International Trade Centre

EVALUATION REPORT

Evaluation of ITC's Performance in Trade and Market Information

Independent Evaluation Unit

October 2021

This evaluation report makes reference to the following SDGs:

EVALUATION OF ITC'S PERFORMANCE IN TRADE AND MARKET INFORMATION

The International Trade Centre (ITC) is the joint agency of the World Trade Organization and the United Nations. ITC is the only international agency dedicated to the development of micro, small and medium-sized enterprises. Formed in 1964, ITC is the focal point for trade related technical assistance within the United Nations system.

For all of ITC's interventions, evaluation is a key instrument to ensure accountability against expected results and to support organizational learning. Evaluations inform ITC's decision-making in policy, programme and project management, with the purpose of improving performance and enhancing ITC's contributions towards achieving the UN Sustainable Development Goals (SDGs).

The ITC Independent Evaluation Unit has carried out this evaluation under its 2020 Work Programme and is responsible for this publication. The evaluation was carried out by a team of three external senior consultants (Ben Shepherd, Veepin Bhowon and Devendranath Chamroo) and was managed by an ITC Evaluation Officer (Simon Bettighofer). Oversight and quality assurance was provided by the head of the ITC Independent Evaluation Unit (Miguel Jiménez Pont).

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Acronyms

AfCFTA	African Continental Free Trade Agreement
API	Application Programming Interface
BSO	Business Support Organization
CBI	Centre for the Promotion of Imports from developing countries
CCITF	Consultative Committee of the ITC Trust Fund
CRM	Customer Relationship Management
DC	Developing Country
DMD	Division of Market Development
ECOWAS	Economic Community of West African States
ET	Evaluation Team
EU	European Union
FAO	Food and Agriculture Organization
GTHD	Global Trade Helpdesk
ICC	International Chamber of Commerce
IDB	Integrated Database
IEU	Independent Evaluation Unit
IP	Internet Protocol
LDC	Least Developed Country
MAT	Market Analysis Tools
MSMEs	Micro, Small, and Medium-sized Enterprises
OEC	Observatory of Economic Complexity
OECD	Organisation for Economic Co-operation and Development
RB	Regular Budget
SASMEA	South African Small and Medium Enterprises Association
SDGs	Sustainable Development Goals
SMEs	Small and Medium-sized Enterprises
SMEDI	Small and Medium Enterprise Development Institute
SPPG	Strategic Planning, Performance & Governance
TI	Trade Information
TMI	Trade and Market Intelligence
TOR	Terms of Reference
TRAINS	Trade Analysis Information System
TT	Transparency in Trade Programme
UNEG	United Nations Evaluation Group
UNIDO	United Nations Industrial Development Organization
WITS	World Integrated Trade Solution
WTO	World Trade Organization
XB	Extra-Budgetary

Executive Summary

The purpose of this evaluation is to provide a comprehensive picture of what kind of trade and market information ITC provides today, and how well the organization analyses, distributes, and uses it in furtherance of its mandate. Key objectives of this evaluation were to assess how effective the organization is in maintaining its relevance in the area of trade and market information, determine the utility and complementarity of ITC's tools and services in this area and the satisfaction of their clients, and to provide insights into how well related information is shared and used within ITC.

ITC's Independent Evaluation Unit (IEU) commissioned and managed the evaluation. The IEU engaged three external senior consultants with extensive experience in this field who formed the evaluation team. **The evaluation followed a mixed-methods design**. Information was collected by the evaluation team using a document review, a data review, a survey of internal and external users of the market analysis tools, case studies in five African countries[1], and interviews with 168 people from various stakeholder groups, including government representatives; business support organizations (BSOs); micro, small, and medium-sized enterprises (MSMEs); academia; and ITC staff.

Background

Providing trade information and market intelligence has been a core function of ITC since its founding in 1964.[2] 'Providing trade and market intelligence' remains one of ITC's six focus areas for trade-related technical assistance. However, the landscape for trade and market information has changed markedly since the organization's founding. A number of private and public sector organizations supply trade-related information, though as will become clear, there are important points of differentiation for ITC's offerings, not least of which is the objective of focusing on MSMEs.

Trade information is relatively well defined within ITC and is considered to relate to the Transparency in Trade Programme led by the organization's Trade and Market Intelligence Section (TMI). The rationale for intervention in this space is that access to trade and market information is crucial for international business success, and that better quality and more up-to-date trade and market information can help support better business decision-making.[3]

The programme aims to improve the trade and investment decisions of companies, notably small businesses, BSOs and policymakers by ensuring the collection, processing and free online dissemination of current trade and investment-related data and analytics through a set of web-based market analysis tools. This suite of market analysis tools (MAT)[4] has formed the primary scope of this evaluation. Other related offerings such as specific product-focused, regional, and national portals, were not assessed in detail, but have been examined as considered relevant to the objectives of this evaluation. Similarly, tools and activities of other ITC programme or work areas were also further investigated where relevant.

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1 Cape Verde, Malawi, Mauritania, Mauritius and South Africa
2 GATT. 1967. Joint GATT/UNCTAD Trade Centre: Note by the Director-General, L/2890 (6 Nov 1967), p. 7
3 ITC (undated). Transparency in Trade. Programme document 2016-2021.
4 Which comprises the following tools: Trade Map, Market Access Map, Export Potential Map, Procurement Map, Investment Map, Rules of Origin Facilitator, Market Price Information, Global Trade Helpdesk.

Findings

ITC's market analysis tools are widely recognized as providing high quality, up to date, comprehensive trade and market information, and they are largely provided free of charge as global public goods[5]. At the same time, ITC trade information and intelligence activities increasingly take place within a competitive environment characterized by numerous public and private sector actors. The variety of tools available means that visibility of ITC's contributions is sometimes limited, and end-users can be confused about the original source of the data they are using.

Most importantly, **ITC's traditional comparative advantages have reached a peak.** Tools like Trade Map and Market Access Map reflect core, historical data requirements among trading firms and policy-makers. However, as the results of this evaluation show, **user needs are undergoing major changes.**

In part, ITC has responded to this: First, it has launched new tools that cover less traditional areas or fill perceived gaps in areas of traditional information needs, such as the Rules of Origin Facilitator and Investment Map. Second, ITC has started developing data products that go beyond disseminating raw or lightly transformed data to provide additional analytics, or to integrate insights across platforms. Tools in this category include Global Trade Helpdesk and Export Potential Map. Finally, it is offering bespoke data solutions that respond to particular demands, such as the African Trade Observatory.

Further action and continuous enhancement however remains necessary given the growing needs of economic operators to better understand international trade issues which are becoming more complex.[6] The effectiveness of the tools in reaching target audiences and responding to their needs should be further enhanced.

Usage data of the tools

The tools collect only limited data on users and use, which is why limited insights into the effectiveness of the tools can be drawn based on this data. Current tracking systems gather data on registered users who log-in to access some tools, and uses IP tracking for tools accessible without logging-in. There is also an annual user survey administered by TMI staff, which targets only frequent users, as per the main purpose of the survey is to respond to corporate and donors' reporting indicators and less so to measure user satisfaction.

Registered users are very unevenly distributed globally, and only around a quarter of them belong to the tools' main target groups. Data from the TMI-administered user database show that the tools are used all around the world, with a total of slightly more than 1 million registered accounts. However, registration patterns are uneven across regions, with half of all users being registered in Latin America, while only 4% are from Africa.

When breaking down registered users by type, students (34%) and research/academia (18%) form the strongest individual groups, while small businesses (17%), policymakers (6%) and BSOs (3%) together account for 26% of registered users. The proportion of BSOs should be seen in perspective, however: it equates to around 30,000 registered accounts, which could be significant in terms of the number of BSO users globally. In addition, the tools have been very successful in attracting women: they make up nearly half (44%) of the registered user base.

Only a small group among the registered users are accessing them through login. Login data shows that most registered accounts (84%) had not logged into the tools during the previous year. Given that users can still access some of the tools' data without logging in, this suggests that many registered users either do not log in when they use the tools or they no longer use them.

[5] In line with the commonly used definition of a global public good that they are accessible worldwide and on a non-rivalrous and non-excludable basis. In other words, no one can be excluded from their benefits and their consumption by one person does not diminish consumption by another.

[6] For example, market access conditions are more complex to understand (rules of origin) and represent trade obstacles in particular for MSMEs in developing countries.

Actual usage data of Trade Map shows a high number of page visits and unique visitors, but with only few visitors who come to the tools frequently. Anonymized data provided to the evaluation team identified over 7.7 million website visits in 2020 from over 1.7 million unique visitors of Trade Map. These numbers are much higher than the data on registered users, which shows that there are many users of the tools who are either not registered or who are registered but choose not to log in.

On average, each unique IP address visited the tools 4.5 times during 2020, but 54% of IP addresses only visited the tools once, and 70% visited no more than twice. In other words: while some users visited the sites very frequently, the majority of them have done so only once or twice in the past year.

The data on IP visits also show a partly different geographical breakdown than the registration data, with most users connecting from Asia and the Pacific (34%), followed by Latin America and the Caribbean (23%). As with registered users, there are only few visits from Africa (3%).

Insights from interviews, surveys and case studies

Awareness and use of the tools vary substantially, which is also due to the fact that some of the tools have only existed for a short time. Trade Map and Market Access Map are the most popular and most used tools, while awareness and use of the other tools is significantly lower. The majority of policymakers and BSOs interviewed through case studies in Africa were aware at least of some of the tools, while the nine African companies that were interviewed often did not know any of them. The tools are viewed generally as complementary, however users feel that integration is still not seamless and their variety causes some confusion. Ongoing integration efforts (such as the Global Trade Helpdesk) are aimed in part at dealing with this issue and are receiving early indications of user support. These findings are based on case studies, key informant interviews, and surveys; they align with findings from usage data, discussed above.

The explicit aim of the tools is to enable MSMEs, business support institutions and policy makers to make better informed trade and investment decisions. Regardless of how large their share of the absolute number of users is, the evaluation found that the tools indeed are used by policymakers, e.g., to formulate policy priorities or develop positions for trade negotiations, and by BSOs to inform their clients.

However, there seems to be a substantial "understanding gap" with respect to MSME users. Survey respondents and key informants interviewed report that the data can be difficult to interpret and use, as many MSME users lack analytical capacity and access to appropriate information technology tools. They would also prefer to access the tools through portable devices (such as smartphones or tablets), which currently is only possible to a limited extent: first because the tools only partially have a responsive design (adapting the web page design to different displays) and second because an associated app is not functional.

The understanding gap also appears to translate in a gap in use. Interviews and case studies suggest that use of the tools is limited in developing countries (DCs) and least developed countries (LDCs), particularly among MSMEs. This finding is also consistent with the insights from usage data, which show that only 17% of registered users are MSMEs and that the fewest visits are from Africa, where the vast majority of LDCs are located.

Moreover, data and user requirements have changed and continue to do so rapidly. As a complement to raw data, firms increasingly need actionable intelligence, in the sense that they need analytics and metrics that support decision making, such as market conditions, and more complex information such as consumer tastes, and market dynamics. In addition, businesses around the world are becoming increasingly data-driven, which means that they are looking to integrate data sources and analytics into their own information systems.

ITC has taken important steps already to simplify and modernize its user interfaces, which are easier to use than those of their- public sector competitors. But the tools could do more to leverage analytical techniques to present the raw data into metrics (data analytics) or graphics (data visualization) that are more easily digestible for users. Doing so could help MSMEs and other users access more detailed insights.

Given the understanding gap that exists with respect to main target groups, capacity building is a key priority. ITC has taken steps to increase capacity building activities over recent years, and there is scope to develop them further by leveraging online technologies, in particular in light of the shift to online activities during the COVID-19 pandemic. Working with BSOs is a priority, because MSMEs in many DCs and LDCs do not have the capacity to undertake analytical work themselves, but instead rely on work performed by BSOs for ready-made analysis, insight, and advice.

Partnerships are becoming increasingly important to drive innovation in tools. Development of new functions and products has largely relied on internal expertise. More recently, TMI has launched collaborations with private sector actors to co-develop and co-distribute its tools and there has been some involvement of the research community in international trade. Targeted collaborations with such expert partners will be of increasing importance for the development of new tools, or to improve the functioning of existing ones.

Access to larger datasets of the tools is granted upon requests to the TMI section and through bulk download (for Market Access Map). Those researchers who have had full access to the data praise its completeness, quality, and up-to-date nature. In addition to accessing the information publicly available, ITC staff requiring specific sets of data can address their requests to the TMI section. ITC staff using large data sets provided by TMI have a very high view of it. However, researchers and other potential users of bulk data are typically unaware that this service exists, as there is no published policy governing such access. Confidentiality agreements with data suppliers were cited as the main essential reason that prevents the sharing of data on a larger scale.

There are good examples of internal cooperation, but also challenges and untapped potentials. While collaboration between TMI and other departments and programmes has increased, it was suggested that collaboration in areas such as surveys or data analysis could be improved and awareness of the tools within ITC strengthened. In this context, it should also be noted that the structure of the organization poses a challenge to transparent sharing and cooperation, as the mechanism of project funding favours keeping information within boundaries and the fact that the financial sustainability of teams is linked to project funding encourages internal competition.

Overview of the conclusions and recommendations of this evaluation

The conclusions outline the specific areas where action is needed. They are supported by a total of nine recommendations:

- The first set of recommendations (1-2) is aimed at **strengthening the strategic approach of the tools** and of the associated programme, and at obtaining reliable information for their future steering.
- The second set of recommendations (3-5) comprises a series of actions to **increase the effectiveness of ITC's market analysis tools**. It also identifies areas where the organization should continue to build on existing strengths and indicates new areas to be explored.
- The last set of recommendations (6-9) refers to aspects that **affect or benefit the organization at large:** ensuring ITC's visibility as a data provider; linking the tools to the wider offering of the organization; strengthening data sharing and collaboration both internally and externally; and safeguarding the tools' provision as a global public good.

Conclusion 1: There is a need to better clarify what the tools are intended to achieve, for whom, and how. According to their intervention logic, the tools' explicit aim is to enable small companies, institutions, and policy makers to make better informed trade and investment decisions. The findings of this evaluation show that the tools have been successful in building a large user base and that they are used worldwide. However, it seems that more efforts are needed to reach main target groups more effectively. For instance, MSMEs are only reached to a limited extent. They tend to find it difficult to use the tools, and rely on assistance, for example from BSOs, to interpret the data. Moreover, the tools are little used in ITC's priority countries[7] compared to the rest of the world.

[7] ITC prioritizes project implementation in least developed countries, landlocked developing countries, small island developing states, Sub-Saharan Africa, small vulnerable economies, post conflict and fragile states. ITC has committed to spending at least 80% of its country-level assistance in these priority countries.

Recommendation 1: Revise the strategy and intervention logic of the market analysis tools.

Directed to Chief Trade and Market Intelligence Section:

- *TMI should prepare a new strategic document that should include a more comprehensive theory of change / intervention logic, detailing what each tool is intended to achieve, who the targeted users are (and which other groups are likely to benefit) as well as the pathways through which intended results are expected to be achieved.*
- *The strategy should also address how to better reach users in ITC's priority countries. Moreover, it should provide information about which collaborations with external actors (such as universities, researchers, private sector, or other organizations) already exist or are being pursued, and how they will contribute to the effectiveness of the tools.*

Conclusion 2: Metrics used so far to assess the performance of the tools offer limited insights. Current tracking systems gather data on registered users for certain tools, while usage levels cannot be comprehensively tracked for non-registered users. The analysis of data on registered users has shown that it only allows limited conclusions to be drawn. The annual MAT survey conducted to respond to corporate and donors' reporting indicators is sent only to a subset defined as "frequent" users[8] as they are considered actual beneficiaries. Although this forms a limited sample, the survey and its results are also used to assess the tools' overall performance, whereby individual values are extrapolated (such as the value of imports/exports for which the tools have helped users to make decisions).

Recommendation 2: Adjust the approach and metrics used to assess the tools' performance.

Directed to Chief Trade and Market Intelligence Section:

- *Explore options to get comprehensive feedback on the usefulness of the tools for their intended target groups, considering survey fatigue and related low answer rates for online questionnaires. Possible approaches include: the existing MAT survey could be retained, but administered to a larger audience using stratified random sampling; a qualitative survey campaign should be carried out, for example through interviews, group discussions or other means, to obtain more detailed information about users' needs. For reporting purposes, the analysis could focus on recent users, while the overall results could provide a more comprehensive picture of the tools' overall performance. Besides, the tools performance could also be assessed through pop-up satisfaction surveys (as currently already done for Export Potential Map), which could provide a more reliable assessment of actual users instead of focussing on registered accounts only.*
- *The tools' performance metrics should be reframed to focus on visits and actual use rather than registered accounts, while distinguishing the type of profile (MSMEs, BSOs etc).*

Conclusion 3: There is much potential for improving the level of awareness of the tools among its target groups. Knowledge of or familiarity with the tools varies considerably across the different tools, target groups and by global region. Among the selected policymakers and BSOs interviewed or surveyed, the majority were aware of at least one of the tools. This should be further improved, in particular as BSOs play a critical role in advising MSMEs. In the meantime, there seems to be a particularly low awareness of the thematic tools among MSMEs, as evidenced by the fact that they make up only a small portion of registered users relative to their total number.[9]

Recommendation 3: Increase awareness of the tools to better reach main target groups.

Directed to Chief Trade and Market Intelligence Section:

- *TMI should improve outreach to its main target groups, for example by carrying out targeted awareness campaigns on the tools globally, combined with capacity building activities upon funds' availability. This could be done through specific user channels, for example at a regional level in collaboration with regional economic communities and with the assistance of national and private sector BSOs.*

[8] ITC's corporate indicators 2020 define active users of ITC data tools as those accessing the tools a minimum of twice per year.

[9] Bearing in mind that tools can also be accessed without registration. Tools offering full access without registration are Market Access Map, Export Potential Map, Rules of Origin Facilitator and Global Trade Helpdesk.

- *In addition, BSOs should be encouraged to include links to the tools into their own websites to make them more visible and accessible to their members, using the guidelines developed by TMI[10]. Given their intense collaboration with BSOs around the world, ITC's Institutions and Ecosystems Section would be a helpful partner in this effort, including to provide contacts of BSOs in ITC priority countries.*
- *Regarding MSMEs as a target group, in particular the level of familiarity with the still very young Global Trade Helpdesk should be increased, as it is especially geared towards their needs.*

Conclusion 4: Efforts have already been made to enhance and simplify the use of the tools and to adapt them to the needs of main target groups, but these efforts should be intensified. Despite recent improvements, further simplification or optimization of the tools' websites would help to increase their use. The aim should be to adjust the tools as best as possible to the needs of the targeted audiences, while minimizing the associated need for learning and training. The recently developed Global Trade Helpdesk, which is an integration of some market analysis tools, is a step in that direction and responds to the constant need for upgrading and providing user-friendly solutions to ITC's clients.

Recent developments in the IT sector make it possible to integrate advanced analytical capabilities into data driven websites. For instance, Tableau makes it possible to incorporate flexible data visualizations, while Shiny apps can facilitate remote data manipulation and analysis. ITC's tools do not integrate these or similar tools. Areas of particular interest include the development of sophisticated analytics, and state of the art data visualizations.

Finally, many users, in particular MSMEs, would prefer to access the tools through portable devices which currently is only possible to a limited extent.

Recommendation 4: Continue to improve the functionality and features of the tools and the user-friendliness of their interfaces. Put more emphasis on analytics and data visualization.

Directed to Chief Trade and Market Intelligence Section:

- *Devote additional resources to further interface improvements for the Market Analysis Tools. Interface simplification should be based on clients' needs, ease of use and designed in a way to minimize the need for user training.*
- *Newer versions should enable the generation of automated reports and insights, and include advanced data visualization capabilities based on user requests. Incorporation of advanced search technology based on plain language or voice activation could help make the tools more accessible.*
- *In particular to better serve MSMEs in DCs and LDCs, the tools' websites should be further optimized to be fully responsive to different user displays and existing mobile applications should be upgraded, so they are functional and able to provide automated personalized insights (based on products).*
- *TMI should further leverage its relationships with universities, researchers, private sector, or other organizations to make use of their expertise, for example in methodology or in designing user interfaces and apps that respond well to user needs. A priority should be to update the Export Potential Map methodology in line with the recent academic literature.*

Conclusion 5: ITC has clear comparative advantages in providing trade and market information, but there are demands for data that cannot be met so far. ITC maintains its role in "classic" data collection and dissemination of global trade information, although the environment is increasingly competitive. It has a comparative advantage in providing international trade data based on a combination of generally free access as well as high quality, timeliness, and completeness of data.

Another area where ITC has demonstrated comparative advantage is the deployment of bespoke data solutions designed to respond to specific needs. The African Trade Observatory is a good example of this.

ITC is partially able to respond to growing demand for data on trade in services, but other organizations (WTO, World Bank, and OECD) have an established comparative advantage in collecting and analysing

[10] https://marketanalysis.intracen.org/en/joinus

data on applied services policies. There is increasing demand, particularly in Africa, for data on informal trade. However, there are currently no international standards or programmes to comprehensively track it in a large number of countries, as it requires national/local analytics and surveys to gather this type of information. An organization like ITC, which has strong relationships with national data providers, could play a leadership role along with partner organizations in implementing specialized studies on a case-by-case basis, i.e. if there are specific country projects and funds.

Recommendation 5: Continue recent developments of promising integrated data solutions designed to respond to specific needs (such as the African Trade Observatory). In addition, explore areas where ITC is well positioned to serve existing demands for data.

Directed to Chief Trade and Market Intelligence Section:

- *While continuing to focus on its core activities of collecting and disseminating comprehensive and updated high quality trade data, TMI should expand partnerships with universities, researchers, private sector, or other organizations to develop new products based on the changing needs of its clients, especially in areas where ITC has an established comparative advantage.*
- *TMI should adopt a strategic approach (in line with recommendation 1) moving into new substantive areas. Given recent work with the African Union, an area of strategy advantage could be the development of standards and methodologies (such as surveys) for estimating informal trade on a case-by-case basis, in cooperation with partner agencies and national statistics offices. Given the nature of the customized assistance that will be required, the activity will need to be financed for individual countries, and might therefore not qualified for Global Public Good related funds.*

Conclusion 6: ITC's visibility in providing trade and market information is partly limited. Public sector data providers typically have cooperative arrangements in place. Transparency regarding these arrangements is so limited that end-users frequently do not realize the origin of the data they are using. In some cases, a likely result is that ITC data are not sufficiently credited by other organizations.

Recommendation 6: Strengthen the organization's visibility where ITC data is used by other providers.

Directed to Chief Trade and Market Intelligence Section:

- *Ensure that ITC data are given due credit when used by other organizations, in particular as regards TRAINS.*

Conclusion 7: The tools reach a broad group of users who could also be interested in or benefit from other ITC products or services. But opportunities to refer to further information and services provided by the organization are hardly used so far. The MAT are the entry point to ITC for many MSMEs and other client groups of interest, as evidenced by the tools' large user base. However, the MAT portals make relatively limited references to other services and information sources at ITC, including those outside TMI. Given that ITC has a wealth of information on trade-related areas beyond the core offerings of the MAT, users would benefit from exposure to those sources.

There is scope to use predictive analytics and other techniques to "cross-sell" ITC information and services based on observed patterns of querying and browsing in the tools. Current efforts around ITC's data management and to establishing a single sign-on for ITC clients could also be helpful in this context.

Recommendation 7: Utilize opportunities to identify and address interest of the tools' users for other ITC products and services.

Directed to Chief Trade and Market Intelligence Section:

- *The market analysis tools' websites should leverage opportunities to provide links to relevant/related ITC products and services.*

Conclusion 8: Data is shared upon request, but there is no transparently defined regulation on the sharing of data. While there is no evidence that data are not shared when required, the process for requesting access to larger datasets is not explicitly available, which means that many external users are unaware of the ability to access large amounts of data. As a result, ITC data are little used by researchers directly. The fact that larger datasets are not shared more openly is primarily justified by confidentiality agreements with data providers.

Neither TMI nor ITC do have an Open Data Charter, or another policy to facilitate access to the data underlying the MAT. While ITC has a history of working collaboratively with some parts of the research community, the general perception among researchers in international trade is that it is difficult to access large amounts of data from the tools.

The current Data Strategy of the Secretary-General invites UN entities to enhance open data sharing portals in order to better share the available wealth of data and statistics and to become better in governing greater exchange of data, developing *"data sharing agreements that enable partners to integrate more deeply with us, in responsible ways".* [11]

Recommendation 8: Develop a commitment to open data and regulate access to data in a transparent manner.

Directed to Director Division of Market Development:

- *ITC should adopt an Open Data initiative. The operational principle should be that all data collected by ITC, including the data underlying the MAT, should be publicly available and released in a way that enables bulk download (like in Market Access Map), subject to contractual or confidentiality restrictions. The World Bank's Open Government Data Toolkit and the Data Strategy of the Secretary-General contain useful elements that ITC should consider during consultations designed to develop its own approach to open data.*
- *The initiative should result in a document, such as a charter or policy, that is developed in a timely and an easily understandable manner, and made readily available to the public within a year. The document should also explain what data cannot be shared and why. Given that within ITC, the Division of Market Development has particular expertise in data collection and treatment, it should lead on this process.*
- *Just as access to data from outside should be transparently regulated, so should the sharing of data within the organization. Independently from the Open Data initiative, internal data sharing should also be governed through a transparent agreement that is accessible to all personnel. It should be ensured to the extent possible that data can be freely shared within the organization where this adds value or enables synergies in line with the organization's and programmes' mandate. These efforts should be aligned with the corporate data management strategy which also aims to facilitate information flow and value addition.*
- *Good collaboration between sections within the Division of Market Development should be ensured, also or especially in case of overlapping mandates or areas of complementary expertise, since they all contribute to the organization's vital research function and therefore need to be well coordinated. Ideally, this would include exploring ways to better harmonize, link and integrate their products and services.*
- *All of these efforts should have the explicit support of senior management.*

Conclusion 9: The tools' purpose is to provide trade and market information as a global public good. This ambition calls for an adequate funding model. Providing trade information has been a core function of ITC since its founding in 1964. While previously sponsored by users and other projects, ITC decided to change the business model as of 1st January 2009[12], offering the market analysis tools free of charge to developing countries. Free access to the tools is greatly appreciated especially in the LDCs and there is widespread support for maintaining trade and market information as a global public good.

[11] UN. 2020. Data Strategy of the Secretary-General for Action by Everyone, Everywhere with Insight, Impact and Integrity (2020-22). UN website, page 30.

[12] ITC Annual Report 2008 and JAG report 2009

Due to ITC's funding structure, TMI cannot rely solely on the organization's regular budget to operate the tools. Instead, the team has to continuously raise additional extrabudgetary funds (including project funding), in particular to finance the further development of new or existing tools. TMI has been very successful in mobilising resources (human, financial and logistics) for the development of tools and services through its network of development partners and donor agencies. This implies however that at present private sector partners and donors receive privileged data access and bespoke solutions in return for their support.

Recommendation 9: Uphold the principle that trade and market information is provided as a global public good. Leverage funding from donors and private sector to enhance this offering.

Directed to Chief Trade and Market Intelligence Section:

- *In line with the organization's mandate and strategic plan, TMI should maintain to the maximum possible extent the global public good model of data provision and free access to the tools, in particular for users from developing countries.*
- *TMI should ensure that funds generated by offering customized services do not result in resources and attention being diverted to the provision of services on an exclusive basis, but rather that these resources are used to either drive product development or to support the provision of the tools overall as a public good. Working with donors and external partners to enhance data quality and completeness, as well as the tools' interfaces and capabilities, can further improve the offering in ways that would benefit everyone.*
- *It should be carefully monitored that there is an appropriate balance between the offering that is freely available to all and what is customized and exclusive for specific clients. The ultimate responsibility for ensuring that the tools are provided in accordance with the organizational mandate rests with ITC's leadership. Therefore, the evaluation proposes that TMI should share annually with ITC's Executive Director an overview of the tools' offering while indicating the scope of privileged partnerships and highlighting the value they bring to the global public good model of data provision.*

Notes to Senior Management:

- *ITC should improve its internal knowledge of other services, so each ITC staff has a minimum information/knowledge about market analysis tools (and other services) to be better equipped when meeting beneficiaries and stakeholders. There could be a "package" of information, generic presentations about ITC expertise, or other guidelines that could be a toolkit to promote ITC services beyond individuals' expertise, in particular for DCP colleagues travelling in targeted countries.*
- *In addition, the ITC website should display the full range of ITC products and services. Moreover, the website could provide targeted suggestions based on user behaviour and search queries.*
- *The IT infrastructure required to host and provide the tools and related data has been criticized as insufficient and it has been reported that there have been outages in the past. Therefore, further investment in hardware and software equipment should be considered to host a larger database and develop additional features.*

1) Introduction and methodology

1. The Evaluation Team (ET) has been tasked by the International Trade Centre's Independent Evaluation Unit (IEU) to undertake an evaluation of ITC's performance in trade and market information. The engagement started with terms of reference (TOR), which originally had a broader scope. In the course of the inception phase, however, it became clear that adjustments of this scope should be made. The Inception Report therefore replaced the original TOR. This report follows the scope for the assignment set out in the Inception Report.

2. **The purpose of this report is to present key findings, conclusions, and recommendations.** The basis for these elements is the set of evaluation questions discussed below. The report also discusses the evidentiary basis for the findings and conclusions, as well as the considerations behind the making of recommendations.

3. This report first discusses the background to the assignment. In Section 2, it provides an overview of the Transparency in Trade (TT) Programme, focusing on key activities as well as linkages to broader undertakings within ITC. Section 2 also presents the theory of change and relates it to performance indicators. Section 3 then discusses the ET's findings against the background provided by the first two sections, as well as the evidence upon which they are based. Section 4 states the report's conclusions and presents related recommendations.

4. In line with standard ITC practice, the evaluation unit circulated the draft text of this report to key stakeholders for comments prior to finalization. The IEU in consultation with the ET then edited the report based on those comments. This process resulted in changes in emphasis and correction of factual issues. Suggested changes were only incorporated as long as they were based on either a demonstration of error or infeasibility, or the presentation of contrary evidence.

