November 2011

Evaluation of the World Bank Support Program to ITC: "Trade Data for Low Income Countries"*

January 2008 – December 2010

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* Report prepared for the World Bank. The authors thank the Market Analysis and Research staff for their help with the logistics for administering the questionnaire and for their time.

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LIST OF ABBREVIATIONS

BSI	Business Support Institution
EAP	East Asia & Pacific
ECA	Europe & Central Asia
FDI	Foreign Direct Investment
HICs	High Income Countries
ICTSD	International Centre for Trade and Sustainable Development
IPA	Investment Promotion Agency
ITC	International Trade Centre
LAC	Latin America & Caribbean
LICs	Low Income Countries
LMICs	Lower Middle Income Countries
MAc Map	Market Access Map
MAR	Market Analysis and Research (staff)
MATs	Market Analysis Tools (Trade Map, MAc Map, Investment Map)
MENA	Middle East & North Africa
MFN	Most Favored Nation
NGO	Non-Governmental Organization
NTMs	Non-Tariff Measures
SA	South Asia
SME	Small and Medium Enterprises
SSA	Sub-Saharan Africa
T4SD	Trade For Sustainable Development
TOR	Terms Of Reference
TSI	Trade Support Institutions
UMICs	Upper Middle Income Countries
UNCTAD	United Nations Conference for Trade and Development
WB	World Bank
WTO	World Trade Organization

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A. EXECUTIVE SUMMARY

This report evaluates ITC's accomplishments over the period 2008-2010 during which it received grants of $600,000 per year to develop three data bases and with associated three on-line tools: Trade Map, Market Access Map and Investment Map (henceforth MATs – for Market Access Tools). The key objectives of the grants were to:

1. Improve the quality and availability of global trade and investment information, including indicators for decision makers in developing countries;
2. Promote continuous monitoring and evaluation of trade and investment policies in the context of the ongoing dialogue between development organizations and their clients.

These objectives were to be achieved by: (i) maintenance of the three MATs; (ii) improvement in the quality and availability of data; (iii) insuring free access to data and to MATs to developing country and researchers; and (iv) mobilizing multi-donor long-term support. The stakeholders involved in the evaluation are the World Bank, ITC, and developing-country users benefiting from free access to the ITC's MATs.

This review evaluates ITCs' achievements during this period against the above objectives. The main conclusions from the review are as follows.

- **ACTIVITIES BY ITC STAFF**. During the evaluation period, most ITC resources were dedicated to the development of the tools: data collection, cleaning and inputting; development of the Common User Management system (CUM) that links the three tools; development and maintenance of the software; development of a 'light version' for users with slow Internet connection.

The main challenge was to increase the quality, usefulness and relevance of the ITC's MATs for their three broad categories of users: (a) enterprises; (b) government or Trade Support Institutions (TSI); (c) academics/students. Each group that uses these tools also typically uses other tools. Groups (b) and (c) will complement the data from MATs with other indicators of trade policy, mostly those available from the World Bank's World Trade Indicators (WTI), but also from other data on the restrictiveness of trade policies available from the World Bank's Trade website. For enterprises (group (a)), having recent data is of greater importance. So is having access to monthly data – which is only available for a sample with a relatively large number of developing countries in Trade Map. To devise their export or investment attraction strategies, enterprises may complement their information gathering with other ITC tools (e.g. the guide book for new exporters (ITC, 2011)), but also with for-pay data, especially price data which was often mentioned as an important 'missing information' for developing a firm's export strategy. All in all, while not unique, overall, the degree of duplication between MATs and other 'comparable' tools is rather modest.

➢ **OUTCOMES: USER PROFILE AND FREQUENCY OF USAGE.** Since the launch of the ITC MATs (28, December, 2007) which corresponds to the start of the review period, 163,336 accounts were created. The growth in yearly registrations has picked up over the three-period from 30,000 in 2008, to 45,000 in 2009 and to over 50,000 in 2010. Assuming that registrations are uniformly distributed throughout the year, the growth in registrations should stabilize around 50,000 for 2011. However, among registered users, only 73,000 users can be considered 'active users', and hence were the object of this evaluation.

For an evaluation that concentrates on low-income countries, it is more appropriate to consider usage on a per-Internet user basis. Figure A shows that low-income countries are the largest users once one takes into account Internet access with an average of 14 users per 100,000 Internet users. The frequency of usage (average number of log-ins per users) is also quite high in the low-income countries, the target group for the World Bank (see the text for caveats in interpreting these statistics).

Figure A – Frequency of usage and number by income group

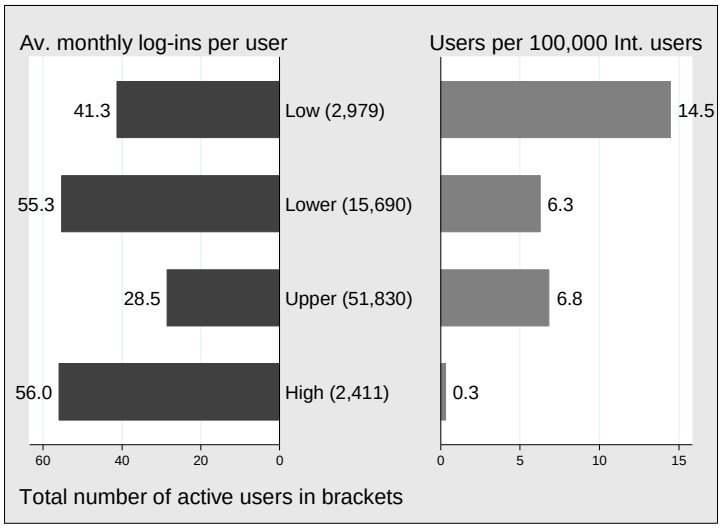


Figure B – Frequency of usage by tool

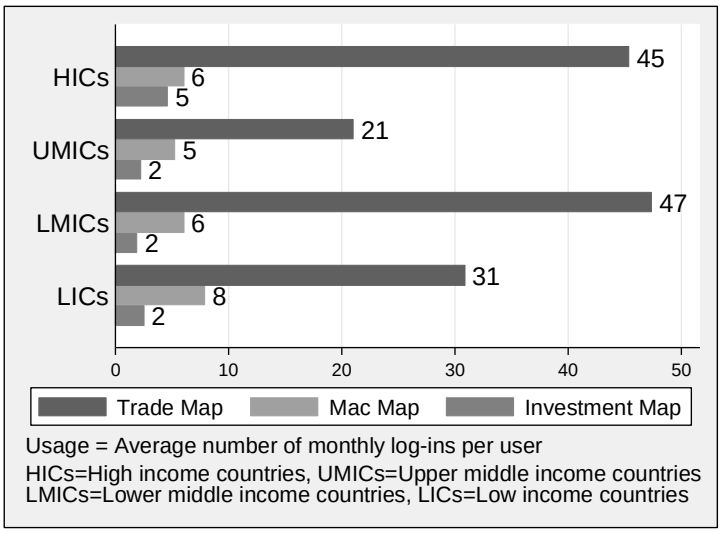


Figure B shows that Trade Map usage is about 4 to 8 times usage of MAc Map, which itself is 2 to 4 times usage of Investment Map. Reasons for the low usage of MAc Map and Investment Map are discussed in the main report where it is indicated that ITC needs to devise a strategy for the future of these tools.

- **RELEVANCE AND QUALITY OF TOOLS.** A Web-based survey including 13 questions was administered to a sample of 36,000 users, obtaining a response rate above 5% (1,800 answers), where the response rate was quite representative of the population of 'active users'. High percentage of 'yes' answers for low-income countries (henceforth LICs) was reported across questions. For example, while on average 85% of the respondents say that the ITC MATs make it easier to obtain trade-related data compared to other tools, the percentage for LICs is 93%. This result is confirmed by qualitative interviews (interviewed users frequently said that it is difficult to obtain their country data by themselves as ministries or customs authorities do not want to share the data within the country). Interestingly, LICs' users more frequently find the information they want. Not surprisingly, free access for LICs also makes a great difference, a result that was emphatically found in all interviews where respondents often said that their institution would not pay for the data. In general, LICs do not use other data sources. It is not clear whether it is a question of access, of existence of the data, or simply that they do not need more data.

Taken together, the results suggest that for LICs, improvements of the tools should focus more on the accessibility of tools (navigation, more effective way to download data, etc.) and on training rather than on the quantity of information (i.e. more information or longer time-periods). This was confirmed in the telephone interviews, which also pointed out that users had difficulty with the disaggregated trade data as many persons interviewed either were not at ease with the use of mirror data, or wanted "better mirror data".

- **CONCLUSIONS.** Four conclusions from this evaluation merit attention for the World Bank. First, whether through the analysis of the results from the questionnaire, or from the phone interviews, it came out overwhelmingly that **the tools should continue to be accessible free-of-charge**. A typical answer to the importance of access free of charges was: "Our management would not pay for it, even when they appreciate their usefulness as they would add 'firms survived without them until recently'". This is especially so for developing countries, but also applies partly for high-income countries.[1]

Second, **overall user satisfaction is high**. This came out in the answers in the questionnaire as well as in the phone interviews. These results should be interpreted as coming from

[1] Besides, it is doubtful that the visibility and credibility obtained from charging a fee to users registered in high-income countries would compensate for the hassles associated with differentiating users according to Internet address.

sufficiently 'satisfied consumers' since we had difficulty in eliciting responses from relatively low frequent users when selecting them randomly.

Third, **low-income countries**, the World Bank's target group, **is a large user-group of the MATs both in terms of frequency of usage** (the second highest among developing countries with an average of 41 log-ins per month) **and in terms of users** per 100,000 Internet users (14.5). Interestingly, with an 11 percent response rate to the Web-based survey, low-income countries had a response rate twice as high as their share in the user population, suggesting their overall interest in the tools.

Fourth, **needs and usage vary across** users. Users based in governmental institutions need 'ready to use' indicators and a more effective way to download data for their research or to prepare negotiations. Academics want more training and an effective way to download as much data as possible for their research. Medium and small enterprises want more training and more information on NTMs. Users in TSI need more training, more indicators and more information on NTMs to provide efficient services to the private sector, etc. Insofar as all needs cannot be satisfied at once, this will require strategic decisions for coming developments on the part of ITC.

- **RECOMMENDATIONS** (See the report for more detailed and more concrete recommendations)

Trade-offs and priorities. In continuing its collaboration with the World Bank, the ITC must continue to manage the potential tensions between the World Bank's objective to promote trade integration for low-income countries while it has a larger mandate to focus on the private sector at large in all developing countries. So far this potential tension has been managed satisfactorily and the tools have been made available free-of-charge to users in developing countries with good usage by this group. But this report shows that the MATs have three constituencies of about equal size but with different needs: (a) enterprises of all sizes; (b) governments and TSI; (c) academics and students. Notwithstanding these different constituencies, there is a consensus around improvements among four desired functionalities:

- Effective way to download data
- More data on NTMs
- More indicators
- More training

Improve tools for users, including training quality. As noted in the report many suggestions for improvements (e.g. improved download capability) are being contemplated by the ITC for the near future. Among those, how to improve the friendliness of the tools (languages, adding a few indicators, translation to other languages; making important links more visible; a short tutorial on the use of mirror data) deserve high priority.

Improved on-line training, continued training of the trainers, and case studies to showcase the tools on the MATs website and in other forums would all contribute to increasing the visibility of tools which was judged to be low during the course of several interviews.

Suggestions to improve the attractiveness of MATs. Answers to how the respondents discovered MATs showed that none of the sister UN organizations were helpful in discovering the tools. Telephone interviews also revealed a general feeling that the tools were not well advertised. A strategy for better marketing should be devised. A more extensive targeting in outreach should be considered. For example, the weekly Bridges produced by the ICTSD in Arabic, Chinese, English, French, and Russian would be a good place for ITC to seek exposure. More visible exposure on the WTO portal would be another area with a potential for a high payoff. A few good case studies on dynamic/lagging market for specific products using the tools (or short briefing notes showing how tools can help answering specific questions – e.g. 5 pages or so as in the Trade Policy Notes of the World Bank) would be another way to attract attention.

B. MAIN REPORT

1. INTRODUCTION: PURPOSE AND SCOPE OF THE EVALUATION

1.1 BACKGROUND AND CONTEXT: THE WORLD BANK PROGRAM TO ITC "TRADE DATA FOR LOW INCOME COUNTRIES"[2]

The World Bank has made available grants of $600,000 per year over the three-year period 2008-2010 to the ITC to develop Market Access Tools (henceforth MATs). The two key objectives of the grants were to:

- Improve the quality and availability of global trade and investment information including indicators for decision makers in developing countries.
- Promote continuous monitoring and evaluation of trade and investment policies in the context of the ongoing dialogue between development organizations and their clients.

These objectives were to be achieved by (see also table 1):

- Improvement in the quality of data. This would include: higher frequency of the data (monthly in addition to annual trade flows); more data (applied customs tariffs taking into account preferential trade agreements); more disaggregated tariff data than theHS-8 level; more data on Non-Tariff Measures (NTMs).
- Maintenance of the three MATs: Trade Map, Market Access Map (henceforth MAc Map), and Investment Map.
- Insuring free access to data and MATs for developing countries and researchers worldwide.
- Mobilizing multi-donors long term support.

The main stakeholders involved in the evaluation are the World Bank, ITC, and developing-country users benefiting from free access to the ITC's MATs. This review evaluates ITC's achievements during this period against the above objectives.

1.2 PURPOSE OF THE EVALUATION

The Terms of Reference (TOR) for the evaluation state: "The evaluation will seek to establish the demand for and benefit derived by low-income countries of access free-of-charge to trade, market access, and investment data through the ITC's tools – Trade Map, Market Access Map and Investment Map" (see Annex I, p.33). In other words, the evaluation is to assess the **usefulness**, **quality** and **relevance** of the trade-related data and market analysis tools offered by ITC, with particular focus on low-income countries and on the private

[2] See the Terms of Reference in Annex I.

sector. This report assesses to what extent these objectives have been met and makes suggestions for improvements.

1.3 SCOPE OF THE EVALUATION

This evaluation covers the following three tools:

- Trade Map. Trade Map provides users with indicators on export performance, international demand, alternative markets and the role of competitors. Trade Map covers 220 countries and territories and 5,300 products of the Harmonized System (at the HS 6-digit level). Trade data is also available at the tariff line level for more than 150 countries and on a quarterly and monthly basis for more than 90 countries. Data availability starts in 2001 and data are updated at least twice a year. The indicators and graphs built into the tool allow the user to study the characteristics and evolution of a market at the product level for a country or group of countries.
- Market Access Map. MAc Map gives information on a country's tariff regime (MFN tariffs, preferential tariffs, rules of origin faced in importing market when the country has preferential access). Market access indicators are provided at several levels of aggregation at the product and country levels.
- Investment Map. The Investment Map database collects yearly Foreign Direct Investment (FDI) statistics (inward and outward FDI) for about 200 countries and territories, and detailed FDI sectoral and/or country breakdown for about 115 countries. It also integrates a database with contacts of foreign affiliates established in developing countries. Investment Map helps identify industries and competing countries that have attracted FDI in the past.

The three tools (along with Standards Map which is new and is not part of this evaluation), are linked.[3] They aim at progressively developing the information that is needed for firms and governments to develop strategies that will help them to integrate better into the world trading system. Countries that have had high export growth rates have typically done so by growth at the extensive margin (new partners, new products and longer survival of new exports) more than at the intensive margin (greater trade volumes in existing products). Information on market access is important for penetrating new markets and maintaining presence in these markets.[4] Trade volumes and market access are linked. This link is explicitly built into Trade Map and MAc Map as the user can correlate the evolution of trade in products with the evolution of market access. The evolution of products and industries are also linked with FDI flows which are built into the tools in Investment Map, which draws on the information on market access and trade volumes from Trade Map and MAc Map. As

[3] The link was established as part of the activities carried out under the grant. See the description of the Common User Management system (CUM) in annex IV.

[4] Besedes and Prusa (2006, 2010), and Brenton, Pierola and Von Uexküll (2011) show that long-run export performance is associated with strong export growth at the extensive margin and longer survival rates for new exports. Both growth at the extensive margin and longer survival rates are associated with knowledge of the evolution of markets and of policies of trading partners.

better data on NTMs at the product level become progressively available, these can be incorporated in MAc Map. Taken together, the tools reflect a 'grand design' approach to developing the information necessary for low-income countries to become better integrated into world trade.

The evaluation focuses on the activities, outputs and intermediate outcomes of the program (see table 1), and make suggestions for improvements of the tools. Indeed, the final outcome for developing countries (an improved trade performance) takes a long time to be observed and is beyond the three-year period under review (only some insights will be provided in section 2.3). Inputs and the adequacy of financial resources are not part of the TOR.[5]

Table 1 – Logical Framework for evaluation of 'Trade data for low-income countries'

Final outcomes ⬆	Better informed decisions for firms and for countries in designing their trade strategies resulting in improved trade performance.
Intermediate outcomes ⬆	Improvement in the quality and availability of global trade and investment information including indicators for decision makers and researchers in developing countries (number and type of users, extent of satisfaction of users).
Outputs ⬆	Development of three ITC MATs (quality and availability of data, number of countries covered, number of tools and differentiation relative to other tools).
Activities ⬆	Data collection, cleaning and processing, software implementation, training and dissemination.
Inputs	Human capital and financial resources.

Source: authors

The evaluation covers specifically developing countries, that is to say users registered in all countries other than high income countries – which according to our analysis of 'active users' (see below) account for 97 percent of users. The TOR also request that the evaluation focuses on users in low-income countries. This is why most of the time we focus the evaluation on low-income countries rather than on user-types.

1.4 METHODOLOGY

The evaluation is based on "triangulation". The effectiveness of the activities (usefulness, quality, relevance) is evaluated from three complementary angles:

- A comparison with other data bases (e.g. WITS, WTI) and with other tools (e.g. SMART, TRIST, TRADESIFT) for content and duplication. These other data bases and softwares

[5] A brief description of the allocation of staff in the Market Analysis and Research (MAR) branch to the various activities is provided in Annex IV.

give either the same or complementary information and carry out similar or complementary analysis on trade and on monitoring of trade policies (description in annex II).

- Interpretation of the questionnaire specifically administered for this evaluation (detailed results in annex VI) along with further description of the population of users in ITC's data base (by income group, region, type of user) (detailed results in annex III).
- Appraisal from structured interviews selected from within Trade Support Institutions (TSI), trade policy makers in government, NGOs, and private sector (detailed results for each interview in annex IV).
- Besides, interviews with the ITC MAR staff focused on the activities undertaken over the grant period and on the constraints that arose during the implementation of the program (detailed results in annex IV).

2. ACHIEVEMENTS OF OBJECTIVES

2.1 ACTIVITIES AND OUTPUTS: SPECIFICITY OF THE ITC'S MATS

Most ITC resources were dedicated to the development of the tools: data collection, cleaning and inputting; development of the Common User Management system (CUM) that links the three tools; development of the software and of a light version for users with slow Internet connection (see the details from the interview with MAR staff in annex IV).

The main challenge was to increase the quality, usefulness and relevance of the ITC's MATs for their three broad categories of users: (a) enterprises of all sizes; (b) governments and TSI; (c) academics and students. Each group that uses these tools also typically uses other tools. Groups (b) and (c) will complement the data from MATs with other indicators of trade policy, mostly those available from the World Bank's World Trade Indicators (WTI), but also from other data on the restrictiveness of trade policies available from the World Bank's Trade website (see annex II). For enterprises (group (a)), having recent data is of greater importance. So is having access to monthly data – which is only available for a sample with a relatively large number of developing countries in Trade Map. To devise their export or investment attraction strategies, enterprises may complement their information with other ITC tools (e.g. the guide book for new exporters (ITC, 2011)), but also with for-pay data, especially price data which was often mentioned as an important 'missing information' for developing a firm's export strategy.[6]

As discussed in annex II, an increasing number of trade-related data bases are becoming available. On the data side, there is collaboration-cum-competition between the main organizations dealing with trade for developing countries (the ITC, UNCTAD, WTO and World

[6] Price data from individual transactions are available from DATAMYNE. In addition to the cost associated with obtaining this information, international organizations are not allowed to compete with private firms. This complicates the extension of data bases to include data collected for-profit by private firms.

Bank), but collaboration has been increasing recently notably in the up-dating of data on Non-Tariff Measures (NTMs). With the launch of Investment Map, ITC is in a unique position even though the tool is not used as much as the others because of a general lack of data availability on FDI. ITC is also taking the lead in the provision of trade data (imports and exports) on a monthly basis and at the national tariff line level. In general, ITC's regular updates should place it at an advantage on data dissemination.

On the tools side, other softwares are available (see annex II for their description). WITS (the World Trade Integrated Solution provided by the World Bank), is best described as a "portal" to access a variety of databases even though it provides a large number of indicators from trade data, indicators that could be added relatively easily to Trade Map.[7] In addition to trade- related data and indicators, WITS also provides the SMART software (a tariff simulation tool). Probably, the closest competitor to the ITC's MATs is the newly launched TradeSift. However, as explained in Annex II, it is not a direct competitor since it is designed to be used off-line which requires downloading the data, and it is accessible for a fee.

In sum, while not unique, overall, the degree of duplication between the ITC MATs and other 'comparable' tools is rather modest.

In addition to the activities related to the development of the MATs, MAR staff spent substantial resources on capacity building, especially in Low-Income Countries (henceforth LICs) (see Annexes IV and VII for more details). For example, 49 seminars were delivered in 2010. To tailor better their heterogeneous audiences, MAR staff have designed a menu of training activities ranging from 'training the trainers' to shorter sessions for policy makers. From the analysis of usage, this targeting approach has been relatively successful (see below) as the average number of monthly log-ins is highest for users in low-income countries who are also those with the highest number of users per 100,000 internet users.

2.2 OUTCOMES

To assess the number of 'active users', their profile, and the frequency of usage of the ITC's MATs, we carried out an in-depth analysis of the users' database provided by ITC (see Annex III for more details). To see if the tools have penetrated targeted groups (i.e. LICs and the private sector), we study the users' profile according to the information declared at the registration (namely their type – Government, mission, Trade Support Institution, enterprise, etc. – and their country). The frequency of usage is measured by the monthly number of 'log-ins' to each tool (although not exactly the same as the number of 'visits', this measure approximates the frequency of usage, see Annex III for more details). The summary results are in section 2.2.1 and the detailed results of that analysis are reported in annex III.

Next we turned to a more direct evaluation of the tools using the Web-Based Survey (WBS) specifically designed for this evaluation along with the results from our interviews with users

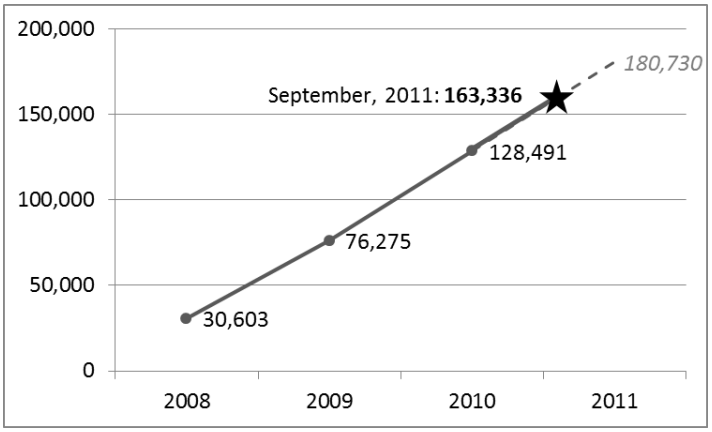
[7] WITS is mostly used by academics and economists in government agencies and in think-tanks. According to the World Bank staff, 8,000 users are registered under WITS.

and the ITC Market Access and Research (MAR) staff. The summary results are reported in sections 2.2.2 to 2.2.4, and in section 2.3. More detailed results from the individual and group interviews are reported in annex IV, detailed statistics from the WBS by country, by income group, by region, and by user-type are reported in annexes V and VI.

2.2.1 USER PROFILE AND FREQUENCY OF USAGE

Since the launch of the ITC MATs (28, December, 2007) which corresponds to the start of the review period, 163,336 accounts were created. Figure 1 shows the progress over the period. The growth in yearly registrations has picked up over the three-period from 30,000 in 2008, to 45,000 in 2009 and to over 50,000 in 2010. Assuming that registrations are uniformly distributed throughout the year, the growth in registrations should stabilize around 50,000 for 2011 (see the projections in figure 1 and table III-1 in Annex III).

Figure 1 – Progression in the number of registered users



As of September, 1st, 2011, only 85% of the total number of created accounts had been activated and have not expired (see figure III-1, Annex III). Among these "activated and still registered users", only 73,000 used one of the three tools at least one time after the day of registration (i.e. only 45% of created accounts). We refer to these 73,000 users as "active users" (only 1,090 accounts, i.e. 1.5%, are not free).[8] Statistics that follow relate only to these active users.

User breakdown by income group. The overwhelming majority of users (97%) are registered in the targeted group of developing countries. The breakdown (using the World Bank definition of income groups) is 71% in Upper Middle Income Countries (UMICs), 22% in Lower Middle Income Countries (LMICs), and 4% in Low Income Countries (LICs). The total

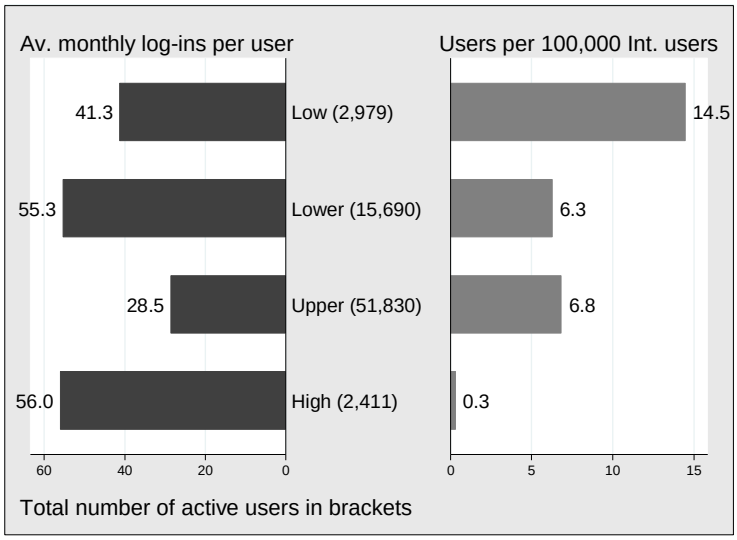
[8] Numbers are rounded to the nearest hundred and do not correspond exactly to those in Annex III. Note that this analysis of the user registration database does not take into account users who use the light version of ITC MATs. This version does not require to be registered or logged (see Annex IV, staff interviews). As a result the usage of the tools by LICs users is probably under-estimated. ITC should track usage of the light version according to the country of registration of users.

number of users according to the four income groups is given in parenthesis in figure 2. In terms of total users, LICs registrations are 20 percent above those in HICs.

The distribution of users across countries is very uneven. There is a great concentration in a handful of countries as 20 countries account for more than 80% of the active users. Five UMICs (Peru, Mexico, Colombia, Turkey and Brazil) account for more than 50% of the total number of active users (see table III-2 in Annex III). In interpreting the results from this analysis (and from the WBS), it should be kept in mind that, with 16,500 registered users, Peru accounts for 23% of the total number of active users (for further details of the breakdown see Annex III).

For an evaluation that concentrates on low-income countries, it is more appropriate to consider usage on a per-Internet user basis. This is done in the right hand-side of figure 2 which shows that LICs are then the largest users with an average of 14 users per 100,000 Internet users. This usage intensity is more than twice as high as for middle-income countries. The top five LICs users are Cambodia, Madagascar, Sierra Leone, Bangladesh and the Comoros (see figure III-2 and table III-3 in Annex III).

Figure 2 – Frequency of usage and number of users (by income group)

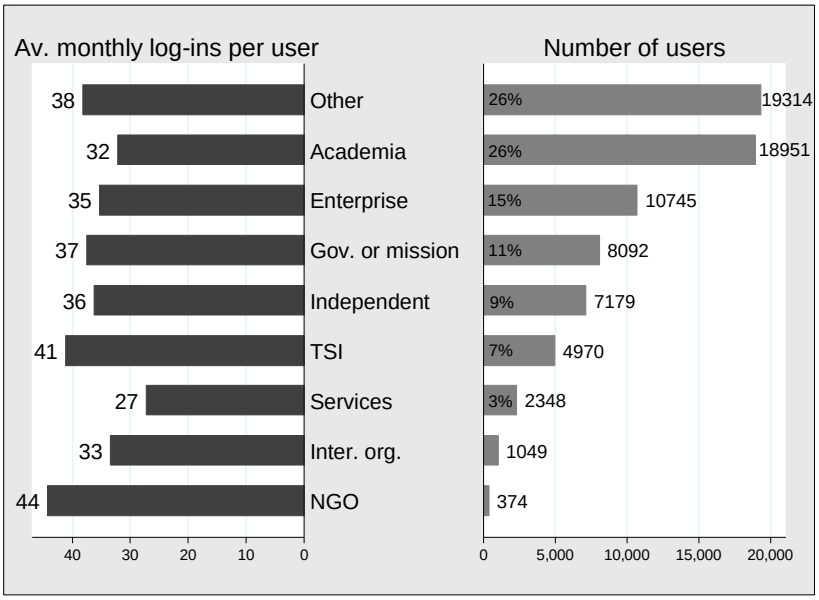


User breakdown by category of user. Figure 3 (right hand-side) shows that one-third of the users are in the ITC's "Private sector" target group as enterprises, independents, TSI (Trade Support Institutions) and services respectively account for 15%, 9%, 7% and 3% of the active users. Most users are researchers or academics. Slightly over 10% of the users work for a Government or a Mission, and about 30% registered themselves in the "other" category, which is likely to also include many students.[9] A breakdown by income group shows some

[9] Because this « other » category is very large (ranging from 18% of the users in LICs to 27% in the UMICs, see figure III-5 in Annex III), we decided to use a slightly different definition of user groups for the WBS. This proved useful as only 2.2% of the respondents selected the « other » category. ITC might consider adopting this

variation: in LICs, the share of government or mission users is larger, while academics are less represented (see figure III-5 in Annex III).

Figure 3 –Frequency of usage & number of users (by type of user)



Frequency of usage. These are reported on the left-hand sides of figures 2 and 3 and are measured by the average number of monthly 'log-ins' per user since initial registration. For reference, the 'world' average is 36 logs a months.[10] According to figure 2, users in UMICs (71% of the total number of users), are less frequent users than users in other groups. LMICs and to a lesser extent, LICs, display an above average usage rate. The lower average usage rate for the lowest income group may be due to Internet connectivity (the telephone interviews revealed variation across groups but low bandwidth and high connection costs were typical of users in Sub-Saharan Africa – SSA – relative to those in Latin America & Caribbean – LAC) but, with 41 connections on average per month, the tools are widely used in the low-income group, disposing of the often-expressed fear that Internet connections are a severe obstacle to higher usage in these countries. However, these statistics are not equally spread across user groups.[11]

The frequency of usage across user groups is quite similar according to figure 3 even though in LICs (resp. LMICs) usage by International Organizations and Services Institutions (resp. by

alternative classification of user groups in the future to avoid the large number of registered users in the "other" category.

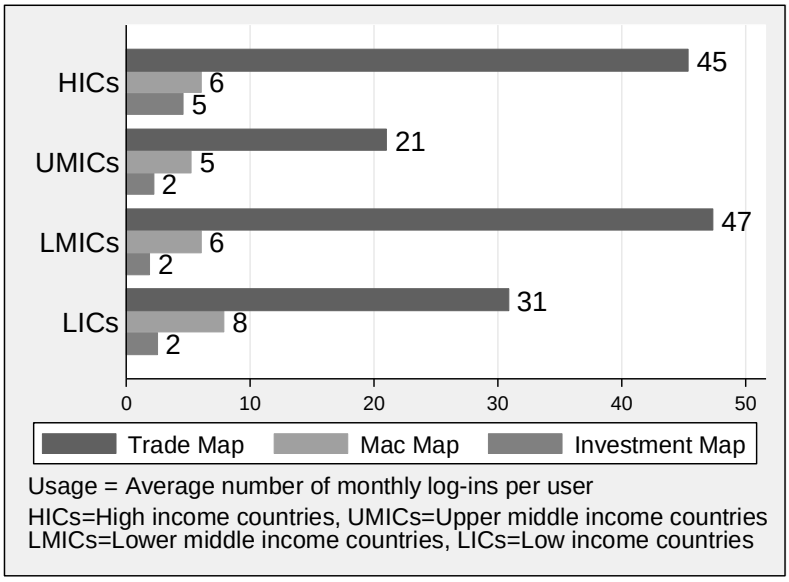
[10] It should be kept in mind that the number of 'log-ins' is not the same as the number of 'visits', see above and Annex III. Thus it could be that the high usage statistics in LICs is due to users not familiar with the tool having to access the same page several times to get the desired information while this is not the case (or is less frequent) in other income groups.

[11] More detailed analysis reveals that the high usage in LICs is largely due to usage by international organizations located there (91 log-ins per month). Likewise, usage in "services" institutions reaches an average of 92 log-ins per month (see figure III-10 in Annex III).

NGOs and TSI) is highest so that in the end the targeting of firms in LICs is not yet very high. This lower usage by the private sector could reflect an ignorance of the tools, a lack of need on the part of enterprises, or a lack of training. Causes of variation in usage across user types merits further regular monitoring by ITC.

Average monthly log-ins for the three tools. Figure 4 shows that usage is by far highest for Trade Map which has the advantage on the timely provision of trade data that has been collected for a long time across countries for an increasingly large number of countries. Whether the classification is by region, by income group, by user or by any other combination of the three (see figures III-13 to III-16 in Annex III), Trade Map usage is about 4 to 6 times the usage of MAc Map, which itself is 2 to 4 times the usage of Investment Map.

Figure 4 – Frequency of usage by tool (by income group)



The discrepancy in usage across tools is very large. Telephone interviews revealed that users often reported greater difficulties in using MAc Map than Trade Map, and that they did not use Investment Map because they did not find the information they were looking for. MAR staff reported problems with the server used for MAc Map which, according to them, accounted for many of the difficulties encountered by users. Since a new server should be up-loaded soon and probably announced to all users, MAR staff should monitor usage in the coming months to check that the low usage is, in fact, due to the performance of the server.

As to the apparently very low usage of Investment Map, this requires a more in-depth appraisal of what this tool can be expected to deliver (for example, the WBS responses reveal that more contact details on transnational companies (TNC) and their affiliates in LICs would be a valuable asset for users in LICs, especially for TSI). As explained above (and in annex II), there are no competitors to Investment Map, so a successful tool would be a great asset for ITC, setting it apart. On the other hand, since countries are reluctant to

communicate data on FDI, it may not be possible to develop a tool that will connect usefully with Trade Map and MAc Map.

2.2.2 PURPOSE OF USAGE

We now turn to the lessons from the Web-Based Survey (WBS) administered for this evaluation. As explained in annex V, a WBS of 13 questions was sent out to one-half of the population of active users resulting in 36,483 recipients. The recipients were selected randomly from the active users and they were told that the survey was anonymous. We received 1,781 fully-completed questionnaires.

As the draw was representative of the population, the last two columns in table 2 below compare the distribution of respondents by user category with the corresponding breakdown in the population. The table shows that academics and "others" are less frequent respondents than their weight in the reference population resulting in an over-representation of the other categories. HICs, LICs, and (to a lesser extent) LMICs are over-represented in the respondents' sample, whereas UMICs are under-represented. To correct for this bias in responses, answers were weighted by the country weight in the reference population.

However, when interpreting results presented below, it should be kept in mind that there may be self-selection in the answers. Indeed, while the shares of users who used the three tools at least once are the same in the group of 1,781 respondents as in the reference population of 73,000 active users (see figures 5); it could be that frequent users in terms of the number of monthly log-ins had a higher response rate.

Figures 5 show that about 1/3 of the users (561 respondents and 21,968 active users) only use Trade Map, and that very few users only use MAc Map or Investment Map. This corroborates the results from the log-ins usage statistics in figure 4.

More interesting is the preliminary assessment of the Common User Management System. While it is not clear from the figure that they are using it jointly, 2/3 of MAc Map users are also users of Trade Map showing the two tools complement each other effectively. The diagram also shows that there is very little usage of MAc Map alone, raising the question of whether that tool could eventually have 'a life on its own'. Likewise, the synergies between Investment Map and MAc Map are negligible.[12] The low usage of Investment Map in solo is likely to be due to the lack of data. Indeed, the low score for the quality of the data in Investment Map is quite striking (see table 3 below, row 5).

[12] The same question was asked in the June 2010 ITC survey. They find that 32% of users use all tools (we find 27%), 15% use Trade Map only (we find 27%), and 14% use Trade Map and MAc Map (we find 35%).

Figure 5a – Usage of tools (WBS)

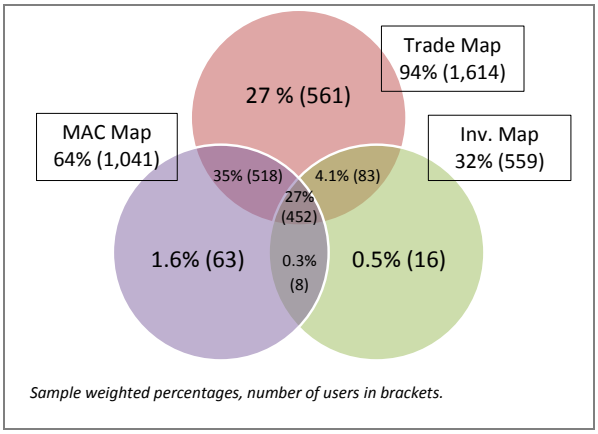


Figure 5b – Usage of tools (active users)

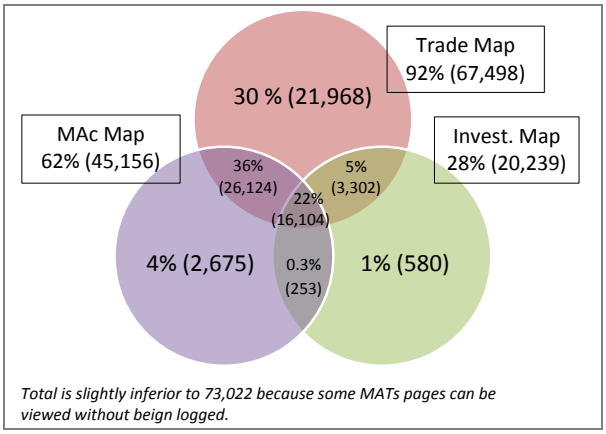


Table 2 – Web-based survey respondents' characteristics

	Number		Percent	
	Respondents	Active users	Respondents	Active users
Total	1,781	73,022	100	100
ACTIVITY				
Government or mission	271	8,092	15.2	11.1
Independent/Individual	201	7,179	11.3	9.8
International organization	27	1,049	1.5	1.4
Large enterprise (> 250 employees)	205	1,294	11.5	1.8
Medium enterprise (50-250 employees)	138	1,390	7.8	1.9
Small enterprises (10-49 employees)	151	1,638	8.5	2.2
Micro enterprises (< 10 employees)	144	1,398	8.1	1.9
Private company		5,025		6.9
Services		2,348		3.2
Trade Support Institution (TSI)	118	4,970	6.6	6.8
Business Support Institution (BSI)	61		3.4	
Investment Promotion Agency (IPA)	21		1.2	
Academia	343	18,951	19.3	26.0
NGO	62	374	3.5	0.5
Other	39	19,314	2.2	26.5
INCOME GROUP				
High income countries (HICs)	121	2,411	6.8	3.3
Upper middle income countries (UMICs)	1,109	51,830	62.3	71.0
Lower middle income countries (LMICs)	419	15,690	23.5	21.5
Low income countries (LICs)	126	2,979	7.1	4.1

Note: blank cells are due to the difference in the definition of groups in the WBS from those in the registration data base

Purpose of usage. When moving to the specific usage of the tools, 2/3 of respondents indicated that they had used the MATs to design an export/import strategy (80% among LICs' users with respondents concentrated in the TSI, IPA, BSI, and independent categories; see tables VI-8g-m in Annex VI). Also, 2/3 responded that they used the tools for their research or academic work. One half responded that they used the tools to design an investment strategy, and one third responded that they used the tools to contact a transnational company (TNC). Since 50% of the LICs users who indicated that they used the ITC MATs to contact a TNC use Investment Map, it could be that they use Investment Map to contact a TNC, rather than to first develop a strategy.

