



Executive Summary

The developing world is arguably more open today than at any time in recent memory. Developing countries have more than doubled their exports since the mid-1980s, helping many of them to grow steadily.

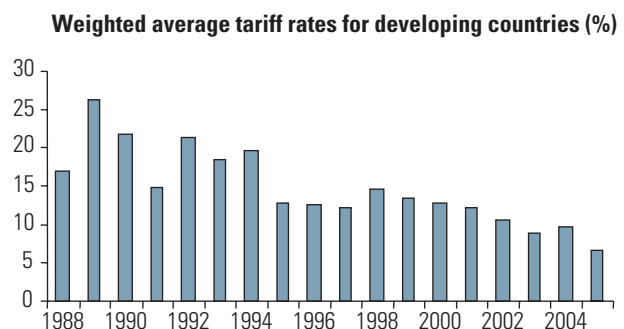
Exports and imports have risen as a share of the gross domestic product (GDP) across a wide range of countries, fueled in part by China's remarkable trade performance and the growth in services trade. Trade policies have also been significantly liberalized. Average import tariffs have fallen steadily over the period (figure ES.1), although the fall in other forms of protection has been more gradual. The World Bank has both influenced and been influenced by these developments.

The Bank has supported the reform of trade policies and the strengthening of trade-related institutions and infrastructure in its client countries. Between fiscal years 1987 and 2004, about 8.1 percent of total Bank commitments (\$38 billion) went to 117 countries to help them better integrate into the global economy. This financing has been accompanied by a large volume of analysis in operational economic and sector work (ESW), research publications on trade, and working papers on trade-related topics.

The Bank's interest in trade has gone through three phases, each with a quite different approach. During the first phase (starting in the 1980s), the Bank focused largely on the

traditional trade agenda related to opening up economies. The Bank based its involvement on the importance of trade for economic growth and on the role of openness in enhancing a country's economic efficiency. By increasing the incentives for and profitability of exporting, Bank support for trade reform was expected to help expand and diversify exports. The findings of several large multicountry comparative studies prepared during this period reinforced this message (Choksi and Papageorgiou 1986; Krueger, Schiff, and Valdes 1991; Michaely and

Figure ES.1: Opening Economies



Source: World Integrated Trade Solution, UNCTAD TRAINS Database TRN, December 17, 2005.

others 1991; Thomas and Nash 1991; Cooper and others 1993).

During the second phase, from the mid- to late-1990s, the Bank's emphasis on trade declined, although the impact of earlier trade reforms was still playing out. Analytical work and (to a lesser extent) new lending were less than in the first phase. The most evident aspect of the diminished attention to trade was the downsizing of Bank units working on trade issues. Concurrently, the elimination of the old technical units under the reorganization of 1996 dispersed trade experts throughout the institution, and several subsequently moved on to work on non-trade issues.

In the third phase, initiated with the collapse of the World Trade Organization (WTO) Seattle trade ministerial meeting in 1999, growing pressure to deliver on the Millennium Development Goals and interest from development partners (notably bilateral donors) led the Bank to reappraise its trade activities. This phase has focused on the global trading system and "behind-the-border barriers" to trade.

In 2001 a decision was made to expand considerably the Bank's work on trade issues, and by July 2002 a new sector unit dedicated to trade had been established in the Bank. In addition, a virtual Trade Department was created, bringing together staff working on trade issues from the Development Economics Complex (DEC), the Poverty Reduction and Economic Management Network (PREM), and the World Bank Institute (WBI). In this third stage, the Bank increasingly treated the multilateral trading system as a framework within which its client countries could achieve greater economic integration (on equal footing) and larger numbers of the poor would be lifted out of poverty.

This evaluation assesses the development effectiveness of Bank trade assistance between 1987 and 2004, based on the Bank's stated strategies and objectives. "Trade" in this context refers to lending and nonlending activities that enhance the environment and capability of Bank clients to trade goods and services in the global economy. As part of this study, a review of the Bank's lending portfolio and

economic and sector work was carried out to identify trade activities. Six main areas of lending support were identified: trade liberalization, institutional trade facilitation (for example, customs), infrastructure-related trade facilitation (such as air freight, ports), private and public trade finance, and technical assistance for trade negotiations.

While there was no formal trade strategy prior to 2001, three key documents provided strategic and technical guidance on Bank trade policy advice: the *1987 World Development Report: Industrialization and Foreign Trade*, the 1988 Development Committee paper on trade, and the section on trade adjustment lending in Operational Directive (OD) 8.60.

