BRINGING DOWN THE BARRIERS – CHARTING A DYNAMIC EXPORT DEVELOPMENT AGENDA

World Export Development Forum
Montreux, Switzerland, 8-11 October 2007

Fiji Islands
Background Country Report

WINNING NATIONAL STRATEGIES FOR EXPORT DEVELOPMENT

A paper contributed by
Mr. Paula N.B. Cirikiyasawa
Acting Senior Economist, Economic Analysis Unit
Ministry of Commerce, Industry, Investment & Communications
Suva, Fiji Islands
Introduction

The Fiji Islands is a small-island developing country, located in the South West Pacific. The archipelago comprises of more than 320 islands, however, the vast majority of our 800,000 populace live on the two largest islands in the group. Our per capita GDP of approximately F$2,500 (US$1,125) is vulnerable to shocks from natural disasters, adverse changes in the terms of trade of our limited range of exports, global economic downturns, and political uncertainty. Agriculture, manufacturing and services are all important components of production, with sugar and subsistence crops dominating agriculture, clothing and footwear dominating manufacturing, and tourism, transport and finance dominating services. Our ethnically diverse population, a majority comprised of Indigenous Fijians and those of Indian origin or Indo-Fijians, and a minority of European and Chinese origins, provides both a challenge and an opportunity for our future political and economic growth.

Participation in Trade Agreements

Fiji is a party to bilateral, regional and multilateral trade agreements the world over. The country completed its accession to the World Trade Organisation on 1 January 1996. But it has so far participated as a non-resident Member, making it difficult for our Government to keep abreast of events in the numerous negotiating groups, and to have our position/concerns fully taken into account. The Cotonou Agreement between the EU and ACP states is also of tremendous significance. This is primarily due to the sugar preferences we enjoy under it, but also because of the agreement’s coverage of tourism, tuna and general development cooperation. We enjoy benefits from a bilateral textiles agreement and under the Generalised System of Preferences with the USA. We also benefit from the non-reciprocal South Pacific Trade and Economic Cooperation Agreement (SPARTECA) with Australia and New Zealand. In addition, Fiji is a member of the Pacific Agreement on Closer Economic Relations (PACER) between Pacific Island Countries, Australia and New Zealand.

At the regional level, Fiji is a member of the newly ratified Pacific Island Countries Trade Agreement (PICTA), aimed at free trade within the Forum Island Countries of the Pacific. We are also members of the reciprocal Melanesian Spearhead Group (MSG) Trade Agreement, operating on a positive list basis, with our Melanesian neighbours. In addition, we hold bilateral trade agreements with Papua New Guinea and Vanuatu, also operating on a positive list basis, and non-reciprocal bilateral trade agreements with Tonga, the Cook Islands and Tuvalu. Free trade agreements within the Pacific are at an early stage of development. The costs are considerable to negotiate and implement these agreements, whereas the volume of trade concerned is still very small.

Government Revenue and Goods Clearance

Fiji’s dependence on customs duties for Government revenue is relatively low compared to many other countries in the Pacific Region, but in global terms is considered very high. Our most recent statistics indicate that almost 55% of current revenue is derived from customs duties and port dues. It is a priority for Government to reduce this reliance on customs duties for revenue, and increase the share of revenue derived from income taxes. This share has been increasing steadily over the last decade due to policy changes, and now stands at nearly 30%.

On clearance, Fiji has steadily improved its capacity to coordinate the relevant Government authorities and facilitate the movement of goods across our border. As long as exporters overseas have correctly completed all procedures prior to the arrival of shipments, perishable containers are cleared immediately on arrival in Fiji, and non-perishable items are cleared within 72 hours.

Imports and Exports

Given the small size of our domestic market, our limited level of economic development and the relative lack of technological complexity of our production processes, Fiji has a considerable dependence on imports of processed and manufactured products. In order of importance, our largest value import categories are: manufactured goods, machinery and transport equipment, food, mineral fuels, miscellaneous manufactured goods and chemicals. In terms of goods exports, our greatest value items are food (primarily sugar and sugar products, fish and fish products), garments, textiles, footwear, gold and timber. However, the importance of goods exports must be contextualised within
our broader export performance on services, where the value of tourism exceeds any single category of merchandise exports, including food.

