Reducing Trade Costs to support Africa's Transformation

The Role of Aid for Trade

United Nations
Economic Commission for Africa

REDUCING TRADE COSTS TO SUPPORT AFRICA'S TRANSFORMATION

THE ROLE OF AID FOR TRADE

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Abbreviations

3ADI	African Agribusiness and Agro-Industry Development Initiative
AfDB	African Development Bank
AfT	Aid for Trade
AIDA	Accelerated Industrial Development in Africa
AUC	African Union Commission
CAADP	Comprehensive Africa Agriculture Development Programme
CFTA	Continental Free Trade Area
COMESA	Common Market for Eastern and Southern Africa
CRS	Creditor Reporting System
DAC	Development Assistance Committee
EAC	East African Community
ECA	Economic Commission for Africa
ECOWAS	Economic Community of West African States
GDP	Gross Domestic Product
GVC	Global Value Chain
ICT	Information and Communications Technologies
IDA	International Development Association
IEA	Intergovernmental Energy Agency
KFAED	Kuwait Fund for Arab Economic and Social Development
LDC	Least Developed Country
LLDC	Land-Locked Developing Country
MDG	Millennium Development Goal
ODA	Official Development Assistance
OECD	Organization for Economic Cooperation and Development
OFID	OPEC Fund for International Development
REC	Regional Economic Community
SADC	Southern African Development Community
SIDS	Small Island Developing State
USD	United States Dollar
WTO	World Trade Organization

1 INTRODUCTION: AID FOR TRADE IN A BROADER PERSPECTIVE

At a conceptual level, the notion of Aid for Trade can be traced to the debate surrounding the Millennium Development Goal (MDG) 8 and the "global partnership for development". In practical terms, however, Aid for Trade entered the development discourse with the 2005 Hong Kong Ministerial Declaration of the World Trade Organization (WTO). That Declaration stated that "Aid for Trade cannot be a substitute for the development benefits that will result from a successful conclusion to the DDA, particularly on market access. However, it can be a valuable complement to the DDA".

The theme of the Fifth Global Review of Aid for Trade, "Reducing Trade Costs for Inclusive, Sustainable Growth", needs to be framed in a broader development context i.e. that of the UN Third International Conference on Financing for Development and the UN Summit for the Adoption of the Post-2015 Development Agenda. Beyond the agenda of the international community, a broader perspective is warranted by the very conjuncture in which Africa finds itself: that of a continent "at the fork of the road".[1] If from a macroeconomic perspective Africa is a rising continent, whose GDP doubled in real terms over the last 15 years (between 1997 and 2013), it is equally true that structural transformation remains still elusive.

Against this background, international trade continues to play a key role for Africa's economic growth and it has the potential to support structural transformation. For this virtuous circle to materialize, however, Africa needs to spur the development of its productive capacities. This is indeed the target against which to assess the contribution of Aid for Trade to Africa's development.

The challenges to address are evolving, in so far as the very nature of Africa's integration into the global market is also changing over the years. The interplay of declining transport/communication costs and production fragmentation has led to the emergence of Global Value Chains (GVCs). African countries have increasingly participated in GVCs, but mainly at the low rung of the ladder in GVCs, i.e. as supplier of raw materials and intermediate products with limited domestic transformation. Even in extractive sectors, where they display revealed comparative advantages, such as mining or agro-food, African economies remain typically confined to the low end of value chains, supplying products that embody very limited domestic value addition (ECA and AUC 2013). In the same vein, intermediate exports have increased more than four-fold in the space of ten years, but remain dominated by mining and resource-based manufactures (ECA, 2015a). Moreover, although the intra-African trade is significantly more diversified than the continent's trade with the rest of the world, many tariff and non-tariff barriers still create considerable fragmentation in the regional market.

Against this background, the recent launch of the Tripartite Free Trade Area, and the beginning of the negotiations for the Continental Free Trade Area (CFTA) represent two steps that promise to bring considerable benefits to the continent. It is clear, though, that Africa's transformation agenda will require complementing trade integration with interventions addressing supply-side constraints – notably poor infrastructures and limited access to finance – as well as non-tariff barriers (ECA 2013a and 2015a).[2]

Trade-costs are a key determinant of trade performance and investment decisions, especially in the context of GVCs, where trade frictions assume even greater relevance, since goods are likely to be exported and imported several times along the value chain. In this respect, addressing those trade frictions that put African traders at a disadvantaged position could go a long way in unleashing the region's trade potential. Furthermore, research points to the fact that trade facilitation measures could significantly boost the gains from regional integration initiatives, allowing a greater number of countries to reap the benefits from the trade liberalization envisaged in the Tripartite free Trade Area or the CFTA (ECA, AUC and AfDB 2012, Mevel and Karingi 2013, Valensisi, Lisinge and Karingi, 2014).