Background

5. Development interventions through the 2030-time horizon are framed through the lens of the UN Sustainable Development Goals (SDGs). Trade is not mentioned in a goal as such but is recognized as a "means of implementation". In other words, increasing trade integration can, for instance, increase availability and decrease price of goods and services that are important from a sustainable development perspective, as well as driving growth in productivity and per capita incomes.[13] According to the TT programme document, ITC sees it as contributing to goals 2 (sustainable agriculture), 8 (decent work and economic growth), 9 (industry, innovation, and infrastructure), 12 (responsible consumption), and 17 (partnerships for the goals).

6. Providing trade information and market intelligence has been a **core function of ITC** since its founding in 1964.[14] 'Providing trade and market intelligence' remains one of ITC's six focus areas for trade-related technical assistance. However, the landscape for trade and market information has changed markedly since the organization's founding. A number of private and public sector organizations supply trade-related information, though as will become clear, there are important points of differentiation for ITC's offerings, not least of which is the objective of focusing on micro, small, and medium-sized enterprises (MSMEs).

7. **Information asymmetries remain** an important issue for businesses in developing countries looking to enter export markets and when influencing governments to promote national business interests in trade negotiations. There is even a case to be made that with the rise of the services economy, and increasing services exports from developing countries, including services delivered online, the problem

[13] Helble, M., and B. Shepherd. 2017. Win-Win: How International Trade Can Help Meet the Sustainable Development Goals. Manila, ADB.
[14] GATT. 1967. Joint GATT/UNCTAD Trade Centre: Note by the Director-General. L/2890 (6 Nov 1967), p. 7

is becoming more acute: for example, goods market tariffs can be obtained from individual Customs agencies as well as other sources—subject to comparability and quality concerns—but comprehensive information on the range of regulatory restrictions affecting services trade is still difficult to access for many countries.[15] Similarly, goods and services trade both increasingly take place within complex and ever changing Global Value Chains. The ways in which market factors and policies interact to produce outcomes for direct and indirect value chain participants is an area of active research and emphasizes the need for detailed and accurate data in both areas.[16]

8. Against this background, the time is ripe to assess the extent to which ITC tools and services have been geared to the needs of clients, as well as to identify future strategic priorities in the area of trade and market information.

Purpose and scope of the evaluation

9. The purpose of this evaluation is to provide a comprehensive picture of what kind of trade and market information ITC provides today, and how well the organization analyses, distributes, and uses it in furtherance of its mandate.[17] Key objectives for the evaluation include the following:

- assessing how effective the organization is in maintaining its **relevance in the area of trade and market information**;
- determining the **utility and complementarity of ITC's tools and services** in this area and the satisfaction of their clients;
- providing insights into **how well related information is shared and used within ITC**; and
- serving as a basis for future improvements by **providing recommendations** to improve ITC's performance in trade and market information.

10. To achieve these objectives, the evaluation examines and responds to the following high-level evaluation questions[18]:

1. What is the **current context in which ITC performs its mandate** to provide trade and market information?
2. How **effective are ITC's tools and services** in the area of trade and market information?
3. To what extent are ITC's **tools and services efficiently managed and provided**?
4. To what extent does ITC succeed in **exchanging and using trade and market information internally**?

11. The insights generated by this evaluation are meant to be useful for different groups of stakeholders. They are in particular:

- **ITC staff** working in trade and market information. The findings of this evaluation will enable them to improve the effectiveness of activities in these areas.
- **Senior Management**, as the evaluation provides evidence, which may be used to enhance the organization's strategic focus, interventions, and programmatic approach in the areas of trade and market information.

[15] Hoekman, B., and B. Shepherd. 2019. Services Trade Policies and Economic Integration: New Evidence for Developing Countries. CEPR Discussion Paper 14181

[16] Diakantoni, A., and H. Escaith. 2012. Reassessing Effective Protection Rates in a Trade in Tasks Perspective: Evolution of Trade Policy in Factory Asia. WTO Staff Working Paper ERSD-2012-13,

[17] On its website, ITC represents its mandate as follows: *"As the joint agency of the United Nations and the WTO, ITC is the only multilateral agency fully dedicated to supporting the internationalisation of SMEs. Its joint mandate combines a focus on expanding trade opportunities with the aim of fostering sustainable development."*

[18] For a more detailed overview of the evaluation questions see section 'Evaluation questions'.

- **Partners and funders**, who seek information about the organization's performance in these areas and to whom ITC is accountable for its work; and
- **the general public** interested in learning more about ITC's work in these areas.

12. Beyond these groups of direct users, the findings of this evaluation are ultimately intended to benefit the main client groups of ITC's work in this area, as the paramount objective of this evaluation is to improve the services provided to them.

13. The evaluation aims to assess ITC's performance in trade and market information. In line with the Inception Report, the main areas of work falling within the scope of this evaluation are a set of tools managed by the Transparency in Trade (TT) Programme, namely:

- **Trade Map:** A tool that presents (i) for trade in goods, monthly, quarterly and yearly trade flows as well as trade indicators based on the Harmonized System (HS) and the National Tariff Line (NTL) level and (ii) for trade in services, quarterly and yearly flows based on the Balance of Payments Manual. It covers about 220 countries and territories.
- **Market Access Map:** A tool that presents data on tariffs and other trade-related market access conditions and charges, including those applied under preferential regimes. It covers up to 239 countries and territories, and at least 5,500 product at HS6 level (goods only), with higher detail information available in many cases.
- **Export Potential Map:** A tool that enables users to identify products, markets, and suppliers with untapped export potential, as well as opportunities for export diversification based on ITC's export potential methodology.
- **Procurement Map:** A tool that provides detailed information on public procurement covering over 5.7 million contract awards and 241,295 active tenders (as of writing).
- **Investment Map:** A tool that provides access to annual foreign direct investment (FDI) flows and stocks for around 200 countries as well as related indicators, and more detailed information for around 115.
- **Rules of Origin Facilitator:** A tool that provides access to information on market access regimes under preferential agreements, focusing on tariffs, duty savings, rules of origin, and certification requirements.
- **Market Price Information:** A tool that provides access to price information on about 300 agricultural products in a number of countries.
- **Global Trade Helpdesk:** An integration tool that provides users with access to information about imports, market dynamics, tariffs, regulatory requirements, and potential buyers, based on information available in the other tools.

14. To maximize focus, attention is concentrated on these interventions identified as "tools" on the ITC Market Analysis website[19]. Other aspects of the TT Programme, such as specific product-focused, regional, and national portals[20], have not been considered as main areas under evaluation, but the ET examined them in the wider scope and as considered relevant to the objectives of this evaluation. Similarly, tools and activities of other ITC programme or work areas were also further investigated where relevant.

[19] https://marketanalysis.intracen.org/en
[20] Such as Cotton Portal, Comoros MPI (Market Price Information) or EuroMed Trade Helpdesk

Evaluation process and approach

Principles and criteria

15. This evaluation and its approach were guided by the following principles:

Table 1: Evaluation principles

Principle	Concrete application
Independence and Impartiality	The evaluation team was committed to avoid any potential conflict of interest and to ensure that the evaluation is carried out impartially to avoid biases and provide legitimacy to its findings.
Credibility	Building on independence and impartiality, the evaluation used a rigorous methodological approach ensuring that results, conclusions, and recommendations are based on objective, reliable and valid data and thorough analysis.
Utility	The main objective of this evaluation is to gain useful insights that can feed into strategy, planning and management. To this end, the evaluation was designed to be helpful in both process and results, and to produce findings that are readily usable and helpful.
Transparency	The evaluation was carried out in a transparent manner through regular consultation with stakeholders while working towards maintaining confidence and ownership throughout the process of developing the findings, conclusions, and recommendations. Key stakeholders were regularly kept informed of the progress made as well as in case of any hurdles relevant to this exercise.
Triangulation	The evaluation used triangulation, i.e. it relied on different data sources and collection techniques to gather different perspectives and test the consistency of information.
Inclusivity and Gender Equality	The choice of stakeholders for interviews was aimed to ensure stakeholder participation from a wide range of types of actors to capture multiple points of view and uphold respect for gender equality and diversity.
Confidentiality	Confidentiality and anonymity of respondents were protected throughout the process, i.e. during the collection, analysis and publication of data.
Adherence to good practice and guidelines	Overall, the evaluation and its methodological approach followed the principles set forth in the ITC Evaluation Guidelines[21] and was guided by the Norms and Standards for Evaluation[22] as well as the Ethical Guidelines for Evaluation[23] published by the United Nations Evaluation Group (UNEG).

[21] ITC (2018). ITC Evaluation Guidelines.
[22] UNEG (2016). Norms and Standards for Evaluation.
[23] UNEG (2020). Ethical Guidelines for Evaluation.

Evaluation questions

16. The evaluation was carried out through a summative and formative perspective. The summative perspective has been backwards-looking, assessing achievements in hindsight, providing evidence on what has been achieved (or not) and the elements which contributed to it. The formative perspective has been forward-looking to inform future decision-making on interventions in trade and market information, providing indications of where the organization should develop in this area.

17. The following table shows the high-level questions and related specific questions, which were examined by this evaluation. Moreover, the table also shows how the evaluation questions are linked to a number of fundamental evaluation criteria[24]. These criteria provide a normative framework for evaluating development assistance and have been adopted by most development agencies as standards of good practice in evaluation.

Table 2. Evaluations questions and corresponding criteria

High-level questions	Criteria focus and definitions
What is the current context in which ITC performs its mandate to provide trade and market information? • What is the importance of trade and market information today, in particular for developing and emerging economies? What are recent and ongoing trends in this area, including latest trends in data technology? • What implications does the corona pandemic have for ITC's work in this area? • What other organizations, companies or actors play a significant role in this area? How does their offer differ from ITC's? • How are ITC's tools and services in this area positioned against this background? Are there opportunities where ITC should establish or strengthen its collaboration with external partners?	**RELEVANCE:** *The extent to which intervention objectives and design respond to beneficiaries', global, country, and partner/ institution needs.* **COHERENCE:** *Related to external coherence considering the consistency of interventions with other actors' interventions in the same context.*
How effective are ITC's tools and services in the area of trade and market information? • What are the trade and market information needs of ITC's main client groups? How will these needs develop in the foreseeable future (e.g. in the next 5-10 years)? • To what extent are the tools and services well-tailored to ITC client groups and their needs? How do clients perceive their usefulness? • To what extent do these tools and services achieve their purpose to enable improved trade and investment decision-making?	**RELEVANCE:** *The extent to which intervention objectives and design respond to beneficiaries', global, country, and partner/ institution needs.* **EFFECTIVENESS:** *The extent to which the intervention achieved, or is expected to achieve, its objectives, and its results, including any differential results across groups.* **IMPACT:** *The extent to which the intervention has generated or is expected to generate significant positive or negative, intended or unintended, higher-level effects.*

[24] OECD (2019), Evaluation Criteria (revised set of definitions)

To what extent are ITC's tools and services efficiently managed and provided? • How well do ITC's tools and services in this area complement each other? Are there overlaps? • How could tools and services be improved, also in light of latest trends in data technology? • To what extent is the current business model of providing trade and market information suitable and sustainable? (e.g. regarding free for all vs. fee-based approaches or regarding the provision and/or sharing of platforms and data with partners)	**EFFICIENCY:** *The extent to which the intervention delivers, or is likely to deliver, results in an economic and timely way.* **COHERENCE***: Related to internal coherence, addressing the synergies and interlinkages between interventions carried out by the same organization* **SUSTAINABILITY:** *The extent to which benefits of the intervention continue, or are likely to continue.*
To what extent does ITC succeed in exchanging and using trade and market information internally? • To what extent is the obtained trade and market information exchanged within the organization and made available to others? To what extent are internal synergies used? • How is ITC using trade and market information for trade-related technical assistance planning, management and follow up? • To what extent is the processing and availability of data relevant or consistent with current developments within the UN system (such as the UN data strategy)?	**COHERENCE***: Mainly related to internal coherence, with some elements of external coherence.*

Evaluation matrix

18. An evaluation matrix was developed to define which data sources have been used to answer the evaluation questions while taking into account availability of data, time and budget. The evaluation matrix is an organizing tool to help plan for the conduct of an evaluation. It was prepared during the inception phase of the evaluation, and was then used throughout the data collection, analysis, and report writing phases. The evaluation matrix forms the main analytical framework for the evaluation. It reflects the evaluation questions to be answered and helps to consider the most appropriate and feasible method to collect data for answering each question. It guides the analysis and ensures that all data collected is analysed, triangulated, and then used to answer the evaluation questions, leading to conclusions and recommendations. The evaluation matrix is presented in Annex 1.

19. An evidence trail, which shows how individual findings led to specific conclusions and the associated recommendations, can be found in Annex 3.

Data collection and sampling

20. The data collection techniques have been determined based on their suitability to answer the evaluation questions. The evaluation has relied on a mixed method design to allow triangulation of multiple data sources and stakeholder groups. The following data collection methods have been used:

a) **Document review**, including three main types of sources:

- Documents related to ITC's work in the area of trade and market information (in particular related to the Transparency in Trade Programme; such as strategic and operational planning documents, work plans & budgets, progress or final reports, monitoring data, or corporate publications).

- Publications, evaluations, or studies related to trade and market information (regarding aspects such as their economic importance, their availability and provision by different sources, related effects and trends in this area).
- Relevant documents published within the UN system in this area, in particular regarding the provision, harmonization and exchange of data.

b) **Key informant interviews**, which were semi-structured and conducted either face-to-face or more often by telephone/video conference, considering the prevailing public health conditions during the project period. A full list of interviewees is in Annex 2. They number 168 (of which 66% were men and 34% women) and fall into the following broad categories:

- Selected representatives of the main target groups for ITC's services in trade and market information (companies, notably SMEs; BSOs; policy makers; market partners);
- ITC staff working in the Transparency in Trade Programme; as well as staff members collaborating with it or working in related areas;
- ITC senior management, as well as other staff members carrying out or having particular knowledge of activities in the area of trade and market information; and with
- Other external stakeholders and resource persons, such as implementing partners and funders; UN agencies and the WTO; as well as research institutes, think tanks or academia.

c) **Case studies**, based on key informant interviews in selected African countries. Specifically, the ET has leveraged professional contacts in Cape Verde, Malawi, Mauritania, Mauritius, and South Africa to provide first-hand examples of the uses to which ITC's trade and market information tools are put, as well as issues encountered by users in dealing with the tools and potential future demand from them for new, modified, or enhanced products. The selection of the above countries has been proposed due to the geographical locations of these countries and the evaluation team members' recent interaction with key stakeholders in these countries related to the use of ITC tools.

In each country, contacts dealt with directly have included Ministries of Trade, Ministries of SMEs, Trade Promotion Organizations, Investment Boards, Exporters' Associations, Statistics Offices, Chambers of Commerce, Women Entrepreneurs Associations, and sectoral associations, with the precise mix varying from country to country based on institutional setups and stakeholder configurations.

The case studies focus on examples of how ITC's tools and services in the area of trade and market information address concrete and specific needs of clients regarding aspects such as export strengthening and/or diversification, understanding conditions to access markets, or trade integration. Detailed findings from the case studies can be found in Annex 4.

Given the limited scope of the case studies, the ET only used results as part of its broader efforts to triangulate information from multiple sources. The case studies are presented as informative examples from countries of interest.

d) **Online surveys** in English, French, and Spanish were used to assess the effectiveness of particular interventions and services, in particular regarding their usefulness for main target groups. On the one hand, a stratified random sample of over 8,000 registered users of the TT tools identified above was asked to respond to a survey tailored towards end-user experience. A total of 135 completed responses were received. In addition, all ITC staff received a link to an internal survey focused more on the use that they make of these tools. A total of 31 responses were received. Given the very high non-response rates for both surveys, the ET has only used them as part of the information base when they corroborate information from other sources, in particular interviews. The questionnaires used for the survey can be found in Annex 5.

e) In addition, a **data review** was undertaken, examining the nature of trade and market information, generated and/or stored by ITC to assess their quality, consistency and potential for harmonization. As a subsidiary issue, attention was given to the issue of the interface between the data that power the TT tools and the systems to be developed under ITC's corporate data management strategy.

21. The table below provides an overview of the data collection framework, including evaluation questions, key dimensions for analysis and the data collection methods used as main lines of evidence.

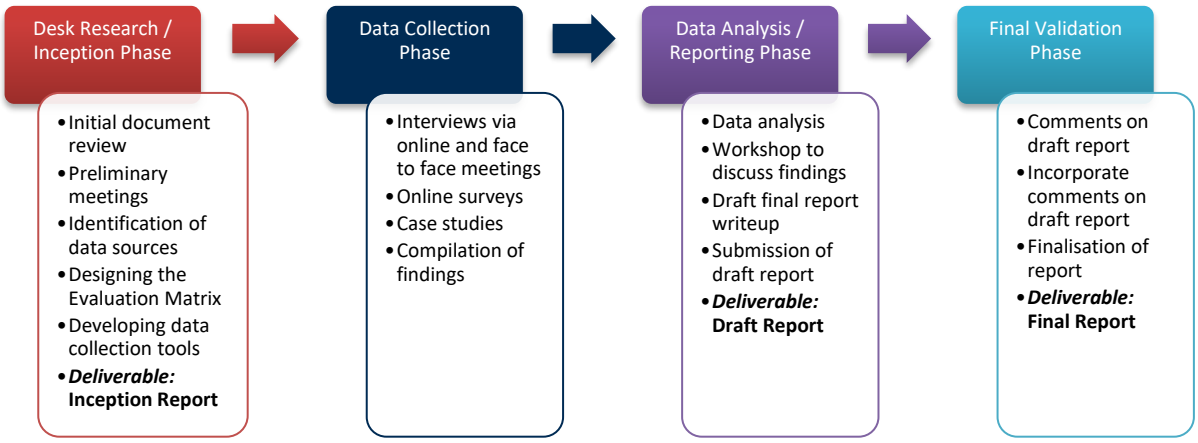
Table 3: Data collection framework

High-level evaluation questions	Key dimensions for analysis	Main lines of evidence
What is the current context in which ITC performs its mandate to provide trade and market information?	• Importance of trade and market information • Trends in this area, incl. data technology • Implications of corona pandemic • Role and offer of other organizations, companies or actors • Positioning of ITC	• Document review • Key informant interviews (in particular ITC staff, researchers and informants from other organizations)
How effective are ITC's tools and services in the area of trade and market information?	• Information needs of *ITC's main client groups*: *MSMEs* (incl. small-scale producers); *BSOs*; *Policymakers*; *Market partners*; *Others* (e.g. academia) • Accessibility and usefulness of tools and services for main client groups • Performance of tools and services to improve trade and investment decision-making	• Case studies (focused on concrete and specific needs of clients and accessibility and usefulness of tools and services) • Online survey (differentiating responses by client category)
To what extent are ITC's tools and services efficiently managed and provided?	• Management and delivery of tools and services • Complementarity of tools and services • Opportunities for improvement, incl. latest trends in data technology • Sustainability of business model	• Document review • Data review • Key informant interviews (in particular ITC staff and researchers)
To what extent does ITC succeed in exchanging and using trade and market information internally?	• In-house exchange of information obtained • Use of information for ITC interventions • Relevance and consistency of data processing regarding developments within the UN system	• Document review • Key informant interviews (in particular ITC management and staff) • Online survey (with ITC staff)

Evaluation process

22. The evaluation was carried out over a period of 16 months. It was started in July 2020 with TOR, which originally had a broader scope. During the inception phase, however, it became clear that adjustments of this scope should be made. The Inception Report therefore took longer than expected, was completed after five months and replaced the original TOR. The data collection was then carried out over the following three months, and roughly lasted until February 2021. Following data analysis, a workshop with key stakeholders was held in end-March to validate preliminary findings. This was followed by report writing, with the report being shared for comments in July 2021. Addressing of the comments and finalisation of the report then took another three months, until October 2021.

Figure 1: Evaluation process



Evaluation team and quality control

23. The evaluation was commissioned and managed by ITC's Independent Evaluation Office (IEU). The IEU established an evaluation team formed by three external senior consultants (Ben Shepherd, Veepin Bhowon and Devendranath Chamroo). The evaluation team worked under the supervision of and in collaboration with an ITC Evaluation Officer (Simon Bettighofer). The IEU internally reviewed and validated the design of the ToR, the inception report, as well as the final evaluation report for quality assurance, ensuring that the process and deliverables met the relevant principles and guidelines. In addition, the head of IEU (Miguel Jiménez Pont) provided guidance and oversight throughout the evaluation process. For fact checking as well as to ensure their ownership and participation, key stakeholders were consulted regularly and had the opportunity to provide comments at the drafting stages of the terms of reference, for the inception report as well as for this final report.

Limitations

24. The ET had a number of challenges to deal with during the evaluation process

- **Survey non-response**: The ET had initially envisaged using survey data as an independent source of information. However, the number of respondents turned out to be too small to allow results to be broken out by respondent demographics. As a result, data from the surveys is only used where it is corroborated by other evidence, and thus serves to emphasize or exemplify points rather than prove them.
- **Difficulty in accessing programme information**: TT programme staff indicated that some information requests from the ET involved undue time burdens or could not easily be fulfilled. Examples include detailed user information based on website access statistics, and TT tools development and maintaining costs, as well as the skill base of TT programme staff. Only partial information was provided in both cases and the ET made use of it, but it is important to note that TT's difficulty in producing this kind of information may indicate room for improvement in terms of the systems used to treat these kinds of queries.
- **Covid-19 pandemic**: Public health considerations largely precluded in-person interviews. While ITC staff and external interviewees were generous with their time for video and telephone interviews, the resulting data collection approach was necessarily more structured than would be typical and may have resulted in a less full information set than in in-person interviews had been possible.
- **Changed assignment scope**: The scope of the evaluation changed fundamentally during the inception phase. As such, the ET was required to change emphasis in a number of areas.

2) Transparency in Trade Programme

Programme activities, tools and overall approach

25. **Trade Information (TI) is relatively well defined within ITC and is considered to relate to the Transparency in Trade (TT) Programme.** As noted above, providing trade and market intelligence is one of ITC's six focus areas, with the TT Programme playing a key role. The rationale for intervention in this space is that access to trade and market information is crucial for international business success, and that better quality and more up-to-date trade and market information can help support better business decision-making.[25]

26. According to the ITC website, the organization's work in terms of providing trade and market information is focused on the following intermediate and final objectives:[26]

    - Providing **global public goods** as the foundation of trade and market information;
    - Strengthening the **skills of local partners** in effectively using trade and market information to make business decisions;
    - Working with local **business support organizations** (BSOs) to improve their trade and market information-related portfolio of services;
    - Developing new and innovative approaches to **intelligence**, including competitive intelligence;
    - Facilitating evidence-based **policy reform**, with a focus on addressing non-tariff obstacles to trade in goods and services.

27. Within this general context, ITC has developed its suite of market analysis tools, as well as other related interventions. In addition to these tools and applications, there is also the Global Trade Helpdesk, which effectively brings together information on trade, export potential, and market access on a single platform. As set out in the Inception Report, Global Trade Helpdesk, Sustainability Map, and capacity building related to TT tools are also considered within scope for this evaluation.[27]

28. Given that the first bullet point above references the concept of "global public goods", it is worthwhile to briefly discuss what this concept implies. One definition indicates that global public goods are *"institutions, mechanisms, and outcomes that provide quasi universal benefits, covering more than one group of countries, several population groups, and extending to both current and future generations"*.

29. In addition, the same source goes on to highlight the characteristics of public goods in standard microeconomic analysis: *"[they] are non-rival and non-excludable: one country's enjoyment of the good does not affect (or reduce) its enjoyment by others and once the good becomes available, no country can be excluded from sharing its benefits"*. This last point is particularly important, as it suggests that when a global public good takes for the form of information, it should be shared as freely as possible, preferably universally. Implicit in this analysis is the idea that a global public good is produced with the objective of supporting widespread benefits and cannot be understood as the "property" of any group or organization in a classic sense.

[25] ITC (undated). Transparency in Trade. Programme document 2016-2021.
[26] https://www.intracen.org/itc/goals/Trade-and-market-intelligence-for-SME-competitiveness/.
[27] By contrast, the Non-Tariff Measures (NTMs) Programme was evaluated in 2018, and therefore was has not re-examined; however, the findings, conclusions, and recommendations of that evaluation were taken into account as appropriate.

Key aspects of theory of change and performance indicators

30. To answer the evaluation questions, the evaluation was informed and guided by a theory of change, which contributes to the understanding of essential elements and causal relationships of ITC's work in the area of trade and market information. For the scope of this evaluation, two already existing theories of change are of importance: one at the level of the TT Programme and one at the corporate level.

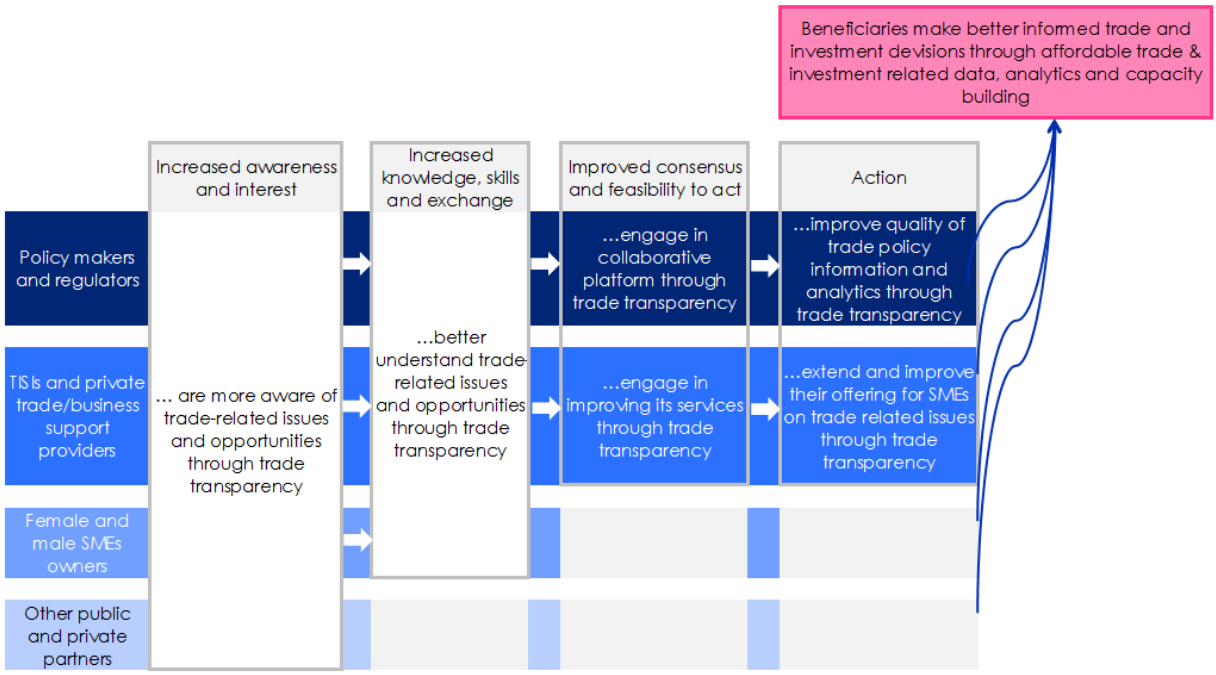
Programme level

31. The TT Programme has a dedicated causal model[28] outlined in its programme document.[29] The overall objective of the programme is indicated as *"Economic operators, institutions and policymakers make better informed trade and investment decisions through affordable trade & investment related data, analytics and capacity building".*

32. To achieve this objective, the programme intends to deliver different outputs for **different groups of clients** in order for them to increase their awareness and knowledge on trade-related issues. In addition, policymakers are supposed to benefit from advisory services and workshops to engage in collaborative platform and improve the quality of national trade policy information. BSOs are foreseen to benefit from customised services to enable them to improve their services and offering for SMEs.

33. The programme's outputs are the suite of market analysis tools, as well as studies, capacity building and advisory services: The programme mainly intends to achieve **results** by putting relevant and current data, indicators, analysis, specialised diagnostic tools, publications and studies directly in the hands of key decision makers. It also intends to build their capacity through face-to-face workshops, webinars and multimedia learning material.