Fiji’s export sector performed well in the initial years following the 1989 shift in policy from import substitution to export orientation, but the country has recently experienced a lower growth rate relative to imports. In the case of sugar, Fiji has enjoyed the preferential prices and market access in the EU market under the Sugar Protocol of the Cotonou Agreement. Preferential access has also been accorded to Fiji’s garment exports into the Australian and New Zealand markets under the South Pacific Regional Trade and Economic Co-operation Agreement (SPARTECA). The export-oriented industry has benefited under the Tax-Free Factory schemes, which has recently been removed as part of Government’s commitment to the WTO Agreement on Subsidies and Countervailing Measures.

Figure 1 show export data from 1992 -2003, and a forecasted data from 2004-2007. The graph in Figure 1 reinforces the notion of a narrow export base such that Sugar and Garments are major contributors to export earnings.

Our merchandise imports are sourced mainly from Australia, New Zealand, Singapore, Japan, the US and China, whilst our merchandise exports are mainly to the EU, the US, Australia, Japan and New Zealand. Australia provides by far our largest market for tourism, followed by New Zealand, the US, the UK, Japan and Continental Europe. Other Pacific Islands, other Asian countries and Canada also provide a substantial proportion of the value of tourist earnings.

Our broader export performance on services, where the value of tourism exceeds any single category of merchandise exports, including food.

Figure 1

Commodity Contribution by Export 1992-2007 (FJD million)

Source: Reserve Bank of Fiji
Note: Yaqona is the Fijian name for Kava.

Export Barriers

The main barriers for our exports are geographic isolation and the relatively limited level of development and technological complexity of Fiji’s economy. The isolation barriers we must face include the high cost and low frequency of shipping services, and the prohibitive cost of airfreight except for high value exports such as fresh fish. The technological barriers centre on the quarantine,
standards and conformance and customs regimes of our export markets. Complying with these standards - from quarantine certification to labelling requirements - imposes an administrative burden on our Government and a cost on our exporters which are beyond Fiji’s current capacity. Constrained Government resources limit our ability to establish effective trade missions in all of our major and potential markets, further limiting the opportunity for exporters to network given the difficulty for Fiji citizens to gain entry visas into our major and potential markets. Limited IT and technological infrastructure leads to problems in facilitating credit and payments for exporters, and with the WTO disciplines coming into effect, it will fast reduce our current preferences and consequently reduce our export opportunities. Our small productive capacity inhibits us from meeting the demand for often high volumes that target markets require, leading to our exclusion from contracts.

Some of these many challenges can be addressed, and it has been the priority for the Ministry of Commerce, Industry, Investment & Communications, to effect trade facilitation. High export costs are inevitable, however, given our isolation and the low level of intra-regional trade. Fiji’s National Trade Facilitation Committee a few years ago attempted to confront quarantine, standards & conformance and customs barriers through securing technical assistance for trade facilitation initiatives, and linking the public and private sectors to improve the delivery of services to exporters. In addition, the relevant stakeholders are working around the clock to improve Government legislation and regulations covering standards, quality, information, labelling, safety and health issues, so that our producers are disciplined domestically with the capacity to meet export standards. Our Ministry is also facilitating links between our central bank, the financial sector and traders, in order to improve credit and payments systems. We continue to push for better ‘mode 4’ (movement of natural persons) access for our citizens to markets abroad, both on a bilateral basis and through the WTO. An advanced regional network of exporters may also enable us to overcome some of our volume limitations, to secure more lucrative contracts in our export markets.

Import Barriers

The barriers faced by exporters abroad and our domestic traders who seek to import goods are primarily infrastructure related. We lack the IT systems, skilled human resources and accumulated learning that is necessary to allow for the efficient processing of imports. There is a gap between the real and ideal levels of cooperation between our various border agencies - Ports, Customs, Quarantine and Health, in particular. High transport costs obstruct imports in a similar way to exports, as do less-than-perfect systems of payments and credits for importers to finance their activities. Fiji also suffers from the small size of our domestic market, leading to a reduction in the range of products which exporters abroad find it efficient to despatch to Fiji. Moreover, we suffer from a considerable degree of ‘dumping’, in terms of receiving sub-standard and out-of-date products no longer saleable in our larger regional neighbours, Australia and New Zealand. Tariffs are not a significant import barrier, given the liberalisation and clarification of our tariff system, however some import licensing practices do obstruct trade.