[1] The expression is borrowed from Zedillo, Cattaneo and Wheeler, (2015).

[2] This is indeed the rationale for the African Union Action Plan for Boosting Intra-African Trade (BIAT), a holistic approach to harness regional integration, articulated in 7 priority areas: namely Trade Policy, Trade Facilitation, Productive Capacity, Trade-Related Infrastructure, Trade Finance, Trade Information, and Factor Market Integration. The BIAT was adopted by the 18th African Union Summit of Heads of State, in January 2012.

On the other hand, it is worth noting that trade facilitation measures aimed at streamlining customs procedures need not – and should not – undermine the effectiveness of customs controls. UNCTAD (2009) cites for instance the case of Angola, Ghana, and Mozambique, where custom automation not only cut processing time, but actually led to an increase in revenue generation, by enhancing the efficiency of control systems and reducing the scope for corruption. The latter objective is a top policy priority for African countries, given that over the period 2001-2010 it is estimated that illicit financial flows from Africa totalled a cumulative sum of USD409 billion, only considering trade mispricing (Mevel, Ofa and Karingi, 2014; see also ECA, 2015b).

At this stage, the Fifth Global Review of Aid for Trade should shed some light on how Aid for Trade is responding to the challenges Africa faces, and in particular on how trade facilitation can deliver transformative, sustainable and inclusive growth. This report aims at contributing to this debate, and frames the discussion about Aid for Trade and trade facilitation, in the context of Africa's quest for structural transformation.

The report is structured as follows. The following section will present the recent trends in Aid for Trade flows to the African region, tracking progress in the implementation and impacts of the Aid for Trade initiative. Section 3 will outline the finding of the African responses to the OECD/WTO monitoring exercise underpinning the Fifth Global Review of Aid for Trade, whose aim was to survey how trade costs affect developing countries' competitiveness and what Aid for Trade can do to deliver inclusive, sustainable growth. Section 4 will finally draw a few concluding remarks.

2 MONITORING AID FOR TRADE FLOWS TO AFRICA

Recent evidence points to the fact that worldwide Official Development Assistance (ODA) flows reached their record-high in 2013, with commitments and disbursements touching respectively USD 187 billion and USD 167 billion, up from USD 171 billion and USD 152 billion in 2012 (all measured in constant 2013 dollars).[3] Year on year, this corresponds to an increase of 9.4% for ODA commitments and 9.9% for ODA disbursements; an expansion rapid enough to alleviate concerns about the past couple of years of slowdown (or even contraction) in ODA volumes. Despite such a resumption in upward trends, the international community remains far from its own ODA targets. In particular, ODA flows in 2013 reached approximately 0.3% of DAC donors GNI, far from the United Nations target of 0.7% enshrined in the Millennium Development Goal number 8 (United Nations 2014).

Perhaps not surprisingly, worldwide Aid for Trade flows also reached their record-high levels in 2013, with commitments totalling USD 55.4 billion and disbursements reaching instead USD 41.6 billion. Notwithstanding the simultaneous peaks, these two magnitudes have followed rather distinct trends over the last few years. Global Aid for Trade commitments peaked in 2010 at USD 46 billion, after five years of robust double-digit growth rate; they subsequently suffered a USD 2.3 billion slump in 2011 (-5%), and have rebounded since then: more strongly in 2012 (+22%), and then levelling off in 2013 (+3%). Worldwide Aid for Trade disbursements, conversely, have displayed a more stable upward trend, increasing at an average rate exceeding 12% from 2006 until 2010, and then continuing their climb until 2013, albeit at a slower pace of 7.3%. It is worth noting, that unlike Aid for Trade commitments (and unlike global ODA disbursements for that matter), Aid for Trade disbursements have proved remarkably resilient to the impact of the global economic crisis, avoiding any instance of contraction since the beginning of the Aid for Trade initiative in 2005.

In 2013 global Aid for Trade flows reached their record-high levels, with commitments totalling USD 55.4 billion and disbursements reaching USD 41.6 billion.