Figure 2: Theory of change - TT Programme



[28] Following the format of a Logical Framework

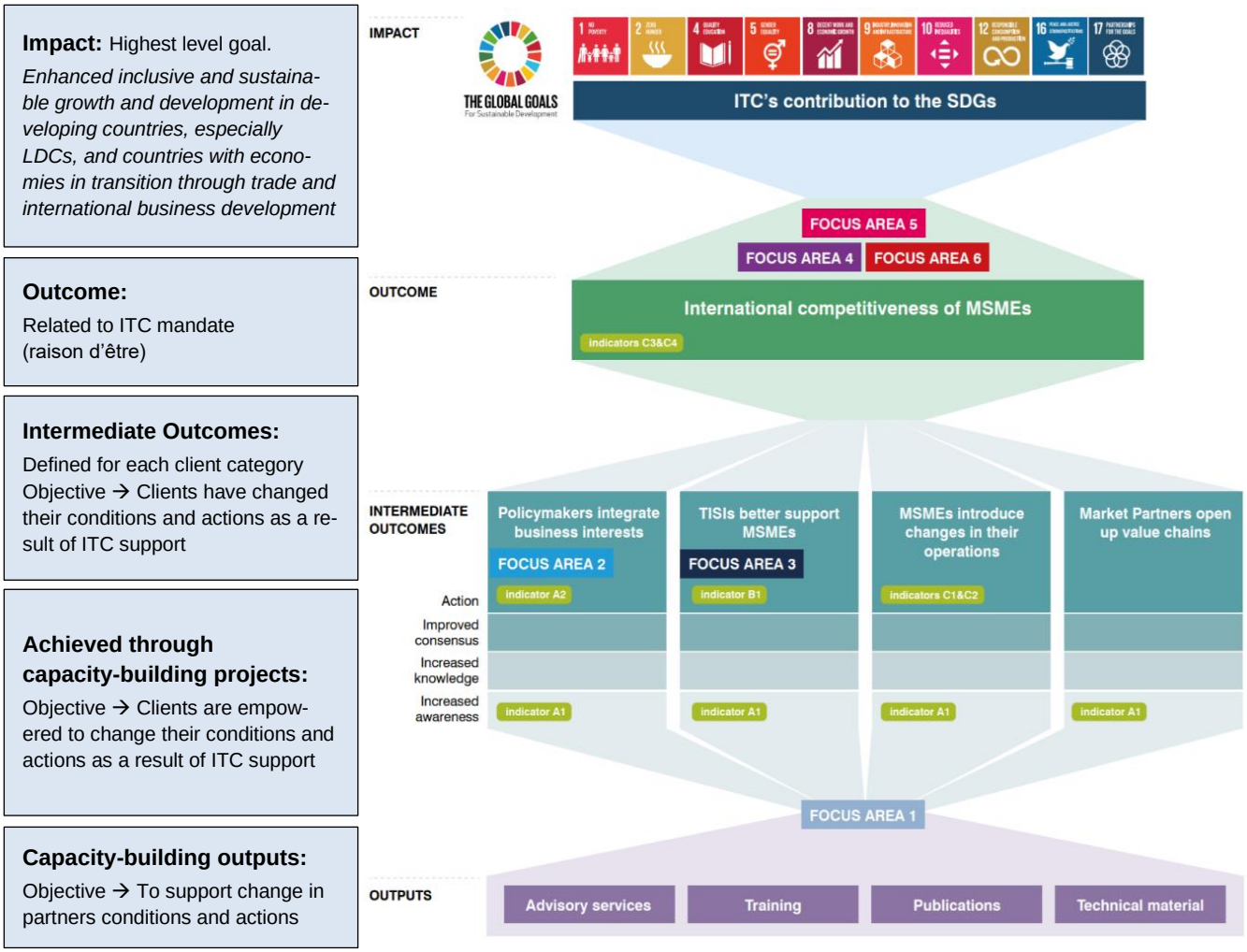
[29] ITC (undated). *Transparency in Trade. Programme document 2016-2021.* The document also includes a more detailed model with specified intended outputs, outcomes, indicators and assumptions (p. 19-20).

Corporate level

34. The theory of change provided in ITC's Strategic Plan 2018-2021[30] delineates the paths to attain intended outcomes and impacts at the corporate level. As can be seen in the figure below, trade and market information have a special role to play. ITC's Focus Area 1 'Providing trade and market intelligence' sits right at the bottom of the framework, thereby forming a sort of **link between the organization's outputs and the desired intermediate outcomes**. Furthermore, the position of this focus area also emphasizes that the provision of trade and market information is aimed at all four different client groups (policymakers, BSOs, MSMEs, and market partners).

35. **The two theories of change (programme vs. corporate) clearly relate to, and complement, one another**: The ITC results framework provides the larger context, while the intended effects on the individual client groups are outlined in further detail in the theory of change of the Transparency in Trade Programme (as discussed above). The methodological approach of this evaluation is informed and guided by these models, with the data collection framework aimed at examining the essential elements and causal relationships of ITC's work in trade and market information.

Figure 3: Theory of change – ITC Results Framework



[30] ITC (2018). *Strategic Plan 2018–2021. Trade Routes to Sustainable and Inclusive Development* (p. 50); graphical representation based on: ITC (2020). *2020 Annual Evaluation Synthesis Report* (p. 3)

3) Findings

Current context in which ITC performs its mandate

Supply side

36. **ITC provides trade and market information and intelligence in a highly competitive context**. On the one hand, a variety of public sector actors are active in this space, such as:

- The UN's Comtrade database provides information on trade flows, while UNCTAD's TRAINS database as well as the WTO's Integrated Database (IDB) provide information on tariffs.
- The World Bank's WITS server integrates these data sources into a single query platform.
- The FAO's FPMA service provides market price information on agricultural commodities, while the IMF and World Bank both have their own series of commodity prices.

37. **Most of these public sector services are provided as global public goods**, at least up to a particular limit for data downloads. By contrast with the range of tools available from various organizations in other areas, ITC Procurement Map and Rules of Origin Facilitator are the only publicly provided information sources providing global data on public procurement and rules of origin respectively.

38. On the other hand, **private data providers also provide services, although typically only upon payment of significant fees.** For example:

- Trade Data Monitor is a private provider that combines raw data on trade flows with access to analysts, for commercial clients.
- Consultancies like Ernst and Young and KPMG have trade practices that provide data to clients, typically within the context of a broader commercial relationship involving consulting services.
- The South African firm Trade Advisory provides a Decision Support Model that bears some similarities to Export Potential Map, in that it aims to support market entry and development decisions.
- Google, through collaboration with TMI, recently launched a free platform "Google Market Finder" which provides assistance to companies and helps them in expanding their business into international markets. This tool provides customised market insights to help companies identify which markets to target, set up their operations and market their business in suggested new markets.

39. **Cost-effectiveness is a key advantage for ITC relative to private providers.** ITC's key point of differentiation with respect to private data providers is its fee structure. Whereas private providers typically charge substantial fees for their services, ITC's data is provided on a global public good model to users in low- and middle-income countries; in some cases, users in high income countries, as well as some institutional users, pay a subscription fee.

40. However, comparing ITC's offerings with those of other public providers is complex because the public sector **providers typically have cooperative arrangements in place**. For instance, Trade Map and Comtrade both collect and disseminate bilateral trade data. Some Trade Map data is sourced from Comtrade, and some Comtrade data is sourced from Trade Map. The ET was unable to ascertain the relative proportions involved, although a review of Trade Map suggests that the proportion of Comtrade is higher for historical than for current data. Similarly, UNCTAD's TRAINS database is exclusively (according to ITC) or mainly (according to UNCTAD) sourced from Market Access Map data.

41. Transparency regarding these arrangements is so limited that **end-users frequently do not realize the origin of the data they are using**. For instance, users of the World Bank's WITS server see ITC's logo as one of the WITS partners, but for downloading tariff data, they are only offered the options of TRAINS or the WTO's Integrated Database. For the typical case of a query using "TRAINS", the data are in fact mostly sourced from Market Access Map, but the end user is unaware of this arrangement, since it is never mentioned in the query tool or in the downloaded files.

42. From a user perspective, the overlap among the various public sector tools is confusing. In some cases, a likely result is that **ITC data are not sufficiently credited** by other organisations with the role they play in research and policy advice: the Market Access Map example just referred to is one such case. In others, the confusion likely runs the other way, with users believing that a higher proportion of Trade Map data is sourced from national agencies than is in fact the case, at least for historical data.

43. **From a public goods perspective, is difficult to understand the rationale for multiple international organizations collecting data that are conceptually very similar**. From a user perspective, but also from a point of view of rational resource allocation, it would be preferable for agencies to take the lead in data collection in the areas where they have comparative advantage. Although there are synergies between agencies in the present arrangement, the lack of clarity from an end-user perspective, as well as cases of actual or potential overlap, mean that there could be room for rationalization.

44. In making this analysis, however, it is important to distinguish between data collection and dissemination. The WITS platform, for instance, is only useful for sophisticated users with a detailed knowledge of international trade and data manipulation tools. As such, **ITC's interfaces** to trade and tariff data are important from a user standpoint, because they **are much more user-friendly and easier to use** than either WITS or Comtrade.

45. However, interviews and case studies reveal that despite this possible ITC advantage, **there is still a substantial "understanding gap" with respect to MSMEs**. Smaller firms in low- and middle-income countries typically only have a rudimentary understanding of trade, so even the presentation in ITC's tools can be difficult for them to access and use.

46. Broadly speaking, users of ITC data strongly support the view that the data are of high quality, completeness, and timeliness, and often see **ITC as performing more strongly than other public sector providers** on these indicators**.** Interviewees uniformly expressed the view that ITC's Market Analysis Tools have data that is timely, complete, and of high quality. Many considered ITC to perform better on these metrics than other international organizations. The survey of external users corroborates this view (Figure 4). While interviewees welcomed the tools' interfaces, they also noted the "understanding gap" just referred to; this gap perhaps explains the somewhat lower score on this metric in Figure 4.

Figure 4*:* Attractiveness of ITC's Market Analysis Tools relative to other suppliers

Source: Survey average (N = 135). Note: 1 = Not at all attractive; 2 = Somewhat attractive; 3 = Attractive; 4 = Very attractive; 5 = Clearly more attractive than other suppliers.

Demand side

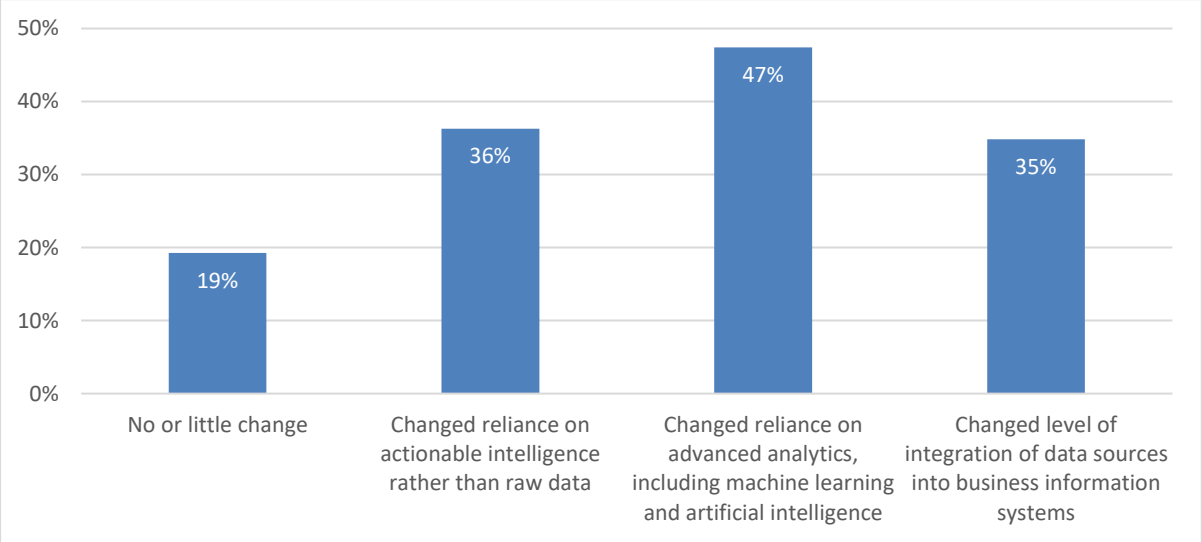
47. Tools like Trade Map and Market Access Map reflect core, historical data requirements among trading firms and policymakers. But interviews and survey results suggest that **user requirements are undergoing major changes.**

48. **In part, ITC has responded to this.** First, it has launched new tools that cover less traditional areas or fill perceived gaps in areas of traditional information needs: examples are Rules of Origin Facilitator, Sustainability Map, and Market Price Information. Second, ITC has started developing data products that go beyond disseminating raw or lightly transformed data to provide additional analytics, or to integrate insights across platforms. Tools in this category include Global Trade Helpdesk and Export Potential Map. Finally, it is offering bespoke data solutions that respond to particular demands, such as the African Trade Observatory.

49. However, interviews highlighted several areas in which **data requirements continue to rapidly change**, and this view is reinforced by survey results (Figure 5).

- On the one hand, **firms increasingly need actionable intelligence rather than raw data**, in the sense that they need analytics and metrics that support decision making.
- Second, **businesses around the world are becoming increasingly data-driven**, which means that they are looking to integrate data sources and analytics into their own information systems.

Figure 5: Proportion of survey respondents indicating changed requirements for trade and market information in the next five to ten years.



Source: Survey count (N = 135).

50. In addition to these general changes, the **nature of data requirements is also changing on a substantive level**. Interviewees highlighted the importance of services trade (the Market Analysis Tools focus on goods trade, although Trade Map also includes information on services), as well as informal trade (not addressed by the tools).

- In **services**, UN Comtrade contains data on trade flows, as do WTO databases. OECD and a World Bank / WTO partnership are collecting data on services trade policies around the world. We share the same data through Trade Map, as data is collected and processed jointly between the four organisations.
- In **informal trade**, there have been surveys in various countries, but data collection is, by the very nature of the subject, extremely challenging and without internationally agreed guidelines or practices. Data collection therefore tends to proceed in a largely ad hoc way at present.

Comparative advantage

51. ITC therefore has a **clear comparative advantage in terms of:**

- **collecting data that are timely, complete, and of high quality**; and,
- **disseminating them through relatively user-friendly interfaces**, though this finding in part reflects the technical nature of competing interfaces among international organizations rather than an ability for users with only a rudimentary background to use ITC's tools.

52. However, ITC's **traditional comparative advantage might have reached a peak** as the development of sophisticated analytics and advanced data analysis techniques will require partnerships with expert partners. While innovation in substantive areas continues, and the African Trade Observatory, discussed below, represents an important example of moving to potential real-time supply of data along with automation in pre-treatment, the use of advanced data analysis techniques from applied statistics, econometrics, and data science is relatively limited. To push the analysis of comparative advantage further, the ET sought information on the distribution of human resources within TMI according to defined competencies such as data analysis, forecasting, big data, and machine learning and artificial intelligence. TMI responded to this request by conducting a self-reported survey whereby staff could indicate that they have or do not have expertise in the listed areas. It was impossible to reach a detailed consideration on the appropriateness of the internal skill distribution within TMI on the basis of this information. But it indicates that even self-reported expertise in areas like big data and artificial intelligence is relatively thin. The implication is that if product development in the future is to focus on sophisticated analytics and advanced data analysis techniques, it will be important for ITC to partner with organizations and experts in these areas.

53. To maintain its comparative advantage there is scope for an organization like ITC, which has strong relationships with national data providers, **to play a leadership role** along with partner organizations in developing guidelines and methodologies **for the more systematic collection of data on informal trade in the future**.

54. Another **important challenge** is related to recent developments in the IT sector, which are making it possible to **integrate advanced analytical capabilities into data driven websites**. The African Trade Observatory is an example of moving in a related direction, by incorporating real-time data and automation of pre-treatment. But the suggestion is to use existing solutions to better leverage the existing data to produce insights. For example, *Tableau* enables integration of powerful data visualization tools. *Shiny* makes it possible to use the R statistical programming language to allow users to perform analytical tasks on remotely hosted data (i.e., without downloading it locally).

55. **ITC's tools do not integrate these or similar tools.** As a result, interviewees noted that data visualization capabilities are limited; an example of superior data visualization that was cited is the *Observatory of Economic Complexity* (OEC), which provides trade data at a disaggregated level using informative visualizations to show market share, as well as sophisticated metrics.

56. In addition, there is limited capacity to automate the production of data and visualizations for report-writing purposes in the ITC products. It is also impossible for firms to link directly to ITC's servers for automatic updating of data used in their own analytics, as the tools do not integrate Application Programming Interfaces (APIs) for bulk download, nor do they include push notifications. Competing platforms, such as UN Comtrade, already integrate APIs, which facilitate data access while ensuring licensing conditions are complied with by requiring a user token for large downloads. ITC already makes use of APIs to facilitate access to data by, for example, Renault Nissan. So there is no issue of technical feasibility, but access nonetheless is not currently available to general users.

57. Whereas ITC's **comparative advantage** in data collection—timeliness, completeness, and quality—is widely recognized, it is **less obvious in the case of data services that focus on the development of new products involving sophisticated analytical techniques.** Export Potential Map represents a

movement into this segment because it uses trade data in a model context to produce measures of trade potential. It also incorporates the product space literature to motivate insights on export diversification.

58. When Export Potential Map was first developed, ITC sought external peer review. Reviewer 1 commented as follows:

> *"The exercise is an interesting contribution. However, the exposition is difficult to follow, details of the modelling are missing, notations in the equations could be very much improved and the theoretical justification of the exercise is loose. … There are many priors, statements that would hardly fit an academic publication."*

59. Reviewer 2 commented as follows:

> *"My advice would be to hold off on integrating the approach into a revision of ITC's EPA methodology to allow for an automated tool/web-application aimed at exporters and related stakeholders until you have more information on how it does in using historical data. Whatever the outcome of that exercise as noted above, as you note in your email it is clear that the tools by design abstract from the many complex factors that need to be considered and that require country-specific analysis. I see two approaches to this: (i) don't do the integration; or (ii) do it, but with very strong health warnings and pointing users to documents that lay out the type of detailed analysis that needs to be done before firms consider investing. Before getting to that decision point however I would do more to generate information on how well the tools do in identifying opportunities by using the historical data."*

60. Following peer review, ITC staff reformulated the document that was reviewed, and Reviewer 1 expressed satisfaction. It is unclear to what extent the model itself was changed. However, Reviewer 2's suggestion of validating the tool against historical data was not pursued formally until the issue was raised by the ET during the present evaluation. To the ET's knowledge, the process of validation using historical data has not yet been completed, but the tool remains fully accessible to users who are likely unaware of this lack of validation; TMI staff indicate that validation was undertaken with CBI experts, given that CBI financed the project. The website of Export Potential Map contains Frequently Asked Questions that deal with the limitations of the tool, as well as publications showing how it is applied in practice. ITC's view is that these pieces of information conform with option ii ("health warnings") set out by Reviewer 2.

61. **An area where ITC has demonstrated comparative advantage is the deployment of bespoke data solutions designed to respond to specific needs.** The African Trade Observatory is a case in point. By leveraging its reputation for quality, completeness, and timeliness, along with its established relationships with data collection organizations, ITC has been able to work with partners in the region to develop a resource that will provide users, primarily policymakers, with very timely, potentially even real-time, trade data.

62. **This development will be, once fully operational, a genuine innovation in the provision of trade data**, and has scope for scaling up in other regions should it prove robust in its initial development. **There is no organization currently in a position to compete with ITC in an area like this**, as they do not have the ability to provide data so rapidly or use automation to such an extent to facilitate that rapidity.

Partnerships for innovation

63. **In the realm of developing new products that manipulate data in sophisticated and informative ways, there is a large community of researchers**, both in academia and in other international organizations, who specialize in this activity. **TT staff have links to some of those researchers**, in particular the Global Trade Analysis Project (GTAP) Consortium as well as a small number of researchers involved in collaborative publications with ITC staff.

64. However, **few other researchers are actively engaged in working with ITC data**, due to the perceived difficulty of downloading bulk data—the absence of APIs was frequently noted—other than a GTAP-ready dataset for Market Access Map. In the case of Export Potential Map, researchers contributed to the peer review stage, but appear not to have been engaged in the tool's design, as the methodology document does not have any authors external to ITC. TMI staff pointed out that the tool received a German Design Award in 2018.

65. **For future activities involving product development based on sophisticated data manipulations, the research community has huge untapped potential in terms of collaboration with TT staff**. However, interviewees from the research community expressed a feeling of exclusion from ITC's Market Analysis Tools due to the difficulty of downloading data in bulk. This sentiment was not uniform: some researchers indicated that they had largely unfettered access to any data they needed from ITC. However, that access relies on—and is seen by others as relying on—personal relationships with ITC staff, which creates a perception of inequity.

66. Clearly, if some researchers can have access to full ITC datasets, there is no contractual reason or reason of confidentiality why others cannot have that same access. Indeed, views of TMI staff, as expressed to the ET, differ on whether those restrictions make it difficult to share data more widely. The unit's response to the ET ultimately indicated that access is currently granted upon request. But **there is a strong case for developing a well-publicized policy governing data access**, so that decisions are seen to be made on the basis of rules rather than discretion.

67. Over the last few years, due to technological progress, **there has been a surge in the supply of big data analytics not only to larger companies but also for MSMEs**. The area of big data analytics is vast and evolving rapidly which makes it too early to predict its impact on governments, BSOs and businesses. The development happening around big data analytics and the fact that they provide very detailed and strategic information for business decision cannot be overlooked. Increasingly, governments are also showing interest in this sector including information which could be used to improve trade.

68. **Big data was a subject of discussion at the ITC level a few years ago but follow up appears to have been limited.** A key issue relates to the development of competencies in this area internally, versus the use of external partnerships with researchers and the private sector to better exploit the potential of big data. While there is some expertise in-house, **it is difficult to see that ITC has a comparative advantage in big data analytics** relative to, in particular, private sector providers that specialize in this area.

69. It therefore represents another instance where **intensifying partnerships with outside organizations could be a way of developing new and innovative products and tools that would respond to beneficiary needs in a novel way**. A key part of developing these kinds of partnerships is a mindset of openness, both in terms of facilitating large scale data access by outside parties, and also to new techniques and approaches not developed in-house but instead brought in from the outside through partnerships especially with researchers and the private sector. While such partnerships are not entirely absent at the present time, there is major scope to deepen and broaden them from a strategic perspective, in particular by extending them to product development, based on increasing demand for big data analytics.

Effectiveness of ITC's market analysis tools

Beneficiaries' market information needs and target audience of the tools

70. Each category of ITC's beneficiaries has specific trade and market information needs, to which the market analysis tools (MAT) need to respond in so far as is possible. Exporters and importers, especially MSMEs, need easily digestible and personalised trade insights. In addition, those firms that may be considering exporting or importing also need access to information and insights. **Firms prefer** spending more time in carrying out their business activities rather than being involved in data research and analysis. Consequently, their market information needs consist of **easily accessible automated insights, alerts, and tailored reports based on data and trade information**. They have a preference for simplified queries over complex data manipulation. Discussions indicated that MSMEs depend highly on mobile applications for most of their information requirements.

71. Interviews disclose that **market participants currently face an overload of trade information on the internet, but that no individual source caters to all their needs.** Respondents (including ITC staff) indicated that the information provided by the MAT constitute only part of the information required by MSMEs in their quest for market information to make informed decisions. The MAT provide more static information—valuable for its description of a particular moment in time—compared to complementary information which could include market behaviours, consumer preferences, cultural biases, distribution channels, freights costs etc.

72. Some of the MAT, such as Trade Map and Market Access Map, also provide historical data, so the picture is partially dynamic. But the emphasis in terms of presentation is not on providing forecasts or other information that describes dynamic market conditions. TMI staff indicated that Export Potential Map partially fills this role—although the extent to which its output is a counterfactual rather than a forecast is open to discussion—and foreshadowed dynamic developments in the African Trade Observatory. In addition, specific training for targeted audiences using Market Profiles responds to the need for market behaviours and other detailed information cited above. Nonetheless, the information received from market participants consulted during the evaluation indicates that more could be done in these areas.

73. **Smaller companies tend to favour easy and user-friendly accessible insights, since they lack the technical expertise as well as the time to interpret data themselves.** As frequently pointed out in interviews, MSMEs have a preference for accessing data through mobile apps. In other words, MSME users are unlikely to access data through desktops or laptops which might be equipped with sophisticated software, but rather need a very simple and user-friendly interface that quickly gives them the personalized information they need.

74. The ***'ITC Market Analysis Tools'*** **mobile application** is available through app stores. However, at the time of the evaluation, the app was last updated in 2017 and it is **not functional** after installation, as also noted by other users in their public reviews of the app. None of the BSOs contacted were aware of the existence of a mobile version of the MAT. In addition, some of the tools' websites have only a limited responsiveness (meaning their design hardly differs between a desktop and a mobile browser) and are therefore difficult to navigate on smartphones.

75. **Public BSOs,** which provide support to businesses from all sectors and to government institutions, require access to large trade and market databases covering all national priority sectors.

76. **Private sector BSOs** are often membership based and cater for their clients in a specific sector. The trade information needs for these organizations consist of being able to access trade data (which is currently available through the MAT) as well as advanced analytics to advise their stakeholders in making business decisions. The information BSOs produce is also used for policy advocacy and to support policy formulation.

77. BSOs interviewed indicated that the type of information provided by the MAT fulfils part of their information needs, which comprise trade data and regulatory information. **BSOs usually carry out further**

analysis and use other sources of information such as CBI[31], FAO, and other development agencies **to complement existing information sources, and to provide more comprehensive insights for their respective clients.**

78. Discussions with BSOs in developing countries indicated that there is presently a significant amount of market information and trade data on the internet and the **challenge lies in absorbing and translating the information into valuable insights for users**. Indeed, this issue lies at the heart of the development of Global Trade Helpdesk. Due to a lack of appropriate skills and capacity, especially in DCs and LDCs, BSO's personnel are unable to understand their clients' information demands which makes this problem even worse. Having **access to automatically generated basic trade reports could therefore be one of the options** to assist these BSOs in addressing the information gap.

79. **The MAT currently emphasize the supply of data and relatively simple analytics and visualizations, not personalized insights, sophisticated analytics, or sophisticated data visualizations.** While requirements differ for MSMEs and BSOs, there is scope for ITC to further leverage technology to produce insights that are more directed at users' interests and preferences.

80. **Policymakers** use trade and market information to formulate policy priorities, execute strategy, and develop stances for trade negotiations. In this group, interviews indicate **a tendency to use Comtrade data and national sources rather than ITC data**. The main reason is that Comtrade is considered as the official repository of trade data provided by countries. Trade negotiators generally use Comtrade as they need harmonised data sets for analysis. ITC data is mainly used to produce position papers or carry out ad hoc analysis given the fact that it is easier to interpret.

81. Interviews indicate that there is **some confusion as to the MAT target audience.** While some interviewees agreed that the tools were intended for all beneficiary groups identified in the TT Programme document (i.e. governments, BSOs, and MSMEs), others – including ITC staff – were of the opinion that the MAT are designed mainly for governments and BSOs. The danger of a lack of clarity in this area is that it leads to less focus on specific categories of users in the development and rollout of tools.

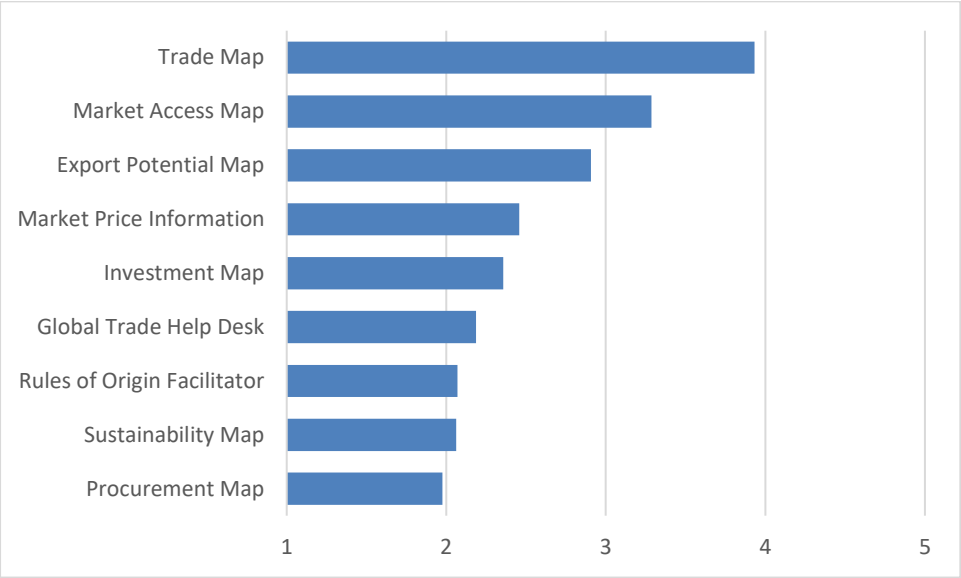
82. The main argument raised as to why the **tools are not suitable for MSMEs** was that they have limited or no understanding of key trade concepts and analysis skills to extract meaningful market information from the MAT. Interviews with MSMEs confirm that many of them, especially in DCs and LDCs, have limited expertise to use the tools. Some of the comments from interviews indicate that Trade Map is "*static and cumbersome"*, other remarks indicate that "*having a common tool for business and government – does not make sense*". It was also reported that since many MSMEs work in niche markets, their "*products cannot be identified through the existing tools*", although this could partly be a reflection of the limitations of existing product classifications, which are independent of the tools. Interviews with BSO's and ITC staff indicate that MSMEs tend to heavily rely on their respective BSOs for market information, or on their own information sources. Feedback from field discussions also revealed that not all BSOs have the relevant capacity and skills in accessing, using and analysing trade data. Very often these BSOs are also unaware of MSMEs' actual information needs and therefore may not provide sustained service even if training is provided.

Awareness of the tools

83. **The awareness of the tools varies widely, with Trade Map and Market Access Map clearly being the best known.** In a survey carried out during this evaluation (Figure 6) Trade Map ranked first in terms of familiarity, followed by Market Access Map and Export Potential Map. The results also showed that respondents were aware of the Rules of Origin Facilitator, Sustainability Map, and Procurement Map but do not use them. In the case of Global Trade Helpdesk, low familiarity can also be explained by the fact that the tool is still very new. Indeed, the tools all differ in terms of the length of time that they have been active, and this is one factor that could influence respondents' familiarity with them.

[31] Centre for the Promotion of Imports from developing countries (CBI)

Figure 6: Familiarity with the following ITC trade information and business intelligence products



Source: Survey count (N = 135). (1): Do not know it; (2): Aware of the product but do not use it; (3): Somewhat familiar; (4): Familiar; (5): Very Familiar

84. To corroborate these views, the evaluation also carried out interviews in five African developing countries[32] (of which three are LDCs). The feedback from interviews indicated that **Trade Map and Market Access Map are known by the majority of policy makers, public institutions involved with trade and exports, and the relatively larger and more organised private sector organizations.** The other tools have been heard of but were less known (and very rarely or not used). In part, this finding reflects the different conceptions behind the various tools, but the issue of focus and targeting has already been addressed above. There are therefore particular demographics where ITC has been successful in developing awareness of the tools, although this undertaking is one that requires substantial time and resources.

85. Interviews carried out for the case studies in African countries also revealed that **MSMEs are the ones who are least aware of the tools** and therefore its weakest user group (compared to BSOs and policy makers). Also, **some of the BSOs representing MSMES indicated that they are not aware of the MAT**. For example, the West Province Branch of the Small Enterprise Development Agency (SEDA) in South Africa which provides support to small enterprises and cooperatives with 53 branches nationally claimed that they were not aware of the MAT. Similarly, the South African Small and Medium Enterprises Association (SASMEA) had never heard about the MAT and was keen to make the tools known to its members and have access to training on how to use them. SME Mauritius (the aim of which is to promote entrepreneurship and improve competitiveness) and Pro Empresa in Cabo Verde (which has a mandate to service MSMEs) were also not aware of the tools. The case studies also showed that there are cases of BSOs that are aware of the tools but are not able to fully utilize their functionality. This was the case with the Small and Medium Enterprise Development Institute (SMEDI) in Malawi.