Our National Trade Facilitation Committee then played a lead role in reducing the barriers to imports to Fiji. It attempted to secure technical assistance to provide the IT infrastructure and training necessary to improve our Customs processing, and linking it electronically with the procedures required by other border agencies. In time, we will accumulate the learning necessary to operate an efficient clearance system. Transport and payments-systems obstacles are being dealt with through as much cooperation as possible between the stakeholders. The promulgation and enforcement of high product standards is the ideal solution to the problem of having poor quality products ‘dumped’ into our domestic markets; and the Ministry of Commerce, Business Development & Investment undertook a review of remaining import licensing processes to provide some remedies to this chronic problem.

The Challenge Facing Fiji Exports

Exports have been on an all time low compared to the rising level of imports. Fiji does not have a “holistic” or all encompassing strategy to support export development. In March 2006 the Ministry of Commerce, Industry, Investment & Communications with the assistance of the Commonwealth Secretariat launched the National Export Strategy Design Process. The objectives were to:
begin the process of designing a national strategy that will seek to raise Fiji’s international competitiveness and lead directly to significant improvement in the country’s export performance;

examine appropriate strategy management structures and processes;

create the national team that will develop Fiji’s national export strategy; and

establish an action plan which will lead to the preparation of the national export strategy and which can be supported with technical inputs from the Commonwealth Secretariat and the International Trade Centre.

This is the first time an effort has been made to put together an integrated export strategy through a co-ordinated approach where the private sector and government work together. Previous efforts to support export were mainly reactive and directed either at sector level or to a particular good or service. This piecemeal approach created inconsistency and distortion in efforts to support export development, especially for the private sector.

In summary, since its independence in 1970, successive governments in Fiji have built up an economic management system that relies upon a high degree of policy intervention and control over private sector activities by government agencies (at either national or local level or both). This “command and control” approach has, in practice, created a network of veto points over private sector activities that have stifled economic development. In many cases, the veto points are operated by officials or Ministers who enjoy a large measure of discretion in deciding whether to approve or reject applications for licenses, permits, or investment approvals. Even if approvals, licenses and permits are freely and promptly granted, the compliance costs imposed on the private sector are considerable. This is not a conducive environment for entrepreneurial activity. It increases transaction costs and does little to minimize the risk that entrepreneurial gains will be expropriated by one means or another.

The incentives provided through the complex system of tariffs, price controls, import licenses and the economic aspects of the affirmative action program encourage the development of low value added activities, and are therefore biased against added value activities in the agricultural sector, placing a high premium on socially unproductive rent seeking activities. Any increase in the level of protection, imposes a growing cost disability upon the tourist and export sectors of the economy.

The objectives of trade policy have changed considerably over the years since independence with an initial period of heavy protectionism was succeeded from 1989 by an era of openness and reducing protection levels to be succeeded in turn from about 2000 by a progressive increase in the level of protection granted to domestic manufacturers and/or producers.

In the early post-independence years, the government of the day encouraged the development of import substitution industries through high tariff protection, import licensing and quotas. Flour milling, beef and fish canning, plastic product assembly, biscuits, beer, soft drinks, cigarettes, steel roofing, paints, cement, matches and soap were some of the industries established at that time. In the early 1980s when growth in the sugar sector began to falter following a series of natural disasters and depressed world prices, the government accelerated its industrialization drive but the high rates of effective protection and the high cost disabilities imposed on export industries began to compound the economic contraction. In the occurrence of the first coup in 1987, it had become clear that import substitution policies were not working. Government policy switched to a policy of deregulation and export-led growth. In 1989, most import licensing was removed and replaced by a simplified tariff system that allowed a progressive reduction from a maximum tariff of 50 percent to 20 percent.

The outward-oriented approach of the late 1980s persisted up to 1998, when the government increased tariffs on most locally manufactured items to 35 percent. The rate was reduced to 30 percent following the 1998 devaluation and then to 27 percent in the 1999 budget, at which level the protective tariff has remained.

The budget for 2001 significantly increased the cascading gradient of the tariff structure when it made substantial reductions to the bottom bands of the tariff as part of an investment package to promote faster economic growth. The import duty on production inputs was reduced from 10 to 3 percent and
the duty on intermediate goods reduced from 15 to 10 percent. The duty on construction materials and capital goods was reduced from 10 percent to 3 percent and a duty suspension scheme was introduced to allow exporters to have access to duty-free imports. (This replaced the previous drawback scheme.) There were also selective reductions on a few basic items (rice, tea and powdered milk) and previously granted concessional rates for flour and sharps and edible oil were confirmed as the new standard rates for those items. The 2001 Budget increased protective duties on poultry and beef to 27 percent while extending the zero duty periods for approved investors and there were some further increases in protective tariffs in the 2002 Budget.