The picture becomes interesting once one looks at the regional breakdown in Aid for Trade flows, with Africa rivalling Asia for the role of top Aid for Trade recipient, and the two regions accounting together for roughly three quarters of the world total Aid for Trade commitments (Figure 1). In 2013, Aid for Trade commitments to Asia exceeded the corresponding flows to Africa: USD 22.7 billion compared to USD 19.3 billion. Beyond the absolute figure, though, it is interesting to note that the two regions were witnessing opposite movements: whereas Aid for Trade commitments to Asia increased by 33% compared to 2012, those to Africa shrunk by 12% year-on-year. For Africa this was the second contraction in five years, making the continent the only region that experienced a "double-dip" contraction in Aid for Trade commitments since the 2009 great recession. This said, in relative terms the Americas suffered an even stronger hit in 2013 (-16%), whilst Europe also witnessed a significant setback (-8%).

[3] Unless otherwise stated, data on ODA and Aid for Trade flows are drawn from OECD – Creditor Reporting System Database, consulted in the second half of April and first half of May 2015. For a more detailed explanation of data sources and methodologies, kindly refer to Annex 1.

Aid for Trade commitments to Africa contracted 12% in 2013, dropping to USD 19.3 billion

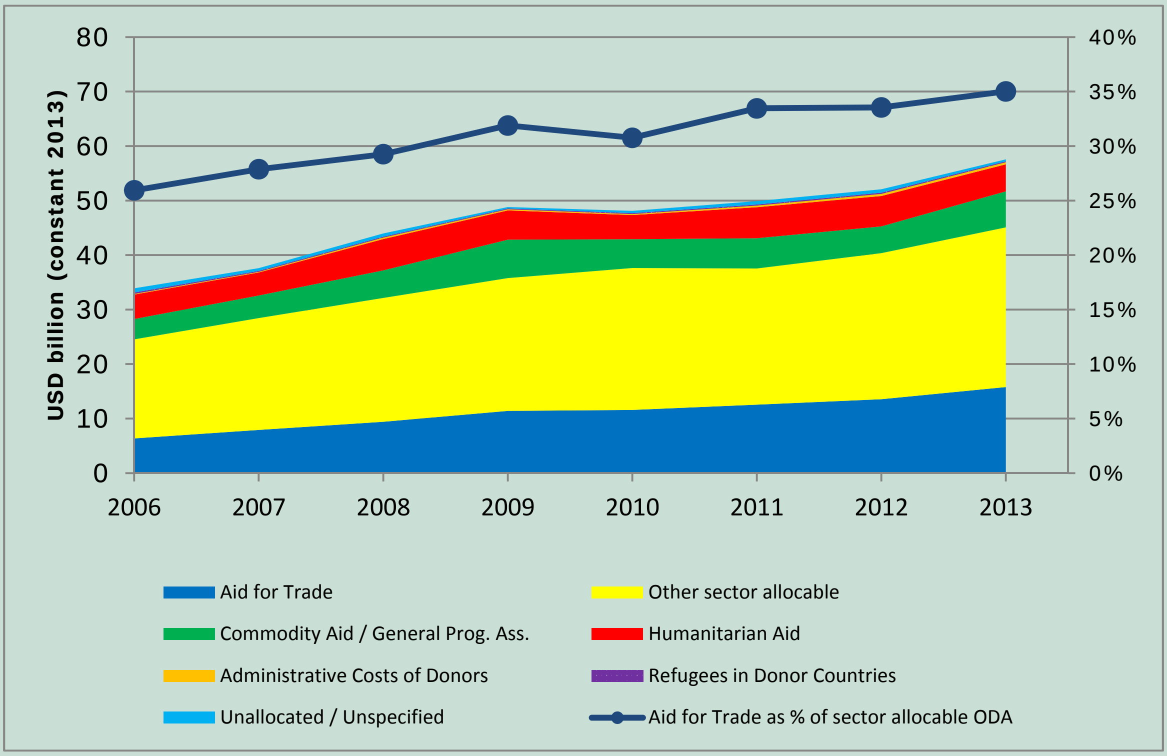
Box 1: What is Aid for Trade?

Aid for Trade can be defined as a sub-set of the Official Development Assistance (ODA), provided by official agencies and multilateral institutions for programmes or projects identified in recipient countries' development strategies as trade-related priorities. Only grants and concessional lending with a grant element of 25% or above (calculated at a discount rate of 10 percent) are counted as Aid for Trade, thus excluding a large proportion of other trade-related official flows (WTO and OECD, 2011).