Lower middle income countries mainly use the tools to design export/import strategies, usually at the firm level. At the other end, high-income countries' respondents use the tools for research work, for example to find information on developments in a particular market (coffee for STARBUCKs, tires and/or rubber for cars or motorcycles for PIRELLI).

Concrete usage. As to the concrete usage of the ITC tools, 93% of the users study data and indicators online, 78% download data, 67% use the graph and map options, and 53% have used the tariff simulation tool (970 users, of which 214 say they do not use MAc Map…). Users in LICs are significantly less numerous to download data and less numerous to use the tariff simulation tool (respectively 68% and 43%). By contrast, they are significantly more numerous to use the graphic and map options (72%, see tables VI-7 in Annex VI).

This result highlights the relevance of 'user-friendly' tools and applications for users in low income countries. Indeed, several respondents in the telephone interviews asked for more user-friendly graphs. One respondent noted that good graphic tools were absolutely essential when making presentations to policy-makers. He asked for more graphs like the bubble graph showing market developments for a particular product.

2.2.3 RELEVANCE AND QUALITY OF TOOLS

Table 3 summarizes the answers to all questions where users were requested to give a Yes/No answer with the percentage of yes answers reported in the table. Insofar as a high percentage is an indicator of successful targeting, most percentages for LICs are higher and often significantly so (i.e. in bold). For example, while on average 85% of the respondents say that the ITC MATs made it easier to obtain trade-related data compared to other tools, the percentage for LICs is 93%. This result is confirmed by qualitative interviews (interviewed users frequently said that it is difficult to obtain their country data by themselves as ministries or customs authorities do not want to share the data within the country). Interestingly, LICs' users more frequently find the information they want. Not surprisingly, free access for LICs also makes a big difference, a result that was emphatically confirmed in all interviews where respondents often said that their institution would not pay for the data. In general, LICs do not use other data sources. It is not clear whether it is a question of access, of existence of the data, or simply that they do not need more data.

Table 3 – Relevance and quality of the ITC tools: web-based survey summary results

Row nb		HICs[(b)]	UMICs[(b)]	LMICs[(b)]	LICs[(b)]	Total
	% of users who answered yes[(a)]					
1	Is it easier to obtain data?	73	87	87	**93**	85
	Is the quality of data better?					
2	*In general*	71	65	68	**82**	71 [(c)]
3	*In Trade Map*	48	**52**	42	46	46
4	*In MAc Map*	14	18	18	**25**	20
5	*In Investment Map*	3	**10**	6	6	6
6	Does free access made a difference?	53	78	87	87	76
	The ITC MATs have improved…					
7	… my awareness about international trade	56	70	69	73	65
8	… my decisions about export or import	18	26	29	**48**	30
9	… the services I provide to others	44	33	32	**51**	38
10	The ITC MATs have helped in designing the trade policies of my country[(d)]	9	18	47	**67**	35
	% of users who…					
	Find the information at least 50% of time…					
11	*… in Trade Map*	91	91	95	**99**	94
12	*…in MAc Map*	58	83	85	86	79
13	*…in Investment Map*	40	73	65	71	59
14	Use one other source of information	68	**70**	54	62	63
15	Use two other sources of information	**44**	36	38	32	37
16	Use three other sources of information	**29**	24	20	13	21
	Discovered ITC MATs *via*…					
17	*Searching the Internet*	19	16	**22**	12	18
18	*Word of mouth*	10	14	**15**	6	11
19	*Trade Support Institution*	**24**	11	7	12	15
20	*ITC*	19	24	30	**41**	27
21	*WTO*	3	2	2	2	2.5
22	*UNCTAD*	3	3	3	**12**	5
23	*World Bank*	2	2	1	0	1.5
24	*A University*	10	5	**13**	9	9
25	*A NGO*	1	1	**3**	1	1

Notes: Figures in bold indicate one standard-deviation beyond the mean

(a) For exact questions, see Annex V.

(b) HICs=High Income Countries, UMICs=Upper Middle Income Countries, LMICs=Lower Middle Income Countries, LICs=Low Income Countries.

(c) If we consider only those who have indicated at least one tool where they find the quality better, this percentage drops to 50%.

(d) Only users who work for a Government, a Mission, an Embassy, etc.

A majority of respondents (2/3) use at least one other source of information in their work. This was confirmed in the phone interviews where it was pointed out – both by users and by trainers/teachers – that the MATs were an entry-point into the design of an export strategy for the firm or a trade strategy for the country. ITC staff is well aware of this and have developed other tools for researching export markets (e.g. the guide book for new exporters), but it is worthwhile remembering this fact when designing improvements in the tools: these tools will always remain an entry point.

Answers to how the respondents discovered MATs are interesting. It should help ITC develop an improved marketing and promotion strategy, especially in low income countries where, except for UNCTAD, none of the sister UN organizations were helpful in discovering the tools. Telephone interviews also revealed a general feeling that the tools were not well advertised. A strategy for better advertising should be devised. For example, the weekly Bridges produced by the ICTSD in Arabic, Chinese, English, French, and Russian would be a good place for ITC to seek exposure. More visible exposure on the WTO portal would be another area with a potential for a high payoff. A few good case studies on dynamic/lagging market for specific products using the tools would be another way to attract attention.

2.2.4 SUGGESTIONS FOR IMPROVEMENTS

Users were also given a list of improvements that they were asked to rank in order of priority ranked from most to least desirable. The options were selected from some of the phone interviews and from our prior understanding of where MAR staff were planning to carry out improvements. The options (see the wording of question 10 in annex V) that users were asked to rank were: more effective way to download data; more indicators; more information on NTMs; more information on companies and their affiliated; more training; access to tools *via* smartphone; other (to specify).[13]

The results are summarized in tables 4a (whole sample) and 4b (only LICs which is a sample of 113 respondents). The table gives the first and second choices for the three improvements that received the highest percentage of answers along with the profile of those who selected the corresponding (first) choice.

[13] Only 45 respondents (2.5%) selected this option as a first, second or third choice. Some examples include more detailed data, monthly data, contact details, exports in value, a concrete case study example, etc.

Table 4 – Functionalities that respondents want to see included in the ITC MATs

a. Whole sample

First choice	Second choice	Profile (according to first choice) *Income group*	Profile (according to first choice) *Status*
More effective way to download data (28%)	More NTM (26%) More indicators (27%) More training (27%)	HICs: 16% UMICs: 28% LMICs:27% LICs: 22%	Large etp: 18% Gov: 18% Academics: 17%
More training (21%)	More NTM (38%) More contact (25%) More Effective way to download data (14%)	HICs: 32% UMICs: 12% LMICs:29% LICs: 27%	Academics: 35% Other: 13% Small etp: 11%
More indicators (17%) (*more NTM=13%*)	More NTMs (29%) More effective was to download data (25%) More training (17%)	HICs: 23% UMICs: 26% LMICs:37% LICs: 15%	Gov: 32% TSI: 12 Large etp: 11% Academics: 11%

b. Low-income countries only

First choice	Second choice	Profile (status)
More effective way to download data (33%)	More indicators (50%) More effective way to download (18%)* More training (18%)	Academics: 29% BSI: 19% IPA: 18% Indep. : 10% Gov. : 10%
More training (30%)	More contact (41%) More Effective Way to download data (37%) More indicators (9%)	TSI: 45% IPA: 13% Indep.: 13% Gov. 10%
More indicators (13%) (*more contacts = 11%*)	More effective was to download data (28%) More contacts (23%) More training (10%)	Gov: 35% TSI: 12% Medium etp: 11%

* In the way the question was set-up, users could effectively chose the same functionality in second choice. In the whole sample, only 36 respondents did so, and they were mostly in LICs, hence the result reported here.

Implementing a more effective system to download data was selected first among improvements and it was requested quite evenly across income groups (except high income group users who are not as concerned about data download, perhaps because they have access to other data in raw form). But all three second choices were also very close in percentage terms to the first choice. In sum, according to the WBS, the four most desired functionalities are:

- Effective way to download data
- More data on NTMs
- More indicators
- More training

All four came out ahead with equal support across the whole sample. The status is also evenly distributed across enterprises, academics and government users.

A more effective way to download data is also the top request for functionality improvement among LICs, especially for academics and investment / business support institutions (table 4b). More training comes in second place for the LICs, with more indicators in third place.

Institutions do not download data as frequently as other users. Government-based users first want indicators, a result that was confirmed in the interviews.

Many other suggestions for improvements, some easy to implement, came out of the phone interviews (see details in annex IV). Perhaps the most important to consider first is a better-designed user-guide. We know – and verified through the interviews – that users often do not read user-guides even when they are on-line and that they do not use the FAQs facility. Some users also mentioned the language barrier suggesting that translation to other languages could have a high payoff. This aspect taken into account, the recommendation for a better user-guide comes from a couple of interviews with trainers that had considerable experience with the tools. Perhaps, carrying out first a few case studies would make it clear what is needed up-front in a user guide. For low-income countries, the use (and misuse) of mirror data must rank high, suggesting a short video with examples on that subject.[14]

Taken together, these results suggest that for LICs, improvements of the tools should focus more on the accessibility of tools (navigation, more effective way to download data, etc.) and on training rather than on the quantity of information (i.e. more information or longer time-periods). This was confirmed in the telephone interviews which also pointed out that users had difficulty with the disaggregated trade data as many persons interviewed either were not at ease with the use of mirror data, or wanted “better mirror data”.

Several “quick fixes” could be easily carried out. One is a better navigation across the three platforms. Currently, experienced users of web-based softwares find it difficult to go back and forth. Another is a greater number of country or industry-groupings (e.g. the inclusion of

[14] We are aware that the use of mirror data is mentioned in the tutorials. It remains that the issue came up in many conservations.

a few ‘creative industries’ e.g. automotive industries) in the pull down menus. This would help users get over the overwhelming amount of details in the HS system. An “easy currency converter” could also be included. Lastly, a more visible link to video-courses would probably help users.

2.3 IMPACTS

Positive feedback about the impact of MATs came out through the WBS and through the phone interviews. As explained in annex IV, because it was difficult to identify persons to be interviewed through random selection, we had to select most persons from lists of users that are frequent users and had contacts with the ITC staff. This made the interviews interesting, notably because several interviews were with trainers, but probably not as representative as we would have wished.

The persons interviewed ranked the MATs as better suited for their needs than other softwares, several of which they had tested. They also found the ITC staff responsive to queries and generally declared that the tools helped them greatly in their activities. Concrete examples of how tasks could not have been carried out without the tools are provided in the summary of each one of the 16 interviews reported in annex IV.

Even though selection bias is also present in the results from the WBS, table 3 provides another yardstick of impact as a majority of respondents answered that the tools improved their decision making, the services they provide to others, and in developing countries (but not in high-income countries as expected), the design of trade policies in their country. The pattern of ‘yes’ answers across income groups also conforms to expectations as the percent of positive impacts is always greater for LICs than for other income groups.

3. CONSTRAINTS, GOOD PRACTICES, AND LESSONS LEARNED

This report has drawn on indicators such as monthly log-ins per user to identify patterns of usage across types of users and countries. While insufficient to provide an accurate overview of usage, it would be good practice to check on change in usage statistics following in-country (and WEBINAR) training sessions. This would be a useful complement to the other evaluation methods used by ITC to evaluate their training programs.

The WBS and interviews have also led to areas of reflection for improvements in data management, software implementation and training and promotion. These are summarized below.

3.1 DATA COLLECTION AND CLEANING, SOFTWARE IMPLEMENTATION

In addition to cleaning data and digitalizing it, data collection to increase the number of countries has proven to be very difficult (some countries do not have a full national tariff schedule; some others do not systematically report their data, etc.). ITC has thus developed

an established list of contacts to get the data directly from national authorities. This is probably systematized and in the process of being institutionalized, in which case ITC would have an 'edge' in delivering timely data on market access information for a larger number of countries than other data bases and softwares. As of now, according to our interviews, data processing and cleaning is using a lot of resources (4 full time persons for Trade Map, 4 others for MAc Map, and 1 full-time for Investment Map).

As to Investment Map, the preceding sections have shown the difficulties facing this tool. ITC is aware of the problem, and our interview with MAR staff (see annex IV) suggests that ITC plans to hire a senior consultant (expert) to make recommendations on how to improve Investment Map.

In addition, even if the new server for MAc Map will relieve the current computing constraints, ITC should think hard about how to use the new computing power that will be provided by the new server (see the summary of the discussion with MAR staff in Annex IV, and Annex VII). For example, should server capacity be devoted to allowing users to make choices about time periods and growth rates? Should data on tariffs going back to 1986 be considered, as was suggested by MAR staff during the interview? This addition will be welcomed by academics and to a lesser extent by economists in government. On the other hand, it is not clear whether this allocation of resources and computing power to historical data is what is needed most by the private sector whose forward-looking decisions rely mostly on the availability of data for the past few years or that it should have been a priority.

3.2 TRAINING AND PROMOTION

Recognition of the importance of training and of the need to address different constituencies has led to a change in strategy (see annex IV and details provided by ITC staff in annex VII). MAR staff now also evaluates the impact of their training. As mentioned above, this evaluation should be complemented by checking on trends in log-ins following training activities.

Several phone interviews pointed out to insufficient promotion of the tools. While promotion *via* Google, YouTube or social networks (e.g. Facebook) may be limited since some Terms and Conditions may not be compatible with the UN status of ITC, other promotion activities could be carried out. Some have been suggested above. Others should be considered.

4. CONCLUSIONS AND RECOMMENDATIONS

4.1 CONCLUSIONS

Four conclusions deserve attention from the World Bank:

First, whether through the analysis of the results from the questionnaire, or from the phone interviews, it came out overwhelmingly that **the tools should continue to be accessible free-of-charge**. A typical answer to the importance of access free of charges was: "Our management would not pay for it, even when they appreciate their usefulness as they would add 'firms survived without them until recently'". This is especially so for developing countries, but also applies partly for high-income countries.[15]

Second, **overall user satisfaction is high**. This came out in the answers in the questionnaire as well as in the phone interviews. These results should be interpreted as coming from sufficiently 'satisfied consumers' since we had difficulty in eliciting responses from relatively low frequent users when selecting them randomly.

Third, **low-income countries** – the World Bank's target group – **is a large user-group of the MATs both in terms of frequency of usage** (the second highest among developing countries with an average of 41 log-ins per month) **and in terms of users** per 100,000 Internet users (14.5). Interestingly, with an 11 percent response rate, low-income countries had a response rate twice as high as their share in the user population, suggesting their overall interest in the tools.

Fourth, **needs and usage vary across** users. Users based in governmental institutions need 'ready to use' indicators and a more effective way to download data for their research or to prepare negotiations. Academics want more training and an effective way to download as much data as possible for their research. Medium and small enterprises want more training and more information on NTMs. Users in TSI need more training, more indicators and more information on NTMs to provide efficient services to the private sector, etc. Insofar as all needs cannot be satisfied at once, this will require strategic decisions for coming developments on the part of ITC.

4.2 RECOMMENDATIONS

4.2.1 TRADE-OFFS AND PRIORITIES

In continuing its collaboration with the World Bank, the ITC must continue to manage the potential tensions between the World Bank's objective to promote trade integration for low-income countries while ITC has a larger mandate to focus on the private sector at large in all developing countries. So far this potential tension has been managed satisfactorily and the

[15] It is doubtful that the visibility and credibility obtained from charging a fee to users registered in high-income countries would compensate for the hassles associated with differentiating users according to Internet address.

tools have been made available free-of-charge to users in developing countries with good usage by this group. But this report shows that the MATs have three constituencies of about equal size but with different needs: (a) academics and students; (b) governments and TSI; (c) enterprises of all size.

Notwithstanding these different constituencies, there is a consensus around improvements among four desired functionalities:

- Effective way to download data
- More data on NTMs
- More indicators
- More training

4.2.2 IMPROVE TOOLS FOR USERS, INCLUDING TRAINING QUALITY

Many suggestions for improvements noted in the report (e.g. improved download capability) are being contemplated for the near future. Several suggestions on how to improve the friendliness of the tools (languages, adding a few indicators, translation to other languages; making important links more visible; a short tutorial on the use of mirror data) could be carried out in the near future.

Improved on-line training, continued training of the trainers, case studies to show-case on the MATs website and in other fora would all contribute to increasing the visibility of tools which was judged to be low during the course of several interviews. [16]

4.3 SUGGESTIONS TO IMPROVE THE ATTRACTIVENESS OF MATS[17]

More extensive targeting in outreach (e.g. *via* publications); short briefing notes showing how tools can help answering specific questions (e.g. 5 pages or so as in the Trade Policy Notes of the World Bank).

[16] An example might be a widespread announcement of a yearly prize (with a sum to be determined) for the best 3 case studies issued from training courses.
[17] For more recommendations on promotion, see section 2.2.3, p.23.

C. ANNEXES

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EVALUATION TERMS OF REFERENCE

Evaluation of World Bank Program to ITC: ”Trade Data for Low Income Countries”

January 2008 – December 2010

INTERNATIONAL TRADE CENTRE
THE JOINT AGENCY OF THE WORLD TRADE ORGANIZATION AND THE UNITED NATIONS

1. BACKGROUND INFORMATION

The World Bank made available Grants of $600,000 per year over three years 2008-2010 to ITC to achieve two key overall Program Objectives:

(i) improve the quality and availability of global trade and investment information including indicators for decision makers and researchers in developing countries;

(ii) promote continuous monitoring and evaluation of trade and investment policies, in the context of the ongoing dialogue between development organizations and their clients.

The program was managed by ITC in close coordination with strategic partners. ITC selected, managed, delivered, and monitored program activities. ITC established an Advisory Council to provide guidance on all major issues. The Advisory Council comprised internationally acknowledged experts from WTO and UNCTAD, the World Bank, UNSD, several representatives of partner country Trade Support Organizations, and academia. The Council met February 2008, March 2009 and April 2010. It had responsibility for assessing program delivery, as well as identification of priorities for the future work program. Developing country stakeholders were important "owners" of the project, involved at a number of key points:

- National customs and statistics agencies were vital partners in data collection,
- Trade Ministries and WTO Missions were potential users of the systems, and
- Governments and civil society organizations played a major role in dissemination activities

At all points, these stakeholders were fully integrated into the operations process, and acted as conduits for demand-driven activities. The management of the project had regular input and feedback from partner organizations in developing countries.

Each year of the program was governed by a Grant Agreement which outlined the specific Grant objectives and deliverables for that year. The Grant Agreements with the objectives for each of the three years are attached in Annex 1. Grant Funds were administered by ITC through the Revolving Fund for Market Analysis and Research. Financial reporting was done twice a year (June and December) and a financial report of all three years is available in the final 2010 report to the World Bank in Annex 2. Activity reports were furnished regularly to the Bank. Key reports for each of the years of the Grant are included in Annex 2.

	Grant objectives each year
2008	a) Generating annual data for low income countries on tariffs and major non-tariff measures b) Unifying the three ITC trade and investment tools (Trade Map, Market Access Map, Investment Map, Product Map) and developing a single user interface c) Providing free access to low income countries and research institutions d) Ensuring a sustainable transition to a free access business model for low income countries e) Improving the governance structure supporting the collection and dissemination of trade data in low income countries through the establishment of an Advisory Council chaired by ITC and including experts from WTO, UNCTAD and the World Bank, as well as representatives of partner country Trade Support Organisations and academia.
2009	a) Generating annual data for low income countries on tariffs and major non-tariff

	measures b) Unifying the three ITC trade and investment tools (Trade Map, Market Access Map Investment Map, Product Map) and developing a single user interface c) Providing free access to low income countries and research institutions d) Ensuring a sustainable transition to a free access business model for low income countries
2010	a) Improve the transparency of international trade by supporting ITC's collection and treatment in 2010 of the most current data on trade flows (including at the most granular national level and the most frequent monthly values and quantities) applied customs tariffs (including preferences arising out of free trade agreements) major non tariff barriers; foreign direct investment flows and stocks; and information on the activities of foreign affiliate companies b) Facilitate the trade related decisions and activities of enterprises, trade support institutions and trade policy makers in developing and low income countries by supporting ITC's 2010 investment in the maintenance of its integrated suite of market analysis tools – Trade Map, Market Access Map, Investment Map and Product Map c) Ensure that trade-related data are available as a public good through free access to the ITC market analysis tools in 2010 for developing countries as well as research institutions worldwide¨ d) Refining and implementing the 2010 strategy to mobilize multi-donor long-term support for its trade tools, for annual data-updating, software and hardware maintenance, and free dissemination

The program requires the conduct of an independent evaluation, in form and substance satisfactory to the Bank and by an entity satisfactory to the Bank, by 30th June of the year following the last Grant Period, that is, 30th June 2011. Such independent evaluation shall cover all grant periods.

The United Nations Evaluations Group (UNEG) Ethical Guidelines for Evaluation"[18] apply to the conduct of the evaluation of ITC in general and to the present evaluation in particular.

2. PURPOSE OF THE EVALUATION

The purpose of evaluation is to measure achievements against the three-year Program Objectives, the Grant Objectives specific to each Grant year, Deliverables specific to each Grant year and also Activities where they were also specified in the Grant Agreements.

The requirement for an independent evaluation of the three-year Program was stipulated in each annual Grant Agreement.

The evaluation will seek to establish the demand for and benefit derived by low-income countries of access to free trade, market access and investment data through ITC's tools – Trade Map, Market Access Map and Investment Map.

The main stakeholders of the evaluation are the World Bank, ITC and developing country users benefiting from free access to ITC's market analysis tools.

[18] The UNEG Ethical Guidelines for Evaluation are available at: http://www.uneval.org/papersandpubs/documentdetail.jsp?doc_id=102

The recommendations of the evaluation will help improve the usefulness, quality and relevance of the trade-related data and analysis tools offered to developing countries and will have an impact on ITC decisions to continue to commit resources for the collection, treatment, analysis and free dissemination to developing countries of global trade-related data.

3. SCOPE OF THE EVALUATION

The evaluation will report on the three-year program's achievements against the following expected objectives:

1. **Improvement in the quality and availability of global trade and investment information including indicators for decision makers** *(i.e. companies, trade support institutions and governments / policy makers)* **and researchers in developing countries**;

2. **Promote continuous monitoring and evaluation of trade and investment policies, in the context of the ongoing dialogue between development organizations and their clients.** *(i.e. governments / policy makers in developing and least developed countries are better able to develop strategies for export promotion and identify where potential exists)*

In evaluating the program's achievements, all developing and least developed countries should be considered.

4. ANALYSIS AND FINDINGS

4.1 Assessment of Implementation and Delivery

4.1.1 Institutional and Management Arrangements

The evaluation should assess the overall institutional and management arrangements and how these impacted the implementation and delivery of the program.

4.1.2 Implementation of Activities

This part of the report should address how program activities were undertaken, noting any constraints, examining if and how monitoring and backstopping was done during the implementation. Please note that only one Grant Agreement (that of 2010) specifies the word "activities" but they are referred to in Grant Agreements 2008 and 2009 as the "elements" of the "Deliverables"

4.1.3 Achievement of Annual Grant "Deliverables"

The report should indicate the extent to which the planned outputs or "deliverables" as outlined in the Grant Agreements were delivered and how they contributed to the attainment of corresponding Annual Grant Objectives. The section should also show how these results have been achieved within the planned timeframe. The evaluation should look at the resources made available in the Grant as well as what additional resources were required to achieve the deliverables.

4.1.4 Attainment of the Annual Grant Objectives

The report should indicate the extent to which the Annual Grant Objectives were achieved and how these contribute to the attainment of the overall Program Objectives. Where all objectives have not been attained the report should show what progress has been made in achieving those objectives.

4.2 Assessment of the Effects

4.2.1 Program Objectives

The report should identify the extent to which the overall Program Objectives have been delivered. In addressing this, comment should be made on the *relevance*, *effectiveness* and *efficiency* of ITC's delivery.

Relevance – Whether ITC's provision of free trade-related data and analytical tools over the three-year Grant period addressed a need for the same by developing countries and whether developing countries continue to have a need for these data, trade policy indicators and analytical tools. If the data and tools were discontinued, what would be the impact on developing countries?

Effectiveness – Did ITC satisfactorily achieve the expected program objectives? If not, was their some progress towards their achievement? What were the problems and constraints encountered during implementation?

Efficiency – Were the objectives achieved at an acceptable cost and process efficiency, compared with alternative approaches (used by other international organizations or private sector enterprises) to accomplishing the same objectives?

The Evaluator should particularly look into the usage of the market analysis tools in developing countries, especially in Low Income Countries, and provide insights on what can be done more to increase the number of users in these countries, and make the data more useful to them.

4.2.2 Impacts

This part of the report should show the ultimate changes brought about as a result of the implementation of the program. For example, how useful has it been for developing countries to have better quality data; integrated data and improved access? What difference has the Grant made to beneficiaries and stakeholders? What are the manifest or anticipated trade, economic and other effects on companies, trade support institutions, trade policy makers and international organizations and other institutions in the short, medium, or long-term; intended or unintended; positive and negative?

4.2.3 Sustainability

This part of the evaluation should focus on whether the benefits of the program are likely to continue beyond the three-year grant period.

5. LESSONS LEARNED AND GOOD PRACTICES

5.1. Lessons Learned

A high priority should be given to lessons learned. This part of the evaluation report has to deal with those program lessons that have broader applicability to other programs. Frequently lessons highlight strengths and weaknesses in preparation, design and implementation that affect performance, outcomes and impact. Lessons should *specifically refer to the findings* or part of the report that they are based on. Lessons should not be stated as recommendations or written as observations, or a description.

5.2. Good Practices

The evaluation report should cover specific experiences that are considered good practices that are drawn from an evaluation that have a broader applicability to other activities of ITC. The report should identify what worked well and how it can be replicated.

5.3. Constraints

The evaluation report should highlight major constraints that impacted the implementation and delivery of the program.

6. RECOMMENDATIONS

This part of the evaluation report should provide clear and pragmatic recommendations aimed at enhancing the effectiveness, quality or efficiency of interventions.

7. CONCLUSIONS

The evaluation report must draw conclusions based on the analysis and findings, lessons learned and recommendations. There must be a clear link between them.

8. EVALUATION METHODS

In order to capture information to report against the performance indicators and overarching issues, the following methods are recommended:

- Review of Grant Agreements, ITC program reports and minutes of Advisory Council meetings
- Review of survey in 2010 of users of ITC's Market Analysis Tools see http://legacy.intracen.org/marketanalysis/Docs/Survey/201009_MAT_survey.pdf
- Short web-based survey of market analysis tools users focusing on the quality of the data, ease of access, type of use of the data. Information should be broken down by user type (companies; trade support institutions, policy makers / governments, researchers).
- Telephone interviews with a representative selection of trade support institutions and government / policy makers (including members of the Advisory Council) that are regular users of the tools and collection of samples of products / services derived from using the tools. The evaluator should also interview a sample of institutions in low income countries that have access to the tools but are not using it extensively and try to understand the reasons why.
- Analysis of data in Trade Map, Market Access Map and Investment Map to identify: number of countries covered; the number of products covered, how detailed the data is, how current the data is, the number of primary and derived trade-related indicators available;
- Analysis of the integrated portal www.intracen.org/marketanalysis and of user-registrations and usage statistics by country, organisation type, visit length and type of data queried;
- Interviews with a few ITC staff focusing on data collection and dissemination processes (analysis of the number relationships ITC has with providers of primary data at the national, regional and international level) as well as looking at main challenges, issues / lessons learned and future funding arrangements.

The evaluator should present a detailed statement of evaluation methods including the description of data collection instruments and procedures, information sources and procedures for analyzing the data.

9. EVALUATION TEAM COMPOSITION

The evaluator / evaluation team should be independent of ITC, the World Bank and beneficiaries of the program.

The evaluator should have a strong understanding of data relating to trade flows, market access conditions and foreign direct investment. The evaluator should also have an understanding of trade-data uses and data providers and aggregators, including international organizations, private companies and national institutions such as statistics and customs institutions.

The evaluator should have strong analytical skills, particularly in the area of quantitative analysis. The evaluator should have an understanding of economic and trade policy issues, international trade and experience of the issues faced by developing countries in terms of trade-information transparency, accessibility and capacity to conduct trade-related analysis.

10. PLANNING AND IMPLEMENTATION ARRANGEMENTS

Senior staff in ITC's Market Analysis and Research Section (MAR), under the supervision of the Chief of MAR, will provide access to the Evaluator of all data needed to conduct the evaluation as outlined in section 4 Evaluation Methods, including access to the full database of register users of ITC's trade analysis tools. ITC will also provide names and contact details of institutions that may be contacted for more in-depth information about benefits derived from use of the trade tools.

The web-based survey should be conducted by the Evaluator on a web-site independent of ITC.

Timeframe for the evaluation process – The evaluation should start no later than 30th June 2011 and be completed by 30th September 2011.

Resources required and logistical support – The budget for the Evaluation is $42,000 and should include the cost of the web-based survey. ITC will put at the Evaluator's disposal office, email and telephone facilities to mitigate out-of-pocket expenses. No travel to the field is anticipated in this evaluation.

D. Projected Level of Effort		
Activity	Number of days/weeks/months	
	Headquarters	Field
Collection and analysis of data and information about tools usage from user registration database and usage-statistics.	2 days	
Web-based survey of trade-tools users: survey design, execution and analysis.	10 days	
In-depth interviews by telephone with 12 trade support institutions / trade policy makers and in developing countries on their use of the trade-tools.	6 days	
Analysis of the trade, market access and foreign direct investment data available in Trade Map, Market Access Map and Investment Map.	3 days	
Interviews with ITC staff on data collection processes and relationships with primary data providers as well as funding sources and sustainability of trade-tools.	2 days	
Consolidation of analysis and writing of evaluation report.	12 days	
Total	35 days	

E. Projected Cost			
Type	Cost ($)		
	Headquarters	Field	Total
Evaluator's fee	$35,000		
Web-based survey execution	$6,500		
Out of pocket expenses	$500		
Total	$42,000		$US 42,000

Expected deliverables of the evaluation – A detailed evaluation work-plan is required 5 working days from commencement of the Evaluation. The questionnaire design of the web-based survey should be completed within 15 working days of Evaluation commencement.

II. Summary of survey of other softwares offering similar data/features

A large number of data bases relating to trade, trade restrictions and indicators of the east of carrying out international are available. Most of these were presented at a conference at the WTO in May 2010. The brochure "Trade and Market Access Data for Policy Makers" (WTO, 2010) gives a fairly complete list of data bases, softwares, and links. Among the publicly available data bases, it lists 10 data bases on services and over 30 on trade and trade policy indicators (tariffs, subsidies, NTMs, agricultural distortions data bases).

Many of these data bases are not available on an annual basis. Others like the OECD, EUROSTAT and US-ITC data bases either only cover the trade for a single country or group of countries or do not seek to have as wide a coverage as permitted by the data. Other data bases are sector-oriented so often they do not have the same coverage as those provided in MATs (see WTO, 2010, section 3 for coverage). These are not covered here.

This annex describes very briefly the data bases that are "comparable" to what is offered in ITCs Market Access Tools (MATs) Trade Map, Market Access Map and Investment Map; that is those data bases that are free, cover developing countries and are kept up-to-date. It focuses on the softwares that carry out some of the same tasks as ITCs MATs.

1. TRADE DATA BASES

The majority of phone interviewees expressed problems about the quality of the data, a few not aware of the availability of mirror data, and many worried about the inaccuracies in that data. This is not covered further here, except to note that the CEPII has on line the BACI (*Base pour l'Analyse du Commerce International*) uses a set of corrections to reconcile for inconsistencies between partner's and mirror data used in the COMTRADE data which is used in Trade Map.[19] However, this reconciliation of data is not carried out on a regular basis, even though it is well-known that there are large discrepancies in reported trade data in low-income countries (see e.g. Easterly and Ashraf (2010) who advise using HS-4 rather than HS-6 level data when working with low-income countries). The BACI has data for the period 1995-2007 at the HS-6 level.

Most are on the World Bank website (other for-pay data bases like the data provided by Global Trade Information Services are not pertinent for developing countries and are not covered here). The databases available from the World Bank data base are covered first.

[19] The CEPII data is downloadable at http://www.cepii.fr/anglaisgraph/bdd/baci.htm

REGULARLY UPDATED BASES

World Bank Trade Data and Tools website describes the data and tools available

http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/TRADE/0,,contentMDK:21685771~menuPK:4777014~pagePK:210058~piPK:210062~theSitePK:239071,00.html

WORLD INTEGRATED TRADE SOLUTION (WITS)

The data base includes UNCTAD's TRAINS market access data base which is regularly updated and is only accessible through WITS. TRAINS covers 165 countries (counting European Union as one country) with a time span from 1988 to present.

Data in TRAINS, which are updated regularly, are classified according to the HS used in MATS. It is exclusively through WITS and contains: Applied customs tariff information including applied general (MFN); preferential tariff rates, and their ad-valorem equivalents (AVE) for non-ad valorem rates; non-tariff measures (NTMs) classified according to UNCTAD Coding System of Trade Control Measures.

The data base also includes bilateral imports at HS 6-digit level for all countries for which tariff data are available, and national tariff lines level imports for some countries.

WORLD TRADE INDICATORS DATA BASE (WTI)

The World Trade Indicators (WTI) data base is a wide-ranging database ranking tool designed to benchmark trade policy and performance. It is regularly updated and complementary to the more standard data bases on tariffs and NTMs. It contains a broad set of trade indicators for 211 countries and territories to help policy makers, advisors and analysts identify border and behind-the-border constraints to trade integration.

The database is organized around five thematic categories or pillars, namely

(i) Trade Policy (list indicators)
(ii) External Environment
(iii) Institutional Environment
(iv) Trade Facilitation
(v) Trade Outcome

Each pillar contains a main (default) indicator, and is further divided into sub-categories. Indicators may be viewed as ranks or values. Country performance may be examined individually as well as in relation to other countries or country grouping, (by region, income group, trade agreement or other user-defined group). The expanded database contains 500 annual and quarterly variables, which span the period 1995-2009, based on availability. Data descriptions, availability and sources are posted in the User Guide to Trade Data.

The World Trade Indicators database is complemented by:

- an analytical overview report of trade outcomes and policy responses during a tumultuous period for global trade

- country-level trade briefs which summarize insights from the database as well as analyze national impacts of and responses to the food crisis and global recession
- user-friendly Trade-at-a-Glance (TAAG) tables of all countries which provide a snapshot of key aspects of trade policy and performance

OTHER WORLD BANK DATA BASES

Following are data bases available at the World Bank Trade and Data Tools website. Many complementary but are not regularly updated, which reduces their applicability for the kind of routine trade and market analysis carried out under MATs.

TRADE POLICY DATA BASES

- Data on Trade and Import Barriers, 2004-2008
- Temporary Trade Barriers Database, 1980s-2010
- Trade, Production and Protection Database, 1976-2004
- WTO Dispute Settlement Database, 1995-2006
- Overall Trade Restrictiveness Indices, 2008
- Banking Crisis and Exports Dataset, 1980-2000
- Estimates of Distortions to Agricultural Incentives, 1955-2007

DATA BASES ON TRADE FACILITATION, STANDARDS AND INNOVATION:

- Maritime Transport Costs and Port Efficiency
- Trade Facilitation Indicators: Hard & Soft Infrastructure, 2004-2007
- EU Standards Database, 1995-2003
- Technical Barriers to Trade Survey, 2000-2001

Other relevant data bases include the yet-to-be finalized Regulatory Barriers in Services Trade Database that is not yet available and will be a complement to the Trade Restrictiveness indices mentioned above.

WTO DATA BASES

WTO INTEGRATED DATA BASE (IDB)

The IDB contains WTO Members' annual notifications on tariff and trade information, linked at the level of national tariff lines as of 1996. On the trade side, the IDB contains imports by country of origin, in value and quantity at the tariff-line level. As for tariffs, the database contains MFN current applied and bound duties; additionally, information covering preferential duties is available when submitted by WTO Members.

The IDB currently has information for 143 WTO Members. The information included in the IDB comes directly from national official sources and is normally submitted to the WTO through its Members' delegations. IDB provides the Bound tariff data contained in MAc Map.

The tariff and trade information contained in the IDB is available freely to the public at the HS 6-digit level and, as of February 2010, also at the detailed tariff line level for duty rates.

CONSOLIDATED TARIFF SCHEDULES (CTS).

It is available at the HS-6 level. The CTS includes Members' bound tariff commitments (base and final tariffs, other duties and charges, implementation periods, INRs) and specific commitments in agriculture (domestic support, export subsidies and tariff quota information) together with the relevant legal document references. The CTS is currently available in HS-2002 nomenclature.

REGIONAL TRADE AGREEMENT INFORMATION SYSTEM (RTA-IS)

The Regional Trade Agreement Information System is a comprehensive database of all RTAs notified to the GATT/WTO. The application allows users to search and export available information on any notified RTA. It allows a dynamic search through all notified RTAs according to a selection of criterion, such as year of entry into force, type of agreement, etc. The RTA-IS is maintained in the WTO's three official languages, English, French and Spanish by the Regional Trade Agreement Section in the Trade Policies Review Division of the WTO. Any changes to a protocol will be available, only to the extent that it has been notified to the WTO, which limits its usefulness.

2. TOOLS AND SOFTWARE

Following is a list of the main tools and softwares that cover some of the same ground as the Market Analysis tools developed at the ITC.

TRADE SYSTEMATIC INTEGRATED FRAMEWORK FOR TRADE ANALYSIS (TRADESIFT)

The software is developed by members of the University of Sussex with funding from DFID. The software is designed to run on a computer from any data base (ie. COMTRADE, EUROSTAT, BACI, TRAINS, National data). All the programs are run on excel on data downloaded to the computer. It has a rather large number of trade indicators and formulas and many graphical options. Tradesift was officially launched in November 2011. It is up-for-sale with a discount of 30% from the listed prices (ranging from 1750$ to 5,775$ for LDC users) if purchased prior to February 2012.