The 2003 Budget consolidated the tariff structure by reducing the number of bands from six to four: the new bands were 0, 3, 15, and 27 percent respectively. All goods previously attracting the 10 percent duty were placed in the 15 percent band. Food items previously attracting 20 percent were placed in the 15 percent band. Simultaneously, the protective duties on canned fish and white rice were raised from 20 to 27 percent.

The 2004 Budget increased some duties from 3 to 27 percent (chemical pesticides, chocolate wafers, structures and parts of structures of iron and steel, and tubes used in vehicles) and reduced the fiscal duty on aerials and aerial reflectors from 27 to 3 percent, on mosquito destroyer Vape Mat (from 27 to 15 percent) and on oil, air and fuel filters for motor vehicles from 3 to 0 percent. The basic pattern appeared to continue to be protective – to raise duties to 27 percent on products now being manufactured in Fiji and to reduce the duties on products no longer being manufactured locally.

Assessment of Fiji Government’s Policy to Support Export Growth

The basic problem with Fiji’s current protection policy is that it creates perverse incentives that encourage manufacturers/producers to concentrate on low value-added activities and penalizes manufacturers/producers who try to move up the value chain by increasing the value added within Fiji.

The crux of the matter is that the cascading structure of the tariff rate system can have as much, or more, impact on the pattern of incentives as the levels of tariffs. The same tariff rate can produce very different effective rates of Protection (ERPs), depending upon the proportion of value added in each product. Reducing all tariff rates across the board, as was the policy direction between 1989 and 1998, does not necessarily eliminate the perverse incentives that a cascading structure creates. The greater the degree of cascading, the higher the rate of effective protection for a given value added ratio. And the lower the value added ratios of enterprises within that cascading system, then the higher will be the ERP that those enterprises enjoy. The message for policy makers is that a cascading tariff favours manufacturers/producers who add relatively little value.

The strong bias to investment incentives imparted by the tariff structure overrides the normal calculations of economic efficiency so that it becomes difficult to determine where Fiji’s comparative advantage really lies. There is not necessarily anything wrong with concentrating on the development of assembly or light manufacturing activities so long as Fiji can undertake these activities efficiently i.e. at or close to world prices. On the other hand, if it is true that Fiji should potentially be able to carve out a comparative advantage in agricultural and food processing industries, then it makes no sense to bias investment incentives so much against this end of the added value spectrum.

Trade policy decision-makers need to pay more attention to the effective protection outcomes of their tariff decisions in order to create greater uniformity in effective rates of protection across the economy. The primary policy objective for the tariff system should be the adoption of a low and uniform rate structure. The most effective way that has been recommended by experts is the adoption of the framework for tariff setting that focuses upon the incentives being created to consider the following:

- Establish publicly that henceforth tariff rates will be set with regard to their impact on ERPs. A “maximum acceptable” ERP would then be determined, for instance, 35 percent, taking tariffs and all taxes into account. It should also be made clear that this may be adjusted in future to a more suitable long-term level.
- As a matter of policy there would be no changes in tariffs that would result in ERPs above this level. This requires that an agreed method for calculating the ERP be established and made public. (It also implies that adequate technical capabilities are available within the tariff-setting authority to undertake this analysis.)
• As a practical matter, a minimum ERP of, say, 20 percent would also need to be established. Tariff changes would not be made that would reduce an activity’s ERP below this level. This is only likely to arise when tariffs for raw materials and intermediate goods are being considered.

• There needs to be a formal process for accepting and evaluating requests for tariff changes. This process should be timely and reasonably public, and permit access for all stakeholders to the decision-making process, particularly when tariff changes affect the ERPs of more than one activity.

• In parallel with the adoption of an ERP-based tariff setting procedure, a schedule for a program of rate adjustments may need to be established for a move to a uniform rate system. There are two approaches that have been used in this type of tariff exercise: tops down and tops down/bottoms up. Under the first approach, only high tariffs are reduced while low rates remain at existing levels. In contrast, the other approach amounts to a “concertina” adjustment, simultaneously reducing the highest rates and increasing the lowest rates. The “concertina” approach has the advantage of reducing the degree of cascading more rapidly. However, it also has a higher likelihood of greater variation in the resulting ERPs. Nonetheless, since achieving a uniform tariff rate will mean that some rates will have to be increased at some time, the issue boils down to a matter of timing.