The main policy reforms embedded in these documents included replacing quantitative restrictions with tariffs as a first stage of trade liberalization, maintaining low and relatively uniform tariffs for efficiency and political economy reasons, and realistic exchange rates requiring low inflation. The documents also encouraged studies of the economic costs of existing policies, evaluations of the expected benefits of reform, improved data on indicators and measures of nominal and effective protection, and strengthened capacity of reforming countries to assess their own policies. The World Development Report (WDR) also supported the increased use of conditionality in structural adjustment lending as a catalyst for trade reform. Together with a 2002 Board report on trade, these documents provide the strategies and objectives against which Bank trade assistance is evaluated.

World Bank Trade Activities: 1987–2001

Bank support from 1987 through 2001 was expected to (1) reduce disincentives for exporting by eliminating the anti-export bias; (2) expand and diversify exports, thereby increasing foreign exchange earnings; (3) make imports more readily available and increase import competition in final products; and (4) help countries better integrate into the global economy.

The typical trade policy reform package supported by the Bank had four components:

- **Import-related:** Policies such as eliminating or reducing quantitative restrictions and other nontariff barriers, reducing import tariff levels and dispersion, making tariff regimes more uniform and transparent, reducing import surcharges, improving import procedures, and eliminating official reference prices.
- **Export-related:** Policies related to making imports available for exporting; reducing export bans, taxes, and licenses; reducing the anti-export bias; export credit and financing; and other export incentives.
- **Exchange rate and foreign exchange management:** Moving toward market-determined exchange rates, exchange rate devaluation, or step adjustment, and away from the administrative allocation of foreign exchange.
- **Industrial and other supporting policies:** Pricing reform, investment promotion, competition policy, marketing, privatization, labor markets, and safety nets.

Bank support for trade reform was generally consistent with the 1987 WDR on trade, Operational Directive 8.60, and the literature on trade policy reforms. Eliminating quantitative restrictions (QRs) and addressing exchange rate disequilibria were often the first actions the Bank recommended, in line with the literature. Most trade loans initially contained measures to address both import liberalization and to reduce disincentives for exporting. But in 14 countries that together received 55 loans, the Bank focused only on import-related measures. Over time, the Bank has paid increased attention to export-related measures relative to import liberalization.

More generally, overall conditionality associated with trade has declined across Regions and greater reliance is being placed on floating or single tranche conditions, rather than on prior actions, as was previously the case. The decline in conditionality reflects the move toward more open regimes, a shift in the Bank's focus toward longer-term institutional and structural policies, a concurrent rise in IMF trade conditionality, and a rise in trade liberalization through regional trading arrangements (RTAs). In more recent years, the shift also

likely reflects the evolution of the Bank's approach toward greater country-owned conditionality and less prescription, as outlined in Operational Policy 8.60 on development policy lending.

Four areas of concern emerge, however. First, the literature suggests the importance of macroeconomic stabilization to complement trade reforms. But the Bank sometimes supported trade reforms in the presence of serious macroeconomic instability. Second, it is crucial that complementary measures such as removing marketing and price distortions as well as competition policy, reducing labor market rigidities, and improving the regulatory environment (currently more commonly thought of as "investment climate" issues) accompany trade reforms. While this was the case sometimes, compliance with these conditions tended to be the lowest of all conditions, underscoring the political and other difficulties associated with their implementation. Third, trade-related projects did not adequately attend to the poverty and distributional outcomes, including labor market dynamics, and this continues to be a major weakness in project design. Fourth, the Bank did not take the external environment into account sufficiently, and thus did not distinguish the impact of external trade policies and shocks on trade outcomes for different groups of developing countries.

A common criticism of the Bank's trade policy advice is that it has followed a "one-size-fits-all" approach. The Independent Evaluation Group (IEG) examined all adjustment loans approved between 1987 and 2004 that contained trade policy components. While the loans followed sequencing that was broadly in line with the 1987 WDR and the economic literature, IEG found little evidence of a generic (or one-size-fits-all) approach to trade reform in the Bank's client countries. Countries varied in the extent of macroeconomic stabilization they had achieved before the reform was introduced, and in how and when they chose to use export-related policies to stimulate trade promotion. Moreover, countries were heterogeneous in how deeply they reformed and in

the range of complementary policies they introduced to support the trade reform.