The large number of trade indicators probably makes it better suited for someone doing trade policy analysis (i.e. someone with at least an M.A. in economics) rather than for an “officer” in a ministry or an analyst in a firm following trends in a narrow market of interest to a company (e.g. trends in the price of motorcycles tires).

The main strength of Tradesift is that it obviates the need of having access to the Internet except once to download the data. It is designed mostly for Trade policy organizations and most suitable for countries where access to the internet is spotty or expensive. The software is standalone with flexibility (much like EXCEL with pull-down menus that indicate the

formulas that can be computed directly on the data). In particular, the user chooses his data base (countries often prefer their own data). The software includes a report writer (rapid report writer).

The main shortcoming is that the user has to download the data and has to do the updating himself. This may be problematic, but in some instances the user will prefer national data to COMTRADE, especially if the objective is to analyze resource pulls effects of changes in trade policy (e.g. the employment changes resulting from tariff reform). The user may also have access to more recent data that might also be more disaggregated.

TARIFF REFORM IMPACT SIMULATION TOOL (TRIST).

The package allows users to simulate the impact of tariff reform on total fiscal revenue (including VAT and excise taxes). A write up and examples are available from Brenton et al. (2011). Revenue results are broken down to the product level so products that are sensitive in terms of revenue impact can be identified. Results for changes in imports, protection and domestic output and employment can help to analyze the impact of tariff reform at sector level.

The program is based on data collected by Customs so tariff revenues are computed from actually collected revenue so collection efficiency and exemptions can be taken into account. The tool is flexible enough to incorporate any user-determined tariff reform scenario.

The program is set- up in Excel so that all formulas and calculation steps are visible for the user. It is open-source in the sense that users are free to change, extend or improve the software according to their needs.

According to the description on the WEB page, the underlying modeling is intuitive and simulations can be carried out by anyone within minutes once the appropriate tariff scenarios have been entered.

SMART

The tool is well-suited to carry out the implications of tariff reforms based on official tariffs and trade flows. The tool requires that the user supply elasticities for imports and, when relevant export supply elasticities of the partners who export to your country. It calculates tariff revenue and changes in import demands across partners when discriminatory tariff reductions (e.g. joining a FTA) are applied. Calculations are carried out at the HS-6 level of disaggregation with global results obtained by adding up each result at the HS-6 level. Any implications for domestic production are ignored.

The tool is used regularly in WB trade reports. This kind of simulation is far more advanced than the tariff simulation took in MAc map. Together with TRIST, it is better for analyzing the effects of changes in trade policy than the actual tariff simulation tool in Trademap which only computes the new tariff schedule applicable to a country following the application of a

"Swiss formula" tariff reduction in which the user enters the parameters determining the pattern of tariff reduction.[20]

CLUSTERS FOR COMPETITIVENESS (WBG)

The tool applies Porter's (1990) cluster analysis used, among others in some of the annual reports of the World Economic Forum. The idea behind the clusters is to develop the synergies necessary for a sound business strategy that builds effective partnerships with private and public sector organizations with the ultimate goal of enhancing governments' efforts on policy reforms. Several users of MATS interviewed mentioned that they liked this tool and regretted that it was not updated. It is closely linked to the notion of product base that emphasizes inter-sector linkages developed by Hausmann et al (2007) who have data available on line for a larger number of countries for two years 1998 and 2008.

This tool is more appropriate for persons with some training in economics that would be engaged in designing an overall trade strategy. It is not directly comparable to MATs but a couple of interviews revealed that this tool, which is not updated, would be appreciated by users of MATs.

[20] These three softwares designed to carry out analysis on trade reforms (TRIST, Tradesift, SMART) are complementary, though they are all partial-equilibrium-based softwares. This has the advantage of capturing all the disaggregation in the trade and tariff data, but it does not handle the effects of tariff reforms on production and employment in the economy. Nor do they cover spillover effects. These are measurable with the use of GTAP which is a flexible tool appropriate for users with a much stronger background than users of MATs. For these reasons, they are not covered here.

III. Analysis of the ITC's users data base

This annex gives the details of user-registrations and usage statistics by country and by other classifications: region and level of development; type of user (Trade Support Institutions, enterprises, government…). Table and graphs have been made using the ITC user's registration database.

1. NUMBER OF "REGISTERED USERS" (ACCOUNTS) VERSUS NUMBER OF "ACTIVE USERS"

Since the launch of the ITC MATs (28, December, 2007) 163,336 accounts have been created with a slight increase in the yearly registrations through time (table III-1). However, if we suppose that registrations are uniformly distributed throughout the year, registrations in 2011 should stagnate in comparison with 2010.

Table III-1 – Number of registrations per year

	Actual numbers		If we extrapolate 2011 registrations	
	Freq.	Percent	Freq.	percent
2008	30,603	18.74	30,603	16.93
2009	45,672	27.96	45,672	25.27
2010	52,216	31.97	52,216	28.89
2011	34,826	21.32	52,239	28.90
Total	**163,336**	**100**	**180,749**	**100**

Figure III-1 shows that more than 99% of registrations (162,259 of 163,336) have been activated by users. Among these activated accounts, 85% (139,068) have not expired as of September, 1st, 2011. There are thus 139,068 "still registered users", of which only 2,204 are not-free accounts. Indeed, more than 90% of not free accounts have expired.

Among the 139,068 still-registered users, 14,370 never logged into a tool after registration and another 51,676 never logged in after the day of registration. Statistics that follow concern only the 73,022 "still registered users" who logged in at least one day after their registration. In what follows we refer to this group as "active users" (see box III-1 for statistics on paying accounts). Statistics by region and income group are based on the country declared by the user when he registers (using the country detected with the IP address does not change the results that follow).

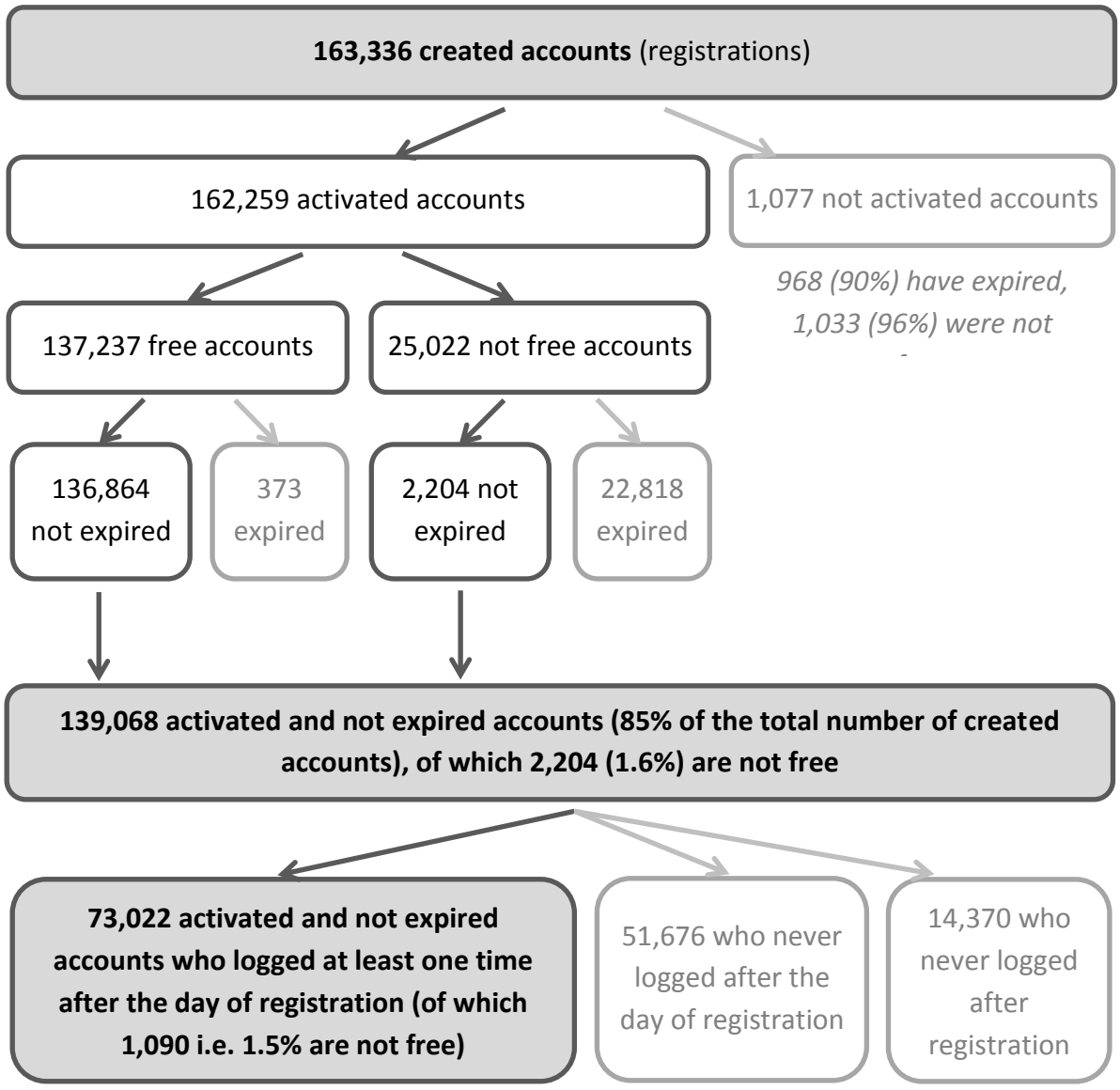
Box III-1 – Statistics on the 22,818 activated – not-free – expired accounts

- Of the 22,818 accounts, 5,418 (24%) have never logged in after registration

- On average, the duration of activity (i.e. the difference between the last logging date and the date of registration) is 11 days (standard deviation = 73 days, max = 1,268 days, i.e. 3.5 years).

- On average, the number of log ins into the tools is statistically higher (at 1% level) in the 373 activated – free – expired accounts than in the 22,818 (11.5 versus 2.7 log-in)

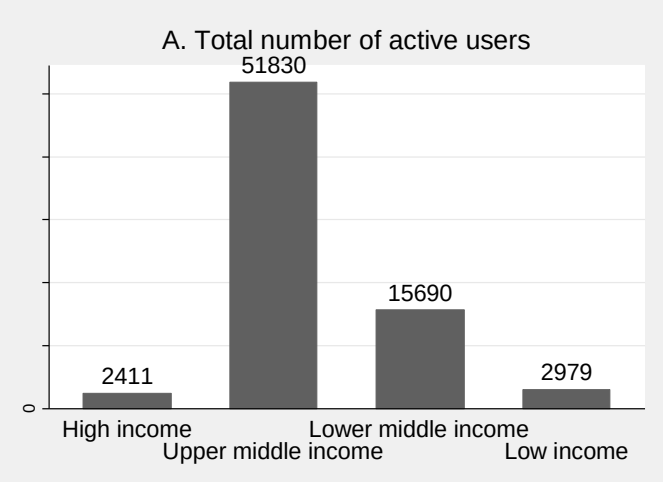
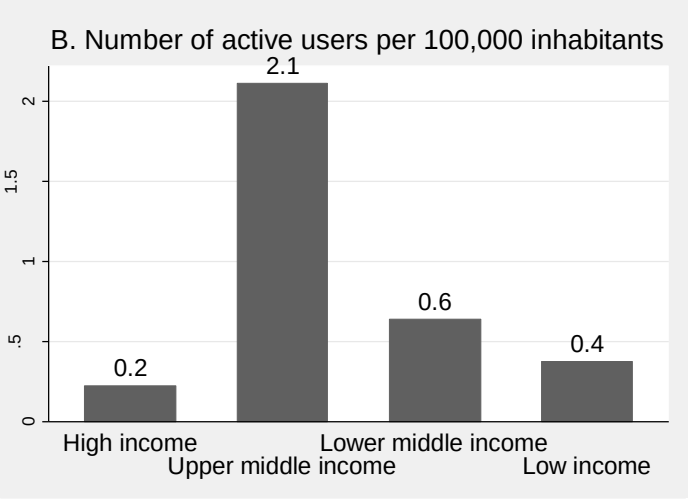
Figure III-1 – Total number and status of created accounts (as of 1st September 2011)



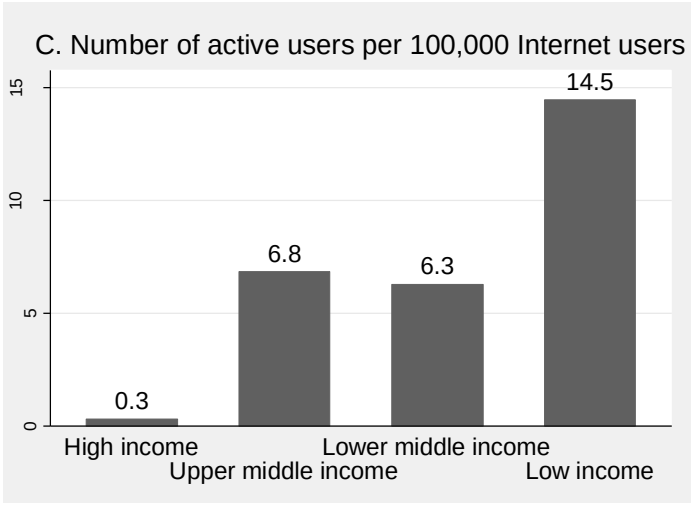
2. DISTRIBUTION OF USERS AMONG REGIONS AND INCOME GROUP

Figure III-2 shows the distribution of users among World Bank income groups.[21] 97% of the active users declared to be based in a developing country (and 97.5% are *detected* – with IP address – to be based in a developing country). In each case the top 5 and the bottom 5 countries in each of the three "developing" groups (upper middle income, lower middle income, and low income groups) are listed. According to practically all measures, high income countries are low users with the high-intensity users concentrated in upper-middle income countries.

Figure III-2 – Distribution of users according to World Bank income group classification

Graphs by income group	Top 5 countries	Bottom 5 countries
	**Upper**: Peru (16,503) Mexico (9,717) Colombia (4,690) Turkey (4,582) Brazil (3,316) **Lower**: Egypt (3,833) India (2,336) Bolivia (1,835) Viet Nam (1,651) Pakistan (1,041) **Low**: Madagascar (530) Bangladesh (456) Uganda (282) Kenya (267) Nepal (224)	**Upper**: St Kitts & Nevis, Lithuania, Bulgaria (2), Mayotte & Palau (3) **Lower**: Marshall Is, Tonga, Vanuatu, Timor-Leste, Kiribati (1-2) **Low**: Korea, Guinea-Bissau, & Somalia (2) Liberia (3) Guinea (5)
	**Upper**: Peru, Grenada, Ecuador, Dominica, Costa Rica **Lower**: Tuvalu, Bolivia, Micronesia, Samoa, Mongolia **Low**: Madagascar, Comoros, Zimbabwe, Cambodia, Uganda	**Upper**: Bulgaria, China, Lithuania, Cuba, Uruguay **Lower**: Iraq, Uzbekistan, Nigeria, Yemen, Angola **Low**: Korea, Congo (Dem Rep) Somalia, Myanmar, Guinea

[21] There are slight differences between the UN and World Bank classifications: Aruba, Bahamas, Bahrain, Barbados, Bermuda, Brunei Darussalam, Croatia, Equatorial Guinea, Faeroe Islands, French Polynesia, Guam, Hong Kong (China), Israel, Kuwait, Macao (China), New Caledonia, Oman, Qatar, Republic of Korea, Saudi Arabia, Singapore, Trinidad and Tobago, Turks and Caicos, US Virgin Islands, United Arab Emirates are considered developing by the UN classification whereas the World Bank groups them in the "High income countries" group category.



Upper: Peru, Ecuador, Grenada, Botswana, Costa Rica

Lower: Bolivia, Samoa, Kiribati, Nicaragua, Belize

Low: Cambodia, Madagascar, Sierra Leone, Bangladesh, Comoros

Upper: Bulgaria, Lithuania, Cuba, Uruguay, China

Lower: Nigeria, Uzbekistan, Côte D'Ivoire, Moldova

Low: Tanzania, Congo (Dem Rep), Somalia, Kyrgyzstan, Eritrea

ITC's tools are mainly used by Upper Middle Income Countries (UMICs) 71%). Low income (LICs) and Lower Middle Income Countries (LMICs) account for respectively 4 and 22% of users. The five UMICs that contain the largest number of users (Peru, Mexico, Colombia, Turkey and Brazil) account for more than 50% of the total number of active users (see Table III-2 below). LICs contain far less users. However, on a per Internet user basis[22] (bottom figure), it appears that the LICs are the largest users (see also Table III-3).

Figure III-3 carries out the same description according to the World Bank classification of regions. It confirms that the Latin American countries are the largest users of ITC Tools, whatever the indicator (total number of active users, average number of active users per 100,000 inhabitants or 100,000 Internet users). Some East and South Asia countries are also large users relative to their population or number of internet users (e.g. Cambodia, Mongolia, Bangladesh, and Nepal). When controlling for the number of Internet users, Sub-Saharan Africa (SSA) performs better than MENA and Central Asia (e.g. Madagascar, Botswana, and Ethiopia). Some countries, mainly in SSA or Europe & Central Asia, do not use ITC tools.[23]

[22] Internet users data are from the World Bank, 2009 or 2008 data (latest available year).

[23] The following countries have less than 10 users: Korea (Dem. Rep.), Guinea-Bissau, Somalia, Timor-Leste, Lithuania, Bulgaria, Liberia, Guinea, Mauritania, Gabon, Cape Verde, Central African Republic, Burundi, Gambia, Eritrea, Congo (Dem. Rep), Suriname, Congo, Turkmenistan, and Djibouti. In fact, among the 47 SSA countries which count at least one active user, only 12 count more than 100 active users: Tanzania (103), Botswana (106), Mauritius (107), Nigeria (119), Ghana (139), Senegal (141), Ethiopia (190), Zimbabwe (198), Kenya (267), Uganda (282), Madagascar (530), and South Africa (1,275).

Figure III-3 – Distribution of users across World Bank Regions

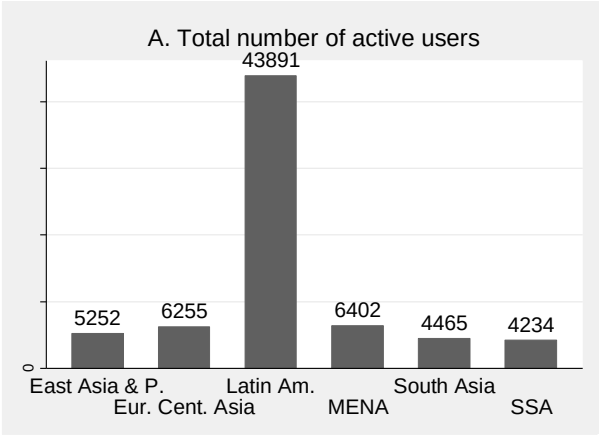
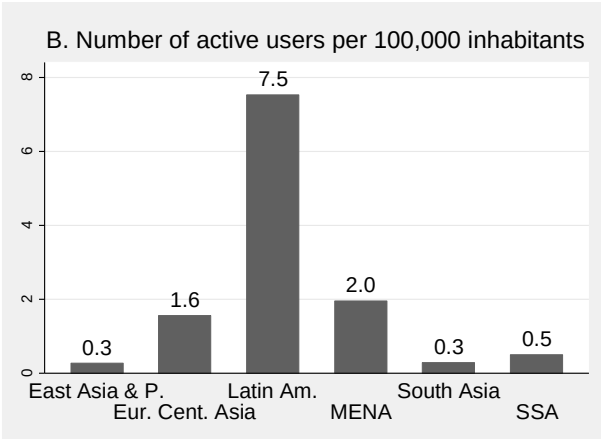
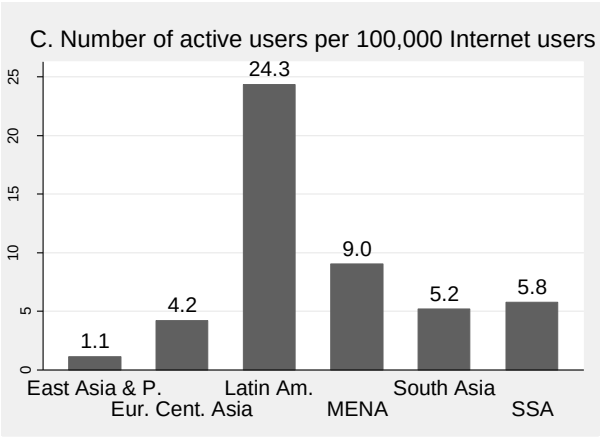
Graph by region	Top 5 countries	Bottom 5 countries
	**East A**: Viet Nam (1,651) Philip. (941) Indonesia (752) China (584) Thailand (549) **Cent. A**: Turkey (4,582) Russian F (466) Ukraine (270) Serbia (147) Kazakhstan (130) **Lat. Am**.: Peru, Mexico Colombia Brazil Ecuador **Mena**: Egypt (3,833), Iran (1,164) Tunisia (569) Morocco (356) Jordan (182) **South A**:India (2,336) Pakistan (1,041) **SSA**: SA (1,275) Madagascar Uganda Kenya Zimbabwe	**East A**: (small islands) **Cent. A**: Lith (2) Bulgaria (2) Turkmenistan (8) Latvia (13) Moldova (13) **Lat. Am**.: St Kitts, Antigua & B, Suriname St Vincent & Guyana (<11) **Mena**: Djibouti 8 Iraq 13 Libya 14 Yemen 21 Lebanon 38 **South A**:Buthna Maldives (21) **SSA**: Sao tome Guinea-Bissau Somalia Mayotte Seychelles (<3)
	**East A**:Tuvalu, Palau, Micronesia, Samoa Mongolia **Cent. A**: Turkey Montenegro Georgia Serbia Armenia **Lat. Am**.: Peru, Grenada, Ecuador Dominica Costa Rica **Mena**: Tunisia Egypt Jordan Iran Morocco **South A**: Bhutan Maldives (21) **SSA**: Mauritius Botswana Seychelles Madagascar South Africa	**East A**: Korea, China, Myanmar Timor Papua NG **Cent. A**: Bulgaria Lithuania Uzbekistan Turkmenistan Macedonia **Lat. Am**.: Cuba Uruguay Haiti Venezuela Suriname **Mena**: Iraq Yemen Algeria Libya Syria **South A**:Afghanistan India **SSA**: Congo (Dem Rep) Somalia Guinea Tanzania Niger
	**East A**: Cambodia, Samoa, Kiribati Micronesia Mongolia **Cent. A**: Armenia Turkey Turk Ukraine Georgia **Lat. Am**.: Peru Bolivia Ecuador Grenada Nicaragua **Mena**: Djibouti Egypt Tunisia Jordan Yemen **South A**:Bangladesh Nepal **SSA**: Madagascar Sierra Lone Botswana Comoros Ethiopia	**East A**: China, Malaysia, Thailand, Indonesia, Vanuatu **Cent. A**: Bulgaria Lithuania Uzbekistan Serbia-Mont Russian Fed **Lat. Am**.: Cuba Uruguay Haiti Venezuela Suriname **Mena**: Algeria Syria Morocco Lebanon Libya **South A**: India Afghanistan **SSA**: Tanzania Nigeria Côte d'Ivoire Sudan Congo Dem rep

Table III-2 gives the breakdown on the number of users by country (for the top 20 countries) ranking countries by decreasing number of users. The distribution of users across countries is very uneven with a great concentration in a handful of countries suggesting network effects, perhaps reflecting successful training and 'word of mouth' spread. Two countries (Peru and Mexico) account for more than one third of all active users, the top 5 for more than 50% (the former plus Colombia, Turkey, Egypt) with 10% of the countries (20 countries) account for more than 80% of the active users.

Table III-2 – Number of users per countries (top 20 countries)

Rank E (over 210)	Country	Income Group	Region	Nb of users	%	% cum	Nb of users per 100,000 inhab	Rank H (over 199 countries)
A	B	C	D	E	F	G	H	I
1	Peru	UM	LAC	16503	23%	23%	56.76	1
2	Mexico	UM	LAC	9717	13%	36%	8.57	15
3	Colombia	UM	LAC	4690	6%	42%	10.13	13
4	Turkey	UM	LAC	4582	6%	49%	6.30	21
5	Egypt	LM	MENA	3833	5%	54%	4.73	27
6	Brazil	UM	LAC	3316	5%	58%	1.70	62
7	Ecuador	UM	LAC	2778	4%	62%	19.21	4
8	India	LM	SA	2336	3%	65%	0.20	146
9	Bolivia	LM	LAC	1835	3%	68%	18.48	7
10	Viet Nam	LM	EA&P	1651	2%	70%	1.90	55
11	South Africa	UM	SSA	1275	2%	72%	2.55	43
12	Iran	UM	MENA	1164	2%	74%	1.57	65
13	Pakistan	LM	SA	1041	1%	75%	0.60	103
14	Philippines	LM	EA&P	941	1%	76%	1.01	84
15	Costa Rica	UM	LAC	870	1%	77%	18.67	6
16	Argentina	UM	LAC	840	1%	79%	2.08	50
17	Indonesia	LM	EA&P	752	1%	80%	0.31	127
18	Chile	UM	LAC	677	1%	81%	3.96	30
19	China	UM	EA&P	584	1%	81%	0.04	180
20	Tunisia	UM	MENA	569	1%	82%	5.39	24

Table III-3 also gives a ranking of countries, this time by number of users per 100,000 internet users (col E). This time again, Peru comes out on top, followed by Cambodia and Bolivia.

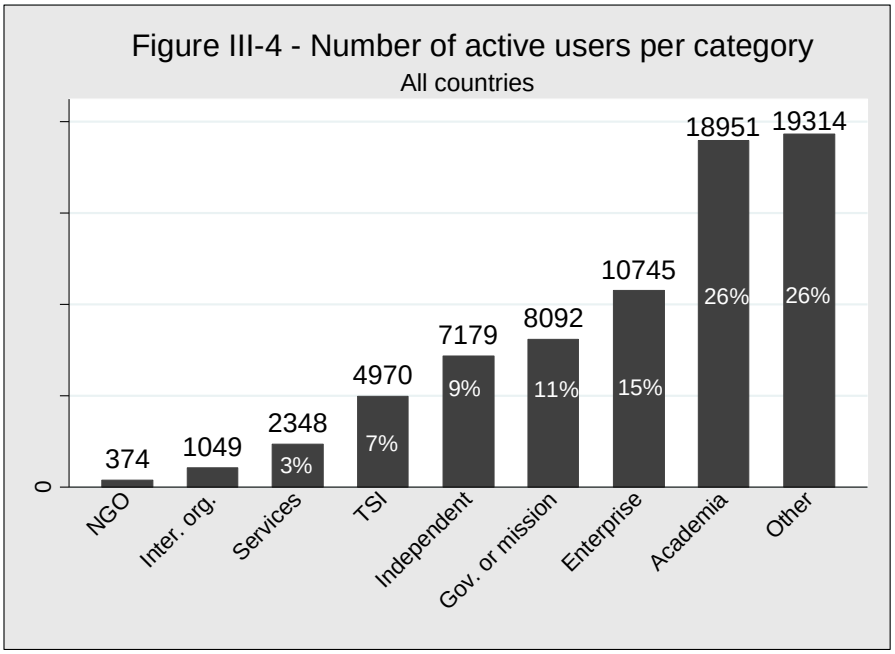
Table III-3 – Number of users per 100,000 Internet users (top 20 countries)							
Rank E	Country	Income Group	Region	Nb of users per 100,000 int users	Nb of users	% tot	Rank F (over210 countries)
A	B	C	D	E	F	G	H
1	Peru	UM	LAC	204.12	16503	22.6%	1
2	Cambodia	LI	EA&P	192.31	150	0.2%	47
3	Bolivia	LM	LAC	166.44	1835	2.5%	9
4	Madagascar	LI	SSA	165.63	530	0.7%	22
5	Ecuador	UM	LAC	135.37	2778	3.8%	7
6	Samoa	LM	EA&P	133.33	12	0.0%	133
7	Sierra Leone	LI	SSA	114.09	17	0.0%	115
8	Grenada	UM	LAC	104.00	26	0.0%	100
9	Kiribati	LM	EA&P	100.00	2	0.0%	185
10	Botswana	UM	SSA	88.33	106	0.1%	60
11	Bangladesh	LI	SA	73.87	456	0.6%	25
12	Nicaragua	LM	LAC	69.50	139	0.2%	51
13	Comoros	LI	SSA	57.61	14	0.0%	125
14	Belize	LM	LAC	55.56	20	0.0%	111
15	Costa Rica	UM	LAC	55.10	870	1.2%	15
16	Micronesia	LM	EA&P	52.94	9	0.0%	141
17	Mongolia	LM	EA&P	48.00	168	0.2%	46
18	Tuvalu	LM	EA&P	46.51	2	0.0%	187
19	Dominica	UM	LAC	46.43	13	0.0%	126
20	Marshall Ilsd	LM	EA&P	45.45	1	0.0%	195

3. TYPE OF USER

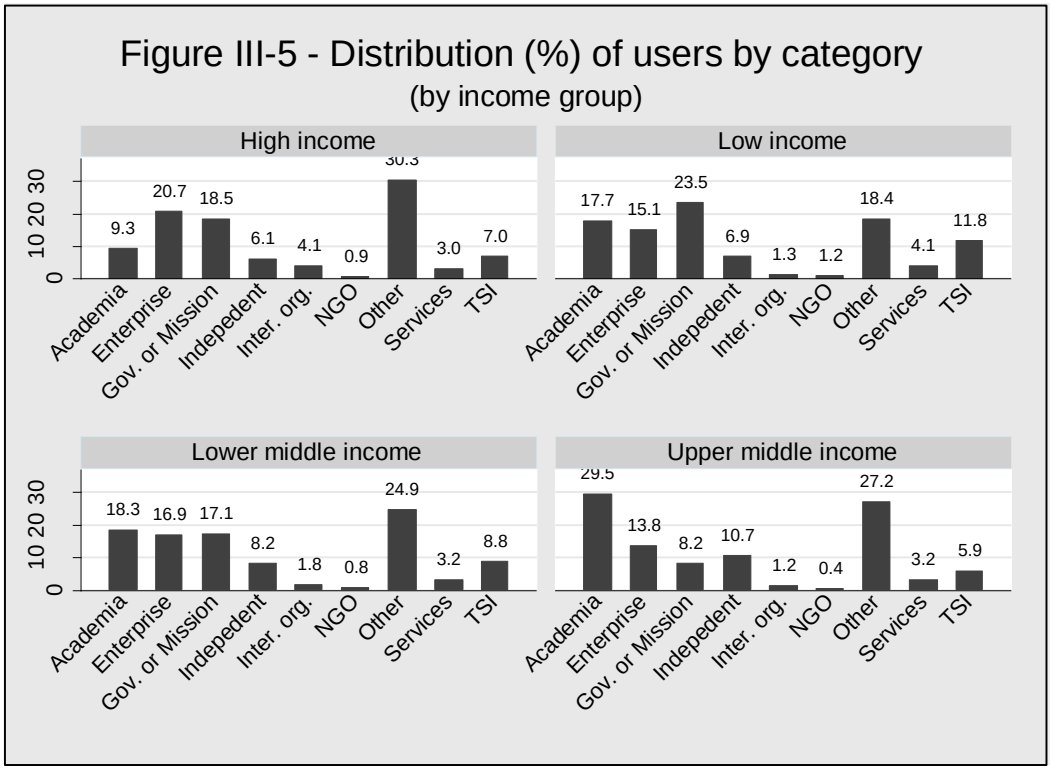
The results presented in this section should be interpreted with the following caveats in mind:

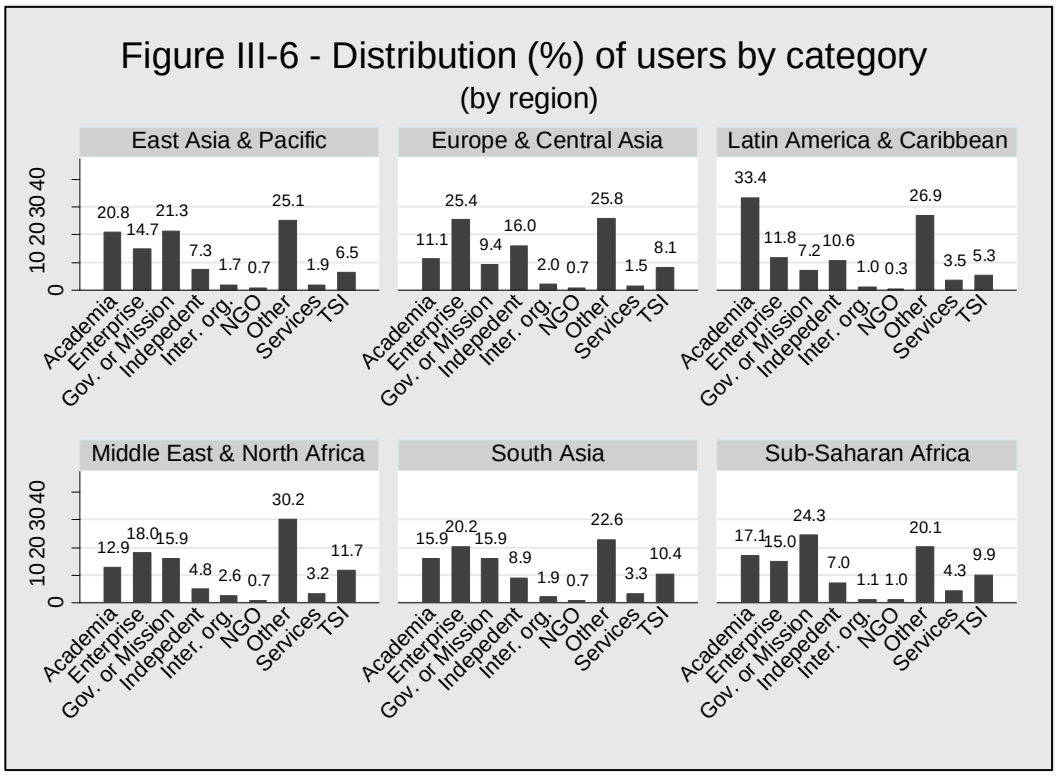
- 25% of the users declared another status than those proposed.
- ITC changed its status nomenclature on April, 2011, 16:
  - Four categories are the same since the beginning: “Government or mission”, “University, Research Institute, Academia”, “Independent / individual”, and “Other”.
  - Three categories have been removed since April, 2011, 16: Trade Organization, Services and Private Company.
  - Seven categories have been included: International Organization, Trade Support Institution, and Enterprise by size: Large (more than 250 employees), Medium size (50-250 employees), Small (10-49 employees), and Micro (less than 10 employees).

- We thus grouped all the Enterprises with Private company and TSI with Trade Organization, which yields nine categories of users.



Researchers and academics account for the large number of users especially in UMICs (figure III-5) and Latin American countries (figure III-6). LICs (and SSA) contain more TSI and governments or missions than the average.





4. FREQUENCY OF USAGE (BY REGION AND INCOME GROUP)

Figures III-7 measures usage by the average number of monthly log-ins per user since initial registration[24]. This is again carried out by the same breakdowns (income group (III-7a), and per region (III-7b)) each time ranked in descending order of the average number of users per 100,000 Internet users (region average of income group averages). Figures III-7c carries out the same comparisons at the country level for LICs (see also bubble graphs at the end of this annex).

[24] The number of log ins is not the number of "visits" but the number of times the informatics system has to "recognize" the user when he uses the tools. We use this measure to approximate the usage of the three tools because the number of "visits" is only available for Trade Map (see below). According to the ITC staff, the number of log-ins is a fairly good measure of the frequency of usage.