86. **Those who are familiar with the tools, and especially MSMEs, indicated that the variety of different tools is confusing**. These findings reinforce the impression of an understanding gap: that trade and policy are complex areas that many MSMEs are ill-equipped to deal with, even with interfaces that are simpler than those offered by other organizations. The data themselves are complex, so without further analytics and in particular visualization, it remains difficult for targeted clients to make full use of them. A tool like Global Trade Helpdesk is useful in integrating the various tools, but in part due to its recent release, the degree of user familiarity is low.

[32] Cap Verde, Malawi, Mauritius, Mauritania, South Africa

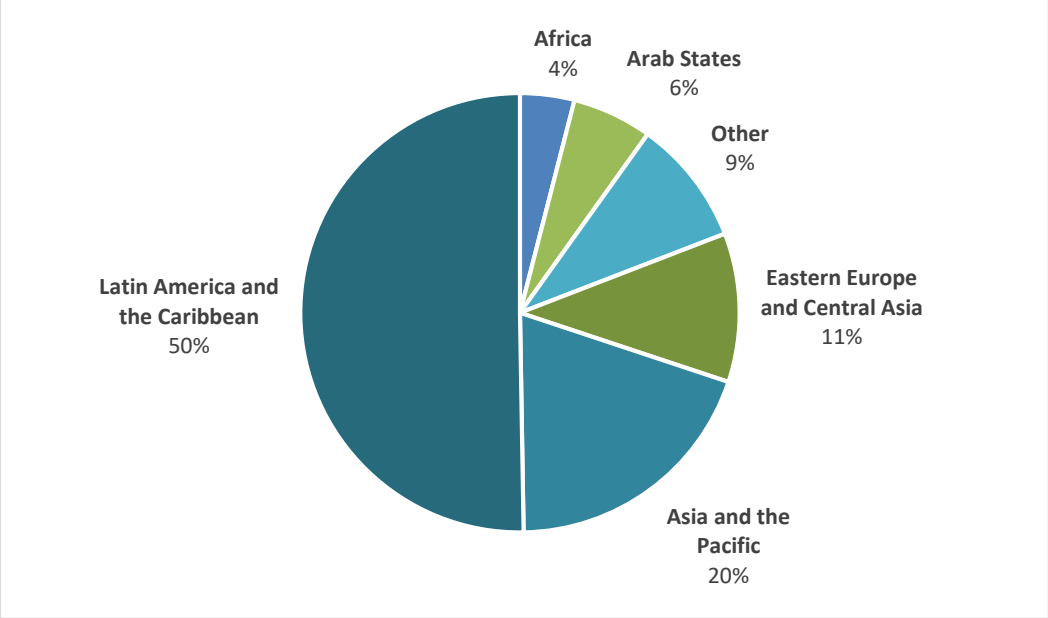
Usage data of the tools

87. **Upgrading ITC's ability to track actual use of the MAT should be an important priority moving forward.** Current tracking systems gather data on registered users for certain tools, but usage levels cannot be comprehensively tracked for non-registered users. IP[33] visits are tracked, but it is impossible to tell if visits from a single address represent one or multiple human users, or, in the opposite case, whether individual users access the tools from different IP addresses (office and home, for example). In addition, the two sources of information cannot be connected: it is impossible to know if a unique IP address is associated with a registered user or an unregistered one. The distinction between the two sources of data is particularly important because a substantial amount of MAT data is available without registration. Therefore, ITC staff emphasized in interviews that **existing user data only provide a partial and limited picture of use**, and so need to be interpreted with caution.

88. Data from the TMI-administered user database show that **the MAT are used all around the world, with a total of slightly more than 1 million registered accounts (1,056,529) of whom an impressive 44% are women[34].** ITC has clearly enjoyed success in reaching out to female potential users of the tools.

89. But as Figure 7 demonstrates, **registration patterns are uneven across regions**. Fully half of the total registered user base is in Latin America, while only 4% is from Africa. While it is of course impossible to target users perfectly according to need and capacity, such a disparity immediately raises questions as to whether or not these tools are reaching their intended audiences. It is difficult to align the prominence of Latin America in Figure 6 with a sense of where the need is greatest for additional trade-related information, as the region is composed of middle- and high-income countries, including OECD members.

Figure 7: Distribution of registered users by region, 2021



Source: User data supplied by ITC staff.

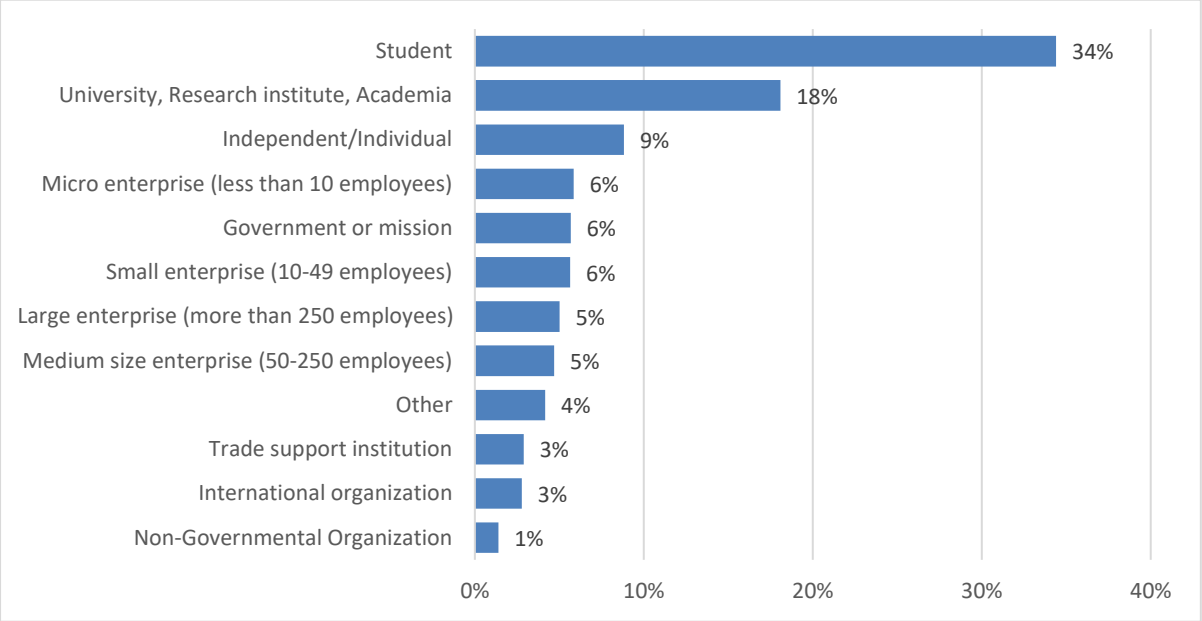
90. Figure 8 moves on from this analysis to look at registered users by type. **Registration data for the MAT shows that about twice as many students (34%) than MSMEs (17%) are registered.** While it is encouraging that students are being exposed to the tools, and ITC staff believe it is possible that they take this knowledge with them into their careers without necessarily updating their user information in

[33] An IP address is a unique address that identifies a device on the internet or a local network. IP stands for "Internet Protocol," which is the set of rules governing the format of data sent via the internet or a local network.
[34] As of January 2021

the database, the degree of the disparity again sits poorly with ITC's institutional focus on MSMEs. Among other categories, while trade support institutions (e.g., BSOs) only represent 3% of registered users, it is possible that the raw number accounts for a significant segment of that market.

91. Together, the findings on user registration suggest that **ITC needs to do more to effectively engage with MSMEs in low- and middle-income countries,** which may be linked to requirements already mentioned above, such as **simplification of interfaces, use of mobile applications, and providing possibilities to companies to use the tools for their specific information needs**. There is already some degree of engagement with this demographic, but at least among registered users, the skew in fact goes in a different direction.

Figure 8: Distribution of users by type, 2021.



Source: User data supplied by ITC staff.

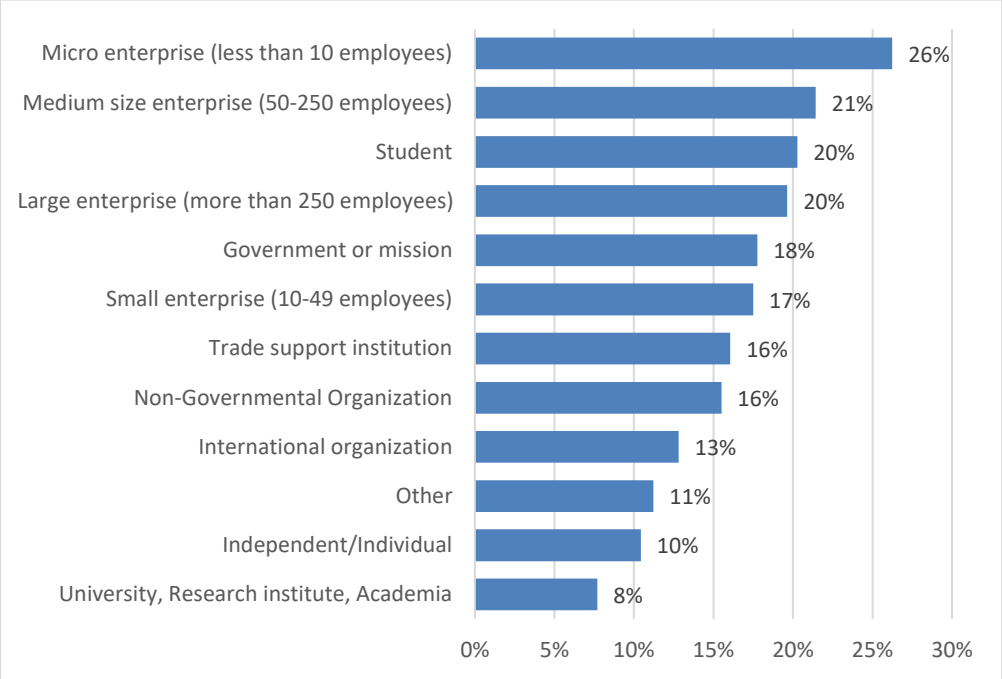
92. TMI also maintains data on logins by registered users. These data are again different from unique IP visits, as they only track use of the tools in which registered users in fact log in. If they believe they can access the data they need without logging in, they may be registered, but simply visit the MAT without logging in. So again, the data need to be interpreted with this limitation in mind.

93. **Login data provided by TMI showed that most registered accounts had not logged in to the tools during the previous year.** As noted above, however, a large amount of data is accessible without login; see below for details on unique IP visits as an alternative metric. For 2020, out of 1,056,529 registered accounts, only 172,777 logged in during the year. This represents a proportion of about **16% of registered accounts who logged in to use the tools** within these twelve months. While this metric is imperfect, as users can still access some data without logging in, it illustrates either that registration does not necessarily imply active use, or that registered users do not systematically believe that the benefits of registration are sufficient to justify logging in whenever they use the tools, and they therefore use them without logging in.

94. The frequency of logging in to the tools among registered users varies greatly. Figure 9 shows that the percentage of users who logged in at least once during the previous year lies between 8 and 26% depending on the user group. Summing users over the groups that make up the MSME designation shows that around 22% of registered users from MSMEs have logged in in the past year. While this figure is among the higher ones compared with other user categories, it is still objectively relatively low. So there is a significant gap between registration and logging in, which could be interpreted as showing that there is a **real need and interest for the tools** (since people are signing up), **but** that **companies have difficulties using or understanding them** (which is why they are subsequently not logging in).

An alternative interpretation would be that **registered users see little benefit in logging in**, and therefore access the data without doing so. But interviews and case studies tend to support the first perspective.

Figure 9: Percentage of users by category who logged in at least once during the previous year.



Source: User data supplied by ITC staff.

95. Moving away from registered users to IP visits shows that the two perspectives provide different insights. The ET was provided with anonymized data that identified **over 7.7 million website visits in 2020 from over 1.7 million unique visitors**. These numbers are much higher than the data on registered users, which suggests that the MAT websites attract significant traffic independently of registration status. Similarly, they show that there are many users of the tools who are either not registered or who are registered but choose not to log in.

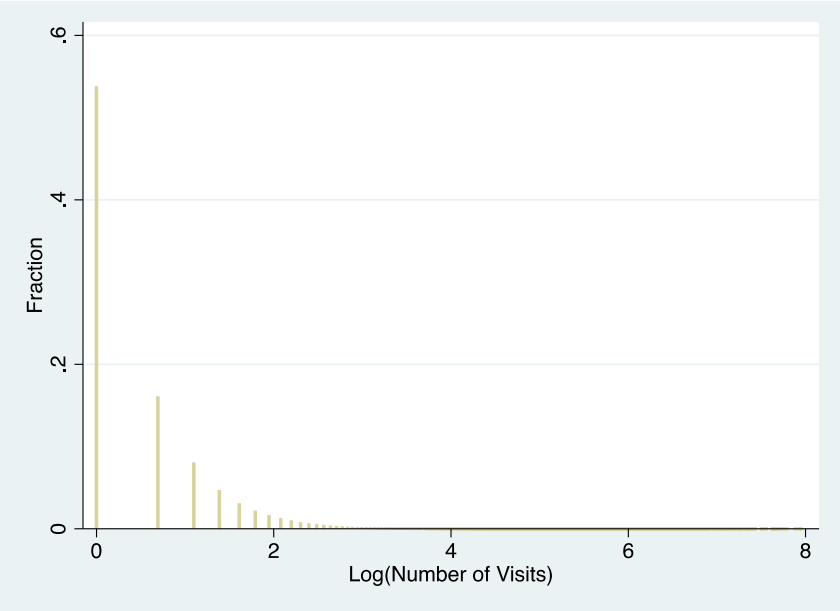
96. The data on IP visits also show a different geographical breakdown from the registration data. Latin America and the Caribbean accounts for 23% of unique IP visitors, which is a much lower proportion than the registration data suggested, though still large in terms of the region's population weight. The largest region for unique IP visitors is Asia and the Pacific (34%). Again, **visits from Africa are relatively rare, as was the case for registrations: only 3% of the total**. While there are significant differences between the two data sources, the issue of user targeting based on need still looms large, even at the same time as recognizing that perfect targeting is impossible.

97. **While the numbers of visits and unique visitors are high, the level of "repeat traffic"—that is to say, visitors who come to the tools relatively frequently—is much smaller.** On average, each unique IP address visited the MAT 4.5 times during 2020, but 54% of IP addresses only visited the tools once, and 70% visited no more than twice. Figure 10 shows the full distribution of the number of visits by each unique IP address in the anonymized data supplied to the ET. It is a histogram in which the height of the bar indicates the proportion of the total number of unique visitors, and the horizontal axis shows the logarithm of the number of visits per year. The analysis only captures users who visited the MAT at least once in 2020. The key finding is that over half of all visitors came to the tools once but did not return. 95% of users visit the site no more than 15 times per year, i.e. a little more than once per month.

98. One possible interpretation is that many users have a specific, time-bound query, which is quickly satisfied. But this interpretation raises the question of how such a usage pattern fits with ITC's objective of providing data that are timely and frequently updated. An alternative interpretation, which is more in line

with evidence from interviews and case studies, is that a significant number of users are insufficiently able to access or interpret the data to see their added value for their activity. Therefore, **the MAT user base has a relatively low level of loyalty to the tools** (repeat visits over a defined time period), **with the exception of a small number of users who use them very intensively.**

Figure 10: Distribution of (log) number of visitors to the MAT by unique IP address, 2020.



Source: User data supplied by ITC staff. Note: to improve readability, the number of visits is transformed by taking the natural logarithm. The height of each bar shows the proportion of the sample reporting the corresponding number of visits, i.e. the bars sum to one.

99. It is useful to compare ITC's registration and website visit statistics with those for UN Comtrade, as reported to the ET. In terms of registration, Comtrade has only 5,000 registered users, although that figure includes site licences, each of which potentially includes thousands of individual users. But based on the raw numbers, **the number of registered users of the MAT is high in absolute terms, and shows that ITC has enjoyed success in encouraging users to register for the tools**.

100. In terms of unique IP visitors, Comtrade reported 2.6 million. This number is over 50% higher than the corresponding figure for ITC. UN Comtrade has been established longer as a database and platform, which likely explains part of the difference. But it also shows that **effective use of the MAT has room to grow in terms of unique visitors,** even though the number of registered users is high in both absolute and relative terms.

101. **The case studies found that Trade Map and Market Access Map were among the most used tools.** Export Potential Map was known by some but rarely used. No specific reason was provided other than the complexity of using it. Staff from trade ministries, public sector BSOs, and more established private sector BSOs were among the main users of the tools:

- **Policymakers** used the tools for high level analysis and presentations.
- Some **public sector BSOs** (in Mauritius, Cap Verde, Malawi) use the tools to **inform their clients** while others such as the DTI and the Provincial Governments in South Africa involved in export promotion use their own tool which is the Decision Support Model.
- **Private sector BSOs** mainly at the corporate level involved in export activities indicated that they tend to use Trade Map and Market Access Map occasionally and would probably **use it more with proper training**. One leather export BSO in South Africa was aware of the MAT and had unsuccessfully attempted to use them. Lack of training was one of the issues raised.
- **At the MSME level,** given the low level of awareness discussed above, **the usage level is very low or non-existent.**

Clients' perceptions of the individual tools

102. The MAT are considered as a **free, easy, and instant access** to reliable and up to date global trade data and trade related information. ITC clients who are aware and use the MAT confirmed during interviews that they are considered as **key assets for trade analysis.** Interview responses indicate a higher popularity for two main tools which are Trade Map followed by the Market Access Map and very little knowledge about the other MAT tools. The degree to which each of the tools suits the demands of its intended beneficiaries varies.

103. **Trade Map and Market Access Map are the most used tools**. According to respondents from field interviews, they are the easiest to use and meet the needs of the users. Interviewees in DCs and LDCs indicated that the reasons for the popularity of Trade Map and Market Access Map are that they are perceived as being comprehensive, accessible, user-friendly, providing reliable and high-quality data, and timely. In contrast, **the use of Export Potential Map, Market Price Information, Investment Map and Procurement Map is overall low.** As previously noted, these kinds of differences potentially reflect both the different target audiences for different tools and their different levels of maturity.

104. **Trade Map** is mainly used by beneficiaries to get quick and first-hand appreciation of any country level trade information and is often a quicker source of access to trade data compared to national sites. Information from the MAT survey and confirmed during interviews indicate that Trade Map is mainly used by BSOs, policymakers, and consultants. Trade Map as a tool has the essential data required to suit the needs of policymakers.

105. However, responses from the stakeholders indicate that other trade data sources, predominantly "official" data sources, such as National Statistics Offices and UN Comtrade, are sometimes preferred for the reasons set out above. BSOs indicated that Trade Map responds to their information needs of accessing international trade data to carry out market analyses and provide them to their clients. While some BSOs indicated that it is a user-friendly tool, others claimed that training is required in making optimum use of the tools. Most of the sectoral private sector institutions interviewed during the fieldwork claimed that Trade Map is a powerful tool for accessing detailed trade information. Entities representing the larger companies indicated that they frequently use Trade Map to make analyses. Organizations representing MSME's however indicated that further training is required to use Trade Map.

106. **Market Access Map** is considered to be very helpful for both BSOs as well as exporters and importers while exploring new markets. The information contained in Market Access Map is considered to be quite comprehensive but for those who are aware, the **Global Trade Helpdesk (**GTHD) was considered as a much user-friendlier and more complete tool to access product information. Interviews indicated that Market Access Map is mainly used to have detailed market and regulatory information about a specific product. Comments have however been made on cases of lack of updated information provided by the Market Access Map but overall, it is considered as a reliable source of regulatory information. The information available to the ET does not enable any conclusion as to the source of the updating issue, and it is possible that it could be dilatory supply of information by country authorities.

107. There are **positive reactions regarding the Global Trade Helpdesk** (GTHD), which is a combination of Trade Map, Market Access Map and Export Potential Map and provide a **"one stop shop access" to information** contained in various MAT tools. Interviewees who have used the tool appreciated the fact that it reduces the need to consult various MAT separately to access data and trade related information. The GTHD gives the possibility of accessing all information related to a specific product though a single web platform. GTHD being a recently developed tool, it is however too early to have a full appreciation of its effectiveness.

108. BSOs interviewed indicate very low or no usage of **Export Potential Map** due to the complexity of its use and understanding. Some results from the Export Potential Map have also been incoherent with the realities of the market. The use of the Export Potential Map seems to be more frequently used within ITC in projects compared to ITC's external clients.

109. **Market Price Information** is also perceived by stakeholders as limited as it provides information to only selected number of goods (commodities and agro based products). Economic operators indicated their preference to get information using their own databases and networks.

110. **Investment Map** has been mentioned by interviewees (ITC's clients and within ITC) as being limited in terms of data on investment and not very helpful at this stage as the set of data is considered as incomplete. None of the stakeholders contacted have discussed or used **Procurement Map**. In interviews across all case studies, BSOs indicated that they are not aware of it.

111. The above observations for Investment Map, Procurement Map and even Market Access Map are confirmed in the Market Analysis Tools Web statistics report[35] showing low utilisation compared to Trade Map.

Reported achievements

112. Of course, it is important to look beyond the MAT user base to consider user satisfaction and other metrics of performance. TMI staff carry out an annual MAT survey with the objective of monitoring relevance, utilisation, and performance of the tools, as well as to provide insights on their impact and receive feedback for future improvements. These survey results are also used to feed into corporate reporting to monitor their performance against set indicators.

113. **MAT survey results and positive feedback from interviews indicate that ITC tools are achieving their expected results in terms of established corporate indicators.** On the basis of information gathered from the MAT surveys[36], the results clearly indicate that the tools have achieved the targets set in the TT programme document. The latest results (Jan 2021) indicate that in some cases not only the targets were achieved but cases of overperformance have been recorded. The "direct beneficiaries" which are the targeted clients of the tools comprise enterprises, institutions, policy makers and other public and private partners grouped into MSMEs (individual firms), BSOs (sector or industry; trade and investment support institution) and policy makers.

114. The MAT results indicate the following:

At the enterprise level

- **92%** of enterprises and women-owned enterprises **reported improved competitiveness** through reduced time or cost of researching markets of other business practices, while only 2% disagreed.
- **66%** of enterprises and women business enterprises **reported additional exports** in the past 12 months (20% Very Positive - 46% Positive). 26% indicated negligible increase in their exports.

At the institutional level

- **82%** of institutions **agreed that they are more aware of international trade issues** which improve their understanding of international trade improve the services they provide to enterprises.

At the policy level

- **95%** of policy makers **indicated that they are more aware of international trade** and better understand trade related issues and opportunities.
- **82%** of policy makers **reported that they have made better policy decisions** thanks to the programme.

[35] ITC, Market Analysis Tools Web statistics - Jan 2009 to Apr 2020. Based on the users' database. Published 8 May 2020.

[36] The MAT surveys are sent out to users, but only to a subset considered as "frequent" users (who have logged in at least once in the past 12 months). While this approach is agreed within ITC's reporting framework, it means that averages only relate to the experience of frequent users, not the full population of users. This problem is referred to in statistics as "sample selection bias", to the extent that it is sought to use results from the MAT survey to inform discussions on "user satisfaction" rather than the narrower issue of "perceptions of frequent users".

115. Some of the respondents (comprising ITC clients and ITC staff) confirmed the above results in a general, qualitative way, during consultations. Interviewees indicated that the tools provide enterprises, BSOs and policy makers **a global trade data platform through which users can access trade and market information.** According to one ITC report[37] "*the positive registration rates in LDCs and the consistently growing user base is further indication that the provision of MAT tools has largely been a continued success*". One of the indirect effects of the MAT is that it is considered by users especially in LDCs as much better and faster source for accessing national trade information compared to existing trade data infrastructure at national level which is often subject to administrative challenges to access trade data or inefficient technological set up.

116. The highlights from the ITC Annual Reports 2018 and 2019[38] show the contribution of the MAT to ITC corporate results.

Table 4: MAT contributions to ITC corporate results

Results 2018	Results 2019
$308 million in trade transaction enabled by MAT out of $1.1 billion in estimated export and investment value resulting from ITC assistance	$367 million in trade transaction enabled by MAT out of $1 billion in estimated export and investment value + $2 billion under negotiation facilitated by ITC
1,100 participants in training and webinars	2,672 participants in training and webinars of which 54% were women
28,000 users of Export Potential Map	64,900 visits of Export Potential Map
Around 4.1 million visits on Trade Map	Over 5.6 million visits, of which 4.7 million on Trade Map
Over 2000 media references	Over 4000 media references

Source: ITC Annual Reports 2018 & 2019

117. However, while results from the MAT survey suggest that the target set in the log frame are being achieved, **feedback from interviews and the case studies—as well as ITC's own user data—paints a different picture on the effectiveness of the tools and services.** In part, this dissonance raises the question of how closely ITC's corporate indicators correspond to the expectations of the user community. An additional issue is that the MAT survey is carried out by TMI, rather than an impartial party, in line with ITC guidance.

118. An example of a possible disconnect between corporate indicators and on the ground performance of the tools is the focus on registered users. As Table 4 above shows, ITC has indeed been very successful in registering users for the tools. The ET became aware of a major social media campaign during the course of the evaluation to celebrate over one million registered users of the tools. But it is important to look behind the figures. As noted above, the number of registered users as a corporate performance metric tends to distract from the fact that most registered users do not regularly log in to use the tools. As previously noted, users can access significant quantities of data without logging in, but the distinction between the two metrics is nonetheless important to keep in mind, either as an indicator of effective use, or the desirability of logging in to access features.

119. The analysis in this subsection reinforces the view that **ITC should shift its corporate indicators to focus on actual use of the tools, rather than registration**. An important limitation of the MAT survey is that TMI only sends it to "frequent users", defined as those who log in at least twice during the previous

[37] ITC (undated). Progress report, International market information tools as a global public good. For the period: 01 January 2020 to 31 December 2020, Annex III: Systemic Issues faced by LDCs.
[38] ITC Annual Report 2018, 2019.

year. Under the weak assumption that frequency of use is correlated with users' subjective perceptions of the tools' usefulness, the survey results clearly suffer from sample selection bias in the sense discussed above, namely that it is only informative as to the satisfaction of frequent users, not users in general. This bias means that reported average scores for the different questions do not represent the true population averages among all users of the tools. If the correlation between perception and use is positive, as is highly likely, then **survey results systematically report levels of user satisfaction that are higher than those in the population as a whole**, due to the sampling methodology adopted by TMI.

120. TMI justified the sampling methodology on the basis that non-response rates are high, even among frequent users, so using an alternative method, such as stratified random sampling with the full user base, would not yield enough responses to allow meaningful conclusions to be drawn. While non-response is certainly an issue, the ET's experience with the survey conducted for this evaluation is that stratified random sampling using the full user database, not just frequent users, produces a similar rate of non-response to the one reported by TMI under their biased sampling method. There is therefore no rationale for only sampling frequent users, and **future surveys should use stratified random sampling based on the entire user database**. In the meantime, TMI should clearly note the sample selection bias their methodology introduces, and accordingly downplay the level of the user satisfaction reported by the survey.

Are the tools serving their purpose?

121. Notwithstanding the ET's reservations regarding the MAT survey, it nonetheless represents a useful source of information provided that results are interpreted as indicative only, and as representing a ceiling on the true level of user satisfaction.

122. As explained above, results of the 2021 MAT survey show that 82% of users agreed that it helped them "to make better-informed trade policy decisions". The result also reported that companies interviewed "found positive or very positive influence of the tools on their import/export activities" and that the value of the stakeholder's imports/exports (in the last 12 months) for which the ITC Market Analysis Tools have helped them to make decisions" was estimated to be US$228 million. However, these results need to be interpreted cautiously, and are likely biased upwards, for the reasons set out above. Nonetheless, **the MAT survey indicates that, based on the metrics used by ITC for corporate reporting, the tools are generally serving their purpose, and are well appreciated.**

123. Just as a review of user data paints a very different picture, so too do field interviews and case studies. Interviews with beneficiaries including ITC staff indicated that while information from the MAT could be helpful for policymakers to make better informed decisions (as it is based mostly on quantitative and regulatory information) **alternative trade data sources or other tools (including from private companies) are more frequently being used for informed decision making.**

124. This is the case mentioned above of trade negotiators who use Comtrade rather than data from MAT. Similarly, BSOs and MSMEs claim that complementary information is required in addition to the MAT in making business decisions. This observation was also confirmed by some ITC staff involved with BSOs and MSMEs. **While ITC has taken steps to incorporate some of the information required by businesses into its tools**—for instance by providing contact details of importing firms—additional and qualitative information indicates that more data and information elements such as more complete sets of business contacts, market insights, granular information, and additional product specifications are required by stakeholders to support business decision making.

125. **Making business decisions requires a more comprehensive set of additional granular, qualitative, and quantitative information** such as: consumption preferences of the population (size, packaging, flavours, designs, etc.), geographical distribution of consumption, infrastructure facilities, spending habits of consumers, competitor intelligence, distribution set up, e-commerce possibilities, logistics, information on economic operators (importers and exporters) etc.

126. The correlation between the use of the MAT and business decision making was questioned by various respondents during interviews. **The market analysis tools constitute only the first step and first level of analysis required during the process of collecting information to gather market intelligence.** Information from the MAT is considered as important but actually opens up avenues for deeper investigations. More work is required in the form of deeper analysis and additional complementary information that could help MSMEs in their decision-making process.

127. Organizations that have worked with MSMEs especially in Central Europe and Africa indicated that the latter tend to rely on trade fairs or buyer-seller meetings, and personal networking where personal exchanges with potential partners is very important rather than trade data and market analysis. The **role of the BSOs** or respective industry institutions is therefore **key in being able to support MSMEs with information from the Market Analysis Tool**s as well as other sources during these events.