Given the concerns raised above, and in light of the evolving circumstances, it can be seen that Bank trade advice and support during the 1980s and 1990s was too narrow in focus. Specifically, it underestimated the complexity and sequencing of complementary policies; the role of the external environment (taking that environment as largely given); the interaction among trade, growth, and distributional outcomes; and the country-specific context (such as initial conditions and institutions) in which these policies interacted. Consequently, Bank advice was too optimistic about the benefits of trade liberalization for growth in the short run.

Project-level Outcomes

Trade-related projects have improved in performance over time. In general, trade adjustment loans have performed better than other adjustment loans in terms of project outcomes (86 versus 78 percent satisfactory), while trade investment loans performed slightly worse than other investment loans (69 versus 72 percent satisfactory, respectively). At an aggregate level, positive project outcomes were more likely to be associated with middle-income countries, low conditionality, good institutional frameworks, and prior ESW. Project design, unrealistic assumptions, and unstable macroeconomic environments contributed most frequently to unsatisfactory outcomes for individual projects.

Outputs

The project data and aggregate data from 45 sample countries show that Bank advice and lending contributed to systematic reductions in protection and to making trade regimes more open, though the pace differed across countries. Many developing countries sharply reduced the level and dispersion of their import tariffs and their use of quantitative restrictions, with the greatest reductions in Latin America. Developing countries also largely eliminated export taxes, licenses, and bans. Black market premiums also disappeared

as countries moved their exchange rate regimes toward market-based systems and foreign exchange availability improved, notably in African countries. The Bank was less successful in helping countries reduce other nontariff barriers, notably in the Middle East and North Africa.

Outcomes

The export supply response was often variable. While export diversification occurred in most Regions, the low base from which nontraditional exports grew in Africa meant even rapid growth rates were inadequate to dramatically change the composition of Africa's export baskets. Moreover, many African countries experienced an erosion of competitiveness in their export baskets, contributing to increased marginalization in global trade. Imports responded to the reforms undertaken, growing rapidly in all Regions and easing input constraints for importers. However, the speed of import liberalization increased competitive pressures in countries that were unable to generate dynamic and sustained manufacturing growth. For countries where data are available, total factor productivity growth gains are apparent.

Impact

Employing a "difference-in-differences" approach that corrects for potential sample selection bias by using a Heckman selection procedure, a counterfactual was constructed to compare countries that reformed their trade regimes with a Bank loan, and those that reformed without such Bank support. Bank clients that obtained loans to support trade reform experienced higher economic growth rates in the medium term (3–6 years) following trade reform, and their growth rates exceeded those independent reformers that reformed without the financial support of the Bank.

Both groups of reformers also experienced dramatic increases in import demand, although this effect lasted longer for Bank-supported reformers. However, Bank-supported reformers exhibited a modest supply response, suggesting that trade liberalization alone was

not sufficient—a finding supported by recent research in this area. The gains in economic growth were often driven by domestic demand arising from improved resource allocation, rather than just export expansion. The employment and poverty outcomes associated with trade reforms were mixed, and the Bank did not conduct sufficient analysis to inform its policy advice and lending on this issue or systematically measure the outcomes.

While the initial impetus for trade reform was often an economic crisis, sustaining the reform required broad support and ownership. Conditionality was generally not conducive to achieving that ownership, and the Bank was more judicious in using it in countries where it had less leverage. Bank advice and analytical work were often instrumental in supporting reform; its value, however, was reduced where it was perceived to be dogmatically based. External factors (market access, regional integration), coherent macroeconomic policies, exogenous shocks (droughts, commodity prices), and timely implementation of complementary policies were critical in determining whether or not individual countries reaped the full benefits of trade reform.

Bank Trade Activities: 2001–04

The Bank's recent trade program, which was revamped in 2001, has two objectives: (1) make the world trading system more "friendly to development" or reciprocally open; and (2) make trade an important part of country development strategies. The Bank employed research, participation in global policy discussions and advocacy, trade capacity building, and mainstreaming of trade as tools to achieve these objectives. The assessment of developments during this period has to be considered in the context of the relatively brief period under review. This is especially likely to be a factor in the mainstreaming agenda, which necessarily requires greater commitment and action by operational units.

The resurgence in the Bank's attention to trade is not primarily characterized by greater trade lending or conditionality. Instead, it is

reflected in a higher profile in global advocacy, an increased volume of trade-related analysis, and greater attention to the institution's capacity to respond to trade-related analytical needs and operational support.