To be internationally competitive Fiji needs a sufficiently wide range of activities to earn the foreign exchange required to meet all the economy’s needs. The fundamental problem with a policy of protecting industries that by definition are not internationally competitive (because they need protection) is that these industries raise the cost structure of the economy and this imposes a severe cost disability upon the tourism and export sectors that will slowly erode their profitability. The cost structure increases because protected industries can afford to bid more for the factors of production, especially labour. Over time the protected industries bid up wages and prices and absorb a greater proportion of national resources at the expense of the internationally competitive sector. Eventually this can create serious problems for the country’s balance of payments.

From an institutional economics perspective, the additional problem with a protectionist policy is that it puts a high premium on lobbying and rent seeking, as company representatives vie with each other either for greater protection or to maintain their existing privileged positions. This unproductive activity that raises transaction costs and takes the country further and further away from its real comparative advantage. The gradual introduction of a low and uniform tariff would release all these resources for more productive activities. The goal should be to encourage all industries to get as close as they can to internationally competitive standards. In this way they are helping to reduce the input costs of the enterprises that trade with them in a ‘virtuous’ and mutually reinforcing process that works to lower the economy’s cost structure and thus make an even wider range of industries internationally competitive.

The National Export Strategy: The Fijian Experience

The ultimate aim of Fiji’s National Export Strategy is to stimulate Fiji exports in the face of advancing globalisation. To foster ownership, and ensure that strategies developed are realistic, a partnership approach was adopted between the public and private sectors. From the Government perspective this involves all relevant Ministries and from the commercial perspective, particular emphasis be given to exporters.

The Strategy is comprehensive in that it addresses competitiveness issues at the national, sectoral and sub-sectoral levels, which are consistent with the priorities endorsed by Government. The document subscribes to the view that investing in export development contributes directly to overall economic and social development and should, therefore, be accorded a high priority in future national planning exercises. This is imperative since the sectoral-level strategies will have to respond to all issues that have an impact on the sectors’ international competitiveness.

The identified areas were selected following internal consultations within the line Ministries, and evaluating export trends over the years under prevailing market conditions. The list is not exhaustive, and the current National Export Strategy, designed for the period 2007-2011, focuses on priority sectors drawn from manufacturing, goods and services. Criteria used to prioritise sectors included the sector’s current contribution to GDP and to total exports, its growth potential, and stakeholder assessment. The list of prioritised areas in the identified sectors include: Agro-Business, Marine Products, Forestry, Mineral Water, ICT, Audio-Visual, Labour Mobility, Education/Training, Sugar, Tourism, Financial Services, Garments and Health. To date it can be said that the outputs of the NESD project has been somewhat achieved. These include:
• a National Export Strategy document endorsed by both the public and private sectors;
• a close public-private sector partnership to implement the strategy;
• a management framework from which to monitor implementation and refine the strategy as and when required; and
• a resource-mobilisation plan designed to secure donor support to the implementation of the National Export Strategy.

The National Export Strategy was presented at the National Economic Summit\(^1\) on September 28, 2006, with the findings of the National Export Strategy Design endorsed by Cabinet at its meeting on the 12th of October 2006 for implementation.

Amongst other things, there is a need to further improve the operating environment in the Fijian economy so that it becomes more attractive to the private sector, encouraging more participation and investment in export businesses. If Government wants the private sector to become the engine of growth, which is its stated intention, then it must actively encourage enterprise and entrepreneurship. The role for Fiji’s entrepreneurs is to uncover new profit opportunities in exports. This could be a major source of improved productivity and driving sustainable growth for improved export development. However, entrepreneurs cannot function without the required access to assets, markets, skills and financial resources. It is important to note that the Private Sector must also be protected through property rights and supportive legislation. The Government over time aims to drastically reduce its direct involvement in private sector activities, and to focus on its core functions such as maintaining macro-economic stability, improving the management of its own operations and creating an institutional and policy environment that encourages and facilitates greater entrepreneurship.