128. At the same time, the MAT are an evolving set of tools and **the Global Trade Helpdesk appears to be a good step towards resolving the confusion created in the minds of users by the existence of a multitude of tools.** The Global Trade Helpdesk, which was introduced in 2020, provides a one stop shop for market information seekers which integrates information from Trade Map, Market Access Map, Sustainability Map, Rules of Origin Facilitator, Export Potential Map, and a number of external sources, on a single platform. This tool although less known by beneficiaries—due in part to its recent launch—has had initial positive responses during interviews on its concept and also that it answers to the needs of enterprises making access to the tools and research for market information easier.

129. The India-East Africa Trade Helpdesk, the Euromed Trade Helpdesk, the African Trade Observatory, and the Central Asia Trade Intelligence (CATI) Portal are part of a new group of tools that are still being field-tested. In terms of content, the information is similar to the Global Trade Helpdesk, but they are presented from a regional perspective. The intent is to create more ownership and to appeal to users in search for regional markets. The African Trade Observatory is even planned to provide real time information. At this stage it is difficult to have a clear assessment of the effects of these tools.

130. However, **looking forward, there is a need for ITC to position itself to fully leverage partnerships with the private sector and the research community to improve its offerings in terms of product range and included features.** The research community can help develop metrics and approaches that may respond more clearly to beneficiaries' needs, while the private sector can bring technology to bear on questions relating to access. For instance, ITC has started to cooperate with Google and plans to deepen its work with that organization to integrate their searches data and benefiting from automatic translation technology into ITC tools.

131. Similarly, **private sector partnerships with major manufacturers appear to be focused on provision of tailored data in exchange for a fee, rather than joint work to develop new products and tools.** While there is likely an element of budgetary support for research and development inherent in these kinds of arrangements, there is only limited collaboration with major private sector players when it comes to the design and development of new tools and interfaces to be offered as a global public good.

132. While the development of new products following new demands by ITC clients seems a logical process, the above findings suggest that there is a problem of awareness of the MAT. ITC should therefore develop **a more aggressive communication strategy through its country desk officers to make the MAT known especially to the business community and particularly to the MSMEs.** Encouraging BSOs to include links to the tools within their websites could be one way to start this process. The objective would be to intensify a process that is already underway, but which is becoming more and more important given the divergence of the MAT user base from core ITC priorities, and the emerging range of additional tools.

Management and service delivery of tools

Complementarity of tools and embedded solutions

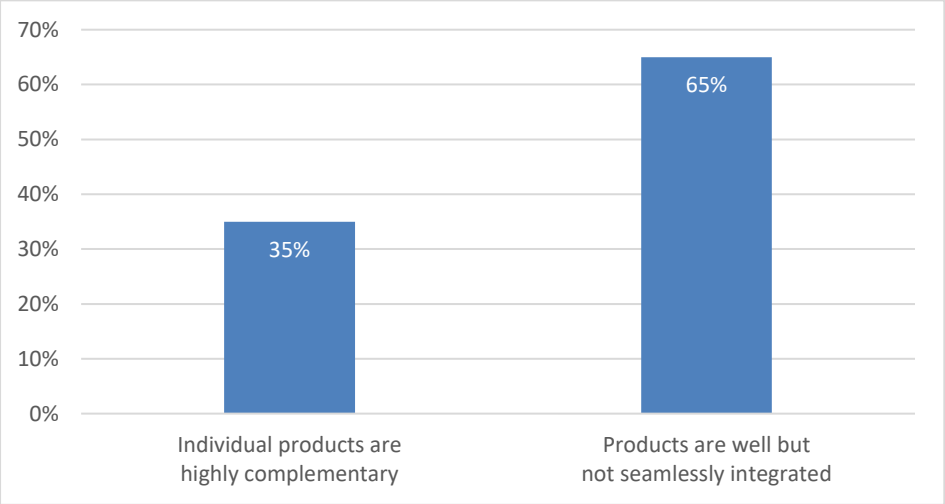
133. The individual market analysis tools were built up over time, with the aim of filling in informational gaps related to international trade for policy makers, BSOs, and MSMEs. The **tools as they exist tend to complement each other** as the information each of them provides is specific and responds to different information needs.

134. **The newer generation tools**, namely Global Trade Helpdesk (GTHD), Euromed Trade Helpdesk, African Trade Observatory, and other regional tools **provide integrated solutions to the user**. They are considered as **one-stop-solutions** as they save the user from having to consult various websites/tools to gather the same set of information and as such represent improvements in terms of user-friendliness over stand-alone tools.

135. The user survey conducted during this evaluation shows that **the variety of tools is not easy for users to handle and tends to be perceived as overlapping or insufficiently integrated**: only around one-third of respondents see the tools as highly complementary, but around two-thirds view them as well but not seamlessly integrated (Figure 11). Products that integrate the various websites and datasets, such as GTHD, are still relatively new compared with the standalone MATs, so there is perhaps some lag in terms of users recognizing that more integrated solutions are available. This finding reinforces the **need to build knowledge and understanding about the newer products.**

136. An additional issue, however, is that the standalone products serve different user bases, as discussed above. Trade Map is of potential interest to a wide range of users in the business and policy communities, but Rules of Origin Facilitator, for example, is seen as a key product by a narrower constituency, particularly policy professionals working specifically on rules of origin. Similarly, Market Price Information is targeted at producers of particular commodities. While the development of integrated solutions such as Global Trade Helpdesk is a very positive development, feedback from users in interviews suggests that there is room to **take a more strategic approach when developing new tools to ensure that the suite is as well integrated as possible**, and that complementarity among individual tools is high.

Figure 11: User perceptions of integration and complementarity.



Source: Survey of MAT users (N=135).

137. **There is scope to push the integration of tools further,** perhaps using GTHD as the core of a comprehensive approach to packaging not just information from the tools themselves, but **from ITC's broader activities.**

138. Interviews with ITC staff indicated that **the MAT are often the entry point for users to the ITC ecosystem, but there has been relatively little emphasis on using the large amount of interest they generate to "cross-sell" ITC products and services.** For instance, GTHD performs well in terms of allowing a user to specify a product, for example, and then to find a range of data from different tools related to that product. A more advanced approach would embed these operations through a central client profile store , as implemented through the SSO under the data management work, so that interest in a particular product would not only retrieve data from the MAT but also links to other ITC resources and activities relevant to that product, such as training materials, research reports, and outputs from other parts of the organization.

139. **Partnering with private sector organizations with skills in predictive analytics, for example, would enable ITC to use the entire history of a user's search preferences to develop personalized recommendations for additional relevant material from the tools and elsewhere to suite that user's interests and preferences.** Major private sector businesses have well-established expertise in this area, so it would clearly be advantageous to partner with them in the development of such tools rather than to start from scratch with development in-house.

140. **ITC has been extending its outreach to optimize the usage and visibility of its tools by embedding some of the tools onto regional and national trade portals and websites.** The beneficiaries include Malawi National Statistics Office, Bahamas Trade Information Portal, Islamic Centre for Trade Development, Export Bahrain and ECOWAS website (ECOTIS). This initiative is being offered in synergy with other ITC projects as well as under contractual agreement for a fee. As an example, the agreement signed with the Federation of UAE Chambers of Commerce and Industry is for a contract value of $30,000 payable over a period of five years (2021-2025). Additionally, several BSOs and government ministries are connected to the tools, free of charge, through hyperlinks, which directly takes visitors to ITC's website and portals. Some of the users are the Mauritius Ministry of Foreign Affairs through its Trade Easy Portal, the Mauritius Chamber of Commerce and Industry through its website, Zambia Development Agency through its website, ZimTrade through its trade portal, and many national trade promotion agencies, among others.

141. Interviews indicated that extension of tool embedding in the case of Kenya was complicated, and ultimately interrupted, due to a lack of agreement within ITC. From the perspective of this evaluation, ITC should clearly prioritize the embedding of the MAT tools in client websites and portals, as this development is in line with the nature of the tools as global public goods, as has also been frequently emphasized by ITC staff. Senior management will therefore need to ensure that the resource implications of this embedding are accounted for through appropriate budgetary support. Supply of the services on a contractual basis is likely not the most efficient approach from a global public goods perspective. Of course, the data were still available to individual users through the standard interfaces during this time. The issue was with embedding in a specific portal.

Capacity Building

142. **The TMI section is providing capacity building services to help clients effectively use the tools in their day-to-day activities.** These capacity building activities are conducted by the TMI team on its own, in partnership with other ITC offerings or programmes (such as the *SME Trade Academy* or *SheTrades*), and in collaboration with other national, regional, and international agencies and institutions, including WTO, World Bank, Regional Economic Communities, and BSOs, and through the services of independent trainers.

143. The report on workshops and webinars delivered in 2018-2020 shows that the number of trainings has recently increased substantially and more than doubled, from 45 and 49 in each of 2018 and 2019, to now 124 in 2020. The progress report[39] confirms that online training delivered in collaboration with other projects is now well anchored within ITC, with 20 out of 30 training/webinars delivered jointly with other projects. Moreover, in light of the prevailing COVID-19 pandemic, 40 out of 47 LDCs were mentored through e-learning, seminars, webinars, media, and newsletters to improve MAT use and data quality. Prior to 2020 (2017-2019) all WTO courses during which ITC tools were presented were all (face-to-face classes with 3561 participants). Additionally, the target of 20,000 views of ITC's MATs e-learning modules was achieved, and there were 129,735 views of the video tutorials on YouTube.

144. The annual MAT survey suggests—subject to the qualifications noted above—that these **capacity building efforts have helped beneficiaries acquire knowledge and skills to use the tools for decision making and to improve their performance**. Results from the survey indicate that more MSME users of the tools have higher levels of awareness, higher skills and knowledge, and better decision-making aptitude. Similarly, BSOs are able to effectively service their stakeholders with better products and services, and policy makers make better policies, strategies, and regulations. ITC also uses its network of BSOs and local experts (trainers) to expand the reach out of its capacity building activities to many countries and regions within countries.

145. To this effect, **TMI offers a well-tailored training/coaching programme for the training of trainers**. This outreach is being further enhanced with training of university students on the use of the tools (which likely contribute to the fact that a significant proportion of registered MAT users are students, as discussed in chapter Usage data). This latter category represents investments for the future as some of these students may move on to become entrepreneurs and some may work in functions supporting MSMEs in their globalization.

146. **Capacity building is a critical component for the success of the tools as it directly addresses the observed understanding gap**. As such, it is important for capacity building to include not only instructions on the technical aspects of using the tools, but also background material and knowledge on the interpretation of trade and market information in the context of making business decisions in a developing country environment. Existing programs covering these aspects could be scaled up, subject to the availability of resources.

147. **The COVID-19 pandemic has spurred ITC to adopt online training, which is welcomed by participants** according to case studies. The potential of digital learning is enormous, in particular given the implications of reduced costs and more straightforward logistics (WEF 2020[40]; Forbes 2020[41]). The inconvenience of time zone differences can be dealt with using asynchronous options, which allows learning at the trainee's pace and convenience.

148. However, **this approach calls for an overhaul of the methodology and delivery modes** to build more interactivity, networking, and hands-on case studies **to compensate for lack of face-to-face learning**[42]. The pre-Covid approach to capacity building was premised on face-to-face sessions which were delivered at ITC Headquarters, in target countries, and in regional destinations. As such these methods do not meet the requirements of asynchronous learning that relies on more demonstration, videos, case-studies and worked-examples. Training was delivered by TMI team, by SME Academy, TMI in collaboration with other ITC programmes and projects as well as in collaboration with other external partners. Although partnerships have remained the same, the delivery mode has shifted from

39 ITC (undated). Progress report, International market information tools as a global public good. For the period: 01 January 2020 to 31 December 2020.

40 https://www.weforum.org/agenda/2020/04/coronavirus-education-global-covid19-online-digital-learning/

41 https://www.forbes.com/sites/ilkerkoksal/2020/05/02/the-rise-of-online-learning/?sh=470ee3c272f3

42 van der Vorst, Tommy; Jelicic, Nick, Artificial Intelligence in Education: Can AI bring the full potential of personalized learning to education? 30th European Conference of the International Telecommunications Society (ITS): "Towards a Connected and Automated Society", Helsinki, Finland, 16th-19th June, 2019

face-to-face to virtual training and is being delivered from ITC Headquarters online, and in collaboration with other partner organizations. It is also to be acknowledged that the SME Academy was continuously building up its capacity to deliver online training.

149. **To address the understanding gap, TMI should consider options for reengineering training manuals, teaching methodology, and delivery modes** to make maximum use of technological advances and changed preferences that make it easier to reach to a larger audience at shorter notice. These options should aim to deliver a revamped offering of capacity building and training courses optimized for distance learning, available in multiple languages, and covering not only the mechanics of using the tools but also the way in which data can be used in a business environment to support decision making and performance improvement. Furthermore, the emphasis should be on **practical learning that is accessible even to users with little background**, in line with the existence of the understanding gap referred to above.

Funding and sustainability

150. **It is difficult to reliably determine the costs of the MAT because the relevant information is either hard to access or to interpret.** ITC relies on two sources of funding: regular budget (RB) and extrabudgetary funding (XB). The regular budget is approved on an annual basis by the United Nations General Assembly and the World Trade Organization (WTO) General Council. Extrabudgetary funds are voluntary contributions, which include two categories of funds known as windows. Window I (W1) consists of unearmarked and soft-earmarked contributions from funders, while Window II (W2) is composed of earmarked contributions for specific projects and programmes. The reports for the Consultative Committee of the ITC Trust Fund (CCITF)[43] are a good source of detailed budget information. They do not provide budget information by section, but by corporate focus areas and, since 2019, also by programmes (which are presented as XB funded technical assistance). For 2019, the budget for the TT Programme is indicated with $3.7 million, and $4.5 million delivered. For 2020, the stated budget was $6.7 million, with $5.4 million delivered.

151. The evaluation team was also provided with information on the estimated costs and personnel work months for the tools. According to this information, some of the expenses for the tools are not only covered by XB, but also by RB (personnel but also technical costs). According to the information provided by the TMI section, **in 2020 the estimated costs of maintaining the eight market analysis tools[44] were $2,778,100 of which 88% were used for human resources**. The funding consisted of $882,400 RB, $408,700 XB Window I and $1,487,000 XB Window II. In total 36 staff members worked on these tools representing 117 work months of engagement.

152. Notwithstanding the information provided, the ET was unable to **reliably understand the cost implications of different activities** such as product development, nor the basis used for pricing services like website embedding. This difficulty was a consequence of internal accounting systems, which likely results in a similar lack of visibility for TMI and ITC senior management.

153. Funds under XB come as contributions from Member States, regional organizations, multilateral donor partners, multilateral financial institutions, BSOs, and the private sector. These contributions are both financial and in-kind support. While all its products and services are duly financed through project contributions, as per agreements reached with donors, **the TT Programme generates additional revenues from the sale of its products and services**, more specifically from MAT licenses[45] paid by clients from developed countries, embedding of MAT tools and training. The money received through

[43] The Consultative Committee of the ITC Trust Fund (CCITF) reviews the use of funds made available through the ITC Trust Fund (ITF) in consultation with the ITC Secretariat and referencing ITC's strategic documents. Reports can be found here: https://www.intracen.org/about/jag/itc_trust_fund/

[44] Trade Map, Market Access Map, Export Potential Map, Procurement Map, Investment Map, Rules of Origin Facilitator, Market Price Information, and Global Trade Helpdesk.

[45] ITC website. 2021. Market analysis tools. Subscription options and fees.

the sale of products and services are credited to one of the nine revolving funds within ITC[46]. MAT licensing raised $1,310,000 over the 2015-2020 period (averaging $218,000 per year), along with $350,000 from 2017-2020 from embedding the tools.

154. In addition, **there is a need to build transparency in the Programme's funding model, with a focus on how funds are raised and utilized**. The findings of one particular report[47] shared with the evaluation team provides a comprehensive overview of results achieved using European Commission funding. However, the report does not provide an appreciation of the input utilisation and costs/benefits ratios thereof. No reports or evaluations have been shared on other funded projects.

155. **While the findings support net benefits for users of the tools** with regard to set indicators and expected outcomes, **the absence of complete information on resource mobilization and their transformation into results** (output, outcome, and impact), **makes it difficult for the evaluation to come to a value judgement of the tools' efficiency, accountability, and operational improvements.** More precisely, it is difficult to attribute the results to the tools alone in quantitative ways.

156. Some of the stakeholders interviewed for this evaluation described the funding of the Transparency in Trade Programme as opaque. However, there is no suggestion that this opacity is particular to the TT programme as opposed to more generally true for ITC programmes. ITC senior management should therefore review organization-wide accounting frameworks to ensure that basic information—revenue, cost components, etc.—are simply and transparently reported. In the absence of these key figures, the evaluation cannot draw any further conclusions on the sustainability of the current business model.

Global public good approach

157. **ITC has over the years built a strong and dynamic network of development partners, donor agencies and sponsors.** These include among others WTO, UNCTAD, WCO, WBG, AfDB, IDB, UNIDO, FAO, ICC, EU, governments, and national development agencies (CBI, BMZ, Sverige, Swiss Confederation, USAID), academia and research institutes, and business corporates.

158. Building on these more traditional alliances, **TMI has recently launched collaborations with private sector actors to co-develop and co-distribute its tools**:

- *Renault-Nissan-Mitsubishi Alliance* on bulk access to databases of tariffs, trade agreements and rules of origin;
- *International Chamber of Commerce* to support the promotion and dissemination of the Global Trade Helpdesk;
- *Google Market Finder* for the dissemination of COVID-19 related temporary trade measures; and,
- *Boston Consulting Group* for customization of Export Potential Map data.

159. All these collaborations open up opportunities for additional revenue generation. However, in light of the findings presented on the needs and usability of the tools, it is **important to ensure that collaboration with the private sector further drives innovation in tools and the development of new products and services**.

160. Moreover, **a custom access model for selected corporate and donor partners—based on a fee for service model—necessarily creates a tension with the promise of a global public good,** which should be widely available—in principle, freely available to all.

[46] Revolving fund activities are financially self-supporting and of a recurring nature. The income they generate is credited back to the funds and is used for the activities of the funds. There are nine revolving funds within ITC that receive money through the sale of products and services. The use of resources within each fund is governed by the fund's terms of reference (ITC. 2013. ITC - Understanding Financial Resources, p.5).

[47] ITC (undated). Progress report, International market information tools as a global public good. For the period: 01 January 2020 to 31 December 2020.

161. While ITC should continue to pursue these kinds of partnerships, and should even expand them in the future, **more attention should be placed on ensuring that collaboration has spillover effects for the intended users of the tools**, as they—and not donors or corporates—are ITC's target groups, for whose benefit the tools are ultimately funded.

162. Moreover, senior management should ensure that the development and dissemination of **trade and market information is properly resourced so that the information can be provided as close as possible to a global public good model**; it is incumbent on senior management to ensure that the perceived need and sustainability of funding should not impede attainment of the development goals to which the MAT are seen as contributing.

Contributions to UN intergovernmental processes

163. **ITC trade and market information** as produced by TMI and disseminated through the MAT **is also leveraged to contribute to UN intergovernmental processes** and to support the implementation of the SDGs at the country level. Below are a few examples:

- *Inter-agency taskforce on financing for development:* TMI provides annual inputs to the IATF's annual Financing for Sustainable Development Report, which tracks progress against the Addis Ababa Action Agenda. TMI's analysis focuses on chapters related to trade, private sector and data.
- *Contributing to the High-Level Political Forum on Sustainable Development:* Since 2018, TMI has collaborated with WTO and UNCTAD to host a side event to discuss issues related to trade and the SDGs at the annual High-Level Political Forum, the forum dedicated to tracking progress against the SDGs. In 2021 the three organizations will present the SDG Trade Monitor joint platform.
- *Tracking progress towards SDGs:* ITC (through TMI) is a co-custodian of three SDG indicators, together with WTO and UNCTAD. (Indicators 10a/ 17.10 /17.11 / 17.12.). TMI thus tracks progress against these indicators for the global community.
- *Country-level support through the Resident Coordinator System:* TMI's knowledge and research can inform the new common country analyses and UN sustainable development cooperation frameworks (UNSDCF) of the repositioned UN development system. So far, TMI contributed to the common multi-country analysis for the Caribbean's new regional framework. They also presented ITC's market analysis tools to the UN country team in Haiti to inform the planning process there.

164. Findings suggest that **there is more potential for inputs in this area**, i.e., research and analysis on the linkages between trade, MSMEs, and the SDGs. To some extent, this is already going on in selected areas. However, involvement in these processes appears to be limited, ad-hoc and based on personal interest and commitment, rather than prioritized by the section or the organization. TMI cites the lack of resources as a reason for this position..

Exchanging trade and market information internally

Enhancing access to data

165. A key objective within any organization is to ensure that information moves efficiently internally. Interviews indicate that ITC, like most international organizations, suffers to some extent from working in silos, so information exchange is sometimes challenging. The **ITC corporate data management strategy – currently under development – recognizes the need to improve internal information flow.** It aims in particular to link up different pieces of information about clients, incl. counterparts and beneficiaries and with the objective to generate insights through the development of "data marts"[48] to act as

[48] A data mart is a database that consists usually of a specific subset of a bigger data warehouse.

repositories for different and defined types of data collected by the organization through projects and platforms. Staff will have access to dashboards that display insights generated with the data.

166. The starting point for analysing information flow with respect to trade and market information is the broader working relationship between TMI, which is responsible for collecting, treating, and disseminating the data, and other parts of ITC. In interviews, ITC staff expressed **mixed views about this working relationship as interaction with TMI is not grounded on an institutionalized mechanism for information transfer.** The background to these perceptions is that there is no special portal giving internal ITC users unfettered access to the full MAT datasets: that access depends on individual requests to TMI staff.

167. **ITC's trade and market information** within the scope of this evaluation **is stored by TMI and is not available automatically or through a simple online interface to all other ITC staff that facilitates bulk download in a way that the outward-facing interfaces currently generally do not.** The position is similar to the one mentioned above in relation to external researchers, who also depend on personal relationships rather than institutional mechanisms to access the full range of ITC's MAT-related data. Some respondents indicated that they had no issues in working with the TMI section and that any data they requested was supplied rapidly and without obstacle. But this process depends on personal relationships between staff in other units and those in TMI.

168. In light of the perceived need for personal relationships with TMI staff in order to fully access data, other respondents claimed that the level of collaboration is not always transparent. Some ITC staff portrayed TMI as a unit operating "on its own" and behaving protectively towards its own work and projects. As noted above, it was reported in interviews that **a lack of internal agreement within ITC in one case resulted in a beneficiary country losing access to ITC services through its designated portal, though not through the general interfaces.** This is a serious issue not only in terms of provision of public goods and attainment of development objectives, but also in terms of ITC's reputation for acting coherently and with a single voice in the development space.

Synergies within ITC

169. **Internal documents and evidence demonstrate increasing collaboration between TMI and other ITC sections and programmes.** These include joint collaborations between TT and the SME Trade Academy, as well as with the She Trades initiative. In 2020, TMI collaborated with these two programmes nine times each, a substantial increase from 2018 and 2019. Similar collaboration is happening with other programmes, where the tools are extensively used as inputs into the design and delivery of technical assistance programmes, and in joint delivery of programmes.

170. However, interviews also suggested that **TMI should intensify its ongoing collaboration with other sections, in areas such as surveys or analysis.** Comments were made on the lack of information dissemination before any project start or tools are developed especially in the design phase. The other point raised is that **better collaboration with other departments could boost the promotion of MAT and create more awareness**; the need to increase awareness of the tools, as well as to increase user loyalty, was noted above. Some respondents indicated that **the absence of an efficient working relationship was considered more as a breeding ground for internal competition rather than one geared towards servicing ITC's clients.**

171. The above views were confirmed by previous evaluations, which have pointed to **information sharing and internal consultation and collaboration as important weaknesses of the organization**, more particularly at the programme-level. One evaluation report sums up the internal relationship by saying that "the picture on synergies within ITC is mixed."[49] It is very explicit that everyone is cast into their respective division and programme roles, with defined budget, objectives, deliverables, and performance indicators.

[49] ITC. 2019. Evaluation of the ITC Trade Facilitation Programme, pp. 34

172. One of the main challenges put forward regarding information exchange is linked to the structure of the organization, which interviews suggest still operates in silos. ITC's organizational structure (built around six divisions and 15 programmes), and its project funding mechanism encourages information to be maintained within boundaries. As such, **units that tend to act protectively towards data and information are to some extent only responding to the organizational incentives they face**. Moreover, the fact that financial sustainability of departments is linked to project financing automatically creates an environment for setting boundaries and limiting information exchanges, as in the example referred to above of the confusion within ITC regarding embedding the MAT in a client portal. There is therefore an incentive for departments to control information flow and data sharing, even within the organization.

173. Several interviewees confirmed that uncoordinated work and poor country coordination[50] present reputational risk to the organization and affect the efficiency of the organization. Dealing with these issues cannot be an issue for individual units only, but instead should be a priority for senior management at ITC. Where such issues affect project delivery, they constitute **a risk on ITCs credibility** vis à vis its clients, above and beyond the impairment to service delivery and pursuit of development objectives. Internal interviews have also revealed that due to the above situation, some staff may not have the entire scope on what others are doing or sometimes there is a feeling that "*what other departments are doing is not necessarily right*".

174. However, it is important to state clearly that there is **no evidence to suggest that MAT-related data are systematically withheld when requests are made**; in fact, most staff who make requests find they are fulfilled. Notwithstanding these findings, **the lack of a formal mechanism or simple online tool means that there is reticence to request the data.** Senior management should ensure that the development of the MAT and the dissemination of trade and market information to the widest possible user base is a corporate priority to which all ITC staff are committed, and should act to prevent perceived competition or non-cooperative outcomes between different parts of ITC, as in the example of the blocked portal referred to above.

Corporate and system-wide initiatives

175. **Several initiatives have been launched to improve internal collaboration and information sharing within ITC**, namely the One ITC[51], the corporate data management strategy[52], and plans to utilize a customer relationship management system. While the data strategy and the CRM system are still in the planning and piloting phase, the success of the One ITC is not known. ITC as a digital workplace or information-based organization will provide ITC staff with a single point of access to the organization's information warehouse for data, information, document, analytical tools, and multimedia resources from all divisions, programmes, and projects. Such a workplace will create an enabling environment for greater interdivision synergy for better planning, implementation, management, monitoring, and reporting of outcomes and outputs. More importantly, it will provide ITC management with the big picture of the organization and an opportunity for quick response.

176. "*Data Strategy for Action by Everyone, Everywhere*" is the UN Secretary-General's agenda for the data-driven transformation of the UN system. The vision is to build a whole-of-UN ecosystem that unlocks full data potential for better decisions and stronger support to people and planet. The idea behind this strategy is to **build new capabilities around analytics, which implies using detailed data for better understanding and data management** to ensuring everyone, everywhere can discover, access, integrate, and share the data they need. The focus of this strategy is on "*data action that adds immediate value for our organization*". The outcome of this strategy is that "*Better approaches to data will deliver better outcomes for everyone"* which includes: "*Stronger decision-making and policy advice, greater data access and sharing, improved data governance and collaboration, robust data protection and privacy, enhanced efficiency across our operations, greater transparency and accountability*."

50 ITC. 2020. Review of the coordination of ITC activities at country level (Draft, January 2020)
51 ITC (undated). Rules of engagement for One ITC (internal document)
52 ITC. 2019. Strategy paper for ITC's corporate data management. Final draft version 28 November 2019 (internal document)

177. **ITC is at an early stage of development in terms of the UN Data Strategy.** Although the principle behind ITC's offering is built around the transparency of information flow and sharing within ITC, based on feedback from ITC staff, the situation is far from the ideal set by the UN Data Strategy. **Information sharing is not yet well structured and established**, as indicated above. Various challenges have been indicated above, linked to organizational structure, funding mechanisms, and personal issues that have come to affect working relationships within ITC, given the importance that personal relationships play in facilitating information flow within the organization.

178. Interviewees noted a **tendency to view TMI data in proprietary ways, both vis-à-vis external actors and internal ones**. As a result, it is difficult to become a fully data-driven organization. Programmes at ITC are perceived to collect and process their own data and information. The degree of data integration, accessibility and sharing is still relatively weak.

179. **ITC's data management strategy has the potential to promote a more central role for data within the organization if it indeed manages to establish mechanisms and structures to utilize and streamline data from multiple systems.** This could be one way of getting around the problem of silos and proprietorship, thereby resulting in a more efficient use of information, avoiding duplication of human and financial resources, and ensuring financial sustainability of the organization.

180. However, **discussions with ITC staff suggest that since the project is still at an early stage, perceptions of scope and ambition vary markedly within the organization**: some staff see it as simply CRM, while others conceive of it as a way of comprehensively sharing data. In part, this state of affairs is due to the organic process of developing the CDMS, including a large number of changes. ITC senior management should intervene to ensure that the organization has a single vision for the data management strategy, in which it is viewed as a core part of the **transition to a data-driven organization in which all information—including the data underlying the MAT—flows as freely as possible.**

4) Conclusions and recommendations

181. **ITC's market analysis tools are widely recognized as providing high quality, up to date, comprehensive trade and market information**, and they are largely provided free of charge as global public goods.[53] At the same time, ITC trade information and intelligence activities increasingly take place within a competitive environment characterized by numerous public and private sector actors. The variety of tools available means that visibility of ITC's contributions is sometimes limited, and end-users can be confused about the original source of the data they are using.

182. Most importantly, **ITC's traditional comparative advantages have reached a peak.** Tools like Trade Map and Market Access Map reflect core, historical data requirements among trading firms and policy-makers. However, as the results of this evaluation show, **user needs are undergoing major changes.**

183. **In part, ITC has responded to this**: First, it has launched new tools that cover less traditional areas or fill perceived gaps in areas of traditional information needs, such as the Rules of Origin Facilitator and Investment Map. Second, ITC has started developing data products that go beyond disseminating raw or lightly transformed data to provide additional analytics, or to integrate insights across platforms. Tools in this category include Global Trade Helpdesk and Export Potential Map. Finally, it is offering bespoke data solutions that respond to particular demands, such as the African Trade Observatory.

184. **Further action and continuous enhancement however remains necessary** given the growing needs of economic operators to better understand international trade issues which are becoming more complex.[54] The effectiveness of the tools in reaching target audiences and responding to their needs should be further enhanced.