This evaluation finds the Bank's objectives between 2001 and 2004 to be relevant, timely, and largely responsive to the rapidly changing global environment on trade issues. However, given the inherent limitations of the Bank's role in global negotiations and the importance of country-specific policy dialogue, the evaluation finds that more attention should have been given to strengthening the analytical tools, processes, and systematic interactions between the Trade Department and operational colleagues. Moreover, the dependency on trust funds in research and capacity building potentially poses serious challenges to the Bank in determining an independent work program.

Progress toward a More Development-Friendly Trading System

Much of the Bank's research between 2001 and 2004 was of consequence (published in respected journals), and in some cases innovative (for example, in new fields such as services, agricultural standards, transport costs, and other behind-the-border issues). Research on some issues related to the multilateral trading system was often timely. For example, in the run-up to the Doha Trade Ministerial, the Bank released the *2002 Global Economic Prospects Report: Making Trade Work for the World's Poor* and produced a paper about the global trade architecture (Hoekman 2002). The *2004 Global Economic Prospects Report: Realizing the Development Promise of the Doha Agenda* was published in the run-up to the Cancun Trade Ministerial meeting.

Research on regionalism has been forward-looking and has moved toward a pragmatic view of RTA membership. However, several areas identified in the trade agenda have been slow to yield significant insights (agricultural trade and policies) or have not been adequately researched (adjustments costs and distributional outcomes associated with trade, microlevel adjustment to trade, and export processing zones).

The Bank has positioned itself more effectively as an advocate for the developing countries on global trade issues and, given the wide reach of its publications, has contributed to increasing awareness of the issues. Given the plethora of other actors in the advocacy field (nongovernmental organizations such as Oxfam and Third World Network, as well as development partners such as the U.K. Department for International Development) and the Bank's limited direct role in WTO talks, the Bank could be seen most accurately as an indirect participant—contributing ideas and adding to the pressure to influence changes, rather than directly influencing outcomes. Staff indicate that the Bank's global advocacy role is useful in positioning the Bank among client countries, especially those in whom the institution might otherwise be less engaged on trade issues (such as in Latin America).

The Bank is meeting its trade-related capacity building (TCB) objectives unevenly and it appears that, as currently stated, the objectives may not adequately capture the scope and priorities of Bank activities. Specifically, the Bank is meeting its commitment to advise countries on trade policy through a dramatically increased volume of trade-related analytical work that is the basis for country policy dialogue, as well as through capacity building components in lending operations.

The Bank has also increased its dialogue with regional trade institutions. This is especially notable in the Africa Region. Analysis has been conducted on common external tariffs, revenue implications, and possible trade diversion for several RTAs (such as the East Africa Community, the Economic Community of West African States, and Union Economique et Monetaire Ouest Africaine), as well as on Economic Partnership Agreements with the European Union. In Latin America, work on Central America Free Trade Agreement (CAFTA) with Latin American officials was timely.

The Bank is doing less well helping countries to meet its stated objectives of adopting appropriate regional policies and participating more effectively in negotiations.

It has been least effective in helping countries manage external shocks and adjustment costs related to trade liberalization.

The most high-profile initiative in the Bank's TCB work is the Integrated Framework for Trade-Related Technical Assistance (the IF), a multidonor, multiagency collaboration originally set up in 1997 to provide trade-related technical assistance to the 49 least-developed countries (LDCs). While diagnostic needs assessments have been carried out for almost half of eligible LDCs, follow-up and implementation have been slow.

Concrete proposals and approvals for trade capacity projects are finally emerging. As of May 30, 2005, 23 activities (\$8.1 million) had been approved. A review of the proposed activities suggests overlap with other donor activities in some cases, defeating the purpose of donor harmonization. More generally, the pace is slow relative to the Doha negotiations and the needs identified in the Diagnostic Trade Integration Study (DTIS), and there is no mechanism to ensure that the most critical priorities are funded first.

Two independent evaluations of the IF were undertaken, in 2003 and 2004. Among the main evaluative findings are that despite a 2001 restructuring, weaknesses from the original program remain, including insufficient focus on improved trade outcomes, rather than the process alone, and a shortage of funds (financial and administrative) to meet the identified demands for technical assistance in developing countries. More generally, IEG's review of 26 global public programs provides some useful lessons (OED 2004a). The most relevant for the IF are the need to link financing to priorities in a systematic fashion, to strengthen and streamline the governance and management of programs, and to develop a results-based management framework.