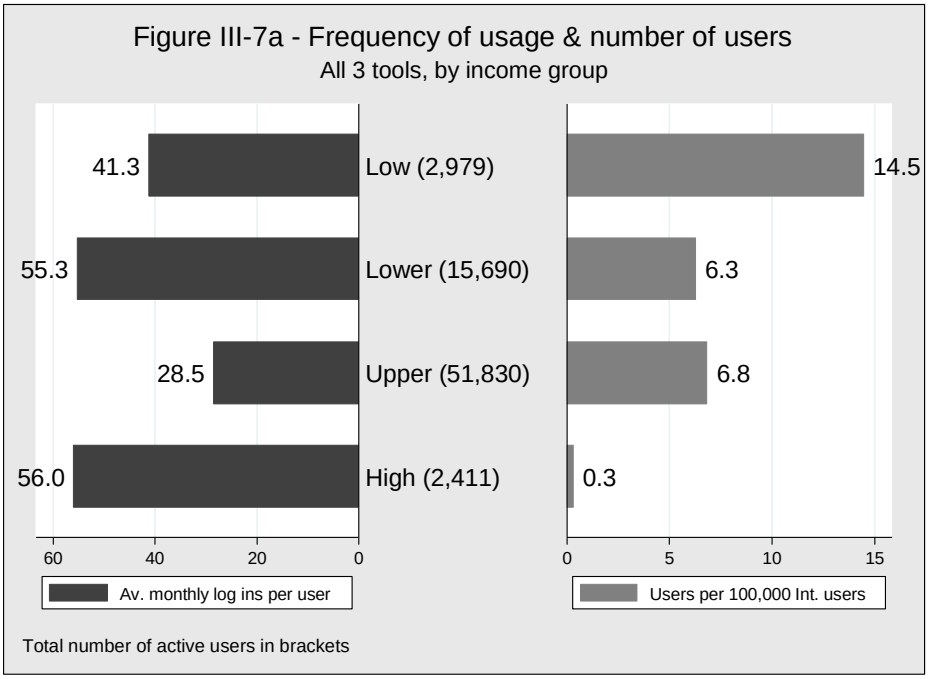


Figure III-7a - Frequency of usage & number of users
All 3 tools, by income group
41.3
Low (2,979)
14.5
55.3
Lower (15,690)
6.3
28.5
Upper (51,830)
6.8
56.0
High (2,411)
0.3
60
40
20
0
0
5
10
15
Av. monthly log ins per user
Users per 100,000 Int. users
Total number of active users in brackets

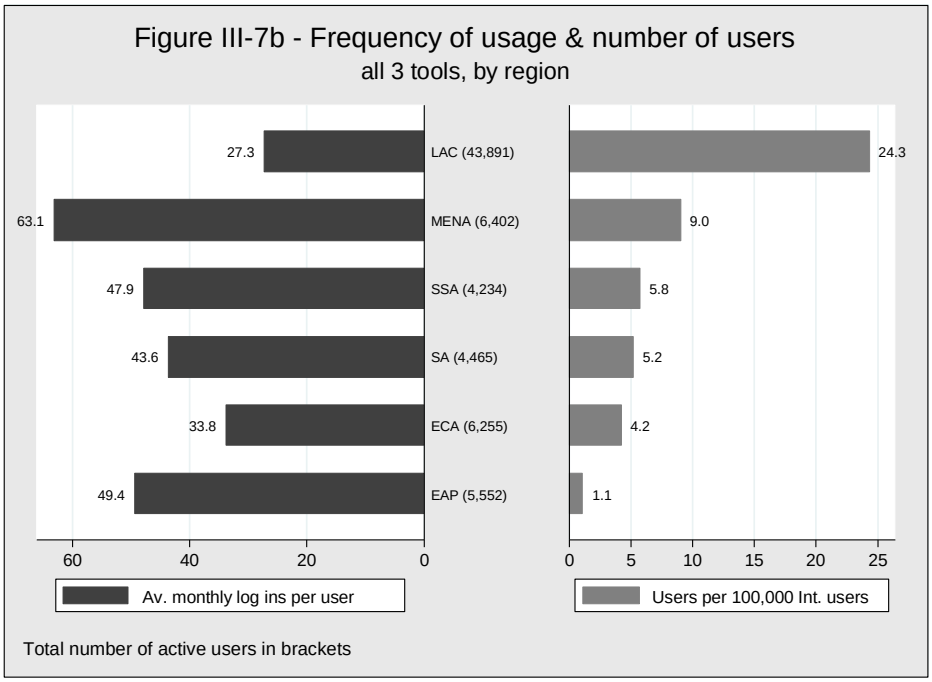
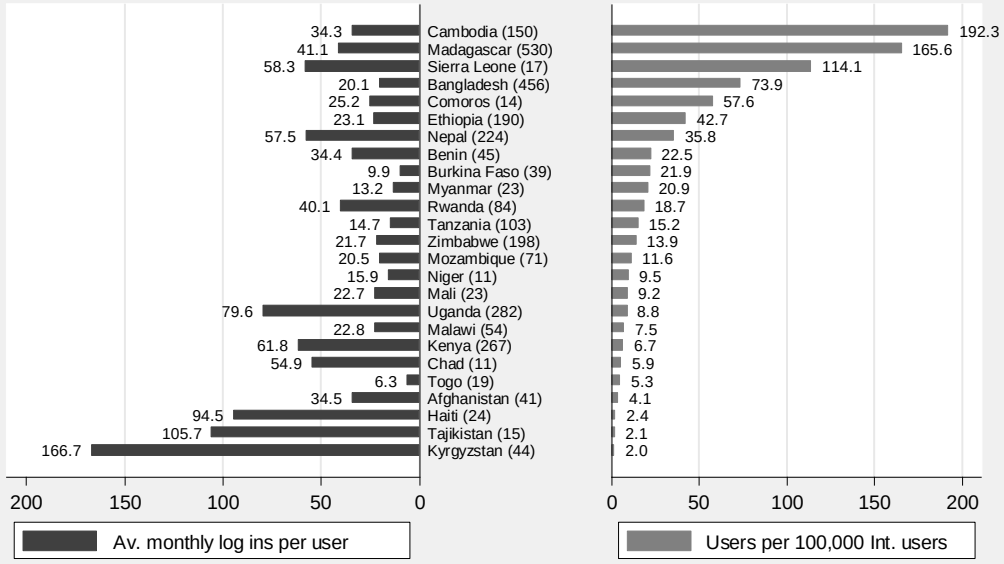


Figure III-7b - Frequency of usage & number of users
all 3 tools, by region
27.3
LAC (43,891)
24.3
63.1
MENA (6,402)
9.0
47.9
SSA (4,234)
5.8
43.6
SA (4,465)
5.2
33.8
ECA (6,255)
4.2
49.4
EAP (5,552)
1.1
60
40
20
0
0
5
10
15
20
25
Av. monthly log ins per user
Users per 100,000 Int. users
Total number of active users in brackets

Figure III-7c - Frequency of usage & number of users

all 3 tools, low income countries

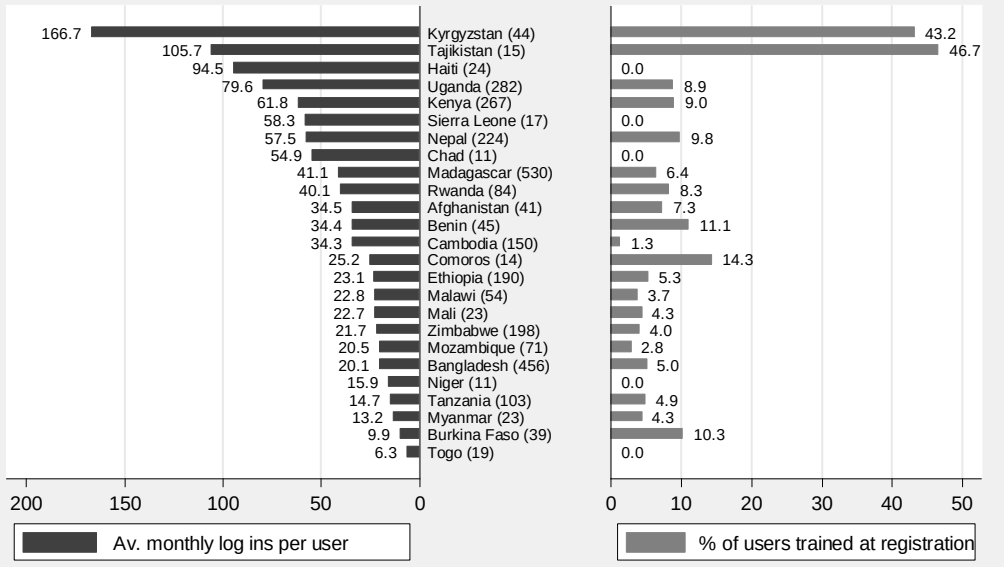


Only countries with at least 10 users
Total number of users in brackets

According to figure III-8, there is a kind of correlation between usage and training (note: training = 1 if the user declared having being trained at the registration).

Figure III-8 - Frequency of usage and proportion of users trained

all 3 tools, low income countries



Only countries with at least 10 users
Total number of users in brackets

Table III-4 ranks the top 10 countries in each region according to the average number of user log-ins and in which quartile they are in the overall distribution. For example in MENA (12 countries), the distribution of average usage is very skewed, with only the top user (Syria) belonging to the top quartile of user log-ins. This proxy for usage is only a rough approximation since it does not take into account duration of logging which would not be either a reliable of "true usage" since a user can stay logged in for up to 30 minutes without doing anything before being kicked out.

Table III-4 – Average number of monthly log-ins per user (ranked in descending order or usage) (Top 10 countries per region)

Country declared at registration	Nb of users	Av users' log-in per month	Regional Quartile
Latin America and Caribbean (30 countries)			
Antigua and Barbuda	3	1023.80	4
Saint Vincent and the Grenadines	9	863.30	4
Saint Lucia	15	476.20	4
Dominica	13	190.72	4
Paraguay	210	170.20	4
Grenada	26	103.56	4
Belize	20	101.36	4
Haiti	24	94.51	4
Chile	677	61.00	4
Nicaragua	139	58.90	4
Europe and Central Asia (23)			
Lithuania	2	228.25	4
Serbia	147	192.02	4
Kyrgyzstan	44	166.69	4
Tajikistan	15	105.72	4
Turkmenistan	8	97.37	4
Georgia	102	80.84	4
Russian Federation	466	68.13	4
Serbia-Montenegro	22	54.98	4
Romania	73	48.75	4
Montenegro	15	44.39	4
East Asia & Pacific (23)			
Democratic People's Republic of Korea	2	75.87	4
Philippines	941	64.97	4
Viet Nam	1651	64.45	3
Marshall Islands	1	60.00	3
Tonga	1	60.00	3
Vanuatu	1	60.00	3
Samoa	12	52.20	2
Thailand	549	51.67	2
Mongolia	168	36.70	2

Table III-4 – Average number of monthly log-ins per user (ranked in descending order or usage) (Top 10 countries per region)			
Country declared at registration	Nb of users	Av users' log-in per month	Regional Quartile
Cambodia	150	34.29	2
MENA (12)			
Syrian Arab Republic	133	158.56	4
Egypt	3833	82.39	2
Libya	14	39.39	2
Tunisia	569	38.42	2
Jordan	182	26.11	2
Iran (Islamic Republic of)	1164	25.21	1
Morocco	356	23.08	1
Yemen	21	22.07	1
Algeria	71	18.24	1
South Asia (8)			
Pakistan	1041	96.05	4
Maldives	21	75.62	4
Nepal	224	57.54	3
Afghanistan	41	34.50	3
Sri Lanka	329	26.51	3
Bhutan	17	26.21	3
India	2336	25.94	1
Bangladesh	456	20.14	1
Sub-Saharan Africa (47)			
Uganda	282	79.63	4
Sao Tome and Principe	2	75.02	4
South Africa	1275	72.33	3
Seychelles	3	66.99	3
Democratic Republic of the Congo	6	62.88	3
Kenya	267	61.78	3
Sudan	61	61.29	3
Sierra Leone	17	58.30	3
Chad	11	54.92	3
Namibia	41	44.53	3

Since the focus is on the evaluation of ITC MATs' usage for LICs, table III-5 ranks countries in ascending order by per capita usage by income group for all low-income countries.

Table III-5 – Ranking of LICs according to the nb of active users / 100,000 inhab

Country	Region	Rank (nb of active users per 100,000 inhab.) / 210	Rank of the av nb of users' log-in by 30 days (/210)
Madagascar	SSA	42	55
Comoros	SSA	54	108
Zimbabwe	SSA	64	124
Cambodia	EA&P	83	73
Uganda	SSA	90	23
Kyrgyzstan	ECA	95	9
Rwanda	SSA	99	60
Nepal	SA	100	45
Kenya	SSA	101	35
Benin	SSA	109	72
Malawi	SSA	120	119
Gambia	SSA	122	171
Togo	SSA	126	190
Bangladesh	SA	128	136
Mozambique	SSA	129	131
Sierra Leone	SSA	132	44
Haiti	LAC	137	19
Burkina Faso	SSA	138	177
Ethiopia	SSA	140	118
Mali	SSA	152	120
Central African Republic	SSA	155	67
Guinea-Bissau	SSA	156	129
Afghanistan	SA	157	71
Eritrea	SSA	158	144
Chad	SSA	161	47
Liberia	SSA	169	199
Burundi	SSA	171	149
Niger	SSA	172	151
Tanzania	SSA	173	154
Guinea	SSA	177	192
Myanmar	EA&P	178	162
Somalia	SSA	187	172
Congo (Dem. Rep.)	SSA	195	34
Korea (Dem. Rep.)	EA&P	196	24

A Pearson rank-correlation shows that there is no correlation between per capita usage and average number of log-ins (see also bubble graphs at the end of this annex).

5. FREQUENCY OF USAGE BY TYPE OF USER

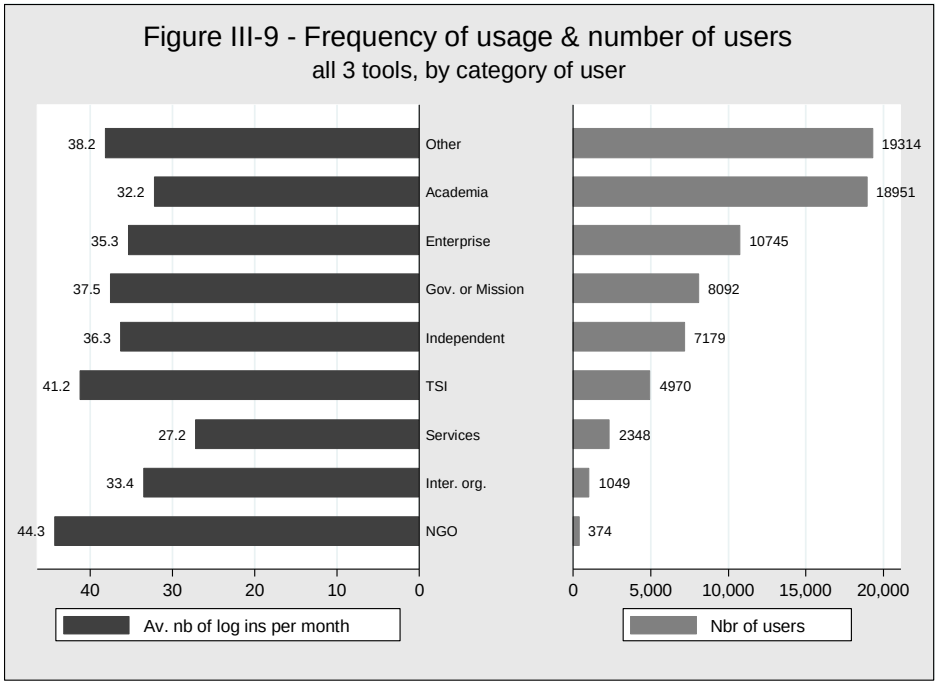


Figure III-10 – Frequency of usage & number of users by type of user and income group

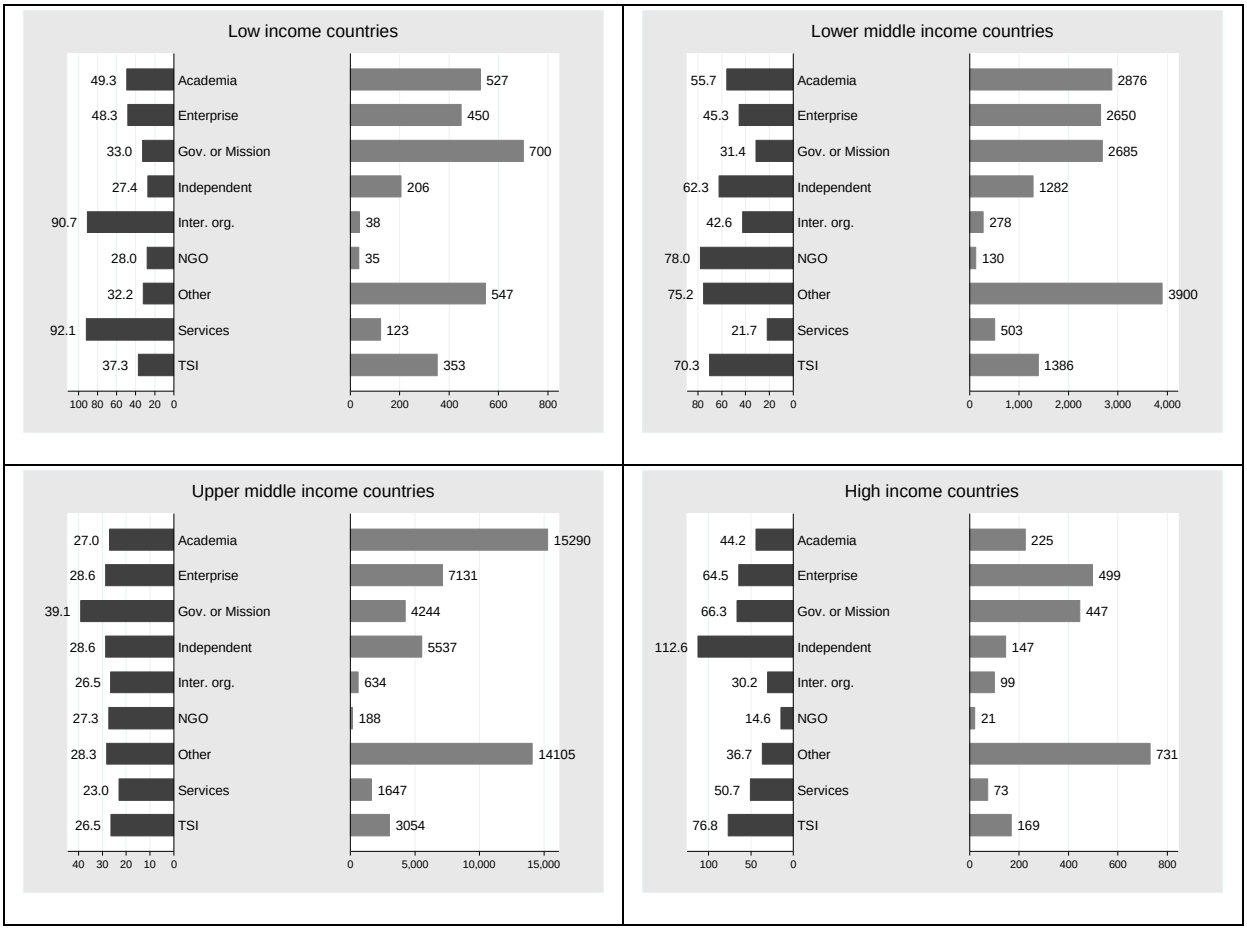


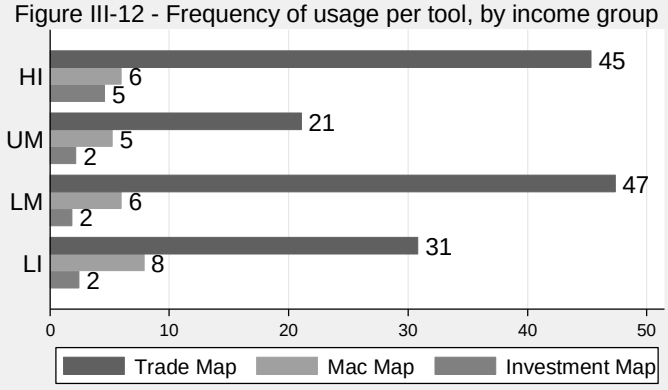
Figure III-11 – Frequency of usage & number of users by type of user and region

6. FREQUENCY OF USAGE BY TOOLS (TRADE MAP, MAC MAP, INVESTMENT MAP)

The world average number of monthly log ins per user is 27.9 for Trade Map, 5.6 for MAc Map, and 2.3 for Investment Map.

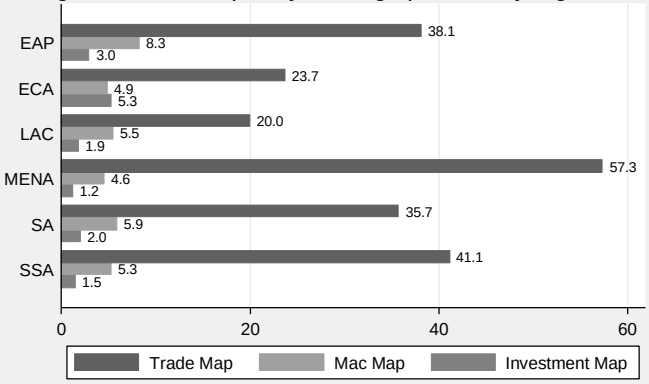
Whether the classification is by region, by income group, by user, or by a combination of the three, Trade Map usage is about 8 to ten times usage of MAc Map which itself 2 to 3 times usage of Investment Map (see figures III-12 to III-16).

Figure III-12 - Frequency of usage per tool, by income group



Usage = Average number of monthly log-ins per user
HI=High income countries, UM=Upper middle income countries
LM=Lower middle income countries, LI=Low income countries

Figure III-13 - Frequency of usage per tool, by region



Usage = Average number of monthly log-ins per user
EAP=East Asia & Pacific, ECA=Europe & Central Asia, LAC=Latin America & Caribbean
MENA=Middle East & North Africa, SA=South Asia, SSA=Sub-Saharan Africa

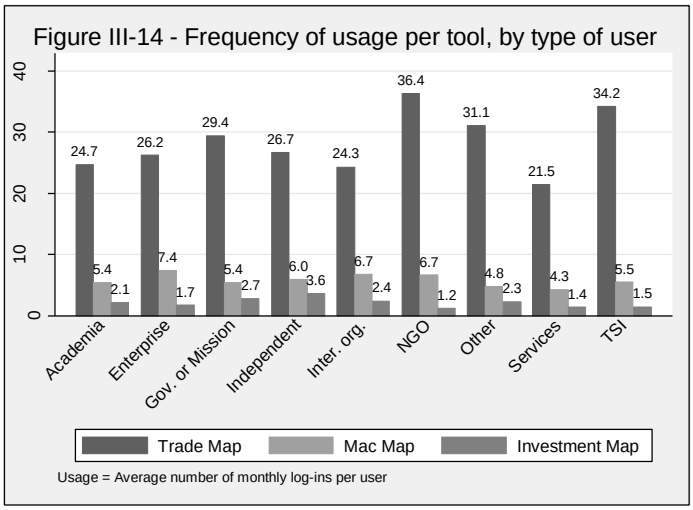


Figure III-15 – Frequency of usage & number of users by tools, type of user, and income group

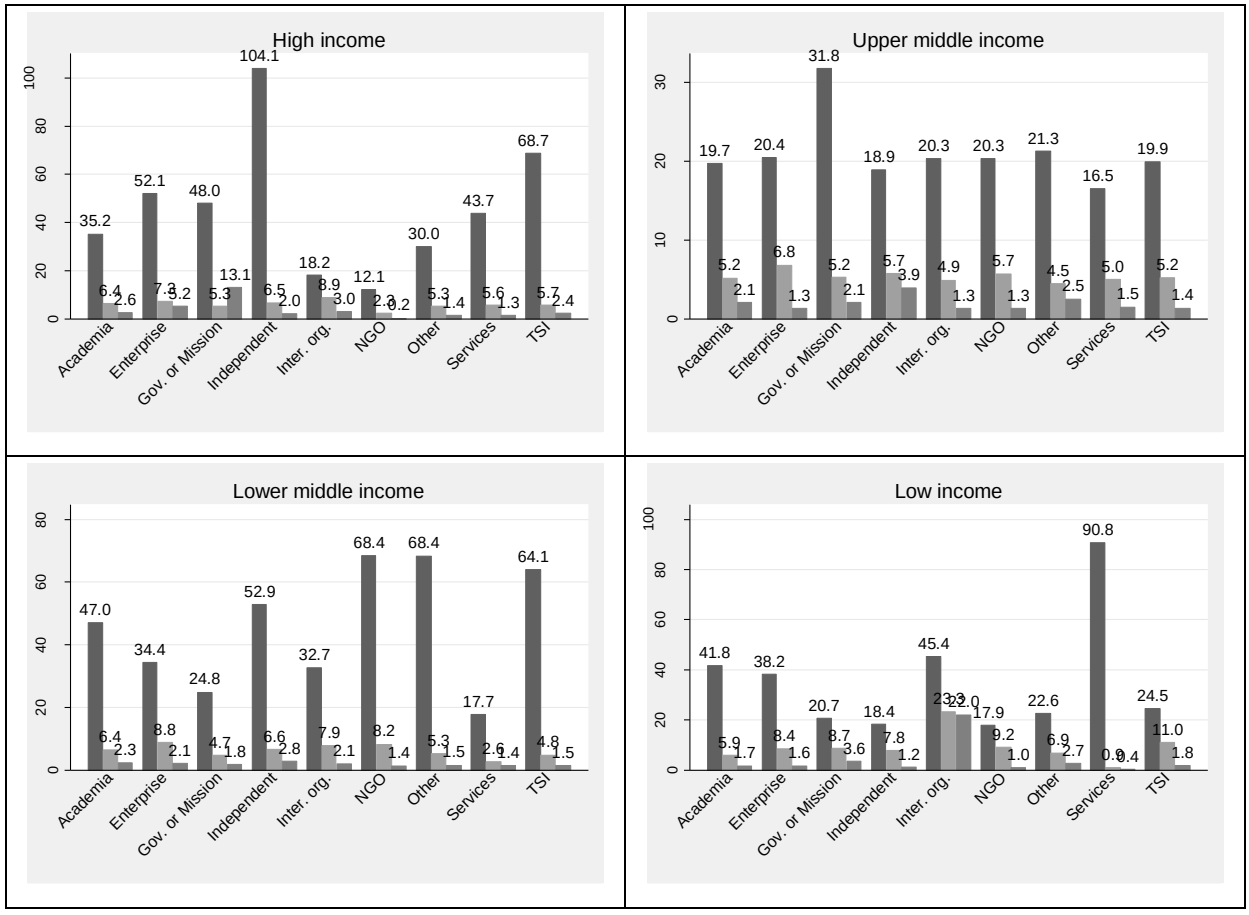
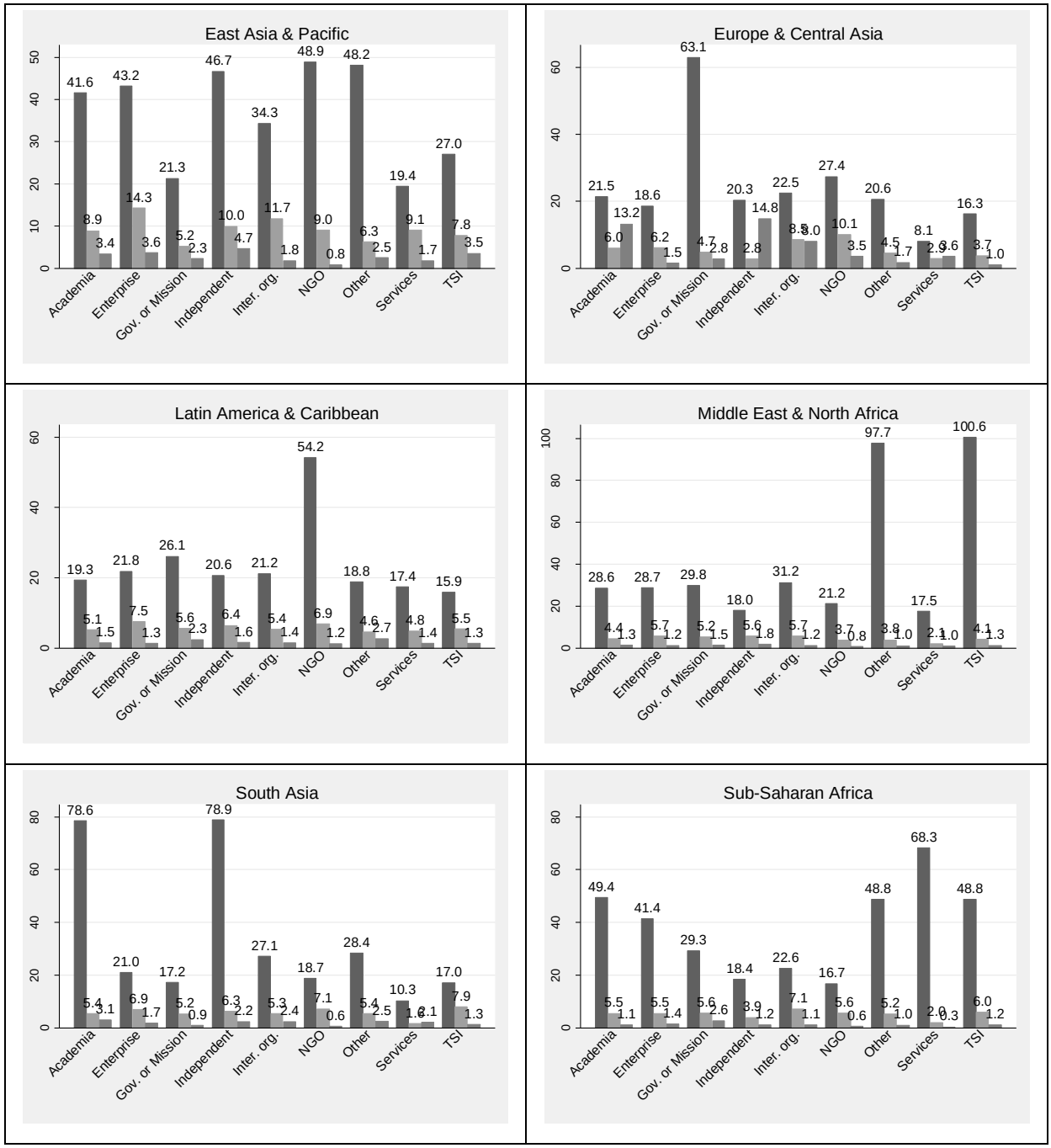


Figure III-16 – Frequency of usage & number of users by tools, type of user, and region



The top 20 countries that use the different tools are (only countries with more than 10 users):

- Trade Map: Saint Lucia, Serbia, Dominica, Paraguay, Trinidad & Tobago, United Arab Emirates, Syria, Singapore, Pakistan, Grenada, Australia, Haiti, Kyrgystan, Belize, Uganda.
- MAc Map: Kyrgyzstan, Tajikistan, Saint Lucia, Georgia, Chad, Nepal, Samoa, Sierra Leone, Maldives, Syria, Montenegro, Uzbekistan, Dominica (mainly ECA & Islands).

- Investment Map: Russian Federation, Kyrgyzstan, Trinidad & Tobago, Slovenia, Saint Lucia, Belize, Montenegro, Tajikistan, New Zealand, Cambodia, Cameroon, Swaziland, Honduras

Among LICs and LMICs only, the top 10 countries that use the different tools are:

- Trade Map: Paraguay, Syria, Pakistan, Turkmenistan (8 users), Haiti, Egypt, Kyrgyzstan, Belize, Uganda, Philippines
- MAc Map: Kyrgyzstan, Tajikistan, Georgia, Chad, Nepal, Samoa, Sierra Leone, Syria, Uzbekistan, Belize
- Investment Map: Kyrgyzstan, Belize, Tajikistan, Cambodia, Cameroon, Swaziland, Honduras, Syria, Haiti

7. FOCUS ON TRADE MAP[25]

On average (average on all active users), on Trade Map, the number of visits per 30 days is 14.5 (all two days), a visit lasts 32.5 minutes, and users view 56 pages per visit. On average, users spend 17 minutes per day on Trade Map.

Figure III-17

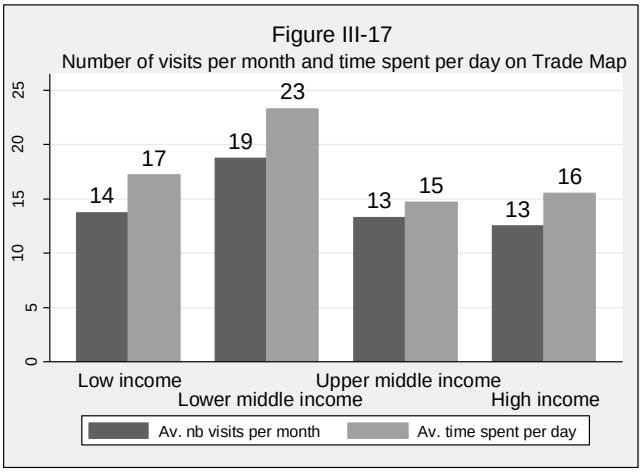
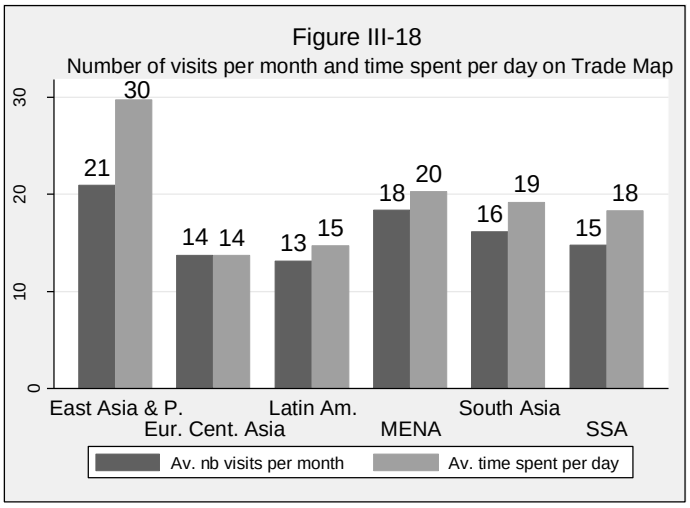


Figure III-18

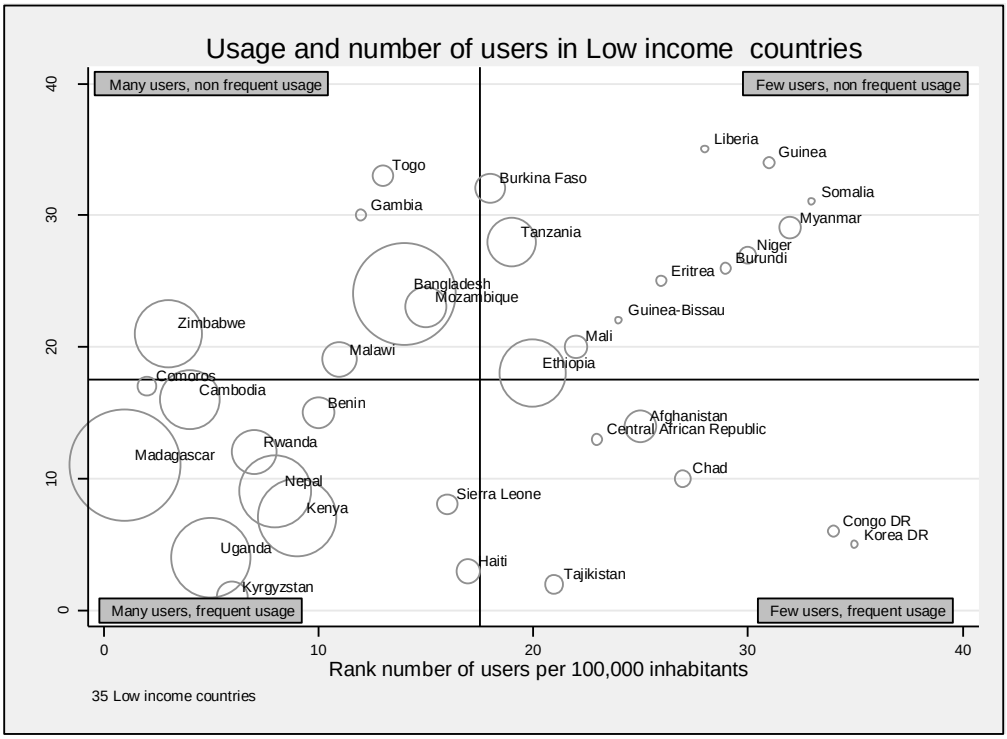


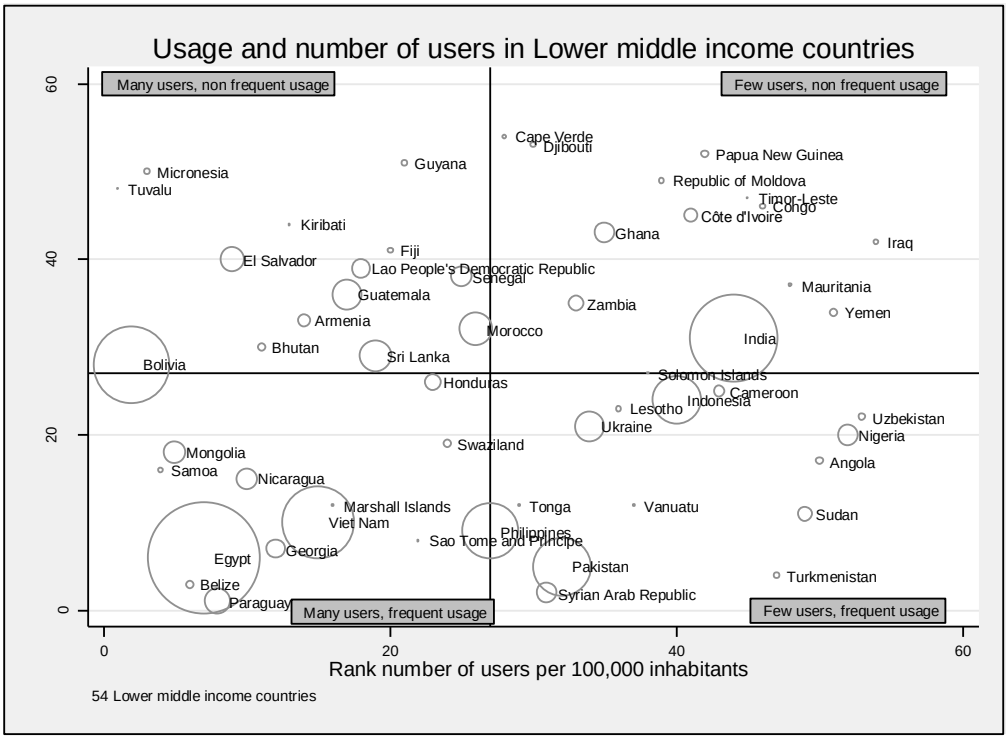
[25] These statistics on only available for Trade Map and rely on data which are available from 2008 to 2010.

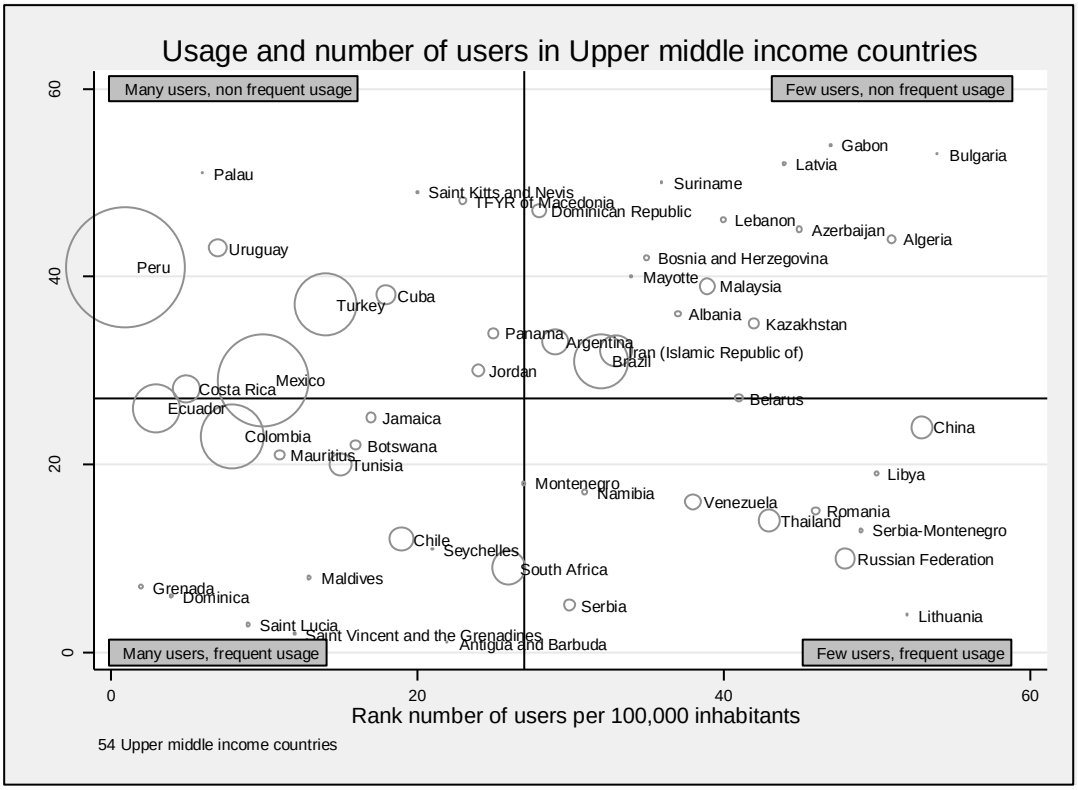
8. SUPPLEMENTARY GRAPHS: TOTAL NUMBER OF USERS, USERS PER INHABITANTS AND USAGE

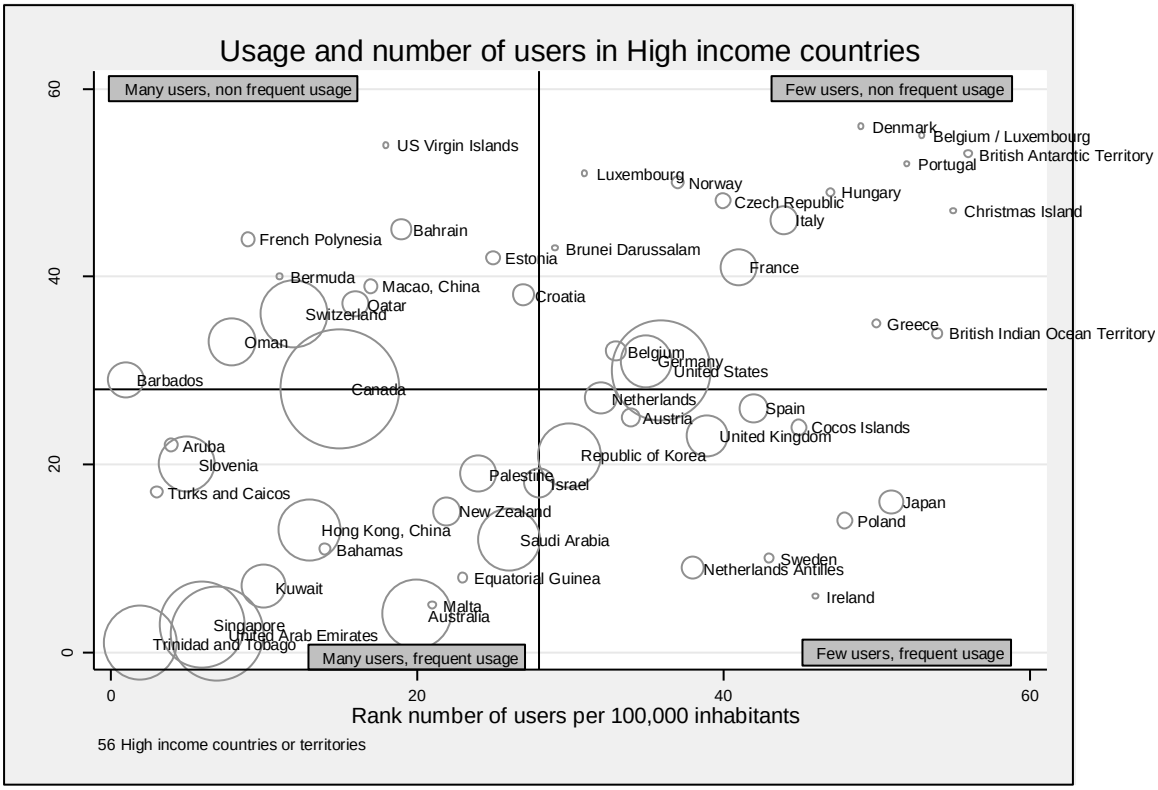
Countries are ranked according to the frequency of usage (y-axis) and by the number of users per 100,000 inhabitants (x-axis). The size of the bubble is proportional to the total number of users.

