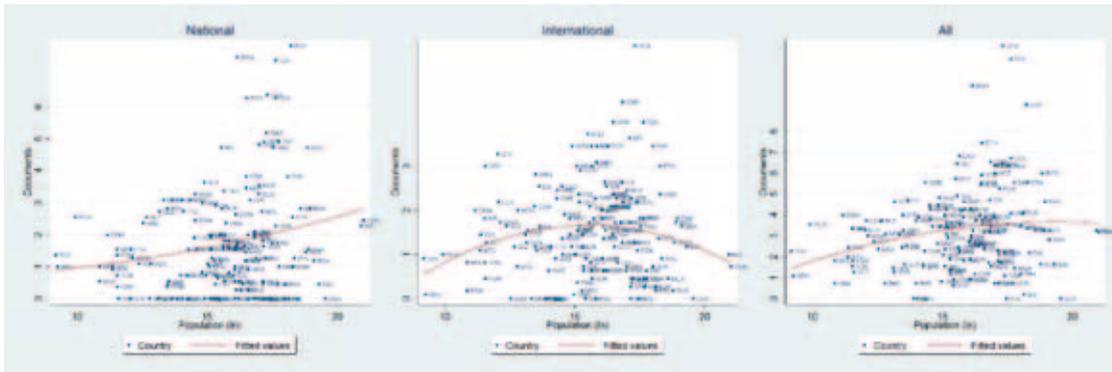
Appendix V. Additional plates

Figure 15: Documents by SITC, Rev.4 (Chapter) in 2015
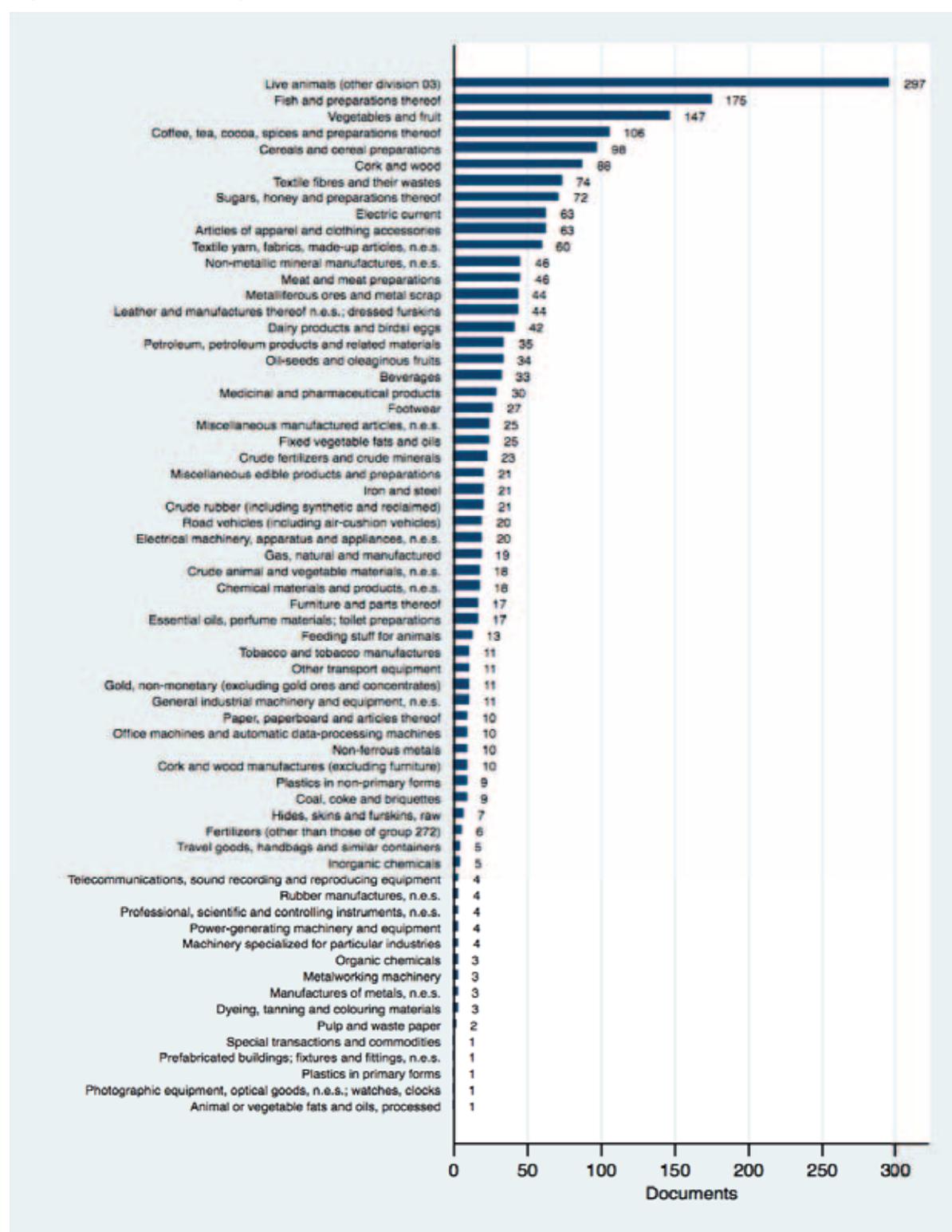
Source: Authors' calculations using ITC's Trade Strategy Map

Figure 16: Average number of documents and population since 2005

Source: Authors' calculations using ITC's Trade Strategy Map and World Bank's World Development Indicators.

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The International Trade Centre (ITC) is the joint agency of the World Trade Organization and the United Nations.