Progress toward Mainstreaming Trade

Mainstreaming trade in Bank operations has several dimensions (ESW, trade in assistance strategies, knowledge management, and incorporation of relevant trade issues in sector activities and strategies); the Bank is doing

better along some dimensions than others. It has responded quickly to keep up with the WTO negotiations and other global trade issues, and to catalyze a rapid increase in trade-related analytical work. Trade Department staff members have been an important part of this improvement—sharing their expertise through mission participation, contributions to and leadership of reports, and as peer reviewers.

After sustained decline from the mid-1990s following the conclusion of the Uruguay Round, ESW on trade issues has risen in recent years in every Region except Latin America and the Caribbean, which started at a high level. In the past three years, strategic Regional flagships on trade have been carried out in every Region except Africa (where one is under way) and have been well focused on the particular concerns of the Regions they cover.

Underpinning this reversal is the greater interest of client countries in trade issues as they grapple with more complex integration into the global economy, greater commitment and interest of donors leading to additional trust funds, and development of a new trade-focused economic report—the DTIS, which was an important initial catalyst in spurring analytical trade work in low-income countries by the Bank.

The focus of trade ESW broadened over time from changes in incentives and general trade performance in the 1980s to encompass a broader definition of competitiveness (labor costs and infrastructure) and external environment considerations (such as the impact of Regional arrangements or market access issues). Increasing attention has been given to the analysis of Regional trade integration issues with analysis and advice to Regional organizations, notably in Africa (Economic Partnership Agreement and common external tariffs for several African RTAs) and Latin America (such as the US-CAFTA agreement). However, reports have only rarely presented an in-depth analysis of the welfare implications of trade policies, analyzed the institutional framework for trade, or incorporated political economy factors that could influence trade reform and outcomes. Also largely missing is microeconomic analysis

on the response of firms to changes in incentives.

Despite the overall increase in operational trade ESW, the Bank has done less well in systematically mainstreaming trade in Country Assistance Strategies and in sector activities and policies, although the trend is improving. Regional trade coordinators (RTCs) in each of the Bank's six operational Regions are expected to facilitate the information flow between country management units (CMUs) and the PREM Network and to provide strategic direction on trade issues. However, it appears that achieving full effectiveness in their interventions is limited by budgetary, staffing, organizational and leadership issues. With the exception of Africa, the RTC role remains largely an unfunded mandate. The role of the coordinator varies across Regions, with sector leaders, lead economists, and sector managers variously being assigned the role. However, in most Regions it is unclear whether the RTC has the necessary authority to play a strategic role that cuts across sectors, or even lead discussions with CMUs. In addition, the absence of tangible budget support and links to annual performance evaluation reduces incentives. To enhance the role of Bank Regional vice presidential units (VPUs) in making trade linkages, it would be useful to clarify responsibilities, establish clear terms of reference and accountabilities, and for Regional management to indicate the modalities for integrating trade into the country dialogue and growth agenda.

After a slow start, knowledge management activities are picking up. A series of *Trade Notes* was initiated in 2003 and the trade thematic group is being revived. But a gap still exists between these activities and the needs of country economists. A survey of Bank country economists indicated a need for more knowledge about transitional costs associated with trade reform, greater empirical and comparative analysis, and practical research on global supply chains.

The current trade agenda goes beyond the traditional concern with border regimes of tariffs, nontariff barriers, and other impedi-

ments to trade. The gross distortions in trade regimes endemic in the 1980s have been reduced significantly. For this reason, greater attention is now focused on behind-the-border barriers (internal constraints) that adversely affect a country's investment climate, along with the constraints and opportunities associated with the global trading system.

Within the Bank, global advocacy to redress imbalances in the global trading system can be handled by senior management and the Trade Department alone. However, all the other impediments to global integration have to be addressed in conjunction with other sector groups and require strengthened implementation by operational VPUs (as highlighted above) and country management units.

In areas where the other sector groups worked with the Trade Department or where the Trade Department provided intellectual leadership—such as sanitary and phytosanitary standards and trade facilitation—the Bank has been successful in ensuring the operational relevance of its activities. In other areas where the Bank might have made an impact—agricultural trade and policies, trade and poverty linkages—inadequate investment and less intellectual leadership has led to less success. In an important area of focus in the ongoing WTO negotiations—services liberalization—the Bank lacks a critical mass of staff with the necessary skills to underpin country dialogue and operations.