Applying this definition to the African context, and distinguishing Aid for Trade from the various other components of ODA, yields Figure 1-Box 1. As can be seen, Aid for Trade has been slowly expanding its share of total ODA flows, and accounts nowadays for roughly 35 percent of sector allocable ODA disbursements, or 26 percent of total ODA disbursements excluding debt relief.

For more details, kindly refer to the statistical and methodological note in Annex 1.

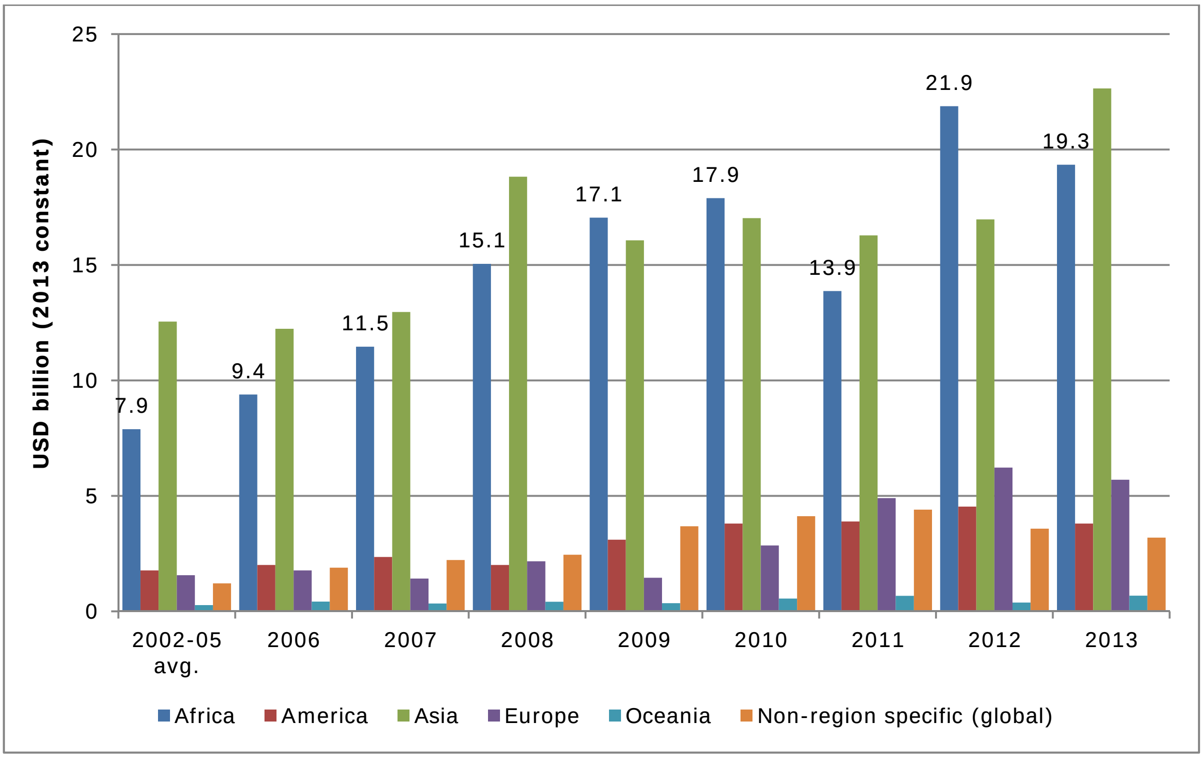
Figure 1 - Box 1: Disbursements of Aid for Trade and Overseas Development Assistance to Africa (excluding debt relief)



Source: authors calculation based on OECD Creditor Reporting System Database (consulted in April 2015)

Admittedly regional trends hide huge variability from one country to another (see Annex 2). The African region indeed includes some of the world biggest recipients of Aid for Trade commitments – such as Egypt, Tanzania, Morocco, Ethiopia and Mozambique, all of which received in 2013 more than USD 1 billion – but also some of the smallest ones (like Central Africa, Eritrea, Swaziland, Seychelles, Botswana, Equatorial Guinea and Gabon, which received less than USD 8 million each). Heterogeneity dominates also in terms of year-on-year growth (see Annex 3) in Africa: in 2013 commitments grew in 29 countries, but dropped in 25 others; however, they actually increased by 4.7% in the median African country, suggesting that the regional average is pulled down by the negative performance of large recipients such as Egypt, Morocco, Ethiopia and Kenya. More fundamentally from a policy-making point of view, country-level data point to the volatility of Aid for Trade funds over time. This is epitomized by the fact that the median African country has experienced 3 years in which Aid for Trade commitments between 2006 and 2013, and all African country (except South Sudan, for which there are only two observations available) have experienced at least one year of contraction in real terms, as well as a minimum of five years of growth.