185. The following conclusions outline the specific areas where action is needed and are supported by a total of nine recommendations:

- The **first set of recommendations** (1-2) is aimed at **strengthening the strategic approach of the tools** and of the associated programme, and at obtaining reliable information for their future steering.
- The second set of recommendations (3-5) comprises a series of actions to **increase the effectiveness of ITC's market analysis tools**. It also identifies areas where the organization should continue to build on existing strengths and indicates new areas to be explored.
- The last set of recommendations (6-9) refers to aspects that **affect or benefit the organization at large:** ensuring ITC's visibility as a data provider; linking the tools to the wider offering of the organization; strengthening data sharing and collaboration both internally and externally; and safeguarding the tools' provision as a global public good.

186. **Conclusion 1: There is a need to better clarify what the tools are intended to achieve, for whom, and how.** According to their intervention logic, the tools' explicit aim is to enable small companies, institutions, and policy makers to make better informed trade and investment decisions. The findings of this evaluation show that the tools have been successful in building a large user base and that they are used worldwide. However, it seems that more efforts are needed to reach main target groups more effectively. For instance, MSMEs are only reached to a limited extent. They tend to find it difficult to use the tools, and rely on assistance, for example from BSOs, to interpret the data. Moreover, the tools are little used in ITC's priority countries[55] compared to the rest of the world.

[53] In line with the commonly used definition of a global public good that they are accessible worldwide and on a non-rivalrous and non-excludable basis. In other words, no one can be excluded from their benefits and their consumption by one person does not diminish consumption by another.

[54] For example, market access conditions are more complex to understand (rules of origin) and represent trade obstacles in particular for MSMEs in developing countries.

[55] ITC prioritizes project implementation in least developed countries, landlocked developing countries, small island developing states, Sub-Saharan Africa, small vulnerable economies, post conflict and fragile states. ITC has committed to spending at least 80% of its country-level assistance in these priority countries.

Recommendation 1: Revise the strategy and intervention logic of the market analysis tools.

Directed to Chief Trade and Market Intelligence Section:

- *TMI should prepare a new strategic document that should include a more comprehensive theory of change / intervention logic, detailing what each tool is intended to achieve, who the targeted users are (and which other groups are likely to benefit) as well as the pathways through which intended results are expected to be achieved.*
- *The strategy should also address how to better reach users in ITC's priority countries. Moreover, it should provide information about which collaborations with external actors (such as universities, researchers, private sector, or other organizations) already exist or are being pursued, and how they will contribute to the effectiveness of the tools.*

187. **Conclusion 2: Metrics used so far to assess the performance of the tools offer limited insights.** Current tracking systems gather data on registered users for certain tools, while usage levels cannot be comprehensively tracked for non-registered users. The analysis of data on registered users has shown that it only allows limited conclusions to be drawn. The annual MAT survey conducted to respond to corporate and donors' reporting indicators is sent only to a subset defined as "frequent" users[56] as they are considered actual beneficiaries. Although this forms a limited sample, the survey and its results are also used to assess the tools' overall performance, whereby individual values are extrapolated (such as the value of imports/exports for which the tools have helped users to make decisions).

Recommendation 2: Adjust the approach and metrics used to assess the tools' performance.

Directed to Chief Trade and Market Intelligence Section:

- *Explore options to get comprehensive feedback on the usefulness of the tools for their intended target groups, considering survey fatigue and related low answer rates for online questionnaires. Possible approaches include: the existing MAT survey could be retained, but administered to a larger audience using stratified random sampling; a qualitative survey campaign should be carried out, for example through interviews, group discussions or other means, to obtain more detailed information about users' needs. For reporting purposes, the analysis could focus on recent users, while the overall results could provide a more comprehensive picture of the tools' overall performance. Besides, the tools performance could also be assessed through pop-up satisfaction surveys (as currently already done for Export Potential Map), which could provide a more reliable assessment of actual users instead of focussing on registered accounts only.*
- *The tools' performance metrics should be reframed to focus on visits and actual use rather than registered accounts, while distinguishing the type of profile (MSMEs, BSOs etc).*

188. **Conclusion 3: There is much potential for improving the level of awareness of the tools among its target groups.** Knowledge of or familiarity with the tools varies considerably across the different tools, target groups and by global region. Among the selected policymakers and BSOs interviewed or surveyed, the majority were aware of at least one of the tools. This should be further improved, in particular as BSOs play a critical role in advising MSMEs. In the meantime, there seems to be a particularly low awareness of the thematic tools among MSMEs, as evidenced by the fact that they make up only a small portion of registered users relative to their total number.[57]

Recommendation 3: Increase awareness of the tools to better reach main target groups.

Directed to Chief Trade and Market Intelligence Section:

- *TMI should improve outreach to its main target groups, for example by carrying out targeted awareness campaigns on the tools globally, combined with capacity building activities upon funds' availability. This could be done through specific user channels, for example at a regional level in collaboration with regional economic communities and with the assistance of national and private sector BSOs.*

[56] ITC's corporate indicators 2020 define active users of ITC data tools as those accessing the tools a minimum of twice per year.

[57] Bearing in mind that tools can also be accessed without registration. Tools offering full access without registration are Market Access Map, Export Potential Map, Rules of Origin Facilitator and Global Trade Helpdesk.

- *In addition, BSOs should be encouraged to include links to the tools into their own websites to make them more visible and accessible to their members, using the guidelines developed by TMI[58]. Given their intense collaboration with BSOs around the world, ITC's Institutions and Ecosystems Section would be a helpful partner in this effort, including to provide contacts of BSOs in ITC priority countries.*
- *Regarding MSMEs as a target group, in particular the level of familiarity with the still very young Global Trade Helpdesk should be increased, as it is especially geared towards their needs.*

189. **Conclusion 4: Efforts have already been made to enhance and simplify the use of the tools and to adapt them to the needs of main target groups, but these efforts should be intensified.** Despite recent improvements, further simplification or optimization of the tools' websites would help to increase their use. The aim should be to adjust the tools as best as possible to the needs of the targeted audiences, while minimizing the associated need for learning and training. The recently developed Global Trade Helpdesk, which is an integration of some market analysis tools, is a step in that direction and responds to the constant need for upgrading and providing user-friendly solutions to ITC's clients.

190. Recent developments in the IT sector make it possible to integrate advanced analytical capabilities into data driven websites. For instance, Tableau makes it possible to incorporate flexible data visualizations, while Shiny apps can facilitate remote data manipulation and analysis. ITC's tools do not integrate these or similar tools. Areas of particular interest include the development of sophisticated analytics, and state of the art data visualizations.

191. Finally, many users, in particular MSMEs, would prefer to access the tools through portable devices which currently is only possible to a limited extent.

Recommendation 4: Continue to improve the functionality and features of the tools and the user-friendliness of their interfaces. Put more emphasis on analytics and data visualization.

Directed to Chief Trade and Market Intelligence Section:

- *Devote additional resources to further interface improvements for the Market Analysis Tools. Interface simplification should be based on clients' needs, ease of use and designed in a way to minimize the need for user training.*
- *Newer versions should enable the generation of automated reports and insights, and include advanced data visualization capabilities based on user requests. Incorporation of advanced search technology based on plain language or voice activation could help make the tools more accessible.*
- *In particular to better serve MSMEs in DCs and LDCs, the tools' websites should be further optimized to be fully responsive to different user displays and existing mobile applications should be upgraded, so they are functional and able to provide automated personalized insights (based on products).*
- *TMI should further leverage its relationships with universities, researchers, private sector, or other organizations to make use of their expertise, for example in methodology or in designing user interfaces and apps that respond well to user needs. A priority should be to update the Export Potential Map methodology in line with the recent academic literature.*

192. **Conclusion 5: ITC has clear comparative advantages in providing trade and market information, but there are demands for data that cannot be met so far.** ITC maintains its role in "classic" data collection and dissemination of global trade information, although the environment is increasingly competitive. It has a comparative advantage in providing international trade data based on a combination of generally free access as well as high quality, timeliness, and completeness of data.

193. Another area where ITC has demonstrated comparative advantage is the deployment of bespoke data solutions designed to respond to specific needs. The African Trade Observatory is a good example of this.

194. ITC is partially able to respond to growing demand for data on trade in services, but other organizations (WTO, World Bank, and OECD) have an established comparative advantage in collecting and analysing

[58] https://marketanalysis.intracen.org/en/joinus

data on applied services policies. There is increasing demand, particularly in Africa, for data on informal trade. However, there are currently no international standards or programmes to comprehensively track it in a large number of countries, as it requires national/local analytics and surveys to gather this type of information. An organization like ITC, which has strong relationships with national data providers, could play a leadership role along with partner organizations in implementing specialized studies on a case-by-case basis, i.e. if there are specific country projects and funds.

Recommendation 5: Continue recent developments of promising integrated data solutions designed to respond to specific needs (such as the African Trade Observatory). In addition, explore areas where ITC is well positioned to serve existing demands for data.

Directed to Chief Trade and Market Intelligence Section:

- *While continuing to focus on its core activities of collecting and disseminating comprehensive and updated high quality trade data, TMI should expand partnerships with universities, researchers, private sector, or other organizations to develop new products based on the changing needs of its clients, especially in areas where ITC has an established comparative advantage.*
- *TMI should adopt a strategic approach (in line with recommendation 1) moving into new substantive areas. Given recent work with the African Union, an area of strategy advantage could be the development of standards and methodologies (such as surveys) for estimating informal trade on a case-by-case basis, in cooperation with partner agencies and national statistics offices. Given the nature of the customized assistance that will be required, the activity will need to be financed for individual countries, and might therefore not qualified for Global Public Good related funds.*

195. **Conclusion 6: ITC's visibility in providing trade and market information is partly limited.** Public sector data providers typically have cooperative arrangements in place. Transparency regarding these arrangements is so limited that end-users frequently do not realize the origin of the data they are using. In some cases, a likely result is that ITC data are not sufficiently credited by other organizations.

Recommendation 6: Strengthen the organization's visibility where ITC data is used by other providers.

Directed to Chief Trade and Market Intelligence Section:

- *Ensure that ITC data are given due credit when used by other organizations, in particular as regards TRAINS.*

196. **Conclusion 7: The tools reach a broad group of users who could also be interested in or benefit from other ITC products or services. But opportunities to refer to further information and services provided by the organization are hardly used so far.** The MAT are the entry point to ITC for many MSMEs and other client groups of interest, as evidenced by the tools' large user base. However, the MAT portals make relatively limited references to other services and information sources at ITC, including those outside TMI. Given that ITC has a wealth of information on trade-related areas beyond the core offerings of the MAT, users would benefit from exposure to those sources.

197. There is scope to use predictive analytics and other techniques to "cross-sell" ITC information and services based on observed patterns of querying and browsing in the tools. Current efforts around ITC's data management and to establishing a single sign-on for ITC clients could also be helpful in this context.

Recommendation 7: Utilize opportunities to identify and address interest of the tools' users for other ITC products and services.

Directed to Chief Trade and Market Intelligence Section:

- *The market analysis tools' websites should leverage opportunities to provide links to relevant/related ITC products and services.*

198. **Conclusion 8: Data is shared upon request, but there is no transparently defined regulation on the sharing of data.** While there is no evidence that data are not shared when required, the process for requesting access to larger datasets is not explicitly available, which means that many external users are unaware of the ability to access large amounts of data. As a result, ITC data are little used by researchers directly. The fact that larger datasets are not shared more openly is primarily justified by confidentiality agreements with data providers.

199. Neither TMI nor ITC do have an Open Data Charter, or another policy to facilitate access to the data underlying the MAT. While ITC has a history of working collaboratively with some parts of the research community, the general perception among researchers in international trade is that it is difficult to access large amounts of data from the tools.

200. The current Data Strategy of the Secretary-General invites UN entities to enhance open data sharing portals in order to better share the available wealth of data and statistics and to become better in governing greater exchange of data, developing *"data sharing agreements that enable partners to integrate more deeply with us, in responsible ways".* [59]

Recommendation 8: Develop a commitment to open data and regulate access to data in a transparent manner.

Directed to Director Division of Market Development:

- *ITC should adopt an Open Data initiative. The operational principle should be that all data collected by ITC, including the data underlying the MAT, should be publicly available and released in a way that enables bulk download (like in Market Access Map), subject to contractual or confidentiality restrictions. The World Bank's Open Government Data Toolkit and the Data Strategy of the Secretary-General contain useful elements that ITC should consider during consultations designed to develop its own approach to open data.*
- *The initiative should result in a document, such as a charter or policy, that is developed in a timely and an easily understandable manner, and made readily available to the public within a year. The document should also explain what data cannot be shared and why. Given that within ITC, the Division of Market Development has particular expertise in data collection and treatment, it should lead on this process.*
- *Just as access to data from outside should be transparently regulated, so should the sharing of data within the organization. Independently from the Open Data initiative, internal data sharing should also be governed through a transparent agreement that is accessible to all personnel. It should be ensured to the extent possible that data can be freely shared within the organization where this adds value or enables synergies in line with the organization's and programmes' mandate. These efforts should be aligned with the corporate data management strategy which also aims to facilitate information flow and value addition.*
- *Good collaboration between sections within the Division of Market Development should be ensured, also or especially in case of overlapping mandates or areas of complementary expertise, since they all contribute to the organization's vital research function and therefore need to be well coordinated. Ideally, this would include exploring ways to better harmonize, link and integrate their products and services.*
- *All of these efforts should have the explicit support of senior management.*

201. **Conclusion 9: The tools' purpose is to provide trade and market information as a global public good. This ambition calls for an adequate funding model.** Providing trade information has been a core function of ITC since its founding in 1964. While previously sponsored by users and other projects, ITC decided to change the business model as of 1st January 2009[60], offering the market analysis tools free of charge to developing countries. Free access to the tools is greatly appreciated especially in the LDCs and there is widespread support for maintaining trade and market information as a global public good.

[59] UN. 2020. Data Strategy of the Secretary-General for Action by Everyone, Everywhere with Insight, Impact and Integrity (2020-22). UN website, page 30.

[60] ITC Annual Report 2008 and JAG report 2009

202. Due to ITC's funding structure, TMI cannot rely solely on the organization's regular budget to operate the tools. Instead, the team has to continuously raise additional extrabudgetary funds (including project funding), in particular to finance the further development of new or existing tools. TMI has been very successful in mobilising resources (human, financial and logistics) for the development of tools and services through its network of development partners and donor agencies. This implies however that at present private sector partners and donors receive privileged data access and bespoke solutions in return for their support.

Recommendation 9: Uphold the principle that trade and market information is provided as a global public good. Leverage funding from donors and private sector to enhance this offering.

Directed to Chief Trade and Market Intelligence Section:

- *In line with the organization's mandate and strategic plan, TMI should maintain to the maximum possible extent the global public good model of data provision and free access to the tools, in particular for users from developing countries.*
- *TMI should ensure that funds generated by offering customized services do not result in resources and attention being diverted to the provision of services on an exclusive basis, but rather that these resources are used to either drive product development or to support the provision of the tools overall as a public good. Working with donors and external partners to enhance data quality and completeness, as well as the tools' interfaces and capabilities, can further improve the offering in ways that would benefit everyone.*
- *It should be carefully monitored that there is an appropriate balance between the offering that is freely available to all and what is customized and exclusive for specific clients. The ultimate responsibility for ensuring that the tools are provided in accordance with the organizational mandate rests with ITC's leadership. Therefore, the evaluation proposes that TMI should share annually with ITC's Executive Director an overview of the tools' offering while indicating the scope of privileged partnerships and highlighting the value they bring to the global public good model of data provision.*

Notes to Senior Management:

- *ITC should improve its internal knowledge of other services, so each ITC staff has a minimum information/knowledge about market analysis tools (and other services) to be better equipped when meeting beneficiaries and stakeholders. There could be a "package" of information, generic presentations about ITC expertise, or other guidelines that could be a toolkit to promote ITC services beyond individuals' expertise, in particular for DCP colleagues travelling in targeted countries.*
- *In addition, the ITC website should display the full range of ITC products and services. Moreover, the website could provide targeted suggestions based on user behaviour and search queries.*
- *The IT infrastructure required to host and provide the tools and related data has been criticized as insufficient and it has been reported that there have been outages in the past. Therefore, further investment in hardware and software equipment should be considered to host a larger database and develop additional features.*

Annex 1: Evaluation matrix

Questions and sub-questions	Indicators	Data collection methods	Information / data sources
1. What is the current context in which ITC performs its mandate to provide trade and market information?	• *Alignment between information needs and ITC's strategic plans at corporate and programme/project level* • *Feedback from Governments, BSOs, MSMEs, Funding Agencies*	• *Document reviews* • *Interviews* • *Survey*	• *Corporate/Strategy Documents* • *BSOs, Governments, MSMEs, Large corporations, Researchers* • *External Documents and Reviews*
What is the importance of trade and market information today, in particular for developing and emerging economies? What are recent and ongoing trends in this area, including latest trends in data technology?	• Feedback from Governments, BSOs, and SMEs in developing countries • Changes in the number of requests for trade information and related tools from ITC • Changes in the number of subscribers to ITC's tools • Emergence of new and competing trade information platforms provided by other institutions	• Document reviews • Interviews • Survey	• ITC documents • BSOs reports • Reports from international agencies on information needs • Reports on information trends from international articles • BSOs, Researchers
What implications does the corona pandemic have for ITC's work in this area?	• Reports on the impact of the current COVID-19 situation on the business environment • Evidence from BSOs and MSMEs of any changes in the demand pattern related to trade information	• Document Reviews • Interviews • Surveys	• International business articles • ITC staff • BSOs, Government representatives, MSMEs, Large corporations • Interviews with international organizations providing trade information
What other organizations, companies or actors play a significant role in this area? How does their offer differ from ITC's?	• Trade databases and services already provided online by other/competing agencies • Perception of ITC's target group on the comparative usage of trade data and tools from different service providers	• Document Reviews • Interviews • Surveys	• Online databases and tools provided by competing institutions • BSOs, Researchers
How are ITC's tools and services in this area positioned against this background? Are there opportunities where ITC should establish or strengthen its collaboration with external partners?	• Stakeholders' perception on ITC tools and services	• Interviews • Survey	• ITC management and staff • BSOs, Researchers
2. How effective are ITC's tools and services in the area of trade and market information?	• *Data on estimated volume of trade created through the use of ITC tools and products from existing ITC reports* • *Increased number of users of ITCs tools and products*	• *Document Reviews* • *Interviews* • *Surveys*	• *ITC documents* • *ITC surveys* • *ITC staff, BSOs, Government representatives, Researchers and academia, MSMEs, Corporates*

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Questions and sub-questions	Indicators	Data collection methods	Information / data sources
What are the trade and market information needs of ITC's main client groups? How will these needs develop in the foreseeable future (e.g. in the next 5-10 years)?	• Third party BSOs' reports on trade information needs, country reports, reports from other programmes related to trade information needs • Evidence of trade information gaps from BSOs and SMEs International articles on potential needs related to trade data by competing agencies or companies • Evidence of new tools and services already developed by competing institutions or data companies	• Document reviews • Interviews • Survey	• BSOs, Researchers, MSMEs • ITC management and staff • Interviews with data companies • International business literature
To what extent are the tools and services well-tailored to their main target groups and their needs? How do they perceive their usefulness?	• Data on estimated volume of trade created through the use of ITC tools and products from ITC reports • Perception of the level of satisfaction between Policymakers, BSOs', Large companies' and SMEs' needs and tools and data provided by ITC • Perception from BSOs and SMEs on the correlation between use of ITC tools and services and business opportunities and trade creation	• Document Reviews • Interviews • Surveys	• ITC survey results • ITC documents • BSOs, Researchers, MSMEs
To what extent do these tools and services achieve their purpose to enable improved business decision-making?	• Data on estimated volume of trade created through the use of ITC tools from reports • Perception from BSOs, large companies and SMEs on the level of use of ITC tools and their impact on business decision making • Degree of correlation between the use of ITC tools and business decision making at the levels of Governments, BSOs, Large companies and MSMEs	• Document Reviews • Interviews • Surveys	• ITC survey results • ITC documents • BSOs, Researchers, MSMEs, Large corporations
3. To what extent are ITC's tools and services efficiently managed and provided?	• *Perception from ITC staff on the management of tools and services in the area of trade and market information* • *Perception from BSOs, Governments, MSMEs and Researchers on how efficiently ITC tools and services are managed and delivered*	• *Document Reviews* • *Interviews* • *Surveys*	• *ITC documents* • *International business reports* • *ITC management and staff*
How well do these tools and services complement each other? Are there overlaps?	• Perception from BSOs, MSMEs and Researchers on the complementarity of ITC tools and services • Evidence of overlaps of tools and services identified by BSOs and SMEs	• Document Reviews • Interviews • Surveys	• BSOs, SMEs, Researchers

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Questions and sub-questions	Indicators	Data collection methods	Information / data sources
How could tools and services be improved, also in light of latest trends in data technology?	• Perception from BSOs, MSMEs and Researchers • Insight from document review on latest trends in data technology	• Interviews • Surveys	• BSOs, Researchers
To what extent is the current business model of providing trade information suitable and sustainable? (e.g. regarding free for all vs. fee-based approaches or regarding the provision and/or sharing of platforms and data with partners)	• Perception of ITC target group of data users on free availability of trade data and related tools v/s a paid service for the same information. • Perception from ITC target group users on a fee-based trade information supply model. • Perception from ITC staff on provision of free data and analysis tools v/s a paid service and the sustainability of a free for all model	• Document Reviews • Interviews • Surveys	• ITC Documents • International Business reports • BSOs, Researchers, MSMEs, Large corporations
4. To what extent does ITC succeed in exchanging and using trade and market information internally?	• *Perception from ITC staff on the efficiency of internal exchange and use of information in the area of trade and market information* • *Perception from Governments, BSOs, SMEs and Researchers on how efficiently trade and market information is shared and used among ITC staff*	• *Document Reviews* • *Interviews* • *Surveys*	• *ITC and UN documents* • *International business reports* • *ITC management and staff* • *Governments, BSOs, SMEs, Researchers*
To what extent is related information exchanged within the organization and made available to others? To what extent are internal synergies used?	• Perception from ITC staff on the level of information exchanged internally and made available to others • Perception from ITC staff, Governments, BSOs, SMEs and Researchers on how efficiently internal synergies are used	• Interviews • Surveys	• ITC management and staff • Governments, BSOs, SMEs, Researchers
How is ITC using trade and market information for trade-related technical assistance planning, management and follow up?	• Perception from ITC staff on the usage levels of trade and market information for trade-related technical assistance planning, management and follow up	• Interviews • Surveys	• ITC management and staff
To what extent is the processing and availability of data relevant or consistent with current developments within the UN system (such as the UN data strategy)?	• Alignment between processing and availability of data from ITC and current developments within the UN system (such as the UN data strategy)	• Document reviews • Interviews	• ITC management and staff • ITC Documents • UN data Strategy

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Annex 2: List of persons interviewed

National/regional institutions and private sector

Family Name	Given Name	Organization	Job Title	Gender
Barber	Ana Denise	Ana Consulting	President of Anna Consulting. Former Executive Chairperson of CV TradeInvest	F
Ramkaloan	Kevin	Business Mauritius	Chief Executive Officer	M
Chisambi	Kettie	Business Organics Ltd	Managing Director	F
Neves	Jose Luis	Cape Verde Chamber of Commerce and Industry	Secretary General	M
Boogers	Sanne	CBI	Programme Manager	F
Wane	Abdel Aziz	Chambre de Commerce de Nouackchott, Mauritania	Secretary General	M
Mavubi	Providence	Common Market for Eastern and Southern Africa (COMESA)	Director of Agriculture and Industry	M
Muzurori	Tasara	Common Market for Eastern and Southern Africa (COMESA)	Team Leader/CBT Expert - CBT Initiative	M
Onyango	Christopher	Common Market for Eastern and Southern Africa (COMESA)	Director of Trade and Customs,	M
Teixeira	Luis	Competitiveness Unit- Prime Minister's Office, Cabo Verde	Head of Unit	M
Sekai	Kuvarika	Confederation of Zimbabwe Industries	Chief Executive Officer	F
Almada Dias	Jose	CV TradeInvest, Cabo Verde	Executive Chairman	M
Santos	Leida	CV TradeInvest, Cabo Verde	Manager- Exports	F
Masibi-Mampane	Ogaufi	Department of International Relations and Cooperation (DIRCO), South Africa	Directorate Central Africa Branch	F
Senona	Joseph	Department of Trade, Industry and Competition, South Africa	Chief Director, Trade and Investment South Africa (TISA)	M
Govender	Luke	Department of Trade, Industry and Competition, South Africa	Director at South African Department of Trade and Industry	M
Mpetsheni	Thulani	Department of Trade, Industry and Competition, South Africa	Director: Export Promotion, Asia and Middle East at Trade and Investment SA	M
Guisset	Dialel	Direction des Etudes Economiques et de la Planification, MCT	Director	M
Habibullah	Mohamed	Direction Général de la promotion du secteur privé	Director	M
Ethmane	Mohamed	Direction Générale de la Normalisation et de la Promotion de la Qualité (DGNPQ)	Director	M
Hamza	Yacoub	Director of Tourism	Ex Director of IT and Information systems, Ministry of Trade and Industry	M
Bucktowonsing	Geerish	Economic Development Board, Mauritius	Senior Manager, International Business	M
Jeetah	Nirmala	Economic Development Board, Mauritius	Senior Manager, Traditional Industries	F
Napaul	Reshma	Economic Development Board, Mauritius	Senior Officer	F
Malick	Limam	Economie et Secteurs Sociaux, Délégation de l'Union Européenne en Mauritanie	Project Manager, Cooperation Section	M
Mungur	Sanjay	Empretec Mauritius	Chairman, Chief Executive Officer	M

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Family Name	Given Name	Organization	Job Title	Gender
Ha	Doan Thi Thanh	ERIA	Senior Economist	F
Kaimapanjira	Chifuniro	Export Development Fund, Malawi	Chief Operating Officer	M
Dorward	Nigel	Farmed Abalone Export Council	Secretary General	M
Khoubah	Ahmed	Federation des Pèches, Mauritania	Secretary General	M
Kohli	Anil	Firemount Textiles Ltd, Mauritius	Executive Chairman	M
Pidial	Jenny	Fit-U-Garmets Ltd, Mauritius	Managing Director	F
Mosteiro	Jose Luis	Frescomar- Ubago Group	Managing Director	M
Kellerman	Marletta	Fresh Produce Exporters Forum / Fruit South Africa	Marketing Manager	F
Shingal	Anirudh	ICRIER	Research Fellow	M
Baker	Paul	International Economics Consulting Ltd	Chief Executive Officer	M
Muyila	Willy	Malawi Bureau of Standards	Deputy Director General	M
Kibombwe	Cindy	Malawi Investment and Trade Centre	Director of Trade Promotion and Facilitation	F
Kumbemba	Clement	Malawi Investment and Trade Centre	Chief Executive Officer	M
Kanyuka	Mercy	Malawi National Statistics Office	Commissioner of Statistics	F
Jovanovic	Aleksander	Market Research Independent, Serbia	Consultant	M
Sauzier	Jacqueline	Mauritius Chamber of Agriculture	Secretary General	F
Ismael	Yousouf	Mauritius Chamber of Commerce and Industry	Secretary General	M
Rajmun-Joosery	Lilowtee	Mauritius Export Association	Director General	**F**
Ramnarain	Raj Gupta	Mauritius Revenue Authority (Customs)	Head of Section-Excise Unit	M
Dukhira	Devesh	Mauritius Sugar Syndicate	Chief Executive Officer	M
Chancellor	Kaferapangira	MCCCI, Malawi	Chairman	M
Lemine	Mohamed	Ministry of Commerce, Industry and Tourism, Mauritania	Deputy Director External Trade	M
Boodhoo	Sunil	Ministry of Foreign Affairs & Regional Integration, Mauritius	Director, International Trade Division	M
Nkombezi	Wiskes	Ministry of Industry and Trade, Malawi	Director of SMEs	M
Simbani	Peter	Ministry of Industry and Trade, Malawi	Trade Officer-	M
Wadonda Chirwa	Cuthbert	Ministry of Trade & Industry, Malawi	Chief Economist	M
Kumbemba	Clement	Ministry of Trade and Industry, Malawi	Trade Director	M
Chatima	Christina	Ministry of Trade, Malawi	Director of Trade	F
Moothoosamy	Barlen	Ministry of Industry and Commerce, Mauritius	Head, Business Information Unit	M
Kachamba	Gilbert	MRA (Customs), Malawi	Trade Officer-	M
Mwale	William	NASME, Malawi	National Chairperson	M
Dr Munthali	Thomas	National Planning Commission, Malawi	Director General	F
Chinyamunyamu	Bettie	National Small Holders Farmers Association of Malawi	Chief Executive Officer	F
Tooree	Balram	National Women Enterprise Council, Mauritius	Acting Secretary General	M
Karki	Dipesh	Independent consultant, Nepal	Market Access Tool Trainer	M
Malla	Binayak	Kathmandu University School of Management (KUSOM)	TMI Trainer	M
Cruz	Adriano	North Chamber of Commerce – Cabo Verde	Secretary General	M
Ba	Oumar	Office National des Statistiques (ONS)	Director Statistics	M
Pizzaro	Juan	Peru	Independent Consultant	M