BY INCOME GROUPS

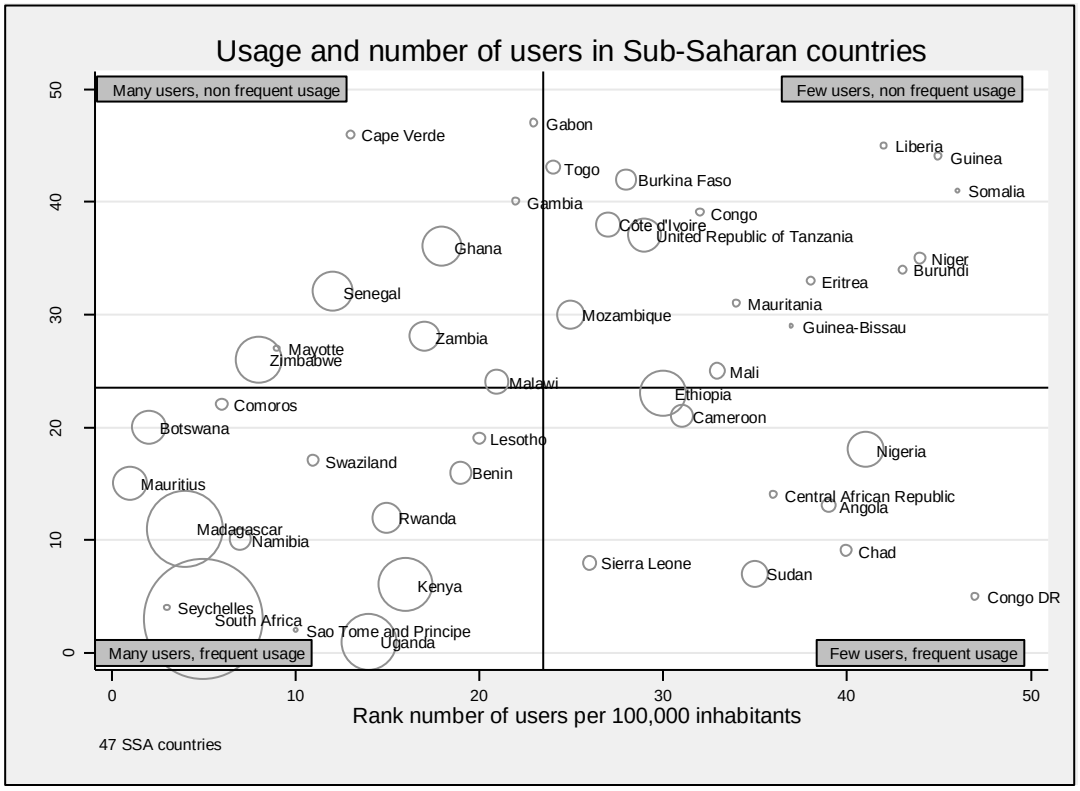


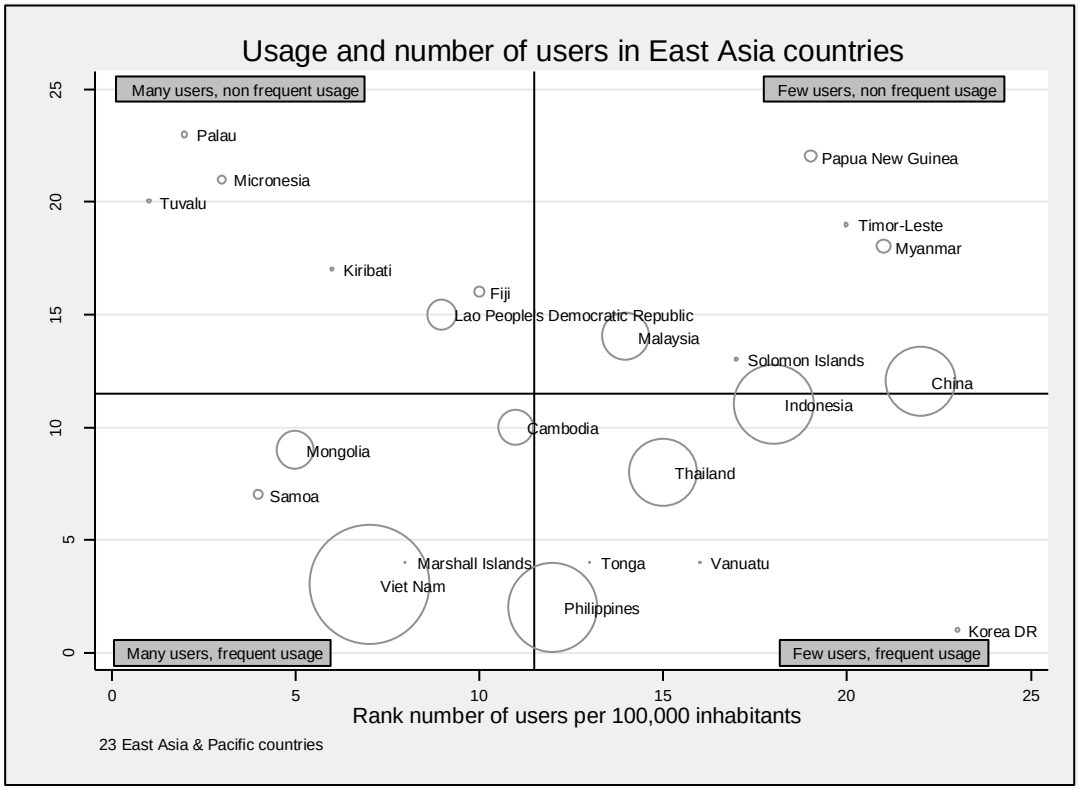


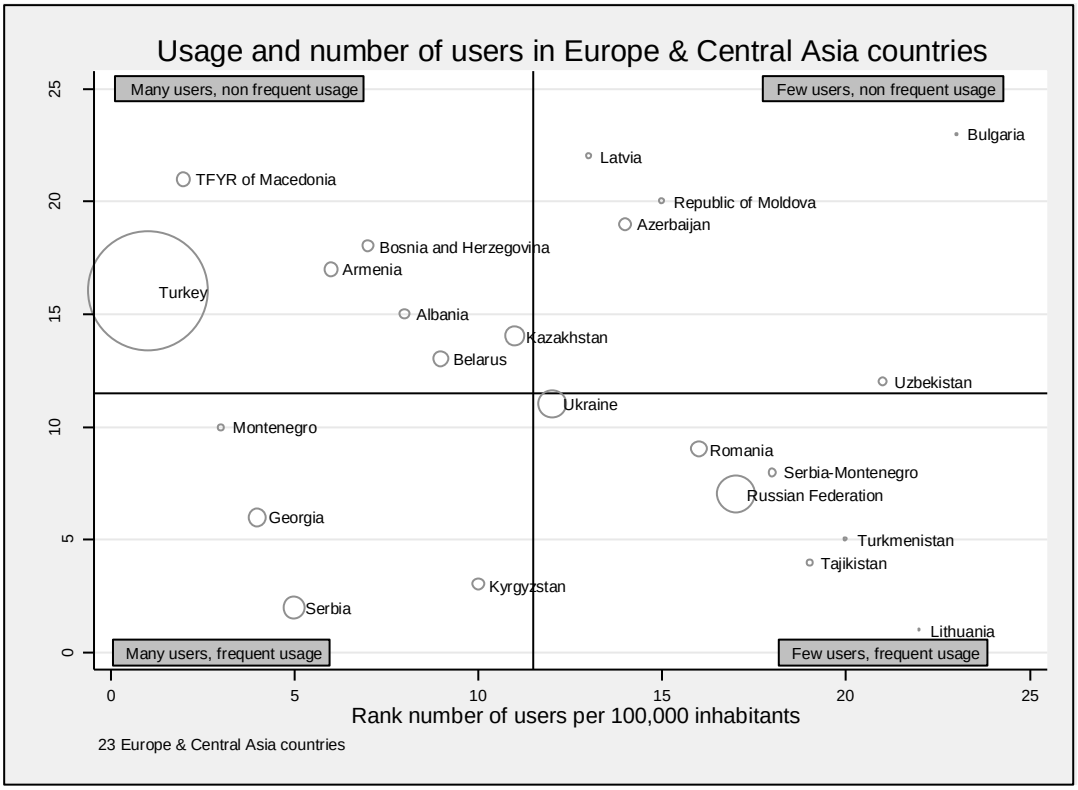

Usage and number of users in Upper middle income countries
Many users, non frequent usage
Few users, non frequent usage
Many users, frequent usage
Few users, frequent usage
Gabon
Bulgaria
Latvia
Palau
Suriname
Saint Kitts and Nevis
TFYR of Macedonia
Dominican Republic
Lebanon
Azerbaijan
Algeria
Uruguay
Peru
Bosnia and Herzegovina
Mayotte
Malaysia
Cuba
Turkey
Albania
Kazakhstan
Panama
Argentina
Iran (Islamic Republic of)
Brazil
Jordan
Mexico
Costa Rica
Ecuador
Belarus
Jamaica
China
Colombia
Botswana
Mauritius
Tunisia
Libya
Montenegro
Namibia
Venezuela
Romania
Thailand
Serbia-Montenegro
Chile
Seychelles
Russian Federation
South Africa
Maldives
Grenada
Dominica
Serbia
Lithuania
Saint Lucia
Saint Vincent and the Grenadines
Antigua and Barbuda
0
20
40
60
Rank number of users per 100,000 inhabitants
54 Upper middle income countries

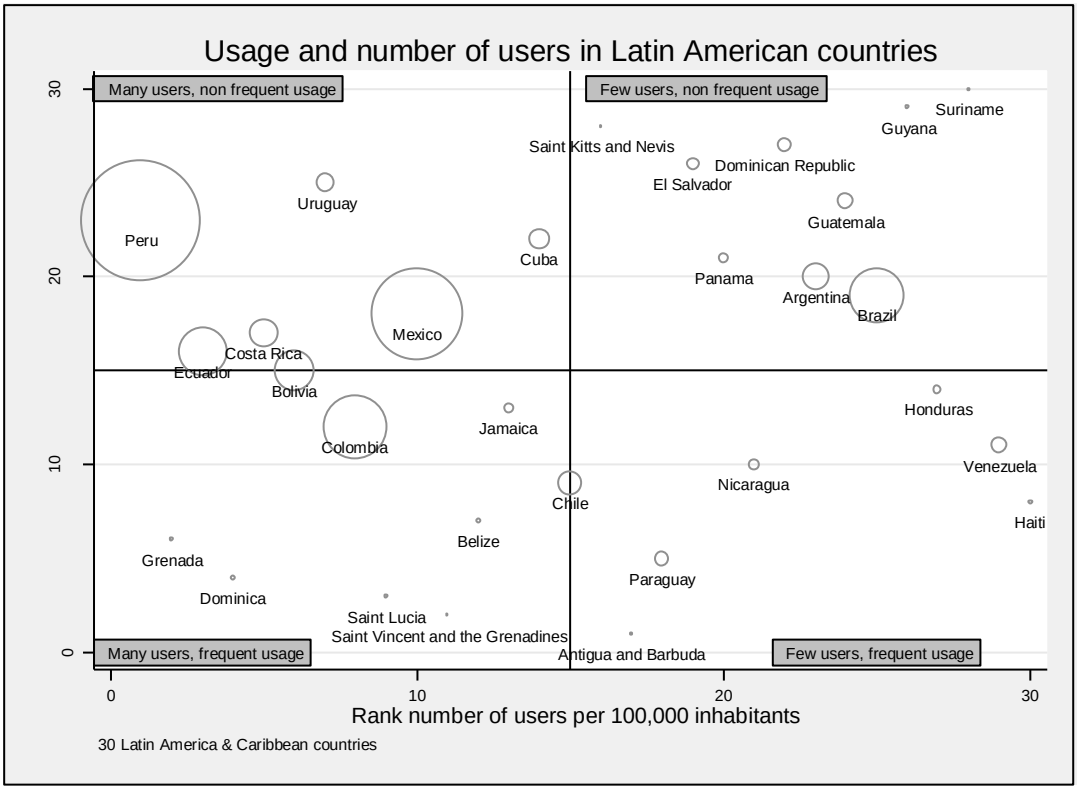

Usage and number of users in High income countries
Many users, non frequent usage
Few users, non frequent usage
Many users, frequent usage
Few users, frequent usage
Denmark
Belgium / Luxembourg
British Antarctic Territory
US Virgin Islands
Portugal
Luxembourg
Norway
Hungary
Czech Republic
Christmas Island
Italy
Bahrain
French Polynesia
Brunei Darussalam
Estonia
France
Bermuda
Macao, China
Croatia
Qatar
Switzerland
Greece
British Indian Ocean Territory
Oman
Belgium
Germany
United States
Barbados
Canada
Netherlands
Spain
Austria
Cocos Islands
United Kingdom
Aruba
Republic of Korea
Slovenia
Palestine
Israel
Turks and Caicos
Japan
New Zealand
Poland
Hong Kong, China
Saudi Arabia
Bahamas
Sweden
Netherlands Antilles
Kuwait
Equatorial Guinea
Ireland
Malta
Australia
Singapore
United Arab Emirates
Trinidad and Tobago
0
20
40
60
Rank number of users per 100,000 inhabitants
56 High income countries or territories

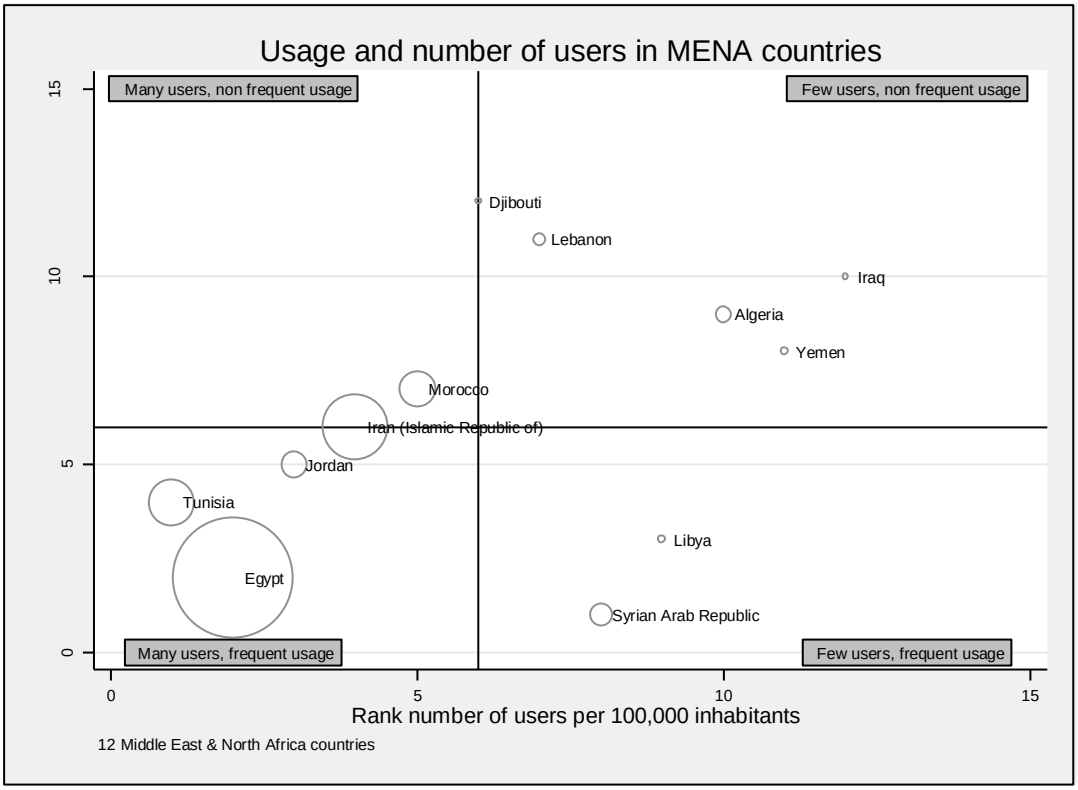
BY REGION

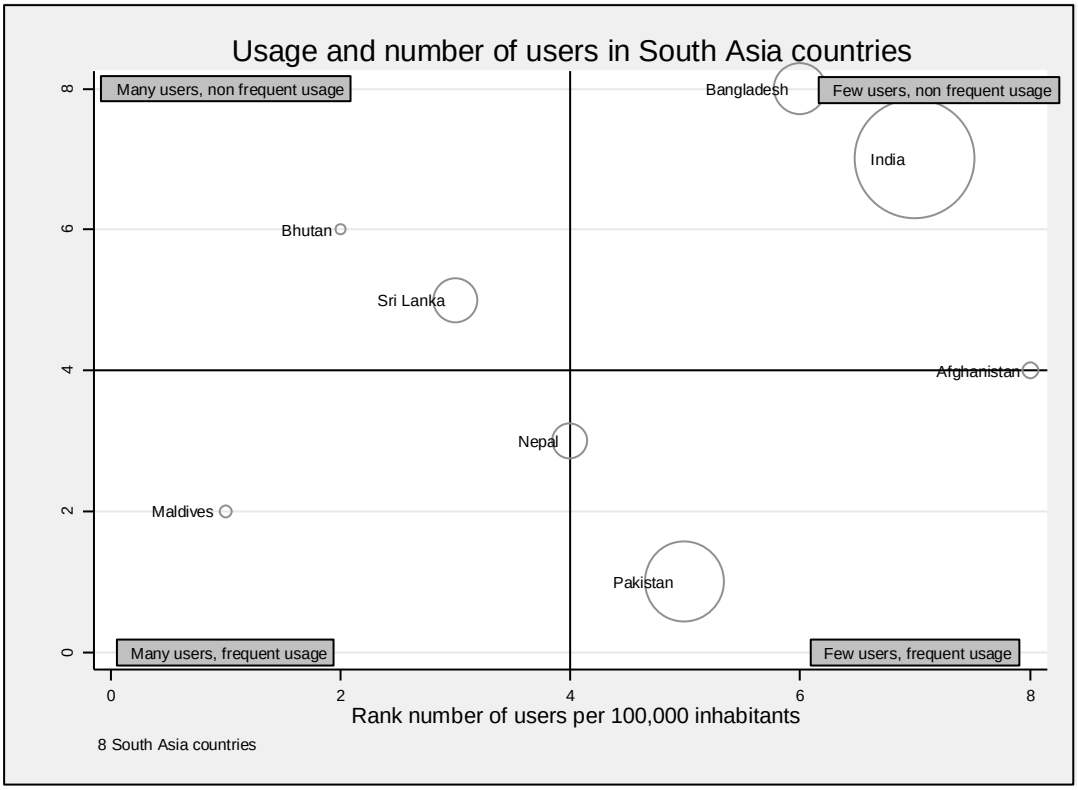

Usage and number of users in Sub-Saharan countries
Many users, non frequent usage
Few users, non frequent usage
Many users, frequent usage
Few users, frequent usage
Cape Verde
Gabon
Liberia
Guinea
Togo
Burkina Faso
Somalia
Gambia
Congo
Côte d'Ivoire
United Republic of Tanzania
Ghana
Niger
Burundi
Eritrea
Senegal
Mauritania
Mozambique
Guinea-Bissau
Zambia
Mayotte
Zimbabwe
Mali
Malawi
Ethiopia
Comoros
Cameroon
Botswana
Lesotho
Nigeria
Swaziland
Benin
Mauritius
Central African Republic
Angola
Madagascar
Rwanda
Namibia
Chad
Sierra Leone
Sudan
Kenya
Congo DR
Seychelles
South Africa
Sao Tome and Principe
Uganda
0
10
20
30
40
50
Rank number of users per 100,000 inhabitants
47 SSA countries


Usage and number of users in East Asia countries
Many users, non frequent usage
Few users, non frequent usage
Many users, frequent usage
Few users, frequent usage
Palau
Papua New Guinea
Micronesia
Tuvalu
Timor-Leste
Myanmar
Kiribati
Fiji
Lao People's Democratic Republic
Malaysia
Solomon Islands
China
Indonesia
Cambodia
Mongolia
Thailand
Samoa
Marshall Islands
Tonga
Vanuatu
Viet Nam
Philippines
Korea DR
0
5
10
15
20
25
Rank number of users per 100,000 inhabitants
23 East Asia & Pacific countries


Usage and number of users in Europe & Central Asia countries
Many users, non frequent usage
Few users, non frequent usage
Many users, frequent usage
Few users, frequent usage
Bulgaria
Latvia
TFYR of Macedonia
Republic of Moldova
Azerbaijan
Bosnia and Herzegovina
Armenia
Turkey
Albania
Kazakhstan
Belarus
Uzbekistan
Ukraine
Montenegro
Romania
Serbia-Montenegro
Russian Federation
Georgia
Turkmenistan
Tajikistan
Kyrgyzstan
Serbia
Lithuania
0
5
10
15
20
25
Rank number of users per 100,000 inhabitants
23 Europe & Central Asia countries


Usage and number of users in Latin American countries
Many users, non frequent usage
Few users, non frequent usage
Many users, frequent usage
Few users, frequent usage
Suriname
Guyana
Saint Kitts and Nevis
Dominican Republic
El Salvador
Uruguay
Guatemala
Peru
Cuba
Panama
Argentina
Brazil
Mexico
Costa Rica
Ecuador
Bolivia
Honduras
Jamaica
Colombia
Venezuela
Nicaragua
Chile
Haiti
Belize
Grenada
Paraguay
Dominica
Saint Lucia
Saint Vincent and the Grenadines
Antigua and Barbuda
0
10
20
30
Rank number of users per 100,000 inhabitants
30 Latin America & Caribbean countries


Usage and number of users in MENA countries
Many users, non frequent usage
Few users, non frequent usage
Djibouti
Lebanon
Iraq
Algeria
Yemen
Morocco
Iran (Islamic Republic of)
Jordan
Tunisia
Libya
Egypt
Syrian Arab Republic
Many users, frequent usage
Few users, frequent usage
0
5
10
15
Rank number of users per 100,000 inhabitants
12 Middle East & North Africa countries


Usage and number of users in South Asia countries
Many users, non frequent usage
Few users, non frequent usage
Bangladesh
India
Bhutan
Sri Lanka
Afghanistan
Nepal
Maldives
Pakistan
Many users, frequent usage
Few users, frequent usage
0
2
4
6
8
Rank number of users per 100,000 inhabitants
8 South Asia countries

IV. Interviews (questionnaire, list of persons interviewed, and results)

1. INTERVIEWS WITH USERS

OBJECTIVE

The interviews were part of the triangulation approach to see if the answers from phone interviews correspondent to those obtained from the questionnaire answers and to get further information to better assess the **usefulness**, **quality** and **relevance** of the trade-related data and analysis tools Since respondents to the questionnaire rarely added written comments to specify comments/suggestions that were not directly included in the questionnaire, the interviews offered the opportunity to collect more precise suggestions so as to make data more useful, thereby leading to an increase in the number of users.

SAMPLE SELECTION

This proved very difficult. Our initial objective was to select half of the persons for interview from a list suggested by ITC and the remainder from a selection of users on the basis of usage profiles described in annex III. Unfortunately, we had little success with this strategy as our random selection process only succeeded in getting us three interviews through this process. We also selected a few persons to be interviewed from the user's queries following their answers to the e-mail questionnaire. The source of each person interviewed is given below.

We usually circulated the guide below before the interview. Only a few persons interviewed returned the guide (usually not all questions in the guide). For those who returned the guideline, we included the answers along with the summary of the interview. An interview would typically last 30-45 minutes.

We had great difficulty in selecting persons to be interviewed randomly across regions. Thus, the interview only followed approximately the guideline as we left freedom to branch out to other topics during the conversation.

LIST OF PERSONS INTERVIEWED

- David Parsons, Indonesian Chamber of Commerce (ITC list-Oct. 24).
- Hector Espinoza, Peru, Independent advisor (user-answer e-mail address-Nov1)
- Takafumi Nakase, Japan International Cooperation Agency (ITC suggestion-Nov 2)
- Fernando Bastidas, Venezuela (selection via user-mail question -Nov 7)
- Luis Resendiz, Mexico, Pirelli (ITC suggestion-Nov 7)
- Antonio Seward, Argentina, Former Ambassador(ITC suggestion-Nov 8)
- Celina McLean, Argentina, Chamber of Commerce of Exporters (ITC suggestion-Nov 14)
- Miyoba Lubemba, Zambia, Ministry of Commerce (ITC suggestion-Nov 14)

- Shaimaa Mahmoud, Egypt, ExpoFront (ITC suggestion-Nov 14)
- Toby Schaeffer, US, Fintrac (ITC suggestion-Nov 16)
- Nadhem Mtimet, Tunisia, Reseacher (selection from user mail, November, 16).
- Sam Legare, South Africa, Dept. of Agriculture, Forestry and Fisheries (ITC suggestion, Nov. 17)
- Aleksander Jovanovic, Serbia, TSI (ITC suggestion-Nov 24)
- Hanta Rakotovao, Madagascar, TSI (random selection from users' registration database, November, 23).
- Grant Vinning, Solomon Islands – Fiji, Consultant (ITC suggestion, Nov 24)

SEMI-STRUCTURED INTERVIEW GUIDE

1. Beginning of the interview: user's profile and type of work.

- "As a way to start our conversation, would you please describe your [*institution/enterprise/research center*] and the type of work you are doing in this [*institution/enterprise/research center*]?"

➔ Objective: get the user's profile

- Other questions as the conversation goes along (precisions, perhaps description of the user's team…)

Transition to ITC MAT

- "Now we are going to start talking about the ITC Market Analysis Tools. This expression (MAT) refers to Trade Map, Market Access Map and Investment Map. Do you use these three tools or only some of them?"

2. Purpose of use (to do what? In which contexts?)

- "For what purposes or in which contexts do you use these tools?" [if the user needs more precisions or if he is not very talkative]:

  - ✓ Enterprises: do you use these tools to design the export/import strategy of your enterprise for example?
  - ✓ TSI / IPA: do you use these tools to advise your customers / members?
  - ✓ Gov. / missions: do you use these tools to prepare bilateral or multilateral negotiations? To design the export/import/FDI attraction national strategy?

- "Can you give me a concrete and detailed example (for example the subject of your last report, the purpose and results of the last time you used the tools in the context you have just described)?" [When the user is answering, we need to know if he/she speaks about Trade Map, Market Access map, Investment map or the three]

- “Would you say that in this specific case, the analysis you carried on would not have been possible without MATs?” “Why?” [or perhaps later in the concluding section]

3. Type of use (what type of data or functionalities?)

- “What do you do precisely when you are using the tools? Do you look at the data online, do you download data and analyze them with another software (which?), do you use graph and maps (and include them in your reports?) Do you use the simulation tool?” Etc.

➔ Objective: Get a precise description of what they do, what type of data they use, which functionalities they mostly use.

4. Main advantages or most relevant/useful characteristics

- “Do you use another software or another website to find or use similar trade-related data and tools? If yes, which? Why or putting otherwise, what are the main advantages and inconvenient of ITC MATs compare to alternatives you mention?”

5. Weaknesses of ITC MATs

- “What are the main weaknesses of the ITC MATs you use?” [Open-ended question and then suggestions: languages, Internet connection …]

- “Have you ever experienced some difficulties?” (Web connection, problems with your navigator (e.g. Firefox), problems with technical assistance, do not succeed to find an information…)”

- “Could you give an example when such weaknesses have prevented you from achieve your work?”

- “Why do not you use Trade Map / MAc Map / Investment Map (more)?” [Check before or infer from what precedes].

➔ Objective: Try to know if it is because the user does not need the information / does not know what information these tool contain / does not know how to use these tools / do not find the information useful or of a sufficient quality to use it / the user finds the information elsewhere / lack of competencies, need of training etc.

6. Suggestions to improve the tools (or to make them more relevant to your needs)

- “What type of information or data might you want to see included in the MATs?” [Open-ended question and then suggestions: NTB; higher frequency, higher granularity, more indicators, time series, data on production…)

- "What type of functionalities or option might you want to see included in the MATs?" [Open-ended question and then suggestions: a more effective tool to download data, more graphs and map option …)

- "Do you feel that you need more practical training on how to use the MATs, e.g. more explanation on the different possibilities, on the available information?"

- "Do you feel that you need more theoretical information on trade-related data or analysis, e.g. how can I design an efficient export strategy? What are the different types of trade indicators and how can I analyze them, etc."

7. Other questions / concluding questions

- "Would you say that your work would be more difficult or of a lower quality without the resources provided in MATs?"

- "Would you say that MATs make international trade more transparent?"

- "What other support / program would help you in your trade activities?" OR "what are the main constraints to the development of your trade- or investment-related activities?"

- "Do you have any additional comments or suggestions about the ITC MATs?"

8. Specific questions according to users

- Latin American: "we have noticed that in your region (I mean Latin America), the frequency of usage reaches a peak during spring and autumn; do you have an idea about a possible explanation?"

- Africa: "what is the main inconvenient of ITC MATs for African users?"

- ….

SUMMARY OF INTERVIEWS WITH USERS

The summaries of interviews that follow are ordered by the date of interview with source for the interview. For those who returned the questionnaire guide, the answers are included here and preceded by Answers to questionnaire with the questions in italics followed by the answers.

David Parsons: Indonesian Chamber of Commerce (ITC list-Oct. 24).
Profile. Parsons has been working for five years as head of a research team helping out first entrepreneurs association; now works for the industrial entrepreneurs association. He heads a team of 5 researchers. Currently, they are involved in helping develop regional trade policies for Indonesia (ASEAN is now involved in a web of RTAs). Indonesia, becoming more

democratic means that there is much more consultation, notably with entrepreneurs whose opinions are being sought. The industrial sector would like to know what benefits/costs will result from the bilateral trade agreements that the government is engaging in at the regional level.

Usage: Trade Map (and market access map).Up until now, their role was mostly in helping out with negotiation agreements. Here MATs heavily used, mostly Trade Map but also MAc map. He does not use investment map because the Indonesian gov't doesn't provide investment data. Interestingly , he points out that Services is the big area in bilateral trade negotiations and that Indonesia---which is very protectionist—including in Services would not be ready to reduce protection, but might allowing in FDI would be the way to open up the market. Having data on investment on a comparative basis would then be very useful for this purpose. FDI went up from 8 to 121 billion but to which sectors? FDI can open up market

MAT tools are heavily used in his group. They use the data to get a snapshot of bilateral trade. Some examples follow.

---What is structure of bilateral trade including evolution of the Balance of bilateral trade with countries with whom they sign an RTA. (He gave example of Australia, whose bilateral trade balance deteriorated following RTAs in the region. But this result which would go against the "mercantilist" view of trade was in fact good for Australia as it indicated that Australia was now partaking more in the "slicing up of the value chain". Hence the usefulness of comparative analysis that can be carried out with the MATs.

Trade Map also used to see where Indonesian industry is going relative to China, Australia. Used to study the evolution of meat.

Future usage. Up until now the tool was mostly useful for negotiation. Now more pressure on implementation. 'Deep' integration means moving beyond reduction of tariffs and market access in goods with reduction to barriers in services very important and up for negotiation. Here having data on investment in Services would be very useful. Information on ROO useful notably for negotiating FTA with EU (ROO in ASEAN are so far simple with no PSRO).

Free access. Very important to have the tool as the gov't often only gives aggregate data. Data is also only conveyed in a pdf format. He said that before it became free, he tried to convince his bosses to buy it, but to no avail. So having it free for developing countries is likely to be very important.

Transparency of international trade. Very useful to have data accessible. Puts pressure, not only on trade negotiators in Geneva, but also at the national level. Also helps to see what the competition is doing.

Downloading and other tools. Often, they download data to do further work on EXCEL. This they do quite frequently, in part because INTERNET connection is not always good. Also to carry out more work. He uses other data and software from the WB, notably WTI and DB data bases. . Does not find WITS user friendly nor with data sufficiently up-to-date.

As to the use of tools/features, yes they use tariff simulation, but it seemed he was just discovering it. Liked very much the graphics "if I don't give it in pictures, I get no attention because of very limited time span for concentration". He reckoned that, even though he is a fan, there is a lot more there than he can use. He says his staff finds the on-line tutorials well done and sufficient.
Parsons finds that ITC MATs are quite complementary with the WB data bases. Sees no overlap with WITS which would not deliver data on time to carry out the type of analysis that has to be done under pressure. Having the tools to analyze the data also helps a lot under time pressure.
More data. Yes of course, on NTBs in ASEAN and what is happening on that front. But he was quite insistent on the need for better investment data (could help bring down protection in services).
Some easy to carry out improvements. He likes the "creative industries" button which he finds nice when looking for trends. But he would like to see better definitions of groupings (e.g. chapters that correspond better to 'real world' situation, i.e. "electronics", "automotive parts" etc…). Then he would not have to create it himself….Users get overwhelmed with the level of detail in the HS. Using SITC classification could be useful.
Another example along the same lines: the option for creating country groupings should keep up with the evolving architecture of East Asia: ASEAN; ASEAN +3; ASEAN + 6. All these breakdowns could be on a pull down menu. This suggests ITC teaming with WTO which now has a big data base on all RTAs which could serve to add more country categories in a pull down menu.
Underselling the tool However, he pointed out the ITC is underselling its tool: it could do a better job at publicity. Having a couple of well-done case studies would help a lot: take a case study on a manufacture, say automotive sector and see how the sector is evolving at home and in the competition.

Hector Espinoza, Independent advisor to Foreign firms (Lima, Peru) (user-answer e-mail address-Nov1)

Profile. The interview was by skype following his request for information on tools via the user-answer e-mail address. Espinoza wanted more information on the tools without being very precise about his requests. We took advantage of his request to ask him for an interview. He has clients in Canada, China, speaks good English, seems to have good contacts, and does some teaching on foreign trade (I could not get an affiliation from him although he said he had been an auditor at PWC).
Does not use the tool very much. He would like more information. Surprisingly, he does not know much about investment map, but he said that faculty at the university used Trade Map and Market access map in their teachings (I could not get more precise information)
Future usage. He said that Investment map was not of much use, that he used another tool (in Spanish) which is not the same as Trade Map. It gives him total trade for products and

also the geographic destination within the country i.e. Miami or New York in the US. Although his English was good, he said that the language was a great barrier to increasing usage in the future. He found the detail in HS classification difficult to comprehend and not having a good mastery of English making it difficult to identify the corresponding HS code to access the data.
He offered his services to translate it to Spanish…. I told him that Trade Map existed in Spanish which he did not seem to be aware of Presumably, any translation of specialized documentation such as that on RoO would have to be carried out at ITC or with an institution in Latin America, perhaps a university.
Free access. Having free access most welcome. Internet access in Lima is not a problem. Monthly cost for unlimited access is 15-25$ per month with 40% of population having access. Universities and high schools have access. Cybercafés cost 50 US cents per hour. (We spoke in skype for one hour with no interruption). This good access might be a reason for the intensive usage in Peru.
Transparency of international trade. He agreed that having access to the tools increases the transparency of trade
Downloading and other tools. He had only limited use of data from the Internet so he does not do much downloading.
Improvements. For emerging countries, new products are important. He took the example of avocados which Peru cannot export to the US because of SPS. He did not know about the 'standards' tool but was quite insistent that there is a need to have information on regulations in potential importing countries. When I mentioned that the data on legislation about rules of origin that need to be met to benefit from preferential market access, he was aware of them (not of their availability in MAc Map) and said that they were often too complicated to understand in English. He would like to have the regulations in the importing country in Spanish. He sees that a translation into Spanish of the technical barriers to trade in the importing country as important to increase transparency.
Underselling the tool He was emphatic that the tool needs to be better advertised. He suggested Facebook and Tweeter.

Takafumi Nakase, Japan International Cooperation Agency (ITC suggestion-Nov 2)
Profile. Nakase uses MATs (mostly Trade Map) to help design Japan's bilateral aid program to Zambia. He reckons that he does not know about all the features in the tools and that he uses Trademap for limited purposes, e.g. to get a feel for where the structure of trade of Zambia by region is progressing (both for imports and for exports). This helps him design a bilateral aid support strategy for his gov't. He has limited knowledge of the options of the possibilities in MATs, but would welcome training.
Usage: He has only used Trade Map and does not envisage using other tools.
Future usage. He is not a heavy user so he does not plan other usage or other tools. Does not know anyone in Zambia using MATs. He was not informed about the seminar on-line.