A detailed review of the current Fiji’s Government policy and strategy in support of export development will be undertaken in light of the prevailing circumstances taking into account the number of cross-issues at stake. These include: supply and infrastructure constraints; the absence of bulk handling facilities; markets information; research; human resource development and a vibrant domestic economy; the high cost of finance; raw materials and transport; taxation issues; currency fluctuation; the need to improve the Fiji image and reduce the cost of doing business here; the resource situation; institutional assets; and vulnerability to natural disaster. New strategies for the 13 identified areas were dovetailed with Government’s strategic objectives as outlined under the Fiji’s Strategic Development Priorities.

In summary:

- 73 objectives were agreed to and listed in order of priority;
- To complement these objectives, 266 strategies were developed, together with key performance indicators; and
- The strategies were then grouped under four major categories, namely the development, competitiveness, client and institutional perspectives.

- The development perspective, with 16 strategies, focuses on how politicians, Government decision makers, Civil Society Organisations (CSOs) and the donor community perceive the vision from the standpoint of its relevance to socioeconomic development, and its contribution to national development goals;

- The 127 strategies under the competitiveness perspective, address the way sector associations and advocacy groups, potential investors, both domestic and foreign, and prospective buyers/importers perceive the vision in terms of reinforcing the sector’s capacity to improve the business environment. These strategies also focus on enhancing current sector players’ participation in the international value chain, and increasing opportunities for value retention, addition and creation;

- Under the client perspective, there are 41 strategies identified. These deal with how current, potential and aspiring exporters, as well as other key enterprises and players in the sector value

---

\(^1\) A national development consultative forum comprising of representatives of the public, private sector, academia and non-state actors.
chain, perceive the vision in terms of furthering their commercial objectives and satisfying their needs for support;

- There are 82 strategies identified under institutional perspective. These are concerned with the way organisations from both the public and private sector, within the trade support and services delivery network, perceive the vision in terms of consolidating and reinforcing their positions, facilitating their work, and enhancing their capabilities and competencies.

The successful implementation of all action plans under the National Export Strategy programme will require an effective monitoring and management mechanism. A number of options were considered and, after thorough consultation with all stakeholders, it was agreed that, initially, existing Government machinery should be used.

The Way Forward

The Interim Administration in Fiji has allocated F$2.5 million in the 2007 revised Budget to support the growth of export sectors to restore the export earning capacity of the economy in the short-term. The funding is intended to assist the six major sectors identified from the thirteen sectors in the National Export Strategy to kick-start and improve our export performance under the current economic conditions. These include Agro-business, Forestry, Marine Products, Mineral Water, ICT and Audio-Visual.

The document tells compelling significance of the need to broaden our export base. It is important to note that the implementation of the National Export Strategy (NES) is not expected to dramatically increase our Foreign Exchange Earnings, however, it provides a framework for all stakeholders to start working together within mutually agreed objectives for the common good of our nation.

For the NES to bear fruition, the task is not easy, but at the same time it is timely and achievable. It needs the combined effort, commitment and dedication of all stakeholders in terms of pooling of resources, understanding the guidelines and meeting our deadlines.

As previously specified under para 9.8 the NES will be monitored by a NES Core Team comprising of representative (s) of the public and the private sector, academia and non-state actors. These individuals were heavily involved in the actual design process of the NES and it is only fitting that they be co-opted to effectively partake in the implementation phase of the NES.

Last but not least, technical assistance will have to be solicited from ITC and the Commonwealth Secretariat to provide the platform and the guidance in the effective implementation of the NES.

Concluding Remarks

In times of global uncertainties, the aim for our exporters is to achieve greater access to overseas markets as quickly, as broadly and as deeply as possible. Our efforts to penetrate markets complement what we are doing in the new Round of global trade negotiations now underway at the WTO. The government is fully committed to continuing its active pursuit of the massive potential benefits that would result from the successful conclusion to the Doha Round.

However, the Round has been stalled due to the inability –and unwillingness –of the powers that be to come to agreement on agriculture. But still we remain optimistic, about the capacity of the multilateral trading system to agree on a mutually beneficial and far-reaching reforms that deliver consistent and fair rules, and a level playing field, for international trade.

Winning National Strategies for Export Development is all about formalizing a realistic NES, ensuring that the appropriate monitoring mechanism are put into place, resources are pooled efficiently to achieve intended outcomes and soliciting technical assistance at the outset of an implementation programme for consistency and sustainability purposes.