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Family Name	Given Name	Organization	Job Title	Gender
Barros	Pedro	Proempresa, Cabo Verde	Managing Director	M
Hitt	Mohamed	Programme Cadre Intégré Renforcé, Mauritania	Coordinator	M
Gasasira	Martin	Rwanda Development Board	Export Marketing Analyst	M
Jairaj	Nerisha	SA Footwear & Leather Export Council	Executive Director	F
Atwood	Jill	SA Fruit & Vegetable Canners' Export Council	General Manager	F
Pienaar	Arlene	SA Fruit & Vegetable Canners' Export Council	Brand Experience Manager	F
Coetzee	Quinton	Small Enterprise Development Agency, South Africa	Branch Manager: George & Central Karoo	M
Jackson	Zaida	Small Enterprise Development Agency, South Africa	Branch Manager: City of Cape Town	F
Mhlongo	Kiewit	Small Enterprise Development Agency, South Africa	Branch Manager: Cape Winelands and West Coast	M
Naidoo	Raven	Small Enterprise Development Agency, South Africa	Operations Manager: Western Cape Provincial Office	M
Qunta	Alex	Small Enterprise Development Agency, South Africa	Provincial Manager	M
Rampersad	Ravin	SME Mauritius	Chief Executive Officer	M
Dean	Stacey	South African Association of Seafood Importers and Exporters (SAASIE)	Vice Chairman	M
Kleyn	Pete	South African Ostrich Business Chamber	Chairperson	M
Johnson	Howard	South African Small and Medium Enterprises Association, SASMEA	CEO	M
Fong Ting Shing	Set	Statistics Mauritius	Deputy Commissioner of Statistics	F
Moraby	Rooksana Bibi	Statistics Mauritius	Statistician	F
Moumakoe	Keitumetse	Steel Tube Export Association of South Africa	CEO	M
Darga	Amedee	Straconsult Ltd	Chairman & Chief Executive Officer	M
Kikoti	Miriam	TANTRADE, Tanzania	Trade Officer (Information & Statistics)	F
Cameron	Martin	Trade Advisory Pty Ltd, South Africa	Managing Director	M
Brasher	Don	Trade Data Monitor	CEO	M
Baghdadi	Leila	Tunis Business School	Professor	F
Babetta	Hamza	Union Nationale du Patronat Mauritanien	Deputy Secretary General	M
Bosman	Karen	WESGRO (Western Cape Tourism, Trade and Investment Promotion Agency)	Strategic research and public affairs officer	F
Botha	Janine	WESGRO (Western Cape Tourism, Trade and Investment Promotion Agency)	Trade Economist	F
Kuni	Denan	WESGRO (Western Cape Tourism, Trade and Investment Promotion Agency)	Head: International Trade and Development.	M
Van Der Waal	Cornelis	WESGRO (Western Cape Tourism, Trade and Investment Promotion Agency)	Chief Research Officer	M
Mbatha	Matome	Wines of South Africa	Marketing Manager	F
Mugaga	Christopher	Zimbabwe National Chamber of Commerce	Chief Executive Officer	M
Majuru	Alan	ZimTrade, Zimbabwe	Chief Executive Officer	M

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Academia

Family Name	Given Name	Organization	Job Title	Gender
Hoekman	Bernard	European University Institute	Professor	M
Aguiar	Angel	Purdue University	Research Economist	M
Rwehumbiza	Deusdedit	University of Dar es Salaam Business School, Tanzania	Senior Lecturer, TMI trainer	M
Magai	Sauti	University of Dar es Salaam Business School, Tanzania	Lecturer, Market Access Tool Trainer	M
Seetanah	Boopen	University of Mauritius	Prof, WTO Chairperson at the University	M
Teeroovengadum	Viraiyan	University of Mauritius	Head, Faculty of Law and Management	M
Fontagne	Lionel	University of Paris I	Professor	M
Evenett	Simon	University of St Gallen	Professor	M

International organizations

Family Name	Given Name	Organization	Job Title	Gender
Fink	Anna	ADB	Economist	F
Helble	Matthias	ADB	Economist	M
Nillson	Lars	European Commission	Deputy Head of Unit	M
De Angelis	Jesica	IADB	Economist	F
Pereira Dolabella	Marcelo	IADB	Economist	M
Jansen	Marion	OECD	Director	F
Dintle	Keatlaretse	SADC Secretariat	Chief Technical Advisor	F
Mamhare	Gladmore	SADC Secretariat	Programme Officer	M
Mendiate	Rinaldo	SADC Secretariat	Programme Officer- Mutual Trade	M
Ndabeni	Alfred	SADC Secretariat	Programme Officer-Trade	M
Sibanda	Khutula	SADC Secretariat	Director, Industrial Development and Trade	M
Bornon	Julien	UNCTAD	UN Program manager, Digital Government for Africa	M
Munyaneza	Samuel	UNCTAD	Statistician	M
Nicita	Alessandro	UNCTAD	Economic Affairs Officer	M
Tsowou	Komi	UNCTAD	Economist	M
Mikic	Mia	UNESCAP	Director	F
Muryawan	Markie	UNSD	Statistician	M
Espitia	Alvaro	World Bank	Economist	M
Rocha	Nadia	World Bank	Senior Economist	F
Taglioni	Daria	World Bank	Manager	F
Marti	Darlan	WTO	Trade Policy Specialist	M

International Trade Centre

Family Name	Given Name	Organization	Job Title	Gender
Aeroe	Anders	ITC	Director, Division of Enterprises and Institutions	M
Aggarwal	Rajesh	ITC	Chief, Trade Facilitation and Policy for Business	M

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Family Name	Given Name	Organization	Job Title	Gender
Al Tali	Raghad	ITC	Associate Programme Adviser	F
Bonthonneau	Pierre	ITC	Trade Facilitation Adviser	M
Buchot	Eric	ITC	Senior Programme Officer	M
Chappaz	Anne	ITC	Chief Trade and Investment Support Institutions	F
Ciniglio de Spadola	Rosa	ITC	Associate Administrative Officer	F
Cochin	Sylvie	ITC	Senior Trade Promotion Officer	F
Dairon	Emilie	ITC	Programme Officer	F
Delachenal	Christian	ITC	Trade Map Manager	M
Diallo	Aissatou	ITC	Senior Programme Coordinator	M
Durand	Christophe	ITC	Statistician	M
Eam On	Pitchaya	ITC	Market Analyst	F
Fessehaie	Judith	ITC	Programme Officer (Policy)	F
Frauenrath	Marie-Claude	ITC	Senor Trade Promotion Officer	F
Gillies	John	ITC	Senior Adviser, Strategic Planning and Partnership	M
Hauswirth	Iris	ITC	Chief, Strategic Planning, Performance & Governance	F
Hermelink	Ursula	ITC	Senior Market Analyst	F
Hoyos	Juan	ITC	Adviser Export Value Chain	M
Jankowska-Ericsson	Anna	ITC	Programme Officer (Trade Information)	F
Lake	Shaun	ITC	E-learning Expert - Instructional Designer	M
Lancey	Raphaelle	ITC	Project Quality Assurance Officer	F
Loridan	Mathieu	ITC	Senior Market Analyst	M
Marty	Olivier	ITC	Senior Officer, Export Strategy	M
Mimouni	Mondher	ITC	Chief, Market Analysis and Research	M
Mischarin	Marina	ITC	Programme Officer (Data Management)	F
Mohan	Sarah	ITC	Associate Programme Officer (Trade Analyst)	F
Musa	Kevin	ITC	MARKUP Programme Manager	M
Pejkovic Kozinec	Rebeka	ITC	Planning and Monitoring System Development Adviser	F
Pichot	Xavier	ITC	Market Analyst	M
Popova	Antonina	ITC	Associate Statistician	F
Roberge	Charles	ITC	Senior Officer Export Strategy	M
Robin	Elodie	ITC	Market Analyst	F
Rollo	Valentina	ITC	Economist	F
Sequeira	Ivan	ITC	Chief, Information Technology & Systems	M
Skidmore	Rob	ITC	Chief, Sector and Enterprise Competitiveness	M
Solleder	Olga	ITC	Trade in Services Officer	F
Spies	Julia	ITC	Senior Market Analyst	F
Urrutigoity	Matias	ITC	Senior Trade Promotion Officer	M
Virdee	Jasmeer	ITC	Trade Development Strategy Officer	M
Von Kirchbach	Margareta	ITC	Learning Systems Officer	F
Wozniak	Joe	ITC	Programme Manager	M
Zargaryan	Armen	ITC	Regional Trade Promotion Adviser	M

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Annex 3: Evidence trail

Findings	Conclusions	Recommendations
According to their intervention logic, the tools' explicit aim is to enable small companies, institutions, and policy makers to make better informed trade and investment decisions. The findings of this evaluation show that the tools have been successful in building a large user base and that they are used worldwide. However, it seems that more efforts are needed to reach main target groups more effectively. For instance, MSMEs are only reached to a limited extent. They tend to find it difficult to use the tools, and rely on assistance, for example from BSOs, to interpret the data. Moreover, the tools are little used in ITC's priority countries compared to the rest of the world.	**Conclusion 1:** There is a need to better clarify what the tools are intended to achieve, for whom, and how.	**Recommendation 1:** Revise the strategy and intervention logic of the market analysis tools. *Directed to Chief Trade and Market Intelligence Section:* • TMI should prepare a new strategic document that should include a more comprehensive theory of change / intervention logic, detailing what each tool is intended to achieve, who the targeted users are (and which other groups are likely to benefit) as well as the pathways through which intended results are expected to be achieved. • The strategy should also address how to better reach users in ITC's priority countries. Moreover, it should provide information about which collaborations with external actors (such as universities, re-searchers, private sector, or other organizations) already exist or are being pursued, and how they will contribute to the effectiveness of the tools.
Current tracking systems gather data on registered users for certain tools, while usage levels cannot be comprehensively tracked for non-registered users. The analysis of data on registered users has shown that it only allows limited conclusions to be drawn. The annual MAT survey conducted to respond to corporate and donors' reporting indicators is sent only to a subset defined as "frequent" users as they are considered actual beneficiaries. Although this forms a limited sample, the survey and its results are also used to assess the tools' overall performance, whereby individual values are extrapolated (such as the value of imports/exports for which the tools have helped users to make decisions).	**Conclusion 2:** Metrics used so far to assess the performance of the tools offer limited insights.	**Recommendation 2:** Adjust the approach and metrics used to assess the tools' performance. *Directed to Chief Trade and Market Intelligence Section:* • Explore options to get comprehensive feedback on the usefulness of the tools for their intended target groups, considering survey fatigue and related low answer rates for online questionnaires. Possible approaches include: the existing MAT survey could be retained, but administered to a larger audience using stratified random sampling; a qualitative survey campaign should be carried out, for example through interviews, group discussions or other means, to obtain more detailed information about users' needs. For reporting purposes, the analysis could focus on recent users, while the overall results could provide a more comprehensive picture of the tools' overall performance. Besides, the tools performance could also be assessed through pop-up satisfaction surveys (as currently already done for Export Potential Map), which could provide a more reliable assessment of actual users instead of focussing on registered accounts only. • The tools' performance metrics should be reframed to focus on visits and actual use rather than registered accounts, while distinguishing the type of profile (MSMEs, BSOs etc).
Knowledge of or familiarity with the tools varies considerably across the different tools, target groups and by global region. Among the selected policymakers and BSOs interviewed or surveyed, the majority were aware of at least one of the tools. This should be further improved, in particular as BSOs play a critical role in advising MSMEs. In the meantime, there seems to be a particularly low awareness of the thematic tools among MSMEs, as evidenced by the fact that they make up only a small portion of registered users relative to their total number.	**Conclusion 3:** There is much potential for improving the level of awareness of the tools among its target groups.	**Recommendation 3:** Increase awareness of the tools to better reach main target groups. *Directed to Chief Trade and Market Intelligence Section:* • TMI should improve outreach to its main target groups, for example by carrying out targeted awareness campaigns on the tools globally, combined with capacity building activities upon funds' availability. This could be done through specific user channels, for example at a regional level in collaboration with regional economic communities and with the assistance of national and private sector BSOs. • In addition, BSOs should be encouraged to include links to the tools into their own websites to make them more visible and accessible to their members, using the guidelines developed by TMI. Given their intense collaboration with BSOs around the world, ITC's Institutions and Ecosystems Section would be a helpful partner in this effort, including to provide contacts of BSOs in ITC priority countries. • Regarding MSMEs as a target group, in particular the level of familiarity with the still very young Global Trade Helpdesk should be increased, as it is especially geared towards their needs.

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Despite recent improvements, further simplification or optimization of the tools' websites would help to increase their use. The aim should be to adjust the tools as best as possible to the needs of the targeted audiences, while minimizing the associated need for learning and training. The recently developed Global Trade Helpdesk, which is an integration of some market analysis tools, is a step in that direction and responds to the constant need for upgrading and providing user-friendly solutions to ITC's clients. Recent developments in the IT sector make it possible to integrate advanced analytical capabilities into data driven websites. For instance, Tableau makes it possible to incorporate flexible data visualizations, while Shiny apps can facilitate remote data manipulation and analysis. ITC's tools do not integrate these or similar tools. Areas of particular interest include the development of sophisticated analytics, and state of the art data visualizations. Finally, many users, in particular MSMEs, would prefer to access the tools through portable devices which currently is only possible to a limited extent.	**Conclusion 4:** Efforts have already been made to enhance and simplify the use of the tools and to adapt them to the needs of main target groups, but these efforts should be intensified.	**Recommendation 4:** Continue to improve the functionality and features of the tools and the user-friendliness of their interfaces. Put more emphasis on analytics and data visualization. *Directed to Chief Trade and Market Intelligence Section:* • Devote additional resources to further interface improvements for the Market Analysis Tools. Interface simplification should be based on clients' needs, ease of use and designed in a way to minimize the need for user training. • Newer versions should enable the generation of automated reports and insights, and include advanced data visualization capabilities based on user requests. Incorporation of advanced search technology based on plain language or voice activation could help make the tools more accessible. • In particular to better serve MSMEs in DCs and LDCs, the tools' websites should be further optimized to be fully responsive to different user displays and existing mobile applications should be upgraded, so they are functional and able to provide automated personalized insights (based on products). • TMI should further leverage its relationships with universities, researchers, private sector, or other organizations to make use of their expertise, for example in methodology or in designing user interfaces and apps that respond well to user needs. A priority should be to update the Export Potential Map methodology in line with the recent academic literature.
ITC maintains its role in "classic" data collection and dissemination of global trade information, although the environment is increasingly competitive. It has a comparative advantage in providing international trade data based on a combination of generally free access as well as high quality, timeliness, and completeness of data. Another area where ITC has demonstrated comparative advantage is the deployment of bespoke data solutions designed to respond to specific needs. The African Trade Observatory is a good example of this. ITC is partially able to respond to growing demand for data on trade in services, but other organizations (WTO, World Bank, and OECD) have an established comparative advantage in collecting and analysing data on applied services policies. There is increasing demand, particularly in Africa, for data on informal trade. However, there are currently no international standards or programmes to comprehensively track it in a large number of countries, as it requires national/local analytics and surveys to gather this type of information. An organization like ITC, which has strong relationships with national data providers, could play a leadership role along with partner organizations in implementing specialized studies on a case-by-case basis, i.e. if there are specific country projects and funds.	**Conclusion 5:** ITC has clear comparative advantages in providing trade and market information, but there are demands for data that cannot be met so far.	**Recommendation 5:** Continue recent developments of promising integrated data solutions designed to respond to specific needs (such as the African Trade Observatory). In addition, explore areas where ITC is well positioned to serve existing demands for data. *Directed to Chief Trade and Market Intelligence Section:* • While continuing to focus on its core activities of collecting and disseminating comprehensive and updated high quality trade data, TMI should expand partnerships with universities, researchers, private sector, or other organizations to develop new products based on the changing needs of its clients, especially in areas where ITC has an established comparative advantage. • TMI should adopt a strategic approach (in line with recommendation 1) moving into new substantive areas. Given recent work with the African Union, an area of strategy advantage could be the development of standards and methodologies (such as surveys) for estimating informal trade on a case-by-case basis, in cooperation with partner agencies and national statistics offices. Given the nature of the customized assistance that will be required, the activity will need to be financed for individual countries, and might therefore not qualified for Global Public Good related funds.

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Public sector data providers typically have cooperative arrangements in place. Transparency regarding these arrangements is so limited that end-users frequently do not realize the origin of the data they are using. In some cases, a likely result is that ITC data are not sufficiently credited by other organizations.	**Conclusion 6:** ITC's visibility in providing trade and market information is partly limited.	**Recommendation 6:** Strengthen the organization's visibility where ITC data is used by other providers. *Directed to Chief Trade and Market Intelligence Section:* • Ensure that ITC data are given due credit when used by other organizations, in particular as regards TRAINS.
The MAT are the entry point to ITC for many MSMEs and other client groups of interest, as evidenced by the tools' large user base. However, the MAT portals make relatively limited references to other services and information sources at ITC, including those outside TMI. Given that ITC has a wealth of information on trade-related areas beyond the core offerings of the MAT, users would benefit from exposure to those sources. There is scope to use predictive analytics and other techniques to "cross-sell" ITC information and services based on observed patterns of querying and browsing in the tools. Current efforts around ITC's data management and to establishing a single sign-on for ITC clients could also be helpful in this context.	**Conclusion 7:** The tools reach a broad group of users who could also be interested in or benefit from other ITC products or services. But opportunities to refer to further information and services provided by the organization are hardly used so far.	**Recommendation 7:** Utilize opportunities to identify and address interest of the tools' users for other ITC products and services. *Directed to Chief Trade and Market Intelligence Section:* • The market analysis tools' websites should leverage opportunities to provide links to relevant/related ITC products and services.
While there is no evidence that data are not shared when required, the process for requesting access to larger datasets is not explicitly available, which means that many external users are unaware of the ability to access large amounts of data. As a result, ITC data are little used by researchers directly. The fact that larger datasets are not shared more openly is primarily justified by confidentiality agreements with data providers. Neither TMI nor ITC do have an Open Data Charter, or another policy to facilitate access to the data underlying the MAT. While ITC has a history of working collaboratively with some parts of the research community, the general perception among researchers in international trade is that it is difficult to access large amounts of data from the tools. The current Data Strategy of the Secretary-General invites UN entities to enhance open data sharing portals in order to better share the available wealth of data and statistics and to become better in governing greater exchange of data, developing data sharing agreements that enable partners to integrate more deeply, in responsible ways.	**Conclusion 8:** Data is shared upon request, but there is no transparently defined regulation on the sharing of data.	**Recommendation 8:** Develop a commitment to open data and regulate access to data in a transparent manner. Strengthen internal information sharing and collaboration. *Directed to Director Division of Market Development:* • ITC should adopt an Open Data initiative. The operational principle should be that all data collected by ITC, including the data underlying the MAT, should be publicly available and released in a way that enables bulk download (like in Market Access Map), subject to contractual or confidentiality restrictions. The World Bank's Open Government Data Toolkit and the Data Strategy of the Secretary-General contain useful elements that ITC should consider during consultations designed to develop its own approach to open data. • The initiative should result in a document, such as a charter or policy, that is developed in a timely and an easily understandable manner, and made readily available to the public within a year. The document should also explain what data cannot be shared and why. Given that within ITC, the Division of Market Development has particular expertise in data collection and treatment, it should lead on this process. • Just as access to data from outside should be transparently regulated, so should the sharing of data within the organization. Independently from the Open Data initiative, internal data sharing should also be governed through a transparent agreement that is accessible to all personnel. It should be ensured to the extent possible that data can be freely shared within the organization where this adds value or enables synergies in line with the organization's and programmes' mandate. These efforts should be aligned with the corporate data management strategy which also aims to facilitate information flow and value addition. • Good collaboration between sections within the Division of Market Development should be ensured, also or especially in case of overlapping mandates or areas of complementary expertise, since they all contribute to the organization's vital research function and therefore need to be well coordinated. Ideally, this would include exploring ways to better harmonize, link and integrate their products and services. • All of these efforts should have the explicit support of senior management.

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Providing trade information has been a core function of ITC since its founding in 1964. While previously sponsored by users and other projects, ITC decided to change the business model as of 1st January 2009, offering the market analysis tools free of charge to developing countries. Free access to the tools is greatly appreciated especially in the LDCs and there is widespread support for maintaining trade and market information as a global public good. Due to ITC's funding structure, TMI cannot rely solely on the organization's regular budget to operate the tools. Instead, the team has to continuously raise additional extrabudgetary funds (including project funding), in particular to finance the further development of new or existing tools. TMI has been very successful in mobilising resources (human, financial and logistics) for the development of tools and services through its network of development partners and donor agencies. This implies however that at present private sector partners and donors receive privileged data access and bespoke solutions in return for their support.	**Conclusion 9:** The tools' purpose is to provide trade and market information as a global public good. This ambition calls for an adequate funding model.	**Recommendation 9:** Uphold the principle that trade and market information is provided as a global public good. Leverage funding from donors and private sector to enhance this offering. *Directed to Chief Trade and Market Intelligence Section:* • In line with the organization's mandate and strategic plan, TMI should maintain to the maximum possible extent the global public good model of data provision and free access to the tools, in particular for users from developing countries. • TMI should ensure that funds generated by offering customized services do not result in resources and attention being diverted to the provision of services on an exclusive basis, but rather that these resources are used to either drive product development or to support the provision of the tools overall as a public good. Working with donors and external partners to enhance data quality and completeness, as well as the tools' interfaces and capabilities, can further improve the offering in ways that would benefit everyone. • It should be carefully monitored that there is an appropriate balance between the offering that is freely available to all and what is customized and exclusive for specific clients. The ultimate responsibility for ensuring that the tools are provided in accordance with the organizational mandate rests with ITC's leadership. Therefore, the evaluation proposes that TMI should share annually with ITC's Executive Director an overview of the tools' offering while indicating the scope of privileged partnerships and highlighting the value they bring to the global public good model of data provision.

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Annex 4: Country case studies

Cabo Verde case study

1. **Economy:** Cabo Verde is a very small exporting nation, ranked 197th in world exports. In 2019 Cabo Verde exported 21 products to only 16 countries for a value of US$ 61,879K, representing only 3% of GDP. Total trade represented 98.7 % of GDP. Made in Cabo Verde products enjoy preferential market access to the EU and UK under EPA, USA under AGOA, to ECOWAS and UEMOA, to Developed countries under GSP, to the Lusophone countries, and to AfCFTA. Exports comprise, fish and preparations of fish (81.4% of total exports, articles of apparel (10.8%), footwear (5.4%), residues of wastes from food industry, spirits and beverages, preparation of cereals, health products/pharmaceutical, and coffee all representing 2.4% of total exports. Its main export destinations are Spain, Portugal, Italy, USA, Germany, Taipei-China, Romania, Guinea-Bissau, Netherlands, and Algeria. Given the concentration of trade with a few subsidiaries of foreign owned companies (Frescomar, Calvopesca Atlantico, Verdeveste Industria De Vestuarios Sarl), the export marketing departments are located in their respective Headquarters in Spain and Portugal. As such the local entities are mainly production centres. The few other SME exporters rely primarily on participation in trade exhibitions, trade missions, face-to face marketing, and e-commerce.

2. **Trade Policy and trade promotion:** Trade policy of Cabo Verde is driven by the Ministry of Finance and Public Administration which oversees the operations of the Cabo Verde TradeInvest, in collaboration with the Ministry of Foreign Affairs and Communities and Defense, and the Ministry of Industry, Trade and Energy. The latter is the parent ministry for Pro-Empresa, the national agency for the promotion of Micro, Small and Medium enterprises, and the National Statistics Office of Cabo Verde. For trade negotiation and policy advocacy the Ministries prefer Comtrade, WITS and ECOWAS data sources. The main impediment for Cabo Verde is the language problem as few of the ITC Tools are offered in Portuguese.

3. **Number of SMEs in the country:** The MSME sector represents over 90% of businesses in Cabo Verde, mostly operating in the informal sector. MSMEs are important in job creation, however, their contribution to wealth creation is limited. Most of the MSMEs are engaged in the services and agriculture sectors and are principally geared towards serving the domestic market, more particularly the tourism and hotel industry. Domestic manufacturing is small and comprises of import substitution industries. The prominence of MSMEs in the country's export has been low and the potential remains low.

4. **BSOs involved in the trade promotion:** The Cabo Verde TradeInvest (CVTI) is the national agency for the promotion of exports from Cabo Verde. Unfortunately, CVTI does not offer a trade information service for exporters as it does not have in-house capabilities for same. Only 2 officers who had served in Cabo Verde Invesimentos, the predecessor organization of CVTI, know of and can use Trade Map, through earlier training. Pro-Empresa does not have a trade information service and is interested to acquire the necessary skills to assist its stakeholders. The Chamber of Commerce and Industry of Mindelo is also interested to offer such a service to its members, more particularly to the local importers community, to enable them to source their requirements.

5. **Engagement with ITC:** The extent of ITC's engagement with Cabo Verde is limited. Its last intervention was on Improving Cape Verde's productive capacities under the One UN Framework. The project consists of developing a national sector-level trade strategy in agriculture, forestry, fishing, industry, mining, tourism and services. In the past ITC had provided technical assistance to Cabo Verde Invesimentos (CI) which included capacity building of CI staff on the use of Trade Map and conducting market research.

6. **Major problems identified for BSOs and MSMEs:** The institutional capacity constraints of the key BSOs, more specifically CV TradeInvest, Pro Empresa and the Chambers of Commerce and

Industry are their lack of experience, analytical capacity and resources to providing information and business intelligence services. At CV TradeInvest, the Export Division comprises a 2-man team, of whom 1 officer is aware of ITC's tools (Trade Map and Market Access Map) from her past tenure with Cabo Verde Investimentos, the predecessor of CV TradeInvest. CV TradeInvest does not have the resources, human and technical to offer trade information services to the business community scattered over 9 islands. The domestic MSMEs are not very active on the export market front and as such their requirements and needs for market information and intelligence are limited.

7. **Availability and access to trade data and market information:** The Instituto Nacional de Estatista is the central executive agency for the collection, production and dissemination of official trade statistics in Cabo Verde. It works closely with the Customs Department of the National Directorates of State Revenues (DNRE). Availability of trade data and information is scarce in Cabo Verde. Documents containing trade data are mostly donor funded projects prepared by foreign experts.

8. **Awareness, appreciation and usage of ITC tools:** The level of awareness of the availability of trade data and information sources (local, regional and international sources) is limited among all stakeholder groups. The parties interviewed are not aware of ITC Tools. Among the BSOs, only a handful of their staffs have had prior experience with ITC tools, more specifically with Trade Map. These organizations rely on data from the Instituto Nacional de Estatistica, and to a smaller extent, on ECOWAS Secretariat. As regards the economic operators, information from the BSOs suggest that MSMEs do not have any market information gathering system, nor are they willing to set one in-house. Potential exporters rarely attempt to gather information before launching into new markets. On the other hand, in Cabo Verde the larger companies are mostly production sites from overseas companies. Their market and sales are not based on the island.

9. **Needs pertaining to trade data and ITC tools:** The needs for and the usage of trade related data and information by the key stakeholders are generally low as Cabo Verde is not a mainstream exporting nation of merchandises. It is primarily a services-oriented economy, and as such the drive for export-led development, although a priority, remains low. The level of familiarity with and usage of ITC tools is low as Cabo Verdeans have difficulty accessing data sources, which are not in Portuguese, except GTH. The new management of CV TradeInvest is now interested to build a Trade Information Service Unit to provide trade intelligence to exporters interested to expand their businesses into Africa under AfCFTA. It unfortunately does not have the resources and in-house capabilities for such a service. The Chamber of Commerce and Industry of Mindelo is also keen on acquiring such capability to service businesses located in the International Business Centre (IBC) located on the island in Mindelo. The IBC comprise 3 exclusive economic zones, namely (i) the Industrial Free Zone, (ii) the Commercial Free Zone, and (iii) the International Centre for the Provision of Services. The established local industries for import substitution are now looking for export markets in the regional market and the emerging local entrepreneurs are also seeking openings under the different bilateral and multilateral trade agreements that Cabo Verde has entered in. There is a growing interest for Africa under the AfCFTA. The parties interviewed were not aware of the existence of the Africa Trade Observatory.

Malawi case study

1. **Economy:** Malawi is a landlocked country in south-east Africa. The economy is largely dependent on agriculture, which accounts for 25.5 % of GDP and is dominated by tobacco, sugar, tea, coffee, fruits and vegetables. The services and the manufacturing sectors accounts for 54.4% and 12.9 % of GDP respectively. Malawi is a relatively small trading nation, ranked 159th in world exports. Its total trade was 57% of GDP in 2019. Total exports of products were US$ 912,983K representing 12% of GDP and services were US$ 179,001K, representing 2.3% of GDP. Total imports of products were US$ 2,941,148K representing 38% of GDP. Given Malawi's landlock situation a large component of its trade happens through informal cross-border trade by MSMEs, mainly by women entrepreneurs.

   Malawi enjoys preferential market access to the EU under the Everything But Arms (EBA) Agreement, EPA to the UK, the USA under AGOA, the regional markets of COMESA, SADC, and the AfCFTA, and, under GSP to most of the developed countries, and bilateral trade agreements with South Africa, Zimbabwe, Malaysia, Mozambique, India and China. In 2019 Malawi exported 79 products to 112 markets. The main export products were tobacco (55%), sugar (9%), coffee & tea ((%), oil seed (7%). Other export products include edible vegetable and fruits, residue of waste, cotton, fertilizers, oil seeds and oleaginous fruits, plastics and articles thereof, wood and articles of wood. The top export markets were Belgium, Kenya, Egypt, South Africa, USA, Netherlands, China, Russian Federation, Tanzania, Zambia. The exporters of the main traditional products are buy-back captive players. The other producers have to find their own market niches.

2. **Trade policy and trade promotion:** The Ministries of Industry, Trade and Foreign Affairs play the leading role in trade negotiations, policy formulations and advocacy. Their main sources of trade related data are the Malawi National Statistics Office, UN Comtrade, WTO Trade Statistics, ITC tools, COMESA Trade Statistics, and SADC Statistics. The main ITC tools used are Trade Map, Market Access Map and to a lesser extent, the Export Potential Map. The National Planning Commission recently used the Trade Map and the Export Potential Map in the design of the Malawi 2063 Agenda.

3. **Number of SMEs in the country:** MSMEs play a crucial role in the economic growth and development of Malawi. It is estimated that over 1.6 million MSMEs operate in Malawi, of which 74% are micro enterprises, 23% small and only 3% medium enterprises. The MSMEs are active in all the sectors of the economy and majority of them trade informally, being neither registered nor licensed, as high as +80% operate in the informal sector. It is estimated that over 40% of Malawi's cross-border trade is conducted informally by MSMEs.