Free access. Very important. The Internet connections in Zambia are poor and very expensive (at the office they are free and work reasonably relatively well, but at home unlimited access costs about 160$ a month and limited access for e-mail and skype about 40$ a month).
Transparency of international trade. He agrees that having the data available helps transparency. When asked about the regulations such as those on RoO in MAc map, he was not aware of their existence. It would be useful to have an example that would show how a country wishing to export under preferential tariff access to a country would have to satisfy its RoO requirement.
Downloading and other tools. He does not download data. He also uses the data on trade given to him from the Government. Sometimes he has difficulties reconciling the projections for exports (especially for copper which is very important for Zambia) from TradeMap with those given to him by the gov't. While he appreciates the degree of disaggregation in the data, there must be quite a few users who really want "standard" tables up-to-date and no more. This might be an "automatic" feature when you choose a country. For example, for Zambia produce automatically aggregate exports at say HS-2 or level for the top 10 partners, and the same for imports (this would be available in a pull-down menu.
More data. Not a heavy user, so more data is not a priority for him.
Underselling the tool He did not have any opinion.

Fernando Bastidas (selection via user-mail question -Nov 7)
Profile. See below
Bastidas sent a query to the user filled out the questionnaire. He learnt about the tool from the Banco de Commercio Exterior two years ago. Among the 35 agricultural products whose production will increase because of better irrigation shortly, coffee and cacao are important. He needs to carry out a market analysis which relies both on data from ITC and on prices from other sources. Hence he needs to download data and his main complaint is about the difficulty of downloading it under current protocol. Interested in MAc map for NTMs and market access information. He was very helpful and interested. Offered to promote the tool via their clients (visit their website)

Answers to questionnaire
- *"Describe your [institution/enterprise/research center] and the type of work you are doing in this [institution/enterprise/research center]?"*
PROINLARA (ASOCIACIÓN CIVIL DE PROMOCIÓN DE INVERSIONES DEL ESTADO LARA). It is a institution (not government) from the state of Lara, Venezuela that promotes several activities for the progress of the region. At the beginning, the main function was to promote investments. Later, the institution expanded its activities with the promotion of trade, with the focus in exports, entrepreneurship and more recently with the promotion of tourism.

PROINLARA is an institution that analyzes the factors that ease the progress and serves as a bridge between the private sector and the government to ease the actors to make the duties for the benefit of the region.
PROINLARA keeps good relationships with the regional as well as the local governments of the several counties (9) no matter the political parties that run them. It also keeps relationships with national actors (both government and private sector)
Among the activities organized and/or promoted in the last couples of years:
Tourism:

- Fam Trips with national tour operators to visit Lara
- Musical congress
- Gastronomic festivals
- Regional photo competitions
- Database of craftmen, hotels and inn, tourist transport, restaurants, musical and dancing groups among others
- Meeting with different actors
- Business matchmaking

Trade:

- Participate in fairs abroad
- Database of export offer, with info of companies, customs, binational chambers of commerce among others
- Meetings with binational chambers of commerce
- Training in international commerce

Investment:

- Investment guide of Lara (with national, regional and local information). Available only in spanish

Entrepreneurship

- Training
- Business matchmaking with local banks

The main website is www.laraenred.com

- *"This expression (MAT) refers to the three tools that are contained in the software: (i) Trade Map; (ii) Market Access Map; (iii) Investment Map. Do you use these three tools or only some of them?"*

We have used (i) and (ii) so far. The other one will certainly be used in the future

- *"For what purposes or in which contexts do you use these tools?" for example:*

    - Enterprises: do you use these tools to design the export/import strategy of your enterprise for example?
    - Trade Support Institutions / Investment Promotion Agency: do you use these tools to advise your customers / members?

- Gov. / missions: do you use these tools to prepare bilateral or multilateral negotiations? To design the export/import/FDI attraction national strategy?
- Advise local companies
- Make a plan for a agricultural valley that will expand the capacity of production 8 times with supply of water from a new reservoir

- *"Can you give me a concrete and detailed example (for example the subject of your last report, the purpose and results of the last time you used the tools in the context you have just described)?"*

We are now studying the commercial feasibility for 35 agricultural products in the national and international markets that will help us to advise correctly to agricultural valley units, because its production will be increased 8 times in the near future. The several stats help us to analyze the information needed enough with info of prices, quantity, tariffs, competition in the markets, seasons of buying that will ease the decisions of the main targets wth the strategies required

Of course, we will need other tools to complete the investigations in other topics of international commerce, like logistic network, non-tariff barriers, …

- *"Would you say that in this specific case, the analysis you carried on would not have been possible without MATs?" "Why?" [or perhaps you can tell us how you did this work before having access to ITC/MAT or yet again that you did not carry out the analysis that you can do with MAT]*

For us, the beginning of any analysis in international commerce is the study of the several stats related to trade. The lack of them makes us more difficult to have a correct point of view for taking the correct decisions to try to introduce our products in the several markets worldwide

- *"What do you do precisely when you are using the tools? Do you look at the data online, do you download data and analyze them with another software (which?), do you use graph and maps (and include them in your reports?) Do you use the simulation tool?" Etc.*

We have downloaded the data in excel files. We are now designing a software that will provide info faster in main points, with comparison between the local offer and the international one that will ease to know the clients with good conditions in price, quantity, season of the year among others, but also our competitors in those markets.

- *"Do you use another software or another website to find or use similar trade-related data and tools? If yes, which? Why or putting otherwise, what are the main advantages and inconvenient of ITC MATs compare to alternatives you mention?"*

We used the info provided from the website INE www.ine.gob.ve (The national institutions of statistics) that only gives info of trade related to Venezuela

- *"What are the main weaknesses of the ITC MATs you use?"*
It is not easy for complete investigations because of the many files you need to download

- *"Have you ever experienced difficulties?" (Web connection, problems with your navigator (e.g. Firefox), problems with technical assistance, do not succeed to find an information…)"*
We do not find info from several countries, in tariffs and trade stats

- *"Could you give an example when such weaknesses have prevented you to carry out your work?"*
We need to download too many files to have the complete info we need for the investigations that takes us too many hours to download the files and it is more difficult to insert them to our program, when it would be faster if a different way would be available

- *"Do you use Trade Map / MAc Map / Investment Map as much as you need? If not what obstacles do you face in using it more?"*
This year, it has been a key tool for our investigations

- *"What type of information or data might you want to see included in the MATs?"*
Non-tariff barriers. Sometimes we use data from ALADI and "Trade Wizard".

- *"What type of functionalities or option might you want to see included in the MATs?"*
A more complete database to be downloaded with different tables in the same file

- *"Do you feel that you need more practical training on how to use the MATs, e.g. more explanation on the different possibilities, on the available information?"*
An online training for new users and/or experienced users.

- *"Do you feel that you need more theoretical information on trade-related data or analysis, e.g. how can I design an efficient export strategy? What are the different types of trade indicators and how can I analyze them, etc."*
I think "on line" meetings with people who works with these tools will help us to have different points of view and help us to work with more efficiency

- *"Would you say that your work would be more difficult or of a lower quality without the resources provided in MATs?"*
Yes. It would be more complicated in the beginning of the studies, that would make a more difficult technical analysis for complete investigations

- *"Would you say that MATs make international trade more transparent?"*
Efficient would be the correct word

Specific questions according to users
Is there a way to download the database in more complete files?

Luis Resendiz, Pirelli, Mexico (ITC suggestion-Nov 7)
Profile. He is manager for the market of imports of motor cycle tires for Mexico. He heard about the tool from a junior team member just out of university. He is a fan and finds it most useful to study the market for motorcycles and its ramifications for the market for motorcycle tires. Trade Map complements the data he obtains from the gov't which is less detailed since it does not provide him with data for other countries. He consults it around 10 times a year, mostly around year end when he has to decide on prices for next year. This might explain the presence of seasonal peaks in usage, at least by private sector users. Trade Map helps him track Mexican imports of tires of motorcycles (but also of motorcycles) by country of origin.
Usage: Almost exclusively Trade Map. For example, while he interested in tires, he needs to study the market for motorcycles by type of motorcycle. According to the dynamics of the market in the past few months, he gets an idea of what type/price to charge for tires. Disaggregated data is important since 250cc will not use the same tires as 500cc. Finds ITC data more reliable than gov't data and he gets better quality help when in need than when he requests information about gov't data through their portal (CIADE). . Does not use other tools
Future usage. He would like to have (and be willing to pay) for a service that would send him "just-in-time" information, for example, if the price of rubber has gone up by more than XX%. He thinks there might be users who would be willing to pay for such a service 'à la carte'.
Free access. Very important especially for small companies who cannot pay. Internet connections are good.
Transparency of international trade. He agrees that having the data available helps transparency. Graphics are very useful. He often uses the English rather than Spanish version. He told me that there were quite a lot of differences in Spanish vocabulary across LA countries which makes the search for product names more difficult. For example, 'tires' is translated differently across countries (gomas, cauchos, cubiertas---etc). So translation to Spanish may present problems for users. He did not know about the why of using direct vs. mirror data. While this is explained in the notes to the Trade Map tool, it might not be visible for the user. And it certainly merits explanation.
Downloading and other tools. He rarely downloads data and does not use other tools.
Underselling the tool . He said that an ITC brochure should be sent to 5-10 universities. Get the administration of dean who would then forward it to the relevant faculty. This would be most helpful (this is when he told me how he learnt about the tool from a student just out of school).

Antonio Seward, Argentina (ITC suggestion-Nov 8)

Profile. Seward is former ambassador of Argentina to Switzerland. He worked with ITC on the development of Trade Map in the early 2000s. He was also under-secretary of trade and development in Argentina. Currently, he is organizing a program for post-graduates in Argentina's foreign service and teaching at the academy. He is contributing to the development of a packet of tools "International Marketing" in which he is planning to use Trade Map in interactive mode. The teaching at the academy puts heavy emphasis on case studies, including visits to successful export firms.

Usage: Almost exclusively Trade Map, although he knows about Market Access Map. When he was in Bern, he used Trade Map to propose a niche for 50 Argentine products which was issued as working paper by ITC. His objective is to transform trade information into a format that is useful for businessmen. For example, how do you identify niche markets in Switzerland? Argentina produces a lot of honey which it sells mostly to high-income countries like US, Germany and Switzerland. Currently, he participates in seminars in several cities in which he presents studies that seek to identify niches in high income markets. When asked of a niche product in Switzerland, he said the study helped identify parts for air conditioning for businesses (not households). This turned out to be an unsuspected niche in which Argentina was subsequently successful in Switzerland.

Future usage. Sees much use for training courses for foreign service officers working in embassies. Not too technical, a tool that relies on minimal background in economics.

Free access. Very important. Internet connections are good.

Transparency of international trade. The tool simply takes advantage of what is available.

Downloading and other tools. He rarely downloads data and does not use other tools. Clearly a tool for micro analysis for picking winners. Useful for trade promotion, not for trade policy formulation which benefits more from the WTI of the WB.

Weakness and suggestions for improvement. Not a heavy user. He was annoyed about not being able to use mirror data at his choice (I told him it could be done) giving examples of exports of Argentina to India (that showed up as exports to Singapore) and to Germany (that showed up as exports to Holland). This question was raised by others as well suggesting that a 5-10 minute video on when and why to use mirror data would be welcome. He also thought that data was only available for 3 years in Trade Map, while in fact it is available since 2001.

Case studies are needed to promote usage. What about inviting submission of case studies when training seminars take place (give an example) and give a prize to the winner?

Underselling the tool . He noted that ITC had an arrangement with the Camera de Exportadores de Argentina and that they should promote the usage of the software. If people know of its existence and free availability, usage should go up. Case studies is a way (malbec brand has been promoted successfully---Argentina did not promote wineries)

Miyoba Lubemba (ITC suggestion-Nov 14)

Profile. Lubemba works in the ministry of commerce of Zambia on export promotion and market development. She and her team of officers are heavy users of MATs. They also use WITS and TRADESIFT. Most training on the usage of MATs takes place within the unit using where more experienced users show newcomers how to use the tools (mostly Trademap). The big advantage of MATs is user friendliness. It is easy to use for someone with minimal training in economics. She recounted getting needed information in the afternoon following a morning meeting.

Usage: Input for trade strategy for next year. Also for annual audits of export firms. Trade Map is often used for sectoral reports for specific markets. Also uses for bilateral negotiations with SADC and COMESA, among others to find key products of interest and to check on commitments vs. actual implementation. Occasionally download data from WITS (or Trade Map) to use it in Excel (sometimes not enough bandwidth to download data). Could not download the manual (bandwidth?). Her division is mostly working on export potential (Trade Map and MAc Map usage), but the investment division uses Invest Map.

Advantages/disadvantages. Lubemba and her team also use WITS and TRADESIFT for which they obtained training via GTZ funding. She finds Trade Map more user friendly than other tools. Easy to teach others, especially for officers that do not have training in economics. The other tools need some training in economics. Very quick usage: you can produce basic information shortly after a meeting, which cannot be done with the other tools.

For small trade flows, the rounding to 1,000$ means some trade flows are missing. So it is necessary to get the data in WITS.

Difficult to do analysis by blocs of countries (would be useful to have more blocs automatically set up). But there is a problem because in some instances there is missing data so the growth rate on the 4-yr period is missing. Improve on missing data.

It is important to have access to mirror data because of the poor quality of the data. But this possibility for the users is not underlined in the introduction to the tool.

TRADESIFT is useful for indices. Get more indicators and more graphs, not more indices which can be left to TRADESIFT

Qualitative information is useful. Needs to be updated regularly to be useful.

Free access. Very important. Does not think that the gov't would pay for the tool.

Transparency of international trade. The tool helps make trade more transparent by helping to close the information gap which is still very large. There is a need for more up-to-date information on developments regarding regional trade agreements.

Spreading usage of the tool. Training in regional offices use the tool for exporters. The tools are introduced, but one must be careful on interpretation for exporters. Institutions of higher learning could use it. Some training funded by NGOs (e.g. GTZ) present all the tools.

Celina McLean (ITC suggestion-Nov 14)

Profile. Celina McLean worked with CERA (Camara de Exportadores de Argentina) from 2004-08. She is now an independent consultant having served on the Advisory Board of ITC . She is very knowledgeable and has been a frequent user of MATs for a long time, including for training the trainers. Mclean has a degree in economics.

Usage: She has used the tools for research on export markets. The MATs are a great complement for the initial work. She does not think that Investment Map will have much success as FDI is not going to take place on the basis of a study of data available on to the public, even if this is only the initial stage (FDI is largely dependent on local conditions that cannot be communicated into a software). Most usage is for Trade Map and MAc Map).

Advantages/disadvantages. Easier to access than other tools. She says that before these tools became available no analysis was done in Argentina. The national statistics only gave data on exports and imports to Argentina, not on other countries.

Free access. In the interview, she was very insistent that keeping the tool free was necessary for its survival and that it is very important to have it. Even middle-income countries like Argentina have a big knowledge gap.

Transparency of international trade. The tool helps make trade more transparent by helping to close the information gap which is still very large (see above).

Spreading usage of the tool. In middle-income countries , the best bet to spread the usage of the tool is by reaching the TSIs.

Answers to questionnaire

-*"Describe your [institution/enterprise/research center] and the type of work you are doing in this [institution/enterprise/research center]?"*

Director, Trade Intelligence Observatory, Institute of International Strategy, CERA -Argentine Chamber of Exporters-, a trade support institution.

From 2004 through 2008, I trained CERA's members and other companies and organizations to use ITC's tools. Since then, I make presentations on demand.

- *"This expression (MAT) refers to the three tools that are contained in the software: (i) Trade Map; (ii) Market Access Map; (iii) Investment Map. Do you use these three tools or only some of them?"*

I use Trade Map and Market Access Map.

-*"For what purposes or in which contexts do you use these tools?"*

To advise members.

To collaborate with the public sector to prepare bilateral or multilateral negotiations.

To train SMEs to do research to prepare an export strategy.

- *"Can you give me a concrete and detailed example (for example the subject of your last report, the purpose and results of the last time you used the tools in the context you have just described)?"*

Building export capability for honey producers in the province of Corrientes. Trade Map and Market Access Map demonstration.

- *"Would you say that in this specific case, the analysis you carried on would not have been possible without MATs?" "Why?" [or perhaps you can tell us how you did this work before having access to ITC/MAT or yet again that you did not carry out the analysis that you can do with MAT]*

It would have been much more time-consuming, if at all possible. The tools are free, user friendly and much easier to use than UN statistics, for example. When CERA became a national licensee in 2004 for Product Map and in 2005 for Market Access Map, they were a novelty in Buenos Aires. We invited members and other organisations, such as Consejo Federal de Inversiones, to online presentations. Trade Map was inaccessible due to cost. When Trade Map became available free of charge to developing countries, it was a great step forward.

- *"What do you do precisely when you are using the tools? Do you look at the data online, do you download data and analyze them with another software (which?), do you use graph and maps (and include them in your reports?) Do you use the simulation tool?" Etc.*

Yes, I look at the data online; download it in Excel. Make online demonstrations. When I prepare Power point presentations I paste the screens on slides, arranged in a research sequence.

- *"Do you use another software or another website to find or use similar trade-related data and tools? If yes, which? Why or putting otherwise, what are the main advantages and inconvenient of ITC MATs compared to alternatives you mention?"*

No, I don´t use other software. Except the national database for import/exports (INDEC) exclusively for Argentina.

- *"What are the main weaknesses of the ITC MATs you use?"*

-Unnecessary features in one tool better covered in another tool, e.g. Trade Flows in MAc Map.

-Trade data in MAc Map is behind Trade Map's.

-Country analysis tab in MAc Map: Data on "Income generated from current tariffs" dates back to 2001.

- *"Have you ever experienced difficulties?" (Web connection, problems with your navigator (e.g.Firefox), problems with technical assistance, do not succeed to find an information…)"*

-No issue with navigator. I actually use Firefox.

-Technical assistance is good.

-Yesterday I looked at Trade Map's Direct data and Mirror data on Argentina's honey exports. Today I cannot access Direct data.
-There's no short cut to get back from MAc Map to the Trade Map screen after navigating the former in search of tariffs.

- *"Could you give an example when such weaknesses have prevented you to carry out your work?"*

When doing an online presentation, I always carry a backup CD in case the connection fails.

When doing research, it can delay the job.

- *"Do you use Trade Map / MAc Map / Investment Map as much as you need? If not what obstacles do you face in using it more?"*

Yes, I use it anytime, anywhere.

- *"What type of information or data might you want to see included in the MATs?"*

Specifically in Market Access Map: links to national customs to search Duties and taxes on imports, above the tariff. For example, VAT and other duties.

- *"What type of functionalities or option might you want to see included in the MATs?"*

- *"Do you feel that you need more practical training on how to use the MATs, e.g. more explanation on the different possibilities, on the available information?"*

Tutorials should be in Spanish; in Portuguese too. Not just English.

- *"Do you feel that you need more theoretical information on trade-related data or analysis, e.g. how can I design an efficient export strategy? What are the different types of trade indicators and how can I analyze them, etc."*

MAT tools are not enough to design an efficient export strategy. They are very helpful to pre-select markets and make informed decisions.

In 2009-2010 Helen Lassen was working on an export course called "Analysis and research of export markets" that would go online and complement the tools; but I have not seen it in ITC's website. It was very well thought-out and designed.

- *"Would you say that your work would be more difficult or of a lower quality without the resources provided in MATs?"*

Yes, definitely.

- *"Would you say that MATs make international trade more transparent?"*

Yes.

- *"What other support / program would help you in your trade activities?" or "What are the main constraints to the development of your trade- or investment-related activities?"*

The main constraints, or support, are at the national level. That said, training is always the best support for SMEs. By training I mean "training the local trainer", because of cost, on one hand, and because of a very positive multiplying effect at the local level, on the other.

- *"Do you have any additional comments or suggestions about the ITC MATs?"*

Merge MAc Map into Trade Map for consistency and easier navigation.

- *Any specific questions/suggestions by users*

ITC should get grants, such as the World Bank's, to make training courses free in developing countries.

Shaimaa Mahmoud (Egypt) ExpoFront (ITC suggestion-Nov 14)

Profile. Mahmoud is director of The International Company for Export Development – ExpoFront. The company works with the government and the private sector. Very knowleadgeable and frequent user of MATs. Has a masters in economics.

Usage: Tools are used for: (i) export strategy for firms/sectors (data on export and import flows to help reach a conclusion on an export strategy); (ii) training to get data on market access to advise on export strategy. Most usage is for Trade Map and MAc Map. When she worked at the ministry of trade, Mahmood also used investment map. She also uses WITS (some problems with the software). WDI data are better explained. For example, how are growth rates computed? This should be explained in a pull-down menu. Market shares and other simple indicators should also be explained since not all users are economists.

Other tools. She regrets that the TRADECAN software on competitiveness developed by the World was not updated. According to her, it would be very easy to incorporate it in Tradmap.

Advantages/disadvantages. Very user friendly. Much easier to access than other tools.

Examples of usage. Her company was contracted by the leather export council to study potential for exports in that sector: Trademap was useful to analyze market potential to identify competitors in the sector. She finds the tool very good for secondary data (i.e. you

need other "primary" data at the later stage before either investing into exporting into new markets --getting primary data is very expensive and only worth it at a later stage).
She would like to see other classification than HS, e.g. SITC classification. For small trade flows, the rounding to 1,000$ means some trade flows are missing. So necessary to get the data in WITS (check).
She finds it difficult to do analysis by blocs of countries (would be useful to have more blocs automatically set up---and to have the setting of blocs in the basic tutorial). But there is a problem because in some instances there is missing data so the growth rate on the 4-yr period is missing. Improve on missing data.
Qualitative information is useful but it needs to be updated regularly to be useful.
Free access. Very important. Does not think that the gov't would pay for the tool, even now that it has used it and knows it is useful. Essential to keep it free.
Transparency of international trade. The tool helps make trade more transparent by helping to close the information gap which is still very large.
Suggestions for improvements

a) Above all improve the quality of data. ITC should improve the quality of the data (in Egypt, quality of data is very poor because of the methodology used to collect imports and exports.) Mirror data is better, but still many problems. Would be willing to use data that has been cleaned even if she does not know how.
b) Would be useful to have HS-8 codes or Hs-10 at least for US and EU.
c) Incorporate time series going further back to the 1908s like WITS
d) Statistics on quantity are needed. Many times unit prices do not make sense.
e) Embed a currency converter to Euro, pound, yen.
f) 2-3 page reports like news on prices produced on a regular basis which would be made available for a fee. She would like to know trends in ready-made garment sector.
g) NTMs are important and could be included in MAc Map.

Spreading usage of the tool. The training manual is not online, or difficult to download. With 18 arab speaking countries, at least the manual should be translated into arabic. No clear link to ITC on the WTO portal. This could be easily remedied (idem for UNCTAD website). Ministry of Trade officials do not have time to spread the tool. Better to approach NGOs and business associations. An e-mail campaign might be useful. Facebook as well.

Answers to questionnaire

- *"Would you say that in this specific case, the analysis you carried on would not have been possible without MATs?" "Why?" [or perhaps you can tell us how you did this work before having access to ITC/MAT or yet again that you did not carry out the analysis that you can do with MAT]*

- Mirror data is a very good idea but it doesn't work with south-south (Arab and African Countries)
- Option of getting data on 8 digits

- Should stress and focus on quantities statistics as much as values cause it would be a very useful source of price data
- Embedded currency converter
- Verification and harmonization of data between the USITC, EURStat and WITS (they should not give different results)
- Issue analytical in-depth reports based on secondary data analysis against subscription or very small fees
- Make use of the NTMs surveys conducted by ITC to develop an interactive tool as part of the market access map working by HS code system just like the Trade Map and updated annually.
- What about the product map?? Very useful link
- Should remain free subscription to developing countries – those countries suffer from a severe informational gap and lack of awareness – only with those tools their business might have a slight chance to develop and become competitive.

- *"What do you do precisely when you are using the tools? Do you look at the data online, do you download data and analyze them with another software (which?), do you use graph and maps (and include them in your reports?) Do you use the simulation tool?" Etc.*
Composite index using excel

- *"Do you use another software or another website to find or use similar trade-related data and tools? If yes, which? Why or putting otherwise, what are the main advantages and inconvenient of ITC MATs compare to alternatives you mention?"*
Should be integrated with WITS – longer time series and TradeCAN which provides useful analysis (competitiveness matrix and stars analysis)

- *"What type of information or data might you want to see included in the MATs?"*
- *"What type of functionalities or option might you want to see included in the MATs?"*
- *"Do you feel that you need more practical training on how to use the MATs, e.g. more explanation on the different possibilities, on the available information?"*
Online training available for fee as those of the world bank trainings (Arabic translation we have at least 19 Arabic speaking countries)

- *"Do you feel that you need more theoretical information on trade-related data or analysis, e.g. how can I design an efficient export strategy? What are the different types of trade indicators and how can I analyze them, etc."*
There must be an interactive glossary or online training (Arabic translation we have at least 19 Arabic speaking countries)

Toby Schaeffer (US) Fintrac (ITC suggestion-Nov 16)

Profile. Schaeffer is an analyst who works for FINTRAC, a company that does contracting for USAID on targeted food assistance. He uses the tools (mostly Trademap) for preliminary work to identify food aid provided by USAID.

Schaefer is a knowledgeable analyst experienced in software usage. During the conversation, it was clear that he did not find the software very "user friendly".

Usage His typical job is to find out what kind of food aid might need, (DRC, Dominican Republic and often low-income countries). His company has to find out what kind of food aid the country might need, either in quantity or in the cans monetized food aid, at what price the food aid should be sold (for example wheat) so that it is a "fair price" in the sense that the food is sold at a price close to the prevailing market price so that the food aid does not disturb the equilibrium in the market. He uses MAc Map to find the tariff that must be added to get an idea of the price at which the food items are sold in the domestic market. He finds that the data on tariffs is often not up-to-date.

Future Usage. Same kind of work but for other countries. Countries like Haiti, DRC, Zimbabwe will be analyzed. These are countries with very poor data. Mirror data useful, but not enough, notably because exporters do not always give data for the ultimate country of destination.

Free Access. Does not apply in this case. Fintrac bought the software 2 years ago. He was about to not renew the contract (got the data from COMTRADE directly sometimes earlier) and at times from the country statistics. But in his latest assignment on Dominican Republic he noticed that COMTRADE data was inconsistent but that Trademap data was better. So he saw value added in the software in this case and will probably renew it.

Improvements. He is often frustrated for downloading. Much easier with COMTRADE. He also finds it difficult to carry out data preparation. He would like to have data on value and volume by country at different levels of disaggregation in one or lesser manipulations that he finds necessary now. For example, exporting files in CSA or Excel takes a long time and is slow. Sometimes, he can only access data by value not by volume, at least in the case of exports . When preparing groups, he would like to be able to get simultaneously data at HS-6, HS-4, HS-2 levels.

He finds it difficult to navigate around the site. For example, it is difficult to get back to previous screen, as he finds he has to go back to the home button (the button 'return to previous menu' is difficult to locate). In short, a more intuitive layout would be welcome

Nadhem MTIMET – Tunisia (selection from user mail, November, 16).

Profile: Nadhem MTIMET is an economist, a researcher, and an assistant professor at the *Ecole supérieure d'agriculture de Mograne* (University of Carthage, Tunisia). His research fields include agro-economics, marketing, and environmental economics. He also works as a national consultant.

Usage (purpose of): MTIMET discovered the ITC tools (mainly Trade Map) 18 months ago when he started a consultancy for the CEPEX (Centre for the Promotion of Tunisian Exportations). The main objective of the study was to assess the potential development of exports from an oasis (fish farming). Since then he uses the data for his research and recommends the tools to the students he supervises. He also uses the tools for a conjoint research with Spanish researchers about olive oil.

Usage (data and functionalities): MTIMET mainly uses Trade Map (he does not use Investment Map). For his study about the potential of Tunisian exports he made bubble graphs (directly inserted in official reports) to study the competitiveness of Tunisian exports (Benchmarking study: Tunisia, Turkey, Morocco, Portugal). He also downloads data and analyses them with another software (SPSS, a statistical software). He frequently merges ITC data with other database directly obtained from the CEPEX (10-digit data).

Strengths/ main advantages: - Very important : the detail of the data (10-digit) : in the case study he mentioned he could have access to these data because the study was for the CEPEX but in general it is very difficult to get access to these data (Ministries or customs organization are always reticent to share these data).

- Monthly data are very useful to identify some peaks

- Other databases used: FAO Statistical Database (FAOStat) but it is much less detailed than the ITC database. COMTRADE Data but the website is less easy to use. Eurostat.

- Internet based capability of MATs allows frequent updates.

Free access is fundamental as a license would be too costly. Moreover, there would be some logistic problem if Tunisians have to pay for it in dollars or in euros.

Weaknesses/difficulties encountered:

- There are many problems with MAc Map: the functioning is slow, the tool is not very ergonomic, and there are problems with the pull down menus.

- The automatic log out from the tools after 30 minutes without any activity is too rapid.

- MTIMET cannot get time series data, or online support.

- Mirror data are doubtful (how are they computed?) This is very difficult to understand for the average user suggesting a better description in the user-guide.

- Sometimes there are some bugs (e.g.: in bubble graphs, sometimes some partner countries are not represented).

Suggestions (possible improvements):

- The value of exports in local currency (and an exchange rate time series) would be very helpful (for a policy-maker the value in dollars or euros is not very informative).

- The link to online support and technical assistance should be more visible on the platform.

- All materials should be in French, Arabic should be envisaged

- It would be very helpful to have a code for organic products in the HS nomenclature.

- More indicators (for administrations which are not familiar with them and which cannot compute them by themselves) and more flexibility (e.g.: the user should be able to choose the initial and final dates for average annual growth rates), idem for the bubble graphs (the user should be able to choose the countries). In sum, more data and more explanations would be needed.

- Training sessions and seminars would be very helpful to diffuse the information widely and to train the users (Despite his competencies as an economist, Mr. Nadhem MTIMET feels that he only uses 30% of the possibilities included in the ITC MATs).

- The fact that trade data are not available for low income countries (and that we have to rely on mirror data) is a serious problem. The ITC, the World Bank and other multilateral or bilateral aid agencies should finance and provide technical assistance to low income countries for the development of their competencies (especially to collect and manage trade data in order to make them available).

This interview with someone who uses the tools extensively and has above-average (in terms of users) training suggests that the tools and their capabilities may be close to their limit in terms of usefulness until one can get from them until better data becomes available.

Sam Legare (RSA) Dept. of Agriculture, Forestry and Fisheries (ITC suggestion, Nov. 17)
Profile. Legare is a an analyst at the Trade Research desk of the Dept of agriculture, fisheries and forestry in Pretoria. There are 85 staff in the department and 5 in the division who work with the exploration of commodity markets where SA could compete.
Legare is only moderately trained in the use of the tools (until he had face to face tutoring, he knew very little of the software's capabilities. In his unit they use mostly Trademap but also MAc Map. Not surprisingly, working in an agriculture division in his response to where improvements should be made, he responded Standards map. During the conversation, it was clear that he still has a ways to go in terms of becoming familiar with the basic functions of Trademap. When asked how much of the functionalities he thinks he might master, he said perhaps 30%. There is room for more face to face training (probably with case studies in hand as the tutoring is carried out.
Usage His typical job is to explore market potential. As an example, he gave oranges. SA could export oranges, but to whom? Getting information on demand and market trends is useful for investigating potential in that market. He uses mirror data occasionally He said MAc Map was useful to give information on tariffs and rules of origin. But he said that there are many other barriers to trade, so that a more operational standards map module would be most useful.

Perhaps a case study on oranges, or for another agricultural product where standards are a barrier to entry in the major importing countries would be useful.

Future Usage. Same kind of work but the tool would be more useful if information on standards were available.
Transparency of trade. The tools make the access to trade statistics more transparent, but not international trade per se as there are so many other aspects of international trade that are hidden and not captured by the tools (probably why he finds the development of Standards map of the highest priority).
Improvements. He finds it difficult to create groups of countries (I did tell him SADC existed as he seemed not to know). He also finds it difficult to create product groups and said he had to create them every time (he uses 6 product groups he creates each time he works on them). I told him that need not be so. Clearly more focused training on how to create and save groups of products and of countries would be welcome.
Sometimes he cannot find the product he is looking for (I could not figure out what the problem was). He also said that because of the difficulty in creating the kind of product groups he wanted (for example 'agricultural products', his unit also uses World Trade Atlas (sold for a fee by Global Trade Information Services). He says that this software is much more user friendly (even though he said that it was more limited on what it could do).
He also finds it difficult to navigate around the site. For example, it is difficult to get back to previous screen, as he finds he has to go back to the home button (the button 'return to previous menu' is difficult to locate). In short, a more intuitive layout would be welcome.
Free Access. Very important. His unit is unhappy about having to pay for World Trade Atlas and might not renew. This suggests that having a free software in "competition" with a paying software might be a learning incentive for the free software (credible threat?).

Hanta RAKOTOVAO – Madagascar (random selection from users' registration database, November, 23).

Profile: Hanta RAKOTOVAO has a bachelor Degree in Law and a MBA in International Marketing. She works for two Trade Support Institution (TSI) and coordinates the relationships between the two. These are:

- The CRCI (*Centre de Ressources pour le Commerce International*). The CRCI is a Trade support institution created by private organizations and groups). It provides its members (33 small and medium enterprises) and students with information and technical assistance. The CRCI also promotes Malagasy exports.

- The FIVMPAMA (*Groupement du patronat malagache* – Malagasy entrepreneurs association), a Business Support Institution (BSI) and TSI.

Usage (purpose of): RAKOTOVAO mainly uses the ITC tools for her activity in the CRCI which provides small and medium export enterprises (or enterprises with a potential to export)

with technical assistance and information to design export strategies (identification of potential markets/products couple, marketing, identification of potential partners). The CRCI also help students as it views them as potential future entrepreneurs. Enterprises exports (or wanted to export) agricultural products (fruits, vegetables, seafood) and handicrafts). They are small enterprises and do not have the information or competencies to design export strategies.

Usage (data and functionalities): RAKOTOVAO mainly uses Trade Map and Market Access Map (twice a week on average). She does not download data but study data and indicators online, and use graph and map options.

Strengths/ main advantages: Her work would be much more complicated and time-consuming without the ITC tools: other data bases or Internet Web site (eg: the WTO) also contain the data but they are less easy to use. Moreover, the ITC tools allow make graph and maps very easy to understood for small enterprises and others which are not familiar with trade-related data and information.

Other strength=interactivity (see next paragraph).

Weaknesses/difficulties encountered:

- Sometimes minor problems with the Internet connection.

- The main difficulties concern the interpretation of the data and indicators (how to interpret a result, a tariff, an indicator?). However, when faced with such a question, RAKOTOVAO sends an email to the ITC technical assistance and receives the information she is looking for quickly. She finds this interactivity is a key strength of the ITC MATs.

- More detailed data would be very helpful or specific groups (eg: the sector of handicrafts baskets sector comprises materials for plaited baskets, baskets…etc., which correspond to many HS6 codes)

Main constraints . To better promote Malagasy exports, lack of data is a handicap but, above all, it is the lack of resources to interpret the data. There is no development strategy; no market analysis etc. Technical and financial assistance by the ITC, by the WB and by other multilateral or bilateral aid agencies to develop these capacities would be very helpful.

Suggestions: more training sessions on the tools and on trade-related data and information

RAKOTOVAO attended two training session in Madagascar and found them very useful. More training sessions would increase the usage of the ITC MATs and, more importantly, the effectiveness of usage (she and most people do not use all the functionalities of the tools).

Moreover she attended a “Trade Information Seminar” (TIS) in Geneva. The kind of information provided was mainly “theoretical”: how design an export strategy, how interpret tariff and trade related data and indicators. She found this kind of information of the utmost importance.

Training should focus on popularizing the tools in the population and within the enterprises.

More information on NTMs would be helpful as Malagasy are not familiar with them.

Free: the fact that the ITC MATs are free is of primary importance because the information provided by the CRCI is free (members pay an annual fee and students do not pay anything). The CRCI could not provide the same help and information is the access to data was not free. ITC tools certainly make International Trade more transparent to low income countries.

On the characteristics of Madagascar (many users, rank first within the SSA and low income countries group as shown in annex II), RAKOTOVAO relates this 'good' performance on usage to the training sessions in Madagascar. However, she also relativizes these figures as they do not say nothing about the impact of the tools (what users do when they are logged in a tool?)

As a conclusion, RAKOTOVAO recalled that the fact the ITC MATs are free is of primary importance.

Aleksander Jovanovic (Serbia) TSI (ITC suggestion-Nov 24)

Profile. Jovanovic works for the Regional Chamber of Commerce and Industry Valjevo. He has used ITC tools for several years. He conducts trainings in Serbia regularly for groups of about 30 persons. All participants are from companies that might or do export. He noted that participants in the training seminars usually did not know about the existence of MATs.

Usage He looks for potential markets for exports or for attracting FDI to Serbia. Recently, he used Trade Map and MAc Map to search for export potential for dried prunes from Serbia. He used Trade Map to see the main importing countries, those that were the fast growing import markets. For exporters who might want to choose between different markets, it is useful to know the market access in different countries. He does not think that Standards Map is very useful as exporters usually do know the technical barriers in the market they are likely to export to. But they do not know how the legal requirements, some of which are available in MAc Map.

Jovanovic does not use Investment (although he has not checked in the last 6 months). Previously, he could not find the information that would have helped him attract FDI to Serbia. Taking as an example and import-substituting industry (metal sector or plastics), he could not find the names of companies that had FDI in Serbia in that sector. He noted, however, that at that time, the data was much better for Turkey. This might be potentially useful for him if he can get names of companies to contact who have already invested in another country similar to Serbia. He could then contact them to try and attract them to Serbia.

Future Usage. He does not find Investment Map useful (mentioned that MAc Map, no longer updated was useful to get names of companies). At this stage, Investment Map does not work well for Serbia as there is not information. He said that he thinks the information is likely to be useful in some other countries, e.g. Turkey.

Free usage of the tools. For him, MATs are still the best free resource in the world for developing countries. He knows that for his TSI, the management would not pay for it, even though they probably could. The argument is that "firms have done without it until then, so why pay now" The typical free-riding problem. Global Trade International Services provides some of the same in-depth information, but it is very expensive.
Internet connections and user friendliness.. No internet connection problems in Serbia. He finds the tool user-friendliness adequate for those he trains. He notes that those who have difficulties are those who are not familiar with working and surfing on the web in their daily work
Improvements. Prices and contacts.
Prices are of great interest to exporters. The unit values from the database are close to useless. There is a need for better price information. DATAMYNE (http://www.datamyne.com/) offers such a service, i.e. prices computed at the product level from customs information at the transaction level by customs from invoice data. The information does not give you the name of the company (for disclosure reasons), but, according to Jovanovic, the tool gives data on prices (including the value of packaging) for each transaction so this information would be more useful for exporters. He could have used that information in his recent study of the market for dried prunes. Apparently the data is available for 50 countries, but it is too expensive to purchase for developing countries. He would like to see that information included in the Trademap.
For contacts, Jovanovic would like to see an improvement in Investment Map so that potential firms in import-competing sectors (like plastics and metals mentioned above) could get names of companies that might be potentially interested in FDI in their sectors.