Figure 1: Aid for Trade commitments by region



Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

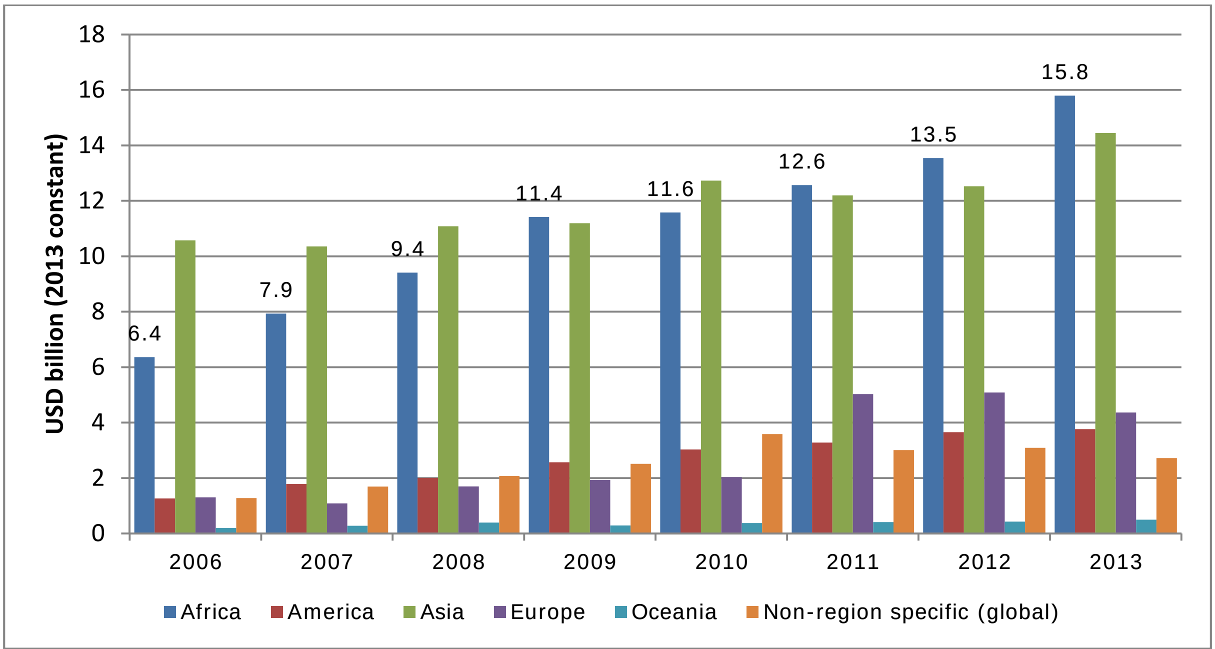
Compared to commitments, Aid for Trade disbursements have generally proved to be more resilient, and this is particularly the case for the African region, where the fluctuations of the former were mirrored by a significantly more stable trend in the latter. In 2013 disbursements to Africa recorded the highest growth rate in real term across world regions (+17%), reaching a peak of USD 15.8 billion; roughly 2.5 times the corresponding value in 2006. This growing availability of funds made Africa the top recipient of Aid for Trade disbursements in 2013; ahead of Asia with USD 14.5 billion (see Figure 2).

Overall, the above trend implies that Aid for Trade disbursements to the region have increased at an average rate of 14% per year since 2006, roughly the same rate of increase of commitments. The growing availability of Aid for Trade financing for Africa – in 2013 disbursements were 2.5 times as high as in 2006 – is certainly an encouraging sign. While disbursements have grown, they must be seen in the context of the scale of Africa's needs, notably its infrastructure gap.

Aid for Trade disbursements to Africa continued to display a strong resilience, reaching a record-level of USD 15.8 billion (+7% compared to 2012)

Once again, country-level data display a much more heterogeneous picture, both in relation to the magnitude and relevance of Aid for Trade disbursements for the recipient economy, as well as in terms of dynamics of such flows over time. With reference to the former element, Africa encompasses some of the biggest recipients of Aid for Trade worldwide – such as Egypt, Kenya, Morocco and Tanzania (all of which received over USD 1 billion in 2013) – along with some of the smallest recipients like Equatorial Guinea, Eritrea, Guinea-Bissau and Libya, which received less than USD 10 million each (see Annex 4).

Figure 2: Aid for Trade disbursements by region