To enhance the effectiveness of its trade activities, the Bank will have to face more squarely the multisectoral nature of the current trade agenda. Over half of the trade-related projects approved in the past 10 years were assigned to a non-PREM network. Specifically, the Bank will have to improve links between the various sectors and the Trade Department on trade issues (research, trade-related capacity building, knowledge management, and development of tools and templates). The Trade Department can bring the global perspective to sector issues. However, implementation rests squarely in the hands of the operational VPUs and the country management units. Success on this multisectoral front

will be the difference between individually competent pieces of analytical pieces and a more synergistic approach.

Recommendations

Recommendation 1: Address Poverty-Distributional Outcomes and External Shocks in a Balanced Approach

This evaluation found that despite the increasing volume of research on poverty issues in the Trade Department and of poverty and social impact analysis more generally, trade-related projects do not consistently or systematically address poverty and distributional outcomes. While much import liberalization has already occurred, further liberalization appears possible for some developing countries, notably within agriculture. With that in mind, three actions are critical:

- First, IEG recommends that, at the country level, all new projects with trade policy components include a discussion of this issue that, at a minimum, draws on the cross-sectoral expertise of economic policy, poverty, gender, private sector development, and (as appropriate) agricultural and rural development units, as well as existing research in the country. Identification of possible transitional costs and an assessment of the existing institutional framework for cushioning shocks and actions to mitigate or minimize shocks would be important considerations in the discussion. Placing trade in a broader discussion of the determinants of poverty will help ensure that this is not a mechanical exercise, but one rooted in its expected importance.
- Second, at the institutionwide level, and following the Bank's statement at the Cancun Ministerial in 2003, IEG recommends that a concrete program of adjustment assistance be developed more rapidly to respond to the trade-related shocks that developing countries may face. To the extent that such a program is no longer deemed relevant, it would be helpful for management to clarify this.
- Third, IEG recommends a more systematic program of research on micro-level adjust-

ment to trade policies, looking at firms, individuals, and households.

***Recommendation 2:
Revisit the Balance between Global and
Country Agendas and Strengthen Operational
Links on Trade Issues***

IEG recommends that management revisit the balance between its activities at the global level on the one hand, and on the Regional and country agenda on the other. Given the multisectoral nature of trade issues, a participatory process that involves operational sector colleagues, other networks, and the Trade Department is likely to yield the greatest benefits. Operational linkages need to be strengthened among different units of the Bank and greater emphasis placed on country and field operations. Three actions are necessary:

- First, greater strategic and intellectual guidance is needed from the Trade Department with respect to the conceptual framework within which country teams should consider trade issues. The design of a guidance note and upstream support on a pilot basis to country teams planning country assistance strategies would be practical first steps and would help distinguish cases where trade is logically a priority element in the country dialogue.
- Second, in three thematic areas of focus, a more formal set of arrangements between operations, networks, and the Trade Department is needed to maximize synergies—agricultural trade and policies, services liberalization, and distributional outcomes associated with trade policies.
- Third, as has been done between the Transport and Agriculture Units on the one hand, and the Trade Department on the other, IEG recommends that working arrangements with the Private Sector Department Vice-Presidency be established to highlight the interface between the two areas and bring the global dimension to bear more precisely. This cross-fertilization

of trade and the need for better integration of trade and the finance, private sector, and infrastructure (FPSI) work program is especially evident in the work on trade in services. Greater interaction between the Trade Department staff specialists in trade in services and the subsectoral expertise in transport, power, finance, telecoms, and so on located in FPSI is needed.

***Recommendation 3:
Strengthen Knowledge Management Efforts***

Two actions are important in this area:

- First, a concerted effort to bring all country economists up to date on the main features and applications of the World Integrated Trade Solution (WITS) software would enhance their awareness of the global trade issues and their implications for the countries they work on. It would also enable them to supervise research assistants and consultants and to seek further training if and when needed.
- Second, knowledge management efforts could reflect greater cross-fertilization with other networks and better integrate trade work done in the center with country-level work on agriculture, economic policy, labor markets, and private sector development. As part of these efforts, the possibility of joint thematic groups with other networks should be explored. More generally, IEG recommends a more effective use of knowledge management tools tailored to key target groups—across sectors. A mechanism to obtain regular systematic feedback from operational staff on the most immediate and relevant trade-related topics would be helpful, as the survey identified gaps, despite the canvassing conducted by regional trade coordinators during the year. Finally, greater sharing of country experience in particular areas, much as was done with the work in agricultural standards, is needed. This will require greater support from the center to ensure quality at entry for project design, as well as economic and sector work.