Grant Vinning (Solomon Islands, fiji) Consultant (ITC suggestion, Nov 24)
Profile. Vinning is a free-lance consultant under contract from the Australian government. In a recent assignment, he worked with cocoa exporters in the Solomon island. Due to differences in time zones and conflicting schedules, we could not arrange an interview, but he kindly filled out the questionnaire

Answers to questionnaire
- *"As a way to start our conversation, would you please describe your institution and the type of work you are doing in it?"*

I use Trademap data in my current project with cocoa exporters from the Solomon Islands. I also use the data in my Asian Development Bank assignment in Nepal and the FAO/USAID project in Pakistan (apples and lamb to Middle East). All three are on-going (and it isn't easy juggling all three, trust me.

- *"This expression (MAT) refers to the three tools that are contained in the software: (i) Trade Map; (ii) Market Access Map; (iii) Investment Map. Do you use these three tools or only some of them?"*

Only Trade Map but I suspect that my forthcoming flower work will require accessing MAc Map.

- *"For what purposes or in which contexts do you use these tools?" for example do you use these tools to design the export/import strategy of your enterprise?*

YES – with cocoa I used the data to show we needed to shift our focus away from Singapore to Malaysia and Indonesia

- *"Can you give me a concrete and detailed example (for example the subject of your last report, the purpose and results of the last time you used the tools in the context you have just described)?"*

I used Trademap in a recent report with A. Ramo "The World cocoa Industry: A Solomon Island Perspective" Honiara, Oct. 2010. The Trademap data was used to detect trends in import values of cocoa over the period 2001-09 for all countries and exports of all the major exporters as well as imports from the Solomon's main trading partners.

- *"Would you say that in this specific case, the analysis you carried on would not have been possible without MATs?"*

YES

- *"Why?"*

Solomon Islands just do not have the resources to have trade offices/officers in the countries. Before I used the ITC data, Solomon Islands depended on its exports stats to determine destination, a practice that totally ignored the fact that once at sea the buyer can legally and legitimately re-direct the final destination for the product. Thus, import data from various countries give a vastly different picture compared with a country's export data. It is the former that is important, not the latter.

- *"Perhaps you can tell us how you did this work before having access to ITC/MAT or yet again that you did not carry out the analysis that you can do with MAT"*

Because of my experience (after all that s why I was hired) I used to use import data from Singapore. But it is awfully expensive to go from the Solomons to Singapore just to collect stats. Same for Malaysia and Indonesia.

- *"What do you do precisely when you are using the tools? Do you look at the data online, do you download data and analyze them with another software (which?), do you use graph and maps* **YES** *(and include them in your reports* **YES***?) Do you use the simulation tool?" Etc.*

- *"Do you use another software or another website to find or use similar trade-related data and tools? If yes, which?"*

I do use FAOSTAT but that data does not give the same ease of access for cross-checking like the ITC data: i.e I can see what Singapore says it sends to Malaysia and then I can check Malaysian figures to see what it says it gets from Singapore.

- *"What are the main weaknesses of the ITC MATs you use?"*

- *"Have you ever experienced difficulties?" (Web connection, problems with your navigator (e.g. Firefox), problems with technical assistance, do not succeed to find an information…)"*

On line connection in the Solomons is pretty crappy but that is a Solomons problem not the ITC's

- *"Could you give an example when such weaknesses have prevented you to carry out your work?"*

Mainly connectivity

- *"Do you use Trade Map / MAc Map / Investment Map as much as you need?"*

Yes but my forthcoming flower work may require more

- *"What type of information or data might you want to see included in the MATs?"*

I am happy with what I get as I have other sources for other data

- *"What type of functionalities or option might you want to see included in the MATs?"*

- *"Do you feel that you need more practical training on how to use the MATs, e.g. more explanation on the different possibilities, on the available information?"*

No, I am a happy

- *"Do you feel that you need more theoretical information on trade-related data or analysis, e.g. how can I design an efficient export strategy?"*

No – for an export strategy one needs vastly more data than what MAT can reasonably be expected to provide: most of the data needed for this is internal, ie capacity to supply, but also shipping, quality of containers and pre-financing just to name a few external parameters. Alas, we have more theoretical export strategists than we have real trade opportunities. You pick up a certain bias there.

What are the different types of trade indicators and how can I analyze them, etc."

- *"Would you say that your work would be more difficult or of a lower quality without the resources provided in MATs?"*

It would have been a lot damn harder and vastly more expensive. I could have done it but with MATS it is a lot easier. What has been a real plus for me is that MATS allow me to train others how to access, and then draw conclusions about the data. Funding just would not have allowed me to take three people from Solomons to Singapore, Malaysia, Indonesia just to collect stats (and people from Pakistan to Dubai and Abu Dhabi; and Nepalese on tea to ….., you get the picture)

- *"Would you say that MATs make international trade more transparent?"*

No. Trade stats do not tell you trade deals: for example the stats don't tell what comes in on a split TT basis, nor what are costs associated with selling FOB versus CIF nor what are hidden costs (such as "facilitation fees" for various import inspections)

- *"What other support / program would help you in your trade activities?" OR "what are the main constraints to the development of your trade- or investment-related activities?"*
Information about buyers – who is trustworthy, who will give you unnecessary grief in being picky over the most minute detail (bag tags to take the latest example from the Solomons)

- *"Do you have any additional comments or suggestions about the ITC MATs?"*

Please don't stop it – keep making it available

2. INTERVIEW WITH THE ITC STAFF (SUMMARY)

The objectives of this interview (TOR) was to identify the main activities taken during the grant period (focusing on data collection and dissemination processes) as well as looking at main challenges, issues, and lessons learned. We let the following persons of the Market Analysis and Research (MAR) staff during a group interview (November, 25):

- Helen Lassen (Manager, Capacity Building Programmes)
- Mondher Mimouni (senior economist)
- Christian Delachenal (senior market analyst)
- Christophe Durand (quantitative market analyst)
- Pitchaya Sam Eam-On (market analyst)
- Ursula Hermelink (tariff and trade data collection)
- Olga Skorobogatova (market access consultant)

ACTIVITIES UNDERTAKEN SINCE THE BEGINNING OF THE GRANT (2008).

MAR Staff first recalled that their activities were directed towards achieving their mandate to help the private sector in developing countries to develop.

DATA COLLECTION, CLEANING AND PROCESSING

Data collection: MAR staff started developing MATs about 8 years ago with help from the European Commission. The objective was to increase country coverage to over 200 countries. Data is obtained from COMTRADE and the WTO for bound tariffs and applied tariffs whenever possible. However, because countries do not systematically report applied tariff data to the WTO, ITC staff have developed contacts to get the data directly. This has led MAR staff to contact the following in-country institutions when data is not available from the WTO IDB (Integrated Data Base):

- Customs authority

- Ministry of finance

- Ministry of Trade

This allows MAc Map to cover 191 countries of which 150 are updated regularly.

Investment Map presents difficulties because the FDI country/sector breakdown is generally not easily available. As a result coverage is less than for Trade Map and Mac Map. ITC collects data on investment through direct contacts with national authorities and through the web, and buys data on foreign affiliates of TNC's.

Coverage for NTM data is out-of-date (current data is for 2004). Dfid is financing the collection of detailed up-to-date data with the hope of obtaining coverage for 50 countries in the next two years (currently coverage is 18 countries).

Data cleaning and processing: MAR staff clean data (e.g. dropping outliers and replacing them with estimates on the basis of time-series estimates). However, when too many data are missing, these data are not published and replaced by missing data.

Data cleaning and processing = 4 full time persons for Trade Map and 4 others for MAc Map and 1 full-time for Investment Map.

INCREASING USAGE IN LOW INCOME COUNTRIES

During the three-year period, the second objective was to increase the accessibility of tools for developing-country users, especially in low-income countries.

Different activities were undertaken (see details provided by ITC staff in annex VII):

A **light version** of Trade Map and Investment Map were developed for users with low band width (users do not have to be logged in this version, which allow a light functioning).

Adding many '**metadata'** (i.e. explanations on what the indicators capture, some global information on countries, indications when the data are estimated, how to interpret the figures and the data, and methodology used for estimated data).

A **Common User Management (CUM)** was launched in 2008 to link the three tools to exploit the interconnectedness of the information across the three tools. Now users only need to login once and they have access to the three tools.

Results: Trade statistics show that the light version is the most used in the ITC web site, and they are very well referenced in Google analytics.

TRAINING AND DISSEMINATION PROCESS

Training: A change in the approach to training has taken place as the two-day presentations provided by external consultants have been abandoned after learning about the poor results due in part to the very heterogeneous group of users (for example, researchers read the manual and find the information they need, while many others do not). A change in strategy took place (see details provided by ITC staff in annex VII). The new approach

- Focuses on LICs, LLDCs, SIDs, and SSA
- "Training the trainers" with training over a 6-month period: 3 weeks training in ITC, followed by homework; theoretical training on how to identify markets… to create real capacities)..
- Technical staff from the ITC participate and carry out the training (this gives feedback leading to any improvements)
- Courses are differentiated (segmented) according to the type of user (e.g. enterprises, enterprises and TSI, PhD students…). (CEPEX/ Ag Module, MEGC)

MAR staff now evaluates the impact of its training by:

- Baseline test before the beginning of the training and a test after the training.
- Satisfaction survey
- Follow up (what have the trainees done 6 or 12 month later).

Technical assistance: Many of the questions asked by users are already answered in the FAQS. MAR staff try to teach the user instead of providing them with data (i.e. screen captures). This is because users do not read manual or watch registered online courses as it is easier to send an e-mail to the staff (and the link "contact us" is more visible). This came out as well from our phone interviews: users do not find online courses, and want the user manuals in their language.

Promotion: UNCTAD virtual institute, newsletter. ITC is trying to be referenced in Google but this still has not occurred for legal reasons. Google, YouTube and Facebook have different Terms and Conditions, some of which may not be compatible with the UN status of ITC. Facebook or other social media would be very helpful for promotion as it relies on huge network effect. Using Facebook has been suggested in some phone interviews.

MAIN DIFFICULTIES DURING THE IMPLEMENTATION OF THE TOOLS

- Data collection to increase the number of countries has proven to be very difficult. For example, some countries do not have a full national tariff schedule (e.g. only 2000 national tariff lines in some islands even if they are WTO members.
- Cleaning and processing the data has proven to be very time-consuming (e.g. data received in pdf format had to be digitalized, then cleaned and finally uploaded). The major part of resources is allocated to data collecting, cleaning and processing.

- Many bugs has to be addressed CUM was launched.
- MAc Map: all the resources (2-3 full time persons) have been put on the development of the new version which should be launched in December 2011 or early 2012. So ITC cannot put the same number of persons on the maintenance of the old version (staff only upload data which thus mechanically leads to a deterioration of the quality of navigation on the website as it contains more and more data that is not maintained).
- The new MAc Map needs a powerful server. This costs 130,000$ per year. The capacity of the server for the new MAc Map is about 8 terra (i.e. seven times the former). A large capacity is required because the MAc Map will include tariffs since 1986. This will be welcome by academics and to a lesser extent by economists in government. It is not clear whether this allocation of computing power to historical data is what is needed most by the private sector whose forward-looking decisions rely mostly on the availability of data for the past few years.
- MAR staff do not know how to improve Investment Map. They plan to hire a senior consultant (expert) to make recommendations on how to improve Investment Map.

LINKS WITH OTHER ORGANIZATIONS / POSITIONING IN THE MARKET

The WTO has to get the official authorization of member countries to use their data (and so the data of the ITC) as official materials for negotiations. Apparently, the EU bought the FEDEX data but only HS6 and one year later (delay) for 1.45$ million. The EU gives their data to TRAINS, WTO (IDB), and WITS.

MAR staff do not view WITS as a direct competitor because they do not build databases (only one portal) but as a 'peer'. Other peers: COMTRADE (complementary for annual data but monthly trade data and NTL data remain the comparative advantage of MATs). More direct competitors are for-pay providers (e.g. FEDEX and World Trade Data).

Funding arrangements: MAc Map will be free as a part of the ITC-WB joint Transparency in Trade (T&T) proposal. Trade Map and Investment Map will continue to be available for a modest fee (WALLMART pay 900$ per year for a global license for all their employees) for developed countries. The main reason for charging a fee is that ITC (like all international organizations are not allowed to compete with private sector (e.g. Global Trade Atlas). In fact it would be less costly to provide data free-of-charge even for developed countries than to pay for processing the contracts. However, MAR staff see a great signal value in having big MNCs as customers which they could exploit for branding.

V. E-mail questionnaire

The following questionnaire was sent to 36,483 users who were randomly selected from the data base of what we refer to as “active users” (i.e. the 73,022 users who have an activated and not expired account and who logged at least one time after the day of registration – see Annex III).

At the request of the ITC we asked some of the same questions that were already asked in the October 2010 survey (which was administered to 60,414 users in June 2010 and received a response rate of 8.5% i.e. 5,400 usable answers). This questionnaire asked 17 questions. As ITC is planning to administer another questionnaire in early 2012, we were asked by ITC to minimize ‘questionnaire fatigue’ and not to ask more than 13 questions. It was also decided to select randomly half of the 73,022 active users. (More precisely, half of 72,966 as 56 e-mails addresses are not valid). The web-based survey was thus sent to 36,483 users with the aim of getting around 1,500 responses (on the assumption of a 3.5% response rate). Because of time constraints, a two-week period was given for answering the survey with one recall at the end of the first week.

The questionnaire was first sent out on October, 25, 2011. Respondents were asked to send answers as of 09 November. By November 1, we had received 1,000 answers. A reminder was sent to those who had not answered on November, 1, 2011. As of November 10, we received 1,942 answers with 1,781 questionnaires fully completed.

Below is the English version of the questionnaire (Spanish and French versions were sent out as well).

(*) ***indicates a mandatory field***

(*) Q1. Please select your status or the type of organization that best describes the one you work for or represent:

- Large enterprise (more than 250 employees)
- Medium size enterprise (50-250 employees)
- Small enterprise (10-49 employees)
- Micro enterprise (less than 10 employees)
- Independent / individual (e.g. individual entrepreneur, consultant (including in consulting firm)…)
- Export / Import support organization (i.e. for-profit or non-profit entity offering trade-related services e.g. exporters' association, producers' organization, chamber of commerce, fair trade organization...)
- Business support organization (i.e., for-profit or non-profit entity offering business-related services e.g. producers' organization, cooperative…)
- Investment Promotion Agency or association
- Non-Governmental Organization (e.g. development agency, Think Tank)
- Government, ministry, embassy, mission, customs
- International organization (e.g. the World Trade Organization, the World Bank, the UNCTAD, …)
- Academia (e.g. school, university, research institute, business school..., including student)
- Other, please specfiy:

(*) Q2. In which country are you normally based?

To quickly find your country, click on the combo -box to expand it and start typing the first letters of your country. A match will quickly appear

Q3. Which of the following market analysis tools have you used? (you may select more than one option)

- ☐ Trade Map (trade indicators, time series on a yearly, quarterly or monthly basis, etc.)
- ☐ Market Access Map (tariffs applied by countries, tariff simulation, etc.)
- ☐ Investment Map (FDI data, foreign affiliates contact data, etc.)
- ☐ None of the above

Q4. Have any of these tools made it easier for you to obtain global trade, tariff or investment data compared with other databases / tools that you used previously?

- ○ Yes
- ○ No
- ○ Don't know
- ○ Not applicable

Q5. Has the fact that these tools have been free to developing countries since 2008, made a difference in helping you to obtain trade, tariff or investment data?

- Yes
- No
- Don't know
- Not applicable

Please explain

Q6. Have you found the quality of the data in any of the tools better than what you were able to obtain prior to using ITC's tools?

- Yes
- No
- Don't know
- Not applicable

Q7. How do you use the following functionalities of the ITC Market Aanalysis Tools?

	Daily	A few times a week	A few times a month	A few times a year	Never	Don’t know
I study data and indicators online (e.g. tables on exports, market shares, tariffs, etc.)						
I download data and analyze them with another software (e.g. Excel)						
I use the graphics and maps provided in the tools						
I use the tariff simulation tool (Market Access Map)						
Other (answering here will allow you to specify)						

Q8. For what purpose(s) do you use the ITC Market Analysis Tools (Trade Map, and/or Market Access Map, and/or Investment Map)?

	Daily	A few times a week	A few times a month	A few times a year	Never	Not applicable
For your information only	○	○	○	○	○	○
To design or validate export / import strategy or decisions (for your enterprise / country / clients / members)	○	○	○	○	○	○
To design inward/outward investment strategy (e.g. identify potential sectors and investors, for your enterprise / country / clients / members)	○	○	○	○	○	○
For research / academic work	○	○	○	○	○	○
To write reports in your institution (e.g. export support organization, Ministry, …)	○	○	○	○	○	○
To contact a transnational company	○	○	○	○	○	○
To prepare trade negotiations (e.g. multi- or bilateral negotiations)	○	○	○	○	○	○
Other (answering here will allow you to specify)	○	○	○	○	○	○

Q9. In the different ITC Market Analysis Tools, do you find the information (e.g. data) or functionalities (e.g. graph, tables) you are looking for?

	100% of the time	75% of the time	50% of the time	25% of the time	0% of the time	I don't use this tool	Don't know
Trade Map	○	◉	○	○	○	○	○
Market Access Map	○	○	○	○	○	○	○
Investment Map	○	○	○	○	○	○	○

Q10. Please rank the additional trade-related data and features that you might want to see included in the ITC's Tools.
(1 =most useful, 7=least useful, each rank can only be selected once)

	A more effective way to download data	More indicators (e.g. Revealed Comparative Advantage)	More information on Non-Tariff Measures (e.g. mandatory technical standards, health and safety regulations)	More information on companies and their affiliates (e.g. detailed activities, contact address)	More training on how to use trade related data and interpret trade indicators	Access to the tools via smart phone application	Other (please specify hereunder)
1st (most useful)	○	○	○	○	○	○	○
2nd	○	○	○	○	○	○	○
3rd	○	○	○	○	○	○	○
4th	○	○	○	○	○	○	○
5th	○	○	○	○	○	○	○
6th	○	○	○	○	○	○	○
7th (least useful)	○	○	○	○	○	○	○

If you answered "Other", please specify:

Q11. What are your other sources of information and analytical tools about international trade (e.g. online databases on tariff and trade)?
(please leave blank if you do not use any other sources)

1.
2.
3.

Q12. How often do you use them compared with the ITC Market Analysis Tools?

	A lot more often	More often	The same	Less often
wits	○	○	○	○

Q13. Have ITC Market Analysis Tools had an impact on your business (Trade Map, Market Access Map, Investment Map)?
(You may select more than one option)

- ☐ Yes, they have improved my awareness about international trade
- ☐ Yes, they have improved my decisions about export or import (e.g. which countries to export to or which countries to source from)
- ☐ Yes, they have improved the services I provide to others (e.g. advice provided to exporting companies)
- ☐ Yes, they have helped in designing the trade related policies of my country
- ☐ No, they did not have an impact, positive or negative
- ☐ They had a negative impact on my business

☐ Don’t know

☐ Not applicable

Q14. How did you hear about ITC Market Analysis Tools (Trade Map, Market Access Map, Investment Map)?

○ Searching the Internet with a search engine (e.g. Google)

○ Word of mouth (e.g. colleagues)

○ A Trade Support Organization in my country (chambers of commerce, export promotion agencies…)

○ ITC (e.g. web site, training, communication from ITC staff, etc.)

○ WTO

○ UNCTAD

○ The World Bank

○ A university

○ A Non-Governmental Organization

○ Don’t know

○ Other, please specfiy:

Please provide here any additional comments or suggestions that you may have regarding:

All three ITC Market Analysis Tools:

Trade Map:

Market Access Map:

Investment Map:

VI. Summary of results of the Web-based survey

Q1 & Q2 – What are your status? In whihch country are you normally based?

Table VI-1 – Geographical distribution of WBS respondents

	Respondents		Active users	
	Nb (A)	Percent (B)	Nb (C)	Percent (D)
WB regions				
East Asia & Pacific	163	9.2	5,252	7.2
Europe & Central Asia	171	9.6	6,255	8.6
Latin America & Caribbean	891	50.0	43,891	60.1
Middle East & North Africa	123	6.9	6,402	8.8
South Asia	111	6.2	4,465	6.1
Sub-Saharan Africa	195	11.0	4,234	5.8
(missing or high income)	127	7.1	2,523	3.5
Total	1,781	100	73,022	100
WB Income groups				
High income countries (HICs)	121	6.8	2,411	3.3
Low income countries (LICs)	126	7.1	2,979	4.1
Lower middle income countries (LMICs)	419	23.5	15,690	21.5
Upper middle income countries (UMICs)	1,109	62.3	51,830	71.0
(*missing*)	6	0.3	0.15	0.2
Total	1,781	100	73,022	100

As can be seen comparing columns B and D, LICs, HICs and SSA countries over-responded. All answers are weighted by the country weight in the population.

Table VI-2 below shows that academics are underrepresented in the WBS answers. On the contrary, governments and, to a lesser extent, enterprises are overrepresented.

Table VI-2 – Distribution of WBS respondents across categories of users

	Number		Percent	
ACTIVITY	Respondents	Active users	Respondents	Active users
Government or mission	271	8,092	15.2	11.1
Independent/Individual	201	7,179	11.3	9.8
International organisation	27	1,049	1.5	1.4
Large enterprise (> 250 employee)	205	1,294	11.5	1.8
Medium enterprise (50-250 employees)	138	1,390	7.8	1.9
Small enterprises (10-49 employees)	151	1,638	8.5	2.2
Micro enterprises (< 10 employees)	144	1,398	8.1	1.9
Private company		5,025		6.9
Services		2,348		3.2
Trade Support Institution (TSI)	118	4,970	6.6	6.8
Business Support Instituion (BSI)	61		3.4	
Investment Promotion Agency (IPA)	21		1.2	
Academia	343	18,951	19.3	26.0
NGO	62	374	3.5	0.5
Other	39	19,314	2.2	26.5
Total	1,781	73,022	100	100

Q3 – Do you use Trade Map, Market Access Map, Investment Map or none?

94% of the users use Trade Map, 64% use MAc Map, and 32% use Investment Map. 27% of the users (452 users) declare that they use the three tools (Trade Map, Market Access Map, and Investment Map) (see also the Venn Diagram in the main report, figure 5a). 4% of the respondents declare that they do not use any of the tools (and answer the questionnaire).

Q4 - Have any of these tools made it easier for you to obtain global trade, tariff or investment data compared with other databases / tools that you used previously?

On average, 85% of the users declare that it is easier to obtain data, and 7% answer no this questions. Tables that follow present results by income group, region, and type of user.

Table VI-4a - Q4 (easier to obtain data?), by income group

	HICs	UMICs	LMICs	LICs	Total
Yes	72.9%	86.7%	87.3%	93.0%	84.7%
No	20.7%	3.4%	2.5%	1.0%	7.0%
Don't know	1.0%	5.3%	5.1%	3.9%	3.7%
n.a. or missing	5.5%	4.6%	5.2%	2.2%	4.6%
Total	100%	100%	100%	100%	100%

Table VI-4b - Q4 (easier to obtain data?), by region

	EAP	ECA	LAC	MENA	SA	SSA	Total
Yes	89.7%	85.7%	85.2%	88.5%	94.9%	90.7%	84.7%
No	0.5%	2.8%	1.0%	0.1%	1.9%	4.0%	7.0%
Don't know	2.7%	8.4%	8.5%	1.8%	1.1%	3.0%	3.7%
n.a. or miss	7.1%	3.2%	5.4%	9.7%	2.2%	2.4%	4.6%
Total	100%	100%	100%	100%	100%	100%	100%

Table VI-4c - Q4 (easier to obtain data?), by type of user

	TSI	BSI	IPA	Academia	Gov	Inter, O	NGO
Yes	**97.3%**	**97.9%**	**100.0%**	64.4%	93.4%	69.6%	90.6%
No	0.6%	0.0%	0.0%	25.7%	2.2%	10.1%	1.5%
Don't know	0.0%	0.1%	0.0%	1.5%	3.5%	17.2%	0.5%
n.a. or missing	2.1%	2.0%	0.0%	8.4%	0.9%	3.1%	7.4%
Total	100%	100%	100%	100%	100%	100%	100%

	Large en	Medium e	Small en	Micro en	Independ	Other	Total
No	94.4%	76.4%	89.9%	82.4%	77.7%	83.6%	84.7%
Yes	2.4%	**21.7%**	0.2%	2.3%	7.5%	0.6%	7.0%
Don't know	0.5%	0.6%	2.7%	1.9%	8.5%	15.2%	3.7%
n.a.	2.7%	1.3%	7.2%	13.5%	6.3%	0.6%	4.6%
Total	100%	100%	100%	100%	100%	100%	100%

Note: Figures in bold indicate one standard-deviation beyond the mean

Q5. Has the fact that these tools have been free to developing countries since 2008, made a difference in helping you to obtain trade, tariff or investment data?

On average, 76% of the users say that the free access makes a difference, and 11% answer that it does not make a difference. Not surprisingly, the poorer the country, the more important is free access:

Table VI-5a – Q5 (free makes a difference ?), by income group

	HICs	UMICs	LMICs	LICs	Total
Yes	52.6%	78.4%	86.6%	86.9%	76.3%
No	29.9%	5.3%	5.2%	4.7%	11.3%
Don't know	3.0%	10.6%	6.2%	5.4%	6.1%
n.a. or missing	14.6%	5.7%	2.0%	3.1%	6.3%
Total	100%	100%	100%	100%	100%

Free access appears to be even more important for East Asia & Pacific and Sub-Saharan countries and, to a lesser extent, for LAC and MENA countries.

Table VI-5b – Q5 (free makes a difference ?), by region

	EAP	ECA	LAC	MENA	SA	SSA	Total
Yes	**91.9%**	70.2%	**82.5%**	79.2%	65.4%	91.1%	76.3%
No	2.9%	**16.3%**	4.6%	2.4%	1.4%	1.2%	11.3%
Don't know	3.8%	12.7%	7.4%	1.6%	31.4%	4.7%	6.1%
n.a. or missing	1.4%	0.8%	5.6%	16.7%	1.8%	3.0%	6.3%
Total	100%	100%	100%	100%	100%	100%	100%

Free access is more important than the average for BSI, IPA, and, to a lesser extent, NGO and micro or small enterprises. It seems less important for International organization and academics.

Table VI-5c – Q5 (free makes a difference ?), by type of user

	TSI	BSI	IPA	Academia	Gov	Inter, O	NGO
Yes	65.6%	**96.9%**	**96.5%**	49.7%	85.1%	57.4%	88.3%
No	1.3%	1.1%	0.0%	**38.6%**	2.8%	15.6%	1.4%
Don't know	20.4%	0.0%	3.5%	8.1%	3.1%	17.2%	1.3%
n.a. or missing	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	100%	100%	100%	100%	100%	100%	100%

	Large en	Medium e	Small en	Micro en	Independ	Other	Total
Yes	81.5%	64.1%	82.9%	86.4%	90.0%	79.2%	76.3%
No	8.6%	**26.0%**	5.1%	4.2%	2.8%	17.6%	11.3%
Don't know	4.7%	6.0%	4.8%	1.2%	2.1%	2.7%	6.1%
n.a. or missing	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	100%	100%	100%	100%	100%	100%	100%

Note: Figures in bold indicate one standard-deviation beyond the mean

Q6 Have you found the quality of the data in any of the tools better than what you were able to obtain prior to using ITC's tools?

Q6 bis: If yes, indicate the tool(s) where you find the quality better.

71% of the respondents have answer "Yes". However, if we consider only those who have indicated at least a tool where they find the quality better, this percent reduces to 50% (ie 50% do not have answered the question or have answered "no"). 46% indicate that quality is better in Trade Map, 20% that quality is better in MAc Map, and only 6% indicate that quality is better in Investment Map. Tables that follow present result to question 6 (do you find the quality better…) by region, income group and type of user.

Table VI-6a – Q6 (quality better ?), by income group

	HICs	UMICs	LMICs	LICs	Total
Yes	70.5%	81.7%	67.7%	64.8%	70.8%
No	12.5%	12.5%	11.8%	17.5%	13.3%
Don't know	11.1%	3.5%	16.6%	11.9%	11.4%
n.a. or missing	5.9%	2.3%	3.9%	5.7%	4.6%
Total	100%	100%	100%	100%	100%

Table VI-6b – Q6 (quality better ?), by region

	EAP	ECA	LAC	MENA	SA	SSA	Total
Yes	72.2%	63.7%	63.5%	74.9%	48.9%	77.8%	70.8%
No	5.2%	13.4%	22.3%	10.1%	38.3%	11.9%	13.3%
Don't know	20.1%	20.4%	8.8%	4.7%	11.1%	6.1%	11.4%
n.a. or missing	2.5%	2.5%	5.4%	10.3%	1.8%	4.3%	4.6%
Total	100%	100%	100%	100%	100%	100%	100%

Table VI-6c – Q6 (quality better ?), by type of user

	TSI	BSI	IPA	Academia	Gov	Inter, O	NGO
Yes	63.8%	82.1%	**91.6%**	68.6%	64.3%	53.8%	74.1%
No	17.2%	5.3%	1.3%	12.4%	15.1%	**37.7%**	8.7%
Don't know	16.8%	4.6%	7.1%	14.4%	18.9%	5.4%	7.0%
n.a. or missing	2.3%	8.0%	0.0%	4.6%	1.8%	3.1%	10.2%
Total	100%	100%	100%	100%	100%	100%	100%

	Large en	Medium e	Small en	Micro en	Independ	Other	Total
Yes	79.2%	**85.7%**	72.9%	72.8%	72.6%	64.7%	70.8%
No	7.8%	8.5%	10.1%	12.4%	15.4%	14.6%	13.3%
Don't know	9.2%	3.4%	8.3%	6.5%	4.9%	20.2%	11.4%
n.a. or missing	3.9%	2.4%	8.7%	8.3%	7.1%	0.6%	4.6%
Total	100%	100%	100%	100%	100%	100%	100%

Note: Figures in bold indicate one standard-deviation beyond the mean

Q7 How do you use the following functionalities of the ITC Market Analysis Tools?

We study the answer by type of user (rows percent = who downloads data, who use graph and map options, etc.; columns percent = what is each type of user doing?). Figures in (***italicized***) **bold** indicate one standard-deviation (***under***) **beyond** the mean.

What is each type of user doing? (Column percent)

Table VI-7a Study data online	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Other	Small en	TSI	Total
Daily	0.2%	0.5%	3.1%	**8.7%**	0.7%	0.4%	0.9%	4.6%	4.2%	2.1%	0.0%	0.2%	**8.5%**	2.3%
Few times a week	8.8%	**33.6%**	12.7%	**31.5%**	9.2%	***0.5%***	**47.7%**	19.2%	4.5%	14.7%	***1.9%***	13.4%	25.5%	16.5%
Few times a month	25.5%	28.0%	34.2%	**45.2%**	30.5%	***11.3%***	***14.7%***	***14.5%***	21.1%	24.3%	24.9%	19.5%	**44.6%**	26.9%
Few times a year	61.3%	34.2%	40.1%	***14.2%***	51.2%	**82.7%**	***25.7%***	57.2%	57.6%	46.8%	**68.0%**	59.1%	***19.0%***	47.3%
Never	2.5%	0.0%	**7.6%**	0.3%	0.0%	1.0%	**8.7%**	0.2%	3.5%	0.0%	2.0%	0.1%	0.0%	2.7%
Don't know	0.0%	0.0%	**0.7%**	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	**0.5%**	0.2%
missing	1.6%	3.8%	1.7%	***0.0%***	**8.4%**	4.1%	2.3%	4.3%	**9.1%**	**12.2%**	3.2%	7.6%	1.9%	4.2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-7b Download data	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Other	Small en	TSI	Total
Daily	0.1%	0.5%	2.5%	0.0%	0.1%	0.0%	1.5%	**4.6%**	**3.7%**	0.0%	0.0%	2.9%	**3.4%**	1.5%
Few times a week	10.0%	**27.3%**	8.1%	14.8%	3.6%	3.3%	**44.3%**	13.0%	5.5%	6.4%	***0.3%***	5.7%	17.4%	12.4%
Few times a month	21.7%	30.8%	41.9%	**65.0%**	37.4%	15.9%	17.7%	18.1%	15.5%	36.7%	***5.1%***	17.6%	**46.9%**	28.7%
Few times a year	**57.4%**	16.5%	34.1%	***10.4%***	30.5%	**76.3%**	21.5%	33.3%	48.5%	42.6%	19.9%	33.2%	17.5%	35.4%
Never	4.7%	13.4%	8.2%	***0.3%***	15.1%	***1.0%***	8.9%	**24.5%**	11.3%	4.3%	9.5%	**21.7%**	5.4%	9.5%
Don't know	0.1%	3.8%	0.6%	0.0%	0.0%	0.5%	0.0%	1.9%	0.0%	0.0%	**32.6%**	3.8%	0.6%	2.7%
missing	5.9%	7.7%	4.7%	9.5%	13.2%	***3.1%***	5.9%	4.7%	15.5%	10.0%	**32.6%**	15.2%	8.8%	9.8%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-7c graph & map	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Other	Small en	TSI	Total
Daily	0.2%	0.0%	**1.9%**	0.0%	0.0%	0.0%	0.2%	1.2%	**2.9%**	0.0%	0.0%	0.0%	**3.1%**	0.8%
Few times a week	8.1%	7.5%	3.9%	**13.2%**	2.4%	2.9%	4.4%	**12.0%**	***1.1%***	3.4%	***0.1%***	10.5%	**15.2%**	6.3%
Few times a month	16.9%	18.5%	21.7%	27.3%	24.7%	***0.8%***	**52.2%**	11.3%	15.4%	5.2%	***2.5%***	11.1%	**35.7%**	20.9%
Few times a year	49.7%	51.9%	32.1%	***13.5%***	26.1%	**57.1%**	***12.8%***	39.1%	55.1%	**57.7%**	**62.9%**	40.2%	28.3%	39.1%
Never	9.9%	***6.4%***	28.8%	**38.8%**	27.3%	**33.0%**	24.5%	26.1%	10.6%	***7.3%***	***1.4%***	21.9%	8.5%	18.3%
Don't know	**4.7%**	**6.7%**	0.8%	0.0%	0.7%	0.0%	0.4%	0.0%	0.2%	0.9%	0.1%	1.1%	1.2%	1.5%
missing	10.4%	9.1%	10.9%	7.1%	18.8%	6.2%	***5.6%***	10.3%	14.8%	**25.6%**	**33.0%**	15.2%	8.0%	13.1%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-7d simulation tool	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Other	Small en	TSI	Total
Daily	0.2%	0.0%	**2.2%**	0.8%	0.1%	0.0%	0.1%	0.1%	**2.5%**	**2.1%**	0.0%	0.0%	0.0%	0.7%
Few times a week	5.8%	**26.5%**	1.9%	**28.4%**	1.5%	0.6%	**44.7%**	10.8%	3.3%	3.3%	13.1%	3.2%	7.4%	10.2%
Few times a month	5.2%	21.4%	**34.4%**	1.9%	**34.5%**	2.9%	8.6%	11.2%	7.3%	8.1%	***0.6%***	8.5%	**38.7%**	17.0%
Few times a year	**45.0%**	21.2%	19.5%	***6.2%***	18.3%	**41.9%**	***10.0%***	25.8%	**41.1%**	12.5%	***1.7%***	37.1%	29.9%	25.4%
Never	24.5%	***11.8%***	24.9%	**48.8%**	18.3%	16.1%	28.0%	**43.6%**	17.3%	30.6%	23.9%	***12.0%***	***8.4%***	22.2%
Don't know	8.0%	6.7%	3.6%	2.3%	6.5%	**32.3%**	3.3%	0.3%	6.9%	22.5%	**40.9%**	2.3%	3.0%	9.3%
missing	11.2%	12.4%	13.6%	11.6%	20.8%	***6.2%***	***5.2%***	8.2%	21.7%	21.0%	19.9%	**36.8%**	12.5%	15.3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Who use the different functionalities? (Row percent)

Table VI-7e Study data online	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Other	Small en	TSI	Total
Daily	***1.5%***	1.0%	20.2%	**10.8%**	3.1%	0.8%	3.8%	**7.8%**	**9.8%**	5.2%	***0.0%***	0.6%	**35.5%**	100%
Few times a week	8.4%	**9.4%**	11.4%	5.4%	5.5%	0.2%	**27.6%**	4.4%	***1.5%***	5.1%	***0.7%***	6.0%	14.6%	100%
Few times a month	15.0%	4.8%	18.9%	4.7%	**11.3%**	2.0%	5.2%	2.1%	4.2%	5.2%	5.7%	5.3%	15.7%	100%
Few times a year	**20.5%**	3.3%	12.6%	0.9%	**10.8%**	**8.1%**	5.2%	4.6%	6.5%	5.7%	**8.9%**	**9.2%**	***3.8%***	100%
Never	14.3%	0.0%	41.4%	0.4%	***0.1%***	1.7%	**30.4%**	***0.2%***	6.8%	***0.0%***	4.4%	***0.3%***	***0.0%***	100%
Don't know	***3.1%***	0.0%	**58.4%**	0.0%	1.6%	0.0%	1.9%	1.9%	***0.0%***	***0.0%***	4.4%	1.6%	27.1%	100%
Total	16.2%	4.6%	15.2%	2.9%	9.5%	4.7%	9.7%	3.8%	5.1%	5.2%	6.2%	7.1%	9.7%	100%

Table VI-7f download data	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Other	Small en	TSI	Total
Daily	***1.1%***	***1.6%***	**25.5%**	0.0%	***0.5%***	0.0%	9.8%	**11.9%**	**13.3%**	***0.0%***	0.0%	**14.7%**	**21.8%**	100%
Few times a week	12.7%	**10.1%**	9.6%	3.4%	2.9%	1.2%	**34.0%**	4.0%	2.4%	2.9%	0.1%	***3.4%***	13.3%	100%
Few times a month	12.0%	5.0%	21.7%	**6.4%**	**13.0%**	2.6%	5.9%	2.4%	2.9%	**7.3%**	1.1%	4.5%	15.4%	100%
Few times a year	**25.6%**	***2.1%***	14.3%	0.8%	8.6%	**10.0%**	5.8%	3.6%	7.3%	**6.9%**	3.5%	6.9%	4.7%	100%
Never	7.8%	6.5%	12.9%	0.1%	**16.0%**	0.5%	9.0%	**9.9%**	6.3%	2.6%	6.2%	**16.8%**	5.4%	100%
Don't know	***0.6%***	6.4%	***3.4%***	0.0%	***0.0%***	0.8%	0.1%	2.6%	***0.1%***	***0.0%***	**73.5%**	10.2%	***2.2%***	100%
Total	16.5%	4.7%	15.7%	2.8%	9.6%	5.0%	10.0%	4.0%	5.0%	5.7%	4.6%	6.9%	9.6%	100%

Table VI-7g graph & map	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Other	Small en	TSI	Total
Daily	***4.4%***	0.0%	**33.6%**	***0.1%***	***0.0%***	0.0%	2.7%	5.5%	**18.6%**	***0.0%***	0.0%	***0.3%***	**34.8%**	100%
Few times a week	20.3%	5.5%	9.3%	**5.9%**	3.8%	2.2%	6.6%	**7.3%**	0.9%	3.1%	0.1%	**12.3%**	22.9%	100%
Few times a month	12.8%	4.1%	15.4%	3.7%	11.8%	0.2%	**23.9%**	2.1%	3.9%	1.4%	0.7%	3.9%	16.2%	100%
Few times a year	20.1%	6.1%	12.2%	1.0%	6.7%	**6.8%**	3.1%	3.8%	7.5%	**8.4%**	**9.9%**	7.6%	6.9%	100%
Never	8.5%	1.6%	23.4%	**6.0%**	**14.9%**	**8.4%**	12.8%	5.4%	3.1%	2.3%	0.5%	8.8%	***4.4%***	100%
Don't know	**48.8%**	**20.0%**	***7.6%***	***0.0%***	4.3%	0.0%	2.2%	***0.0%***	0.8%	3.2%	0.5%	5.2%	7.6%	100%
Total	16.3%	4.8%	15.2%	3.0%	9.3%	5.0%	10.4%	3.9%	5.2%	4.9%	4.8%	7.2%	10.0%	100%

Table VI-7h simulation tool	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium e	Micro en	NGO	Other	Small en	TSI	Total
Daily	5.8%	***0.0%***	**48.9%**	3.2%	1.7%	0.0%	1.0%	***0.4%***	**20.1%**	**18.0%**	0.0%	***0.4%***	***0.6%***	100%
Few times a week	9.1%	**12.0%**	***2.8%***	**7.8%**	1.5%	0.3%	**41.9%**	4.1%	1.7%	1.9%	7.9%	2.3%	6.9%	100%
Few times a month	***4.9%***	5.8%	30.1%	0.3%	**20.3%**	0.8%	4.9%	2.5%	2.3%	2.7%	0.2%	3.7%	**21.6%**	100%
Few times a year	**28.0%**	3.8%	11.4%	0.7%	7.2%	7.7%	3.8%	3.9%	8.6%	2.8%	0.4%	**10.7%**	11.1%	100%
Never	17.4%	2.5%	16.7%	**6.2%**	8.2%	3.4%	12.0%	**7.5%**	4.1%	7.9%	6.6%	4.0%	3.6%	100%
Don't know	13.7%	3.3%	5.7%	0.7%	7.0%	**16.2%**	3.4%	***0.1%***	4.0%	13.9%	**27.2%**	1.8%	3.1%	100%
Total	16.6%	4.8%	15.2%	2.9%	9.3%	5.2%	10.7%	4.1%	4.9%	5.3%	5.8%	5.5%	9.8%	100%

652 users ticked the “other” case but only 138 describe this other functionality.