4. **BSOs involved in the trade promotion:** The Malawi Investment and Trade Centre is the national trade and investment promotion agency of Malawi. It conducts a wide range of export promotion and facilitation activities dedicated for the exporter community. Other key public and private sector agencies and institutions engaged in MSME development and their integration in international trade include: (i) The Malawi Small and Medium Enterprise Development Institute (SMEDI), (ii) The Malawi Confederation of Commerce and Industry (MCCCI), (iii) The National Association of Small and Medium Enterprises (NASME), (iv) The Export Development Fund (EDF), and (v) several industry associations. Although, MITC is focal point for export promotion, the other BSOs also offer export promotion services and even participate in trade fairs and missions. Their extent of information service to exporters and potential exporters remains ad-hoc and disparate.

5. **ITC's engagement with Malawi:** Malawi is a major beneficiary of technical assistance from ITC, delivered as stand-alone and in collaboration with other development partners. These assistance projects cover a wide range of trade related issues. The main projects related to trade related information are: (i) embedding Trade Map in Malawi National Statistics Office website. This was a pioneer project for ITC and is still ongoing, (ii) developing a Trade Information Portal which is

hosted in MITC's website (however, this facility is not being optimized), (iii) Paper on Exploring Malawi's export potential, and (iv) series of workshops and capacity building training sessions of policy makers, BSOs and the exporters' community on Market Analysis Tools and market research.

6. **Major problems identified for BSOs and MSMEs:** Challenges hindering MSME development in Malawi include access to finance, access to markets, infrastructure, weak legal and regulatory framework, supply side capacity, bureaucracy, high costs of doing business, compliance to standards and norms, low technology level, and corruption, among others. Presently, except for very limited services by MITC, no institution offers trade information service to the exporters' community, who rely mostly on trade fairs, missions and face to face meetings for developing their export business. However, due to high turnover of staffs in the public service, most of the trained officers do not stay long enough to maximize the benefits of their training and to share same with the MSMEs. More importantly, most of the NASME membership do not have the technical capability to effectively use the suite of ITC's tools. Some members have attended training sessions on market research, marketing and business intelligence. They have a pressing need for reliable information on market opportunities, more particularly in the neighbouring countries.

7. **Availability and access to trade data and market information:** The MRA (Customs Department) has the overall responsibility of collecting and sharing international trade statistics of Malawi on a monthly, quarterly and yearly basis. The National Statistical Office processes customs data and disseminates key trade indicators on export products and export destinations. Access to international trade data is not an issue in Malawi. Most of the top management cadre at the relevant ministries, BSOs and major exporters know where to and how to access such information, ranging from UN Comtrade, World Bank Data, WTO Trade Statistics, some of ITC's tools, SADC and COMESA statistics as well as private trade data providers. Despite the fact that Trade Map is embedded in the NSO's website, the visibility of ITC's tools among the exporters is low. Furthermore, the MITC's Trade Information Portal developed by ITC is not optimized. The portal is not regularly maintained and updated and some of its hyperlinks do not function. Additionally, the Ministry of Trade and Industry also houses trade data within the NES Secretariat.

8. **Awareness, appreciation and usage of ITC tools:** The general level of awareness on the availability and usage of ITC's tools is limited in Malawi. One reason put forward is that many officers who have attended trainings in market research, data analytics, and use of ITC tools have either been promoted, transferred or retired. To a large extent, the usage of trade data in decision making is problematic. Policy makers have a preference for national data and for UN Comtrade and WITS data for trade negotiations and policy making. They use ITC's Trade Map for speech writing and policy formulation. At the BSOs level, except for MITC and National Planning Commission, the others very rarely use data and information for decision making. Most of them rely primarily on national data sources and are not aware of the wide suite of data sources available for free. They also depend on experts. At the exporters level, most of the stakeholders who participated in the development of the National Export Strategy II, in particular, and the management and members of NASME, in general, are not aware of ITC's tools and were not even aware that Trade Map is embedded in the NSO website. The usage of data and information in business decision making remains low.

9. **Needs pertaining to trade data and ITC tools:** With the intensification of competition for trade at the regional and global levels, the need for reliable, updated and comprehensive trade related data is crucial to Malawian exporters, BSOs and policy makers. Several strategies have been formulated (NES II, AGOA, BREXIT, AfCFTA, CAMESA & SADC) that contain analysis of market opportunities, export potential mapping, trade barriers, sources and level of competition, market access and even lists of potential buyers. However, the full benefit of ITC's tools as a catalyst of trade depends on the stakeholders being aware of these tools, ability to access them, capability to use them effectively, and incorporating the analytics into their decision making.

Mauritania case study

1. **Economic structure:** Real GDP growth in 2019 was estimated at 6.7%, up from 3.6% in 2018, due to increased production in extractive industries and a rise in exports in the fishing sector. The Mauritanian export sectors are dominated by mineral and the fishing industry.

2. **Trade policy and trade promotion**: Trade policy is carried out by the Ministry of Trade and Industry. There is no specific trade promotion institution yet in Mauritania. All actions related to trade promotion is carried out by the Direction de la Promotion du Commerce Extérieur within the Ministry of Trade and Industry which is more a policy organ than an export promotion body.

3. **Number of SMEs in the country:** The MSME sector represents 80% of the enterprises in Mauritania and could therefore be a key driver of growth and job creation. (World Bank 2019). However, most of the national wealth is still produced today by large business conglomerates.

4. **BSOs involved in the trade promotion:** Apart from the Directorate of Foreign Trade Promotion the main private sector organization involved in the promotion of trade in Mauritania is the Chamber of Commerce has sector-based sub chambers. Other BSOs in the areas of the fisheries, mining and agriculture.

5. **Major problems Identified for BSOs and MSME:** SMEs in Mauritania representing over 80% of formal enterprises could be considered as an essential engine of growth and job creation. Promoting the private sector and improving the business climate remains a priority for the Government. Despite their higher representation in the formal private sector, their contribution to GDP is still low. The problems faced by SMEs are: a strong state presence in the economy which created an uneven playing field, limited access to finance, a local workforce with limited skills, the prevalence of corruption, limited business services and inefficient bureaucracy. Under these conditions, SMEs find it difficult to grow especially vis à vis the large multisectoral conglomerates. The Mauritanian government is cognisant these challenges and has started to address then. However, much remains to be done in the SMEs area to enable them to develop and fully play their role.

   Mauritania is among one of the least competitive countries in the world with a score of 40.92 and ranking of 134th out of 140 countries in 2019.

   Discussions with the private sector identified a strong need for reliable trade and economic information. The profile of traders in Mauritania has been dominated by those who carry out business on the basis of experience and intuition. This explains the low level of interest for market analysis and the need for international trade data and sources. The new generation whilst being more IT savvy is slowly feeling the need for more trade information. Physical visits to relevant authorities for information and data is still widely practiced. The level of awareness for international data and tools is very low and the intuition for using tools such ITC tools is very low according to the Chamber of Commerce. Wider awareness campaigns are required across the private sector accompanies by training programmes. The Chamber also mentioned that physical training is likely to be more efficient and impactful than online training where the audience might not be as much attentive.

   The Strategy for the development of the industrial sector in Mauritania (2015-2019) highlights the "absence of supervision and guidance structures allowing access to information and of structures and services to support industrial activities, particularly in technical fields. and technological, maintenance and commercial strategies (product quality management, marketing, etc.)"

6. **Availability and access to trade data and market information:** Two main institutions (The Customs department and the Office National des Statistiques (ONS)) are responsible for the aggregation and diffusion of information related to international trade in Mauritania. The Mauritanian Cus-

toms department does not have a website and information can be obtained through written requests. Trade and economic data for 2019 is available from the Office National des Statistiques (ONS) website but the information is in a PDF format which is not user friendly and cannot be used for quick analysis. A special request can be made to the ONS or the Customs Department but this can take a couple of days.

The Central Bank also provides economic indicators but the latest available on their website is that of 2016 in a PDF format.

7. **Awareness, appreciation and usage of ITC data and tools:** While the ministries and institutions related to trade are aware of the national and international data sources including ITC database and tools, the usage level is very low. Only the main Ministries and institutions dealing with trade are aware of the ITC and other international databases. The level of awareness of MAT tools in other government institutions is also low.

   Up to 2019, only few government institutions and private sector companies were aware of the ITC Data and tools. The Ministry of Trade and Industry had to make an official request to the ONS or the customs to get trade data for analysis. Since 2019, through a Tradecom project (EU funded), a trade portal was developed with links to the ITC website and tools. This created some awareness at the level of ministries and developed great interest in the use of these tools. The Ministry of Trade and Industry was really impressed by the speed at which they could access their own country trade data which is faster than the same information available from local sources. Other tools such as Market Access Map and Export Potential Map are also appreciated and represent additional potential for analysis. Unfortunately, the usage level of these tools is very low.

   Both the government and the private sector feel that the use of ITC tools and services should be further popularised among other government departments and more so among the private sector operators. The few private sector organizations interviewed feel that free accessibility to trade data should be maintained.

   Low usage is also related to lack of capacity and knowledge on how to use the tools. Training on the use of the tools is therefore a must. There is however a feeling that despite a training, the information and analysis coming out of the tools will not be sufficient especially for MSMEs to enable them to make business decisions. More value-added information is required.

8. **Needs pertaining to trade data and ITC tools:** ITC needs to be more visible at the government and institutional level. Despite the need for trade information, the visibility of ITC tools is very much reduced. There is strong need for awareness campaigns about the existence of ITC data sources and tools at the level of the government, BSOs and the private sector companies. This could be in the form of information briefs published in the institutional websites or providing BSOs with links to ITC tools.

   Training on the use of the tools is probably one of most important requirements mainly at the level of the government as well as BSOs. Training of trainers' sessions will act as a catalyst to promote the use of ITC tools at the level of MSMEs.

   The need for a mobile version of a simpler interface could create more interest at the level of MSMEs.

Mauritius case study

1. **The Economy:** Mauritius is a small island country with a population of 1,3 million in 2019. The economy is fairly diversified with the services sector (67.9% of GDP) as the driving force well supported by value-added manufacturing (17.3%) and agriculture and agro- transformation (2.9%). Its GDP was US$ 14,048 million in 2019.

   Mauritius is a trade dependent economy with total trade representing 89.5% of GDP. It has a large network of preferential trade agreements. Total exports of products in 2019 were US$ 1,873,604K representing 13% of GDP, and services were US$ 2,949,254K representing 21% of GDP. Total imports of goods were US$ 5,600,488K representing 40% of GDP and imports of services were US$ 2,949,254K representing 40% of GDP. Mauritius exported 93 products to 142 destinations in 2019. It was ranked 138th in world exports. The top export products are articles of apparel, textiles and clothing (44% of total exports), fish and preparation of fish (14%), sugar (14%), precious stones and jewellery (8%). Other export products include optical, medical and surgical devices, clocks and watches, beverages, spirits and vinegar, and live animals. The main export destinations are France, UK, USA, South Africa, Madagascar, Italy, Spain, Vietnam, Netherlands and Kenya.

2. **Trade policy and trade promotion:** The Ministry of Foreign Affairs, Regional Integration and International Trade, through its International Trade Department drives all trade negotiations, international trade policies and collaborates with other ministries and key private sector institutions on trade related policy advocacy. This Ministry hosts the Mauritius Trade Easy Portal, which acts as a single point of call for international trade statistics and other market information and intelligence. The portal provides hyperlinks to most ITC tools. Other key players in the policy space are: (i) the Ministry of Finance and Economic Planning, which oversees the Economic Development Board, (ii) the Ministry of Industrial Development, SMEs and Cooperatives, under whose aegis operates the SME Mauritius, the national organization for SME development, and (iii) the Ministry of Gender Equality and Family Welfare which oversees the National Women Entrepreneur Council. For trade in services the Ministry of Information Technology, Communication and Innovation also plays a crucial role in trade promotion and trade negotiations.

3. **Number of SMEs in the country:** The MSME sector comprises 116,000 enterprises, representing 80% of total businesses and are active in all sectors of the economy. However, most of the wealth is still created by the large businesses, which account for over 80% of total exports from Mauritius. Most of the SMEs engaged in international trade are exporting to Africa, more particularly to the COMESA and SADC region.

4. **BSOs involved in Trade Promotion:** The Economic Development Board (EDB) is now the national agency for export and investment promotion. Other private sector institutions directly engaged in export promotion are (a) Mauritius Chamber of Commerce and Industry (MCCI), (b) Mauritius Exporters Association (MEXA), (c) SME Mauritius, (d) Association of Mauritian Manufacturers, and (e) the Mauritius Sugar Syndicate. Additionally, (f)the National Computer Board and (g) the National Women Entrepreneur Council. It is to be noted that the MCCI website provides hyperlinks to various ITC tools like the Trade Map, Procurement Map, Export Potential Map, amongst others.

5. **ITC's engagement with Mauritius:** ITC has a long-standing relation with Mauritius. It had assisted the Mauritius Export Development and Investment Authority (MEDIA), its successor organizations, namely: the Mauritius Industrial Development Authority (MIDA), Enterprise Mauritius (EM), the Board of Investment (BOI), and the MCCI. ITC also has close collaboration with the Ministry of Foreign Affairs.

6. **Major problems identified for BSOs and MSMEs:** Several BSOs presently assist Mauritian exporters, in general, and the MSMEs, in particular.

The Ministry of Foreign Affairs is presently the principal user of trade data and information for trade negotiations, policy making and advocacy. None of the other institutions, except for MEXA offers some trade information service to its members. The EDB has discontinued the market Intelligence service to exporters. It has also come to light that many Mauritians follow ITC training courses online. MEXA and MCCI have shown keen interest to offer such training to its members service.

7. **Availability and access to trade data and market information:** The Customs Department of the Mauritius Revenue Authority and Statistics Mauritius are jointly responsible for the collection, processing and dissemination of international trade data in Mauritius. The Customs Department provides the data to the Ministry of Finance (its parent Ministry), which transmit same to the Ministry of Industry and to Statistics Mauritius on a monthly, quarterly and yearly basis. However, its only Statistics Mauritius that publishes aggregate trade data on its website. Professionals and the business community rely more the Mauritius Trade Easy Portal and external data sources, including ITC MAT.

8. **Awareness, appreciation and usage of ITC tools:** The main stakeholders are aware of the different sources of trade information. The policy makers and the BSOs use these data sources for trade negotiations, policy formulation and advocacy and strategic planning, and speech writing. However, the business community mostly rely on paid consultants for market and product development services.

   However, most of the SMEs do not have the technical capability to use the ITC tools for making informed decisions on market entry. Till lately, they relied entirely on the Trade Information Centre of Enterprise Mauritius for their information needs. However, this service has been discontinued and the assets lost. Large companies have dedicated units for market research. On the other hand, the Mauritius Sugar Syndicate relies primarily on the International Sugar Organization and the London Sugar Futures Prices, and the spinning mills rely on the New York Cotton Exchange for their information needs. The University of Mauritius, which houses a Chair for WTO, mainly uses WTO and Comtrade data for their research works. The visibility of ITC tools among university students is very low.

9. **Needs pertaining to trade data and ITC tools:** Presently, there exists a void in the trade data provision service from the government and BSOs, except the Mauritius Trade Easy portal and occasional service from MEXA to its members. None of sector ministries and business support organizations presently offers such a service. There is strong need to build the capacity of these public and private sector agencies and organizations in business intelligence services. Creating awareness on ITC tools and training on their use would be a good start. EDB Mauritius and MCCI have shown interest to host and disseminate ITC tools and services to the Mauritian business community.

South Africa case study

1. **Economic structure:** South Africa's is middle-income economy dominated by the Services and manufacturing sector. Its export sector is dominated by natural resources, agricultural produce and agro industrial products as well as manufactured products. Its main export destinations are China, the USA, Germany, Namibia and Botswana.

2. **Trade policy and trade promotion:** Trade policy is carried out by the Department of Trade and Industry. The role of the DTI is also to provide a conducive environment to investment, trade and enterprise development. Agencies in the provincial government (9 Provinces) who work in collaboration with the DTI, are responsible for the promotion of tourism, trade and investment promotion. The DTI has been working in collaboration with ITC and has had request for training on the TMI tools.

3. **Number of SMEs in the country:** The latest survey[61] from the Small Enterprise Development (SEDA) indicates that South Africa had 2,252,821 SMMEs (Small, Micro and Medium Enterprises) in 2015 of which 667 433 were from the formal sector. They accounted for 14% of the employment in the country and contributed to 21% of the GDP. The SME Sector in South Africa operates in the following sectors: Trade & accommodation (43%), Community services (14%), Construction (13%), Financial and business services (12%).

   In a survey carried out by the Small Business Institute[62], 86% of the SMEs indicated that they use smartphones in their business "all the time". The same survey indicated that 50% of the SMEs indicated that technological limitations inhibit their business growth.

4. **BSOs in the country:** South Africa has a mix of Government institutions and private sector organizations and federations who are involved in international trade. The DTI has actually a network of National BSO throughout all provinces in the country. It has also 18 National Export councils which bring together Industry associations and companies.

5. **Major problems identified for MSMES**

   - Access to finance
   - Poor Infrastructure
   - Low level of research and development
   - Onerous labour laws
   - Shortage of educated labour workforce
   - Inefficient government bureaucracy
   - High crime levels
   - Lack of access to markets

6. **Access to trade data and market information:** Trade data is provided in South Africa by the South African Revenue Service (SARS). SARS has a website where trade and customs data can be accessed. One of the main issues is however related to the ease of access to the database. If data is required for several years, it has to be downloaded year by year. The Department of Statistics in South Africa also provides trade and economic data which is available in excel format. Compared to the two national sources, ITC data is more rapidly accessible and trade analysis is much easier through the Market Analysis Tools.

7. **Awareness and appreciation of ITC data and tools:** Interviews with the South African government indicated that they are aware of the ITC tools but not necessarily used by all department. The

[61] The Small, Medium and Micro Enterprise Sector of South Africa Research Note 2016 | No 1. Small Enterprise Development Agency

[62] https://www.smallbusinessinstitute.co.za/wp-content/uploads/2019/12/AssessmentOfSAsSMELandscape.pdf

Department of Trade and Industry (DTI) (responsible for trade policy) and the provincial governments (mainly responsible for trade and export promotion) claimed to know about the tools and rarely use it except for high level analysis. Discussions with the Department of International Relations and Cooperation (DIRCO) which is under the Ministry of Foreign affairs mentioned that they have been trained by ITC so have a greater knowledge of the ITC tools. They had very positive feedback on the capability of the tools and the rapidity of access to trade information.

The private sector has mixed views on the ITC tools and services. While some of the exporters' associations (with larger corporate members) interviewed know and use ITC tools, a few have never used data from ITC. For those who know about the ITC tools and databases, the latter were highly praised for rapid accessibility and user friendliness. Market Access Map and Export Potential was however less known.

Smaller Export associations indicated that they have not heard about ITC tools or database. A brief introduction of the ITC tools showed high levels of interest and the need to have training session on their use. Further discussions with the MSME sector showed that it is a defragmented sector which suffers from a lack of support. There is certainly a need for increased access to market information and especially the availability of nice market information which could be of use to small exporting companies.

Based on the interviews carried out, there is a general impression that ITC tools are not widely known or used among the private sector in South Africa.

8. **Usage of ITC data and tools:** The government department which makes use of the ITC tools and services is the Department of International Relations and Cooperation (DIRCO). They indicated that they use ITC tools and data on a daily basis mainly geared towards market analysis and export promotion.

   At the level if the Department of Trade, Industry and Competition (DTI), they rarely make use of ITC data and tools. The main reason being that they already have a subscription to a tool called the "Decision Support Model" (DSM) designed by the University of North West. The DTI claims that the model has a global coverage in terms of data, provides a series of additional data compared to ITC tools and helps to have a better approach to export market selection. The same model is being used at the provincial government levels.

   Given the high cost, there has not been mention of the use of the DMS model at the level of the private sector associations. However, it was mentioned that some corporate have access to this model for their own information.

9. **Engagement with ITC or other organizations regarding trade or export development (training, consultancy/ projects):** There seem to be a lack of coordination between the departments of DTI and DIRCO, as the institutions do not seem to be aware of the data sources and tools used by each other. Only DIRCO staff claimed to have been trained on MAT whereas DTI tends to use more DSM Tool and very rarely ITC tools. ITC's assistance seems to be based on institutions' requests which leaves an impression of lack of coordination on strategic approach to export promotion. This could be a case an internal South African institutional issue but has an impact on ITC's intervention and its effectiveness in achieving its objectives.

Annex 5: Survey questionnaires

ITC Trade and Market Information - External

Evaluation of ITC Trade and Market Information

This survey is part of an independent evaluation of the performance of ITC's trade and market information products. It is being sent to a random sample of current users of relevant ITC products. Responses will be treated confidentially, and only reproduced using summary statistics, such as averages. Respondents can elect or decline to provide an email address to allow for possible one on one follow up by the evaluation team.

ITC is grateful for your time in completing this short survey. The estimated time required to complete it is 13 minutes.

1. In what country do you work?

2. How do you identify?

- Man
- Woman
- Other
- Prefer not to respond

3. What is your primary professional affiliation?

- Private sector (business with less than 10 employees)
- Private sector (business with between 10 and 49 employees)
- Private sector (business with between 50 and 250 employees)
- Private sector (business with more than 250 employees)
- Trade and investment support institution
- Business support organization
- International organization
- Academic or Researcher
- Student
- National civil service
- Policymaker

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4. What do you primarily use trade information and business intelligence for?

	Informing business decisions - market entry	Informing business decisions - product or service development	Informing policymaking	Informing research, academic work, or study
Trade information (i.e., trade-related data and information on markets)	☐	☐	☐	☐
Business intelligence (i.e., actionable insights based on data)	☐	☐	☐	☐

5. Please rate your own level of familiarity with the following ITC trade information and business intelligence products

	Do not know it	Aware of the product but do not use it	Somewhat familiar	Familiar	Very familiar
Trade Map	○	○	○	○	○
Market Access Map	○	○	○	○	○
Export Potential Map	○	○	○	○	○
Investment Map	○	○	○	○	○
Procurement Map	○	○	○	○	○
Sustainability Map	○	○	○	○	○
Global Trade Help Desk	○	○	○	○	○
Market Price Information	○	○	○	○	○
Rules of Origin Facilitator	○	○	○	○	○

6. How many times per year do you use the following ITC trade information and business intelligence products?

	Zero	Less than five times	Between five and 15 times	Between 15 and 25 times	More than 25 times
Trade Map	○	○	○	○	○
Market Access Map	○	○	○	○	○
Export Potential Map	○	○	○	○	○
Investment Map	○	○	○	○	○
Procurement Map	○	○	○	○	○
Sustainability Map	○	○	○	○	○
Global Trade Help Desk	○	○	○	○	○
Market Price Information	○	○	○	○	○
Rules of Origin Facilitator	○	○	○	○	○

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7. What do you primarily use ITC's trade information and business intelligence for?

	Business decision making in relation to export development	Business decision making in relation to import competition	Policy research and analysis	Academic research or study	Assisting with business/government interactions regarding trade and trade policy
Trade Map	☐	☐	☐	☐	☐
Market Access Map	☐	☐	☐	☐	☐
Investment Map	☐	☐	☐	☐	☐
Procurement Map	☐	☐	☐	☐	☐
Sustainability Map	☐	☐	☐	☐	☐
Global Trade Help Desk	☐	☐	☐	☐	☐
Export Potential Map	☐	☐	☐	☐	☐
Market Price Information	☐	☐	☐	☐	☐
Rules of Origin Facilitator	☐	☐	☐	☐	☐

8. How useful do you find the following ITC trade information and business intelligence products in making decisions as part of your professional responsibilities?

	Not at all useful	Somewhat useful	Useful	Very useful	Crucial	Do not know
Trade Map	○	○	○	○	○	○
Market Access Map	○	○	○	○	○	○
Investment Map	○	○	○	○	○	○
Procurement Map	○	○	○	○	○	○
Sustainability Map	○	○	○	○	○	○
Global Trade Help Desk	○	○	○	○	○	○
Export Potential Map	○	○	○	○	○	○
Market Price Information	○	○	○	○	○	○
Rules of Origin Facilitator	○	○	○	○	○	○

9. How well integrated are ITC's trade and market information products?

- ○ Individual products are very well integrated
- ○ Products are well but not seamlessly integrated
- ○ Using the products together is possible but difficult
- ○ The products are not integrated at all

10. How do you usually access ITC's trade and market information products?

- [ ] Website
- [ ] Mobile app
- [ ] Social media
- [ ] Other (please specify)

11. Do you use trade and market information products from other suppliers?

- ( ) Yes
- ( ) No

12. Which other suppliers do you rely on for trade and market information?

- [ ] National governments and national statistics offices
- [ ] World Bank
- [ ] World Trade Organization
- [ ] United Nations
- [ ] International Monetary Fund
- [ ] Other sources (including private sector providers), please list

13. How do you rate the attractiveness of ITC's trade and market information products as a whole relative to those of other suppliers?

	Not at all attractive	Somewhat attractive	Attractive	Very attractive	Clearly more attractive than other suppliers
Cost effectiveness	( )	( )	( )	( )	( )
Data completeness	( )	( )	( )	( )	( )
Timeliness of data updates	( )	( )	( )	( )	( )
Data quality	( )	( )	( )	( )	( )
User-friendliness of interfaces and tools	( )	( )	( )	( )	( )
Relevance to your professional responsibilities and situation	( )	( )	( )	( )	( )

14. How will your requirements for trade and market information evolve over the next five to ten years?

- [ ] No or little change
- [ ] Changed reliance on actionable intelligence rather than raw data
- [ ] Changed reliance on advanced analytics, including machine learning and artificial intelligence
- [ ] Changed integration of data sources into business information systems

Other (please specify)

15. Is there any type of trade and market information that you currently have difficulty accessing?

16. What impacts have ITC's trade and market information products had on your professional activities?

17. How could ITC improve its trade and market information products so as to support better decision-making in business and policymaking?

18. Would you be willing to share your email address and participate in a short follow up interview with the evaluation team, if needed? Responses remain confidential.

- ( ) Yes
- ( ) No

19. What is your email address?

ITC Trade and Market Information - Internal

Evaluation of ITC Trade and Market Information

This survey is part of an independent evaluation of the performance of ITC's trade and market information products. It is being sent to ITC staff. Responses will be treated confidentially, and only reproduced using summary statistics, such as averages. Respondents can elect or decline to provide an email address to allow for possible one on one follow up by the evaluation team.

ITC is grateful for your time in completing this short survey. The estimated time required to complete it is 9 minutes.

1. Are you a staff member or consultant of the International Trade Centre?

- ( ) Yes
- ( ) No

2. How do you identify?

- ( ) Man
- ( ) Woman
- ( ) Other
- ( ) Prefer not to respond

3. What do you primarily use trade and market information for?

- [ ] Project development
- [ ] Project implementation
- [ ] Monitoring and evaluation
- [ ] Dialogue with stakeholders
- [ ] Other (please specify)

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4. Please rate your own level of familiarity with the following ITC trade and market information products

	Do not know it	Aware of the product but do not use it	Somewhat familiar	Familiar	Very familiar
Trade Map					
Market Access Map					
Export Potential Map					
Investment Map					
Procurement Map					
Sustainability Map					
Global Trade Help Desk					
Market Price Information					
Rules of Origin Facilitator					

5. How often do you use the following ITC trade and market information products?

	Never	Less than five times in a year	Five to 15 times in a year	15 to 25 times in a year	More than 25 times in a year
Trade Map					
Market Access Map					
Export Potential Map					
Investment Map					
Procurement Map					
Sustainability Map					
Global Trade Help Desk					
Market Price Information					
Rules of Origin Facilitator					

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6. What is your primary use for ITC's trade and market information products in the context of your professional responsibilities?

	Support business decision making for client firms	Policy analysis and interactions with policymakers	Market research	Assisting business/government interactions	General technical assistance
Trade Map	○	○	○	○	○
Market Access Map	○	○	○	○	○
Investment Map	○	○	○	○	○
Procurement Map	○	○	○	○	○
Sustainability Map	○	○	○	○	○
Global Trade Help Desk	○	○	○	○	○
Export Potential Map	○	○	○	○	○
Market Price Information	○	○	○	○	○
Rules of Origin Facilitator	○	○	○	○	○

Other (please specify)

7. How useful do you find the following ITC trade and market information products in performing your professional duties?

	Not at all useful	Somewhat useful	Useful	Very useful	Crucial	N/A
Trade Map	○	○	○	○	○	○
Market Access Map	○	○	○	○	○	○
Investment Map	○	○	○	○	○	○
Procurement Map	○	○	○	○	○	○
Sustainability Map	○	○	○	○	○	○
Global Trade Help Desk	○	○	○	○	○	○
Export Potential Map	○	○	○	○	○	○
Market Price Information	○	○	○	○	○	○
Rules of Origin Facilitator	○	○	○	○	○	○

8. How well do ITC's trade information and business intelligence products complement each other?

- ○ Individual products are highly complementary
- ○ Products are well but not seamlessly integrated
- ○ Products overlap unduly
- ○ No complementarity at all

9. Do you use trade and market information products from other suppliers?

- ○ Yes
- ○ No

10. Which other suppliers do you rely on for trade and market information?

- ☐ National governments and national statistics offices
- ☐ World Bank
- ☐ World Trade Organization
- ☐ United Nations
- ☐ International Monetary Fund
- ☐ Other including private sector sources (please specify)

11. How do you rate the attractiveness of ITC's trade and market information products as a whole relative to those of other suppliers?

	Not at all attractive	Somewhat attractive	Attractive	Very attractive	Clearly more attractive than other suppliers
Cost effectiveness	○	○	○	○	○
Data completeness	○	○	○	○	○
Data timeliness	○	○	○	○	○
Data quality	○	○	○	○	○
Availability of user-friendly interfaces and tools	○	○	○	○	○
Ease of access	○	○	○	○	○

12. How will your requirements for trade and market information evolve over the next five to ten years?

- ☐ No or little change
- ☐ Changed reliance on actionable intelligence rather than raw data
- ☐ Changed reliance on advanced analytics, including machine learning and artificial intelligence
- ☐ Changed level of integration of data sources into business information systems

13. Is there any type of trade and market information that you currently have difficulty accessing?

14. What impacts have ITC's trade and market information products had on your professional activities?

15. How could ITC improve its trade and market information products so as to better support its own activities?

16. Would you be willing to participate in a short follow up interview with the evaluation team, if needed?

- Yes
- No

17. What is your email address?

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