Q8. For what purpose(s) do you use the ITC Market Analysis Tools (Trade Map, and/or Market Access Map, and/or Investment Map)?

We study the answer by type of user (only columns percent = what is each type of user doing?).

Table VI-8a FYI only	Academia	BSI	Gov	IPA	Indep.	Inter. Org.	Large en	Medium e	Micro en	NGO	Other	Small en	TSI	Total
Daily	0.5%	**5.3%**	**5.9%**	0.3%	1.4%	0.4%	0.3%	0.1%	2.9%	0.0%	0.0%	0.2%	**4.1%**	2.0%
Few times a week	7.5%	23.9%	9.1%	9.9%	6.1%	***0.0%***	**47.7%**	16.6%	4.1%	13.3%	0.4%	6.2%	17.0%	12.8%
Few times a month	14.4%	19.7%	27.7%	**43.6%**	**30.0%**	12.1%	15.4%	15.2%	12.1%	***7.5%***	***3.6%***	16.9%	13.7%	18.0%
Few times a year	30.3%	22.9%	18.8%	***0.0%***	25.7%	**68.5%**	23.8%	50.7%	**55.4%**	36.8%	**61.8%**	29.6%	***8.2%***	30.4%
Never	**29.8%**	9.2%	1.4%	0.3%	1.6%	0.0%	2.3%	3.8%	4.4%	0.0%	0.0%	4.8%	0.2%	6.5%
n.a.	2.5%	1.4%	**5.1%**	***0.0%***	**3.8%**	**3.4%**	2.9%	1.5%	***0.3%***	1.1%	0.5%	1.4%	0.7%	2.4%
missing	15.0%	17.6%	32.1%	**45.9%**	31.5%	15.6%	***7.5%***	***12.2%***	20.9%	41.2%	33.8%	41.0%	**56.1%**	28.1%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-8b Design Export S	Academia	BSI	Gov	IPA	Indep.	Inter.Org.	Large en	Medium	Micro en	NGO	Other	Small en	TSI	Total
Daily	0.2%	0.0%	1.9%	0.0%	0.1%	0.4%	0.6%	**4.6%**	**3.2%**	0.0%	0.0%	2.7%	2.5%	1.2%
Few times a week	6.5%	**33.6%**	11.8%	**29.2%**	7.1%	***0.3%***	**46.8%**	14.5%	4.8%	3.6%	14.9%	8.6%	18.0%	14.6%
Few times a month	***6.0%***	27.7%	22.1%	**48.3%**	32.0%	14.6%	14.0%	20.1%	15.4%	21.1%	***3.2%***	13.8%	**45.9%**	20.4%
Few times a year	39.0%	19.1%	28.0%	***13.4%***	40.8%	44.9%	20.3%	28.9%	24.5%	**48.2%**	**60.7%**	29.1%	21.1%	32.7%
Never	**22.3%**	11.5%	11.7%	0.3%	1.5%	4.8%	2.9%	**21.7%**	2.6%	2.7%	0.1%	8.5%	0.4%	8.2%
n.a.	4.3%	***0.1%***	3.8%	0.8%	0.2%	3.4%	**8.1%**	2.4%	4.5%	1.2%	0.3%	***0.1%***	2.6%	2.9%
missing	21.7%	***8.1%***	20.8%	***8.0%***	18.3%	**31.7%**	***7.3%***	***7.7%***	**45.0%**	23.2%	20.8%	**37.1%**	9.5%	20.0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-8c Design Inv Strat	Academia	BSI	Gov	IPA	Indep.	Int. Org.	Large en	Medium	Micro en	NGO	Other	Small en	TSI	Total
Daily	0.1%	**4.3%**	1.4%	0.0%	0.0%	0.0%	0.5%	1.3%	**2.6%**	0.0%	0.0%	0.2%	0.7%	0.7%
Few times a week	1.4%	**28.4%**	3.5%	3.8%	5.4%	0.4%	**46.5%**	2.8%	3.6%	3.6%	14.1%	9.8%	13.9%	10.6%
Few times a month	5.5%	11.0%	17.8%	**55.4%**	8.6%	13.6%	5.3%	6.7%	6.8%	20.1%	0.3%	4.1%	**39.6%**	13.4%
Few times a year	37.7%	18.1%	33.0%	***8.9%***	18.6%	**46.9%**	19.6%	31.9%	**50.9%**	23.0%	27.6%	33.4%	***10.7%***	28.2%
Never	**26.9%**	18.8%	17.1%	***0.0%***	7.2%	4.8%	9.4%	**27.6%**	13.2%	14.8%	**34.9%**	10.6%	***1.6%***	15.2%
n.a.	6.7%	***0.0%***	5.8%	***0.0%***	2.2%	3.8%	**9.1%**	1.4%	2.5%	6.3%	0.3%	**16.4%**	4.2%	5.3%
missing	21.8%	19.5%	21.5%	31.9%	**58.0%**	30.6%	***9.6%***	28.3%	20.5%	32.3%	22.7%	25.4%	29.3%	26.6%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-8d For research	Academia	BSI	Gov	IPA	Indep.	Inter. Org.	Large en	Medium e	Micro en	NGO	Other	Small en	TSI	Total
Daily	1.2%	**4.3%**	2.7%	0.3%	1.4%	0.7%	0.9%	1.2%	0.6%	2.1%	***0.0%***	0.4%	**4.2%**	1.7%
Few times a week	10.2%	**26.9%**	7.0%	3.8%	3.9%	4.1%	**47.6%**	5.3%	3.7%	12.4%	0.0%	7.1%	16.5%	12.3%
Few times a moh	30.6%	14.5%	**34.8%**	28.4%	**36.3%**	24.0%	***7.6%***	23.8%	9.8%	24.7%	***3.6%***	***6.8%***	15.3%	21.9%
Few times a year	**50.7%**	24.6%	26.1%	17.6%	16.8%	44.7%	27.1%	24.3%	**53.6%**	31.7%	**52.4%**	17.2%	***11.4%***	31.0%
Never	0.0%	1.5%	10.3%	0.0%	2.8%	0.0%	6.3%	**24.3%**	10.5%	**16.1%**	0.4%	8.8%	4.4%	6.0%
n.a.	0.1%	7.1%	1.7%	**38.8%**	4.1%	0.0%	3.2%	2.1%	4.8%	3.8%	8.1%	**17.9%**	2.6%	5.0%
missing	***7.3%***	21.2%	17.5%	11.2%	34.8%	26.7%	***7.3%***	19.1%	17.1%	***9.2%***	**35.4%**	**41.9%**	**45.6%**	22.2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-8e Contact a TNC	Academia	BSI	Gov	IPA	Indep.	Inter. Org.	Large en	Medium e	Micro en	NGO	Other	Small en	TSI	Total
Daily	0.3%	**4.3%**	1.2%	0.5%	0.0%	0.0%	0.3%	1.5%	**2.5%**	0.0%	0.0%	0.0%	0.3%	0.7%
Few times a week	5.4%	**24.2%**	2.3%	3.5%	0.0%	0.0%	3.7%	8.6%	1.0%	11.0%	0.0%	4.3%	2.1%	4.3%
Few times a month	0.8%	3.3%	**8.3%**	4.2%	0.1%	***0.0%***	1.0%	**5.7%**	2.2%	0.4%	1.3%	1.1%	**6.7%**	2.9%
Few times a year	2.0%	8.4%	13.1%	**42.8%**	8.6%	***0.4%***	5.7%	18.7%	9.0%	3.8%	**32.5%**	**26.4%**	10.5%	11.6%
Never	**54.9%**	21.8%	29.7%	***9.1%***	11.3%	**58.4%**	**66.6%**	39.0%	16.7%	35.8%	12.4%	15.8%	11.3%	31.9%
n.a.	8.0%	9.2%	6.6%	***0.8%***	**10.4%**	4.9%	**11.3%**	3.5%	8.2%	9.0%	***0.4%***	***1.4%***	4.8%	6.7%
missing	28.7%	28.8%	38.8%	39.1%	**69.6%**	36.3%	***11.5%***	***22.8%***	**60.5%**	39.9%	53.4%	51.1%	**64.3%**	41.9%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-8f Prepare nego	Academia	BSI	Gov	IPA	Indep.	Inter. Org.	Large en	Medium e	Micro en	NGO	Other	Small en	TSI	Total
Daily	0.1%	**4.3%**	**2.7%**	0.0%	0.0%	0.0%	0.3%	1.2%	0.1%	0.0%	0.0%	0.0%	0.3%	0.7%
Few times a week	2.1%	**23.8%**	3.8%	3.6%	2.6%	***0.0%***	2.9%	9.1%	1.5%	**16.7%**	13.0%	3.5%	12.5%	6.2%
Few times a month	1.0%	15.4%	**24.8%**	0.0%	**22.0%**	13.6%	5.8%	4.9%	5.3%	3.5%	0.6%	2.9%	**34.4%**	12.1%
Few times a year	4.1%	7.0%	17.9%	**43.2%**	14.6%	17.3%	**51.8%**	18.4%	11.6%	3.6%	20.0%	5.6%	11.4%	16.3%
Never	**59.5%**	16.8%	25.8%	9.1%	12.0%	13.0%	19.9%	**39.4%**	18.3%	33.3%	11.0%	17.2%	***5.4%***	24.8%
n.a.	8.0%	2.8%	3.3%	0.8%	9.2%	**38.9%**	8.1%	3.0%	8.5%	9.4%	**32.7%**	21.1%	1.3%	10.2%
missing	25.3%	30.0%	21.6%	43.3%	39.5%	***17.3%***	***11.2%***	24.0%	**54.8%**	33.5%	22.7%	**49.7%**	34.7%	29.7%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

425 users indicate another purpose but only 39 of them describe it.

Q8. For what purpose(s) do you use the ITC Market Analysis Tools (Trade Map, and/or Market Access Map, and/or Investment Map)?
Low income countries only (note that we have included other in TSI after having taken a look and the other status description for LICs)

Table VI-8g FYI only	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Small en	TSI	Total
Daily	1.2%	2.0%	**20.5%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%
Few times a week	45.4%	44.2%	14.6%	***0.0%***	***2.0%***	***0.0%***	4.6%	**53.3%**	20.0%	**66.8%**	38.6%	9.1%	21.4%
Few times a month	**41.0%**	9.1%	13.6%	**58.5%**	**42.8%**	23.3%	10.8%	8.1%	**41.2%**	6.6%	***0.0%***	13.1%	24.1%
Few times a year	***1.2%***	23.5%	37.9%	***0.0%***	**45.5%**	***4.5%***	38.3%	30.5%	38.8%	9.4%	20.6%	**55.2%**	29.9%
Never	0.0%	**1.8%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
n.a.	**2.4%**	**2.6%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
missing	8.9%	16.8%	13.5%	41.6%	9.7%	**72.2%**	**46.3%**	8.1%	***0.0%***	17.2%	40.8%	22.6%	20.5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-8h Export/import stra	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Small en	TSI	Total
Daily	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	**40.8%**	3.7%	1.8%
Few times a week	38.9%	**54.3%**	19.5%	35.6%	***0.0%***	***0.0%***	16.4%	**53.3%**	***0.0%***	5.2%	38.6%	22.4%	26.0%
Few times a month	11.0%	13.6%	10.2%	**55.0%**	39.1%	0.0%	12.9%	8.1%	20.0%	**70.2%**	0.0%	8.2%	21.3%
Few times a year	***0.0%***	18.7%	33.2%	***2.3%***	**53.1%**	48.5%	18.3%	38.6%	**53.6%**	9.4%	***0.0%***	**58.8%**	31.5%
Never	**38.1%**	12.5%	8.7%	0.0%	0.0%	0.0%	12.4%	0.0%	0.0%	2.2%	0.0%	0.0%	7.8%
n.a.	0.0%	0.0%	8.7%	1.1%	0.0%	0.0%	0.0%	0.0%	**26.4%**	0.0%	0.0%	0.0%	1.7%
missing	12.0%	0.9%	15.8%	5.9%	7.8%	**51.6%**	**35.3%**	0.0%	0.0%	13.0%	20.6%	6.8%	10.0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-8i Invest strat	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Small en	TSI	Total
Daily	0.0%	0.0%	**4.0%**	0.0%	0.0%	0.0%	**4.6%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Few times a week	3.3%	**52.6%**	7.3%	0.0%	0.0%	0.0%	16.4%	0.0%	0.0%	5.2%	**38.6%**	24.0%	14.9%
Few times a month	9.9%	0.0%	13.5%	**64.4%**	16.3%	0.0%	12.9%	4.1%	**46.4%**	**68.2%**	0.0%	11.5%	19.2%
Few times a year	***1.9%***	26.5%	30.6%	***0.0%***	13.2%	**48.5%**	17.8%	**38.6%**	**38.8%**	8.3%	***0.0%***	14.1%	16.7%
Never	**73.6%**	12.5%	15.9%	0.0%	14.5%	0.0%	12.9%	0.0%	14.8%	5.2%	0.0%	**44.1%**	25.6%
n.a.	3.1%	0.0%	**13.9%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	2.5%
missing	8.2%	8.4%	14.9%	35.6%	**56.0%**	**51.6%**	35.3%	**57.3%**	***0.0%***	13.0%	**61.4%**	***5.1%***	20.4%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-8j Research	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Small en	TSI	Total
Daily	1.9%	0.0%	**5.5%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**3.7%**	1.9%
Few times a week	**48.7%**	**45.3%**	10.6%	0.0%	0.0%	27.8%	4.6%	4.1%	0.0%	**69.1%**	40.8%	0.0%	18.1%
Few times a month	43.5%	5.1%	13.5%	35.6%	7.8%	***0.0%***	17.8%	**79.7%**	46.4%	4.2%	38.6%	18.5%	20.7%
Few times a year	4.7%	23.5%	**42.6%**	3.4%	35.4%	***0.0%***	17.8%	8.1%	**38.8%**	13.0%	***0.0%***	**45.5%**	26.7%
Never	0.0%	0.0%	**11.1%**	0.0%	2.1%	0.0%	**12.9%**	0.0%	**14.8%**	0.0%	0.0%	0.5%	2.4%
n.a.	0.0%	1.8%	3.1%	**55.0%**	10.5%	0.0%	12.9%	0.0%	0.0%	4.4%	0.0%	11.0%	10.8%
missing	***1.2%***	24.3%	13.6%	5.9%	**44.1%**	**72.2%**	33.8%	8.1%	***0.0%***	9.4%	20.6%	20.8%	19.4%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-8k Contact a TNC	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Small en	TSI	Total
Daily	0.0%	0.0%	**5.6%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
Few times a week	36.7%	**45.3%**	5.5%	0.0%	0.0%	0.0%	0.0%	**49.2%**	0.0%	**61.6%**	38.6%	0.0%	16.0%
Few times a month	0.0%	4.8%	4.1%	**5.9%**	0.0%	0.0%	4.6%	**8.1%**	0.0%	0.0%	0.0%	5.2%	3.4%
Few times a year	0.0%	11.1%	4.8%	**57.3%**	12.9%	0.0%	5.4%	0.0%	0.0%	4.2%	0.0%	**44.7%**	20.6%
Never	**38.1%**	14.3%	28.6%	***0.0%***	2.1%	4.5%	25.4%	34.6%	**58.8%**	7.4%	***0.0%***	19.7%	18.4%
n.a.	3.6%	2.6%	**29.0%**	1.1%	**27.8%**	0.0%	12.9%	0.0%	**26.4%**	4.4%	0.0%	0.0%	8.9%
missing	21.7%	22.1%	22.5%	35.6%	57.2%	**95.5%**	51.7%	***8.1%***	14.8%	22.4%	**61.4%**	30.4%	31.9%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table VI-8l Prepare nego	Academia	BSI	Gov	IPA	Independ	Inter, O	Large en	Medium	Micro en	NGO	Small en	TSI	Total
Daily	0.0%	0.0%	**6.5%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Few times a week	13.2%	**44.2%**	4.6%	0.0%	0.0%	0.0%	0.0%	**49.2%**	0.0%	**61.6%**	0.0%	20.3%	17.6%
Few times a month	0.0%	9.9%	1.7%	0.0%	0.0%	0.0%	13.4%	4.1%	0.0%	4.4%	**79.4%**	12.9%	5.8%
Few times a year	1.2%	1.1%	**40.8%**	**57.3%**	**51.7%**	0.0%	5.4%	0.0%	38.8%	5.2%	0.0%	2.5%	19.3%
Never	**73.6%**	12.5%	19.4%	0.0%	2.1%	4.5%	38.3%	30.5%	34.8%	9.4%	0.0%	11.0%	19.0%
n.a.	4.3%	1.7%	10.3%	1.1%	13.3%	0.0%	0.0%	0.0%	**26.4%**	0.0%	0.0%	**45.3%**	15.0%
missing	7.8%	30.6%	16.7%	41.6%	32.9%	**95.5%**	42.9%	16.2%	***0.0%***	19.4%	20.6%	8.0%	22.5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

23 users indicate another purpose but none of them describe it.

Table VI-8m Purpose of ITC's MATs usage, by type of user, LICs only
(have you already used the ITC's MATs to or for…)

	Academia	BSI	Gov	IPA	Indep.	Int. Org	Large etp	Medium etp	Micro etp	NGO	Small etp	TSI	Total
For your information only													
yes	88.7%	78.8%	86.5%	58.5%	90.3%	***27.8%***	***53.7%***	91.9%	**100.0%**	82.8%	59.2%	77.4%	78.7%
no	0.0%	**1.8%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
To design an export/import strategy													
yes	***49.9%***	86.6%	66.9%	92.9%	92.2%	***48.5%***	***52.3%***	**100.0%**	73.6%	84.8%	79.5%	93.2%	80.6%
no	**38.1%**	12.5%	8.7%	0.0%	0.0%	0.0%	12.4%	0.0%	0.0%	2.2%	0.0%	0.0%	7.8%
To design an investment strategy													
yes	***15.1%***	**79.1%**	55.4%	64.4%	***29.5%***	48.5%	51.8%	42.7%	**85.2%**	**81.7%**	38.6%	49.6%	51.5%
no	**73.6%**	12.5%	15.9%	0.0%	14.5%	0.0%	12.9%	0.0%	14.8%	5.2%	0.0%	**44.1%**	25.6%
For your research work													
yes	**98.8%**	73.9%	72.2%	***39.0%***	***43.3%***	***27.8%***	***40.3%***	**91.9%**	85.2%	86.2%	79.5%	67.7%	67.4%
no	0.0%	0.0%	**11.1%**	0.0%	2.1%	0.0%	**12.9%**	0.0%	**14.8%**	0.0%	0.0%	0.5%	2.4%
To contact a TNC													
yes	36.7%	**61.1%**	19.9%	**63.3%**	12.9%	***0.0%***	***10.0%***	57.3%	***0.0%***	**65.8%**	38.6%	49.9%	40.8%
no	**38.1%**	14.3%	28.6%	***0.0%***	2.1%	4.5%	25.4%	34.6%	**58.8%**	7.4%	***0.0%***	19.7%	18.4%
To prepare tarde negotiations													
yes	***14.4%***	55.2%	53.5%	57.3%	51.7%	***0.0%***	***18.8%***	53.3%	38.8%	**71.2%**	**79.4%**	35.6%	43.5%
no	**73.6%**	12.5%	19.4%	0.0%	2.1%	4.5%	38.3%	30.5%	34.8%	9.4%	0.0%	11.0%	19.0%

Figures in (***italicized***) **bold** indicate one standard-deviation (***under***) **beyond** the mean

Q8 For what purpose(s) do you use the ITC Market Analysis Tools (Trade Map, and/or Market Access Map, and/or Investment Map)?

We study the answer by income group, and we regroup answers in Yes / No categories.

Table VI-8n – Purpose of ITC's MATs usage, by income group
(have you already used the ITC's MATs to or for…)

	HICs	UMICs	LMICs	LICs	Total
For information only					
Yes	57.9%	60.3%	58.2%	**78.7%**	63.1%
No	**19.8%**	3.8%	1.7%	0.2%	6.5%
n.a. or missing	22.4%	35.9%	**40.1%**	***21.1%***	30.5%
total	100%	100%	100%	100%	100%
To design export/import strategy					
Yes	***64.7%***	71.5%	67.6%	**80.6%**	68.9%
No	**15.8%**	7.7%	***3.2%***	7.8%	8.2%
n.a. or missing	19.4%	20.8%	**29.2%**	***11.7%***	22.9%
total	100%	100%	100%	100%	100%
To design investment strategy					
Yes	***47.9%***	53.0%	**55.6%**	51.5%	52.9%
No	22.2%	11.1%	***7.0%***	**25.6%**	15.2%
n.a. or missing	30.0%	35.9%	**37.4%**	***22.9%***	31.9%
total	100%	100%	100%	100%	100%
Research					
Yes	**80.4%**	64.4%	***55.4%***	67.4%	66.9%
No	6.6%	7.1%	7.2%	***2.4%***	6.0%
n.a. or missing	***13.0%***	28.5%	**37.4%**	30.2%	27.2%
total	100%	100%	100%	100%	100%
Contact a TNC					
Yes	***7.3%***	14.5%	21.6%	**40.8%**	19.5%
No	**51.9%**	39.7%	19.5%	18.4%	31.9%
n.a. or missing	40.8%	45.8%	**58.9%**	40.8%	48.6%
total	100%	100%	100%	100%	100%
Prepare negociations					
Yes	***21.4%***	40.9%	39.7%	43.5%	35.4%
No	**43.2%**	21.7%	16.8%	19.0%	24.8%
n.a. or missing	35.4%	37.4%	43.5%	37.5%	39.9%
total	100%	100%	100%	100%	100%

Figures in (***italicized***) **bold** indicate one standard-deviation (***under***) **beyond** the mean

Q9 to Q13

See Tables 3 and 4 in part B (main report)

VII. Other materials provided by MAR staff

1. CAPACITY BUILDING: ACHIEVEMENTS AND OBJECTIVES

CAPACITY BUILDING IN MARKET ANALYSIS AND RESEARCH: PROGRAM POSITIONING

Targeting MDGs and ITC Strategic Objectives: Information about markets is critical to export success but equally important is the capacity to understand and interpret trade information and devise export strategies to respond to it. Providing access to information must therefore go hand-in-hand with building skills to turn it into trade intelligence. Hence, building capacity in market analysis is as important to delivering against the MDGs (particularly 8 and 7) and ITC's strategic objectives as providing information and tools, as it empowers beneficiaries with:

1. Understanding of key trade concepts (e.g. trade nomenclatures, tariffs, investment, NTMs and voluntary sustainability standards);
2. Methods to analyse national export performance and structures / dynamics of market demand
3. Market information to make better trade related decisions
4. Methods for sustainable production (TCCEP) and information about markets for products certified under voluntary standards

Building the capacity of policy makers, TSIs and enterprises is central to all ITC MAR activities. **11,000 of ITC's tools' users say they have been trained (MAR Tools registration database).** In 2010, a total of 49 face-to-face national and regional workshops (an increase of 36% on the 36 workshops delivered in 2009) were delivered to 1154 participants from national ministries, TSIs and enterprises representing 61 countries (39% of which were LDCs, LLDCs, SSA and SIDS). Sponsoring programs included PACTII, ENACT, DFID NTM, USAID and DCP managed country programs as well as the Islamic Development Bank among others. Comprehensive training programs (multiple workshops or mentoring sessions) in particular were rolled out in Georgia, Jordan, Morocco, Tunisia and South Africa and ranged from building deep capacity of National Trade Observatories in advanced trade policy analysis to training beneficiaries to prepare detailed market studies on specific products. Complementing the face-to-face workshops, MAR additionally supports participants with content hosted in dedicated courses on a Moodle-based e-learning platform enabling participants a program overview, downloadable course content / exercises and an ability to communicate with other participants or the trainer between workshops. In addition to market analysis skills, The Trade Climate Change and Environment Program also makes an important contribution to building the capacity of LDCs in organic certification and product carbon footprinting and T4SD programme builds the understanding of producers and TSIs of the landscape of private voluntary standards, the market opportunities they present and the ability to compare and analyse the various voluntary sustainability standards.

While outputs of capacity building activities include workshops delivered and participants trained and having passed exit-tests, the longer term outcomes sought include evidence of training replication by TSIs, new skills being applied in daily work, and improved trade related decisions as a result of the training. These are captured through direct qualitative follow-up 12 months or more after interventions and through surveying.

In 2010, total delivery of capacity building in market analysis and research was about $1.6 million. Of this, MAR managed delivery of training valued at $700,000 for programs funded by CIDA (PACTII and Trade Leaders), USAID, South Africa, and Colombia. In addition, the NTM project funded NTM capacity building in 10 countries to a value of approximately $230,000. MAR also delivered capacity building valued at $336,000 managed by other sections (ENACT Morocco, SECO Tunisia, Brazil, Georgia, Maldives and Nepal). Finally, most of the TCCEP 2010 program expenditure of $325,000 was also dedicated to capacity building. T4SD staff delivered many workshops on market analysis and research in 2010 and raised awareness of Standards Map. In 2011, T4SD will rapidly evolve its capacity building content which will be integrated in all tools trainings.

EXAMPLES OF OUTCOMES THAT CAPACITY BUILDING HELPED DELIVER IN 2010 TO ITC'S BENEFICIARIES:

STRENGTHENING POLICYMAKERS' ABILITY TO INTEGRATE BUSINESS INTO THE GLOBAL ECONOMY

Capacity building for policy makers in 2010 ranged from workshop-series on export potential analysis to intensive programs on modelling the economic impact of national trade policy changes and external economic / trade shocks. In Morocco, ITC built over several months Ministry of Trade's capacity in Export Potential Analysis while in Tunisia intensive mentoring built Ministry of Trade skills in economic modelling. An example of an outcome 12 months after training under PACTII in 2009 was provided by an Egyptian policy maker who explained how she had integrated ITC's tools and methods into daily work: "*I use the tools to compare Egypt's exports to other countries… I look at the comparative advantage in terms of preferential treatment in order to establish a plan towards improving the performance of Egyptian exports to the world*". A PACTII trained Senegalese Ministry of Trade official also explained how he had used the acquired skills to develop a product / market action plan "*'J'ai fait une étude sur les marchés d'exportation du Sénégal comprenant les marchés d'exportation actuels du Sénégal, les marchés potentiel de diversification et les marchés attractifs pour chacun des produits exportés par le Sénégal* …". Finally an anonymous ECOWAS participant wrote "*My institution, as an agency of the Ministry of Commerce Trade and Industry is constantly revising (where they exist) and developing (where there are non) sector strategies and the market analysis provides the best means for determining the prioritization of rare resources*."

STRENGTHENING TRADE SUPPORT INSTITUTIONS

Most workshops in 2010, (39 out of 49) were delivered to combined groups of TSIs and policy makers. In response to a 2010 survey of participants trained in 2009 under PACTII beneficiaries explained how they were using the new skills to make better trade decisions. An Ethiopian beneficiary wrote: "*After attending the training, I have prepared five market analysis reports on exportable commodities of Ethiopia. Currently I am serving as a business development specialist at the USAID Agribusiness and Trade Expansion programme. One of the tasks that I am expected to do is to write quarterly market bulletins. I am glad that ITC's training enabled me to write a professional market analysis report*".

Similarly a representative of Mauritius' Export Association wrote: "*This training allowed me to provide information that tailors to the needs of the exporters more efficiently. … That they request on a daily basis to make strategic marketing decisions (whether to work with this country/ client or not, on what conditions, pricing policy, etc)…. Moreover I am delivering a training workshop based on the PACT II training for all my exporters on the 22nd of September 2010. If we are talking about Capacity-building, this is true a Capacity Building exercise."* And in ECOWAS a representative of GEPC in Ghana wrote: *"As a member of ECOWAS Trade Experts Network (which was created from the first Training Workshop), ITC analysis tools were extensively used to identify potential product in the ECOWAS Subregion ....I utilized the tools to analyze the viability of Ghana Export Promotion Council undertaking a solo exhibition in certain countries, for Equatorial Guinea, Liberia, Sierra Leone among others. The tools were used to ascertain the products imported widely in these countries, bilateral trade between Ghana and these countries, tariffs, Balance of Trade, growth of the market etc. These factors have given the Council a lot more information to undertake these market missions."*

MAKING ENTERPRISES MORE COMPETITIVE

MAR's capacity building helped make enterprises more competitive in 2010 through both direct and indirect means. In helping TSIs improve their market analysis and research services, MAR indirectly served the companies that depend on those TSIs. ITC also served companies directly through free video online training content as well as 10 Workshops, reaching 196 beneficiaries on how to do market research from a company's perspective, delivered in Brazil, Colombia, Georgia x 3, Morocco, Serbia x 2, Sri Lanka and Tunisia. Outputs of the training included participants writing market profile reports while outcomes in some cases resulted in replicated training. In **Serbia** the **Chamber of Commerce and Industry** reported in 2011 that as a result of the 2010 training they'd received they had **trained a further 33 representatives of SMEs from various sectors** on using ITC's tools for analyzing export markets.

ITC's Capacity Building in Market Analysis & Research: Outputs 2011 to 2013:

MAR Outputs	MAR Outputs Indicators	MAR Output Targets				Outcomes and Indicators by Beneficiary Group			IMDIS Indicators Sserved	ITC Strategic Objective served
		2010 baseline	2011	2012	2013	Beneficiary	Desired Outcomes of MAR Outputs	Outcome Indicators		
Capacity building workshops and other face-to-face training services; Online capacity building tools	# of workshops/events # of customized webinars # of participants (by type of beneficiary, country of origin, gender etc) Participant satisfaction Proof of learning - pre & exit tests / assigments # of new, certified trainers # of online training courses # of annual downloads of content (by geographic origin) User satisfaction with online content	49 face to face wkshops; 5 customized webinars 1154 trained participants representing 61 countries (30% women); (39% LDCs, LLDCs, SIDS, SSA) High user satisfaction with wkshops with >90% of participants say training will help them make better trade related decisions 3 online training courses 8,400 downloads of e-learning content 75% users satisfied with online content	52 face to face wkshops; 5 customized webinars 1248 trained participants representing 64 countries (37% women); (42% LDCs, LLDCs, SIDS, SSA) High user satisfaction with wkshops with >90% of participants say training will help them make better trade related decisions 4 online training courses 10,100 downloads of e-learning content 80% users satisfied with online content	52 face to face wkshops; 5 customized webinars 1248 trained participants representing 64 countries (44% women); (46% LDCs, LLDCs, SIDS, SSA) High user satisfaction with wkshops with >90% of participants say training will help them make better trade related decisions 4 online training courses 12,100 downloads of e-learning content 80% users satisfied with online content	52 face to face wkshops; 5 customized webinars 1248 trained participants representing 64 countries (50% women); (50% LDCs, LLDCs, SIDS, SSA) High user satisfaction with wkshops with >90% of participants say training will help them make better trade related decisions 4 online training courses 14,500 downloads of e-learning content 80% users satisfied with online content	Enterprises	Enterprises' trade-related decisions have been informed (e.g. markets better analysed; markets identified; market requirements determined)	# of enterprises	c) (i): # of enterprises enabled to formulate sound international business strategies ...	Making Enterprises more Competitive; Strenthening TSIs; Strengthening policy makers ability to integrate business into global economy
							Enterprises' trade environment or export opportunities have improved			
							Enterprises trade turnover has been positively affected	# of enterprises; Turnover value	c) (iii): # of enterprises having met potential buyers and transacted business	
						TSIs	TSIs trade-related services have been assisted or improved	# of TSIs;	b) (i) # of TSIs improving their ranking on ITC pilot benchmarking scheme	
							TSIs have replicated training they received (i.e. multiplied ITC's impact)	# of trainings replicated		
							TSIs initiated proposals have been assisted / improved	# of proposals	b) (ii) # of policy proposals having been presented by TSIs to authorities	
						Policymakers	Decisions taken by policymakers have been assisted	# of policy makers # of policies	a) (i) # of export development strategies ...; a) (ii) # of country networks ... (a) (iii) # of cases in which country negotiating positions enriched ...	

STRATEGY 2011-13 FOR CAPACITY BUILDING

Focusing more on LDCs, LLDCs, SIDS and SSA: 50% of capacity building over the next 3 years will address the needs of LDCs, LLDCs, SIDS and SSA from 39% currently. Content will continue to be segmented to serve different beneficiary groups, with an **emphasis on empowering TSIs multipliers** (including universities and training institutes with trade related courses) for maximum scalability.

Targeting MDGs: Capacity building will continue to focus on MDG 8, by improving beneficiaries understanding of the global trading system, market, opportunities and market access conditions. MDG 7 and 1 will also be addressed with training of beneficiaries to improve understanding of private voluntary standards and organic / environment related market opportunities and potential obstacles:

Continued focus on Outputs and Impact: The strategy over the next 3 years is to increasingly focus face-to-face training on Trade Support Institutions so that they will also be able to train others, thereby multiplying impact. This has been scoped into the 2011 and 2012 capacity building programmes in market analysis for PACTII, particularly in the ECOWAS region where members of the ECOWAS Trade Experts Network will become certified trainers on ITC's tools in 2011 and will co-deliver workshops in the ECOWAS region in 2012.

Focusing on building and maintaining partnerships both as beneficiaries as well as channel partners will be key to increasing capacity building outputs and impact over the next three years. Based on responses to ITCs 2010 survey of tools users, over 32% of African TSIs have benefitted from ITC's training in market analysis and research, followed by 21% in Arab States, 20% in the Asia Pacific, 19% in Latin America, 17% in Eastern Europe and Central Asia. Over the next 3 years, ITC will strive to increase training reach to partner TSIs in LDCs, LLDCs, SIDS and SSA. Beneficiaries will increasingly also deliver ITC training and this will be measured through regular follow-up with partners.

Important also for dissemination of training in market analysis and research have been the international organizations including the World Bank (ITC has distributed content through the World Bank Institute); and UNCTAD's Virtual Institute. In 2010 MAR delivered 4 workshops in collaboration with UNCTAD's Virtual Institute to beneficiaries from Colombia, Russia, Tanzania and the West Indies. Over the next 3 years, further strategic partnerships will be sought, particularly in the dissemination of online training content.

In addition to focusing on partners to replicate training, another important lever to increase impact is to **work intensively with a few countries to build deep trade policy analysis capacity**. The outcome of this training will be the better selection of sectors / markets for national trade promotion, better alignment of trade agreements and policies to capture market opportunities, overcome obstacles and improve the competitiveness of the business environment.

Video training to increase reach: In order to improve access to ITC's training in market analysis and research, MAR will continue in 2011-13 to increase the quality and scope of free video training content. Three hours of training already exists in English. This is being translated into Spanish and French in 2011. New free video training content will also come on stream including training on Standards Map, NTMs as well as elements of Export Potential Assessment methodology.

2. COMPARISON BETWEEN MARKET ACCESS MAP AND FORTHCOMING WITS-MACMAP

Excerpt from the Functional Specifications Document (of September 2009)

ITC and the Bank, in consultation with relevant stakeholders including UNCTAD and WTO, wish to develop a single web-based tool that would serve the collective analysis needs of enterprises, trade support institutions, trade policy makers, trade negotiators, academic institutions and research think tanks, with a focus on but not limited to developing countries.

A single application will merge the functionalities of WITS and ITC's MAc Map, so that all users would have access to a much broader suite of functionality and data, than available in the separate applications as it exists today (see the table below). Furthermore, since MAc Map is already integrated with other ITC tools - Trade Map and Investment Map – the resulting integration of WITS and MAc Map would provide the users from developing countries also seamless access to the functionalities of Trade Map and Investment Map.

Some Examples of Features:

Examples of Features	WITS	MAcMap	New Application
Multi-year tariff data (MFN and preferences)	✔		✔
Data on applied tariff rate quotas and antidumping duties		✔	✔
Seamless database integration (across time and data types)			✔
Single data availability page covering all types of information			✔
AVEs of non ad-valorem tariffs calculated for the most recent tariff data		✔	✔
AVEs of non ad-valorem tariffs included in all aggregations		✔	✔
Different methods of calculating AVE	✔		✔
Data downloading	✔		✔
Sharing of queries between users	✔		✔
Advanced Query definitions kept on the server	✔		✔
Tariffs can be displayed for non-traded products in *all* modules		✔	✔
Econometric Simulations	✔		✔
Graphic presentation of output tables, e.g. maps		✔	✔
Strong user registration and management system		✔	✔

Other features:

- One centralized database on market access data (CAMAD)
- Two databases on trade statistics:
    - ITC Normalized Trade Matrix available for analysis and simulations, as well as download, and
    - Comtrade Database available for download (for the eligible users only).
- A single graphical user interface for all kinds of queries and simulations.
- AVEs are pre-calculated for all non-ad valorem tariffs
- Tariffs displayed for non-traded products in all modules
- Conversion between HS revisions
- Single data availability page unifying all databases
- Graphic presentation of output tables
- User-friendly interface and navigation
- Strong user management system
- User customization and personalization
- Integration of data update module
- Strong options for web application administration
- High performance
- Data download options in multiple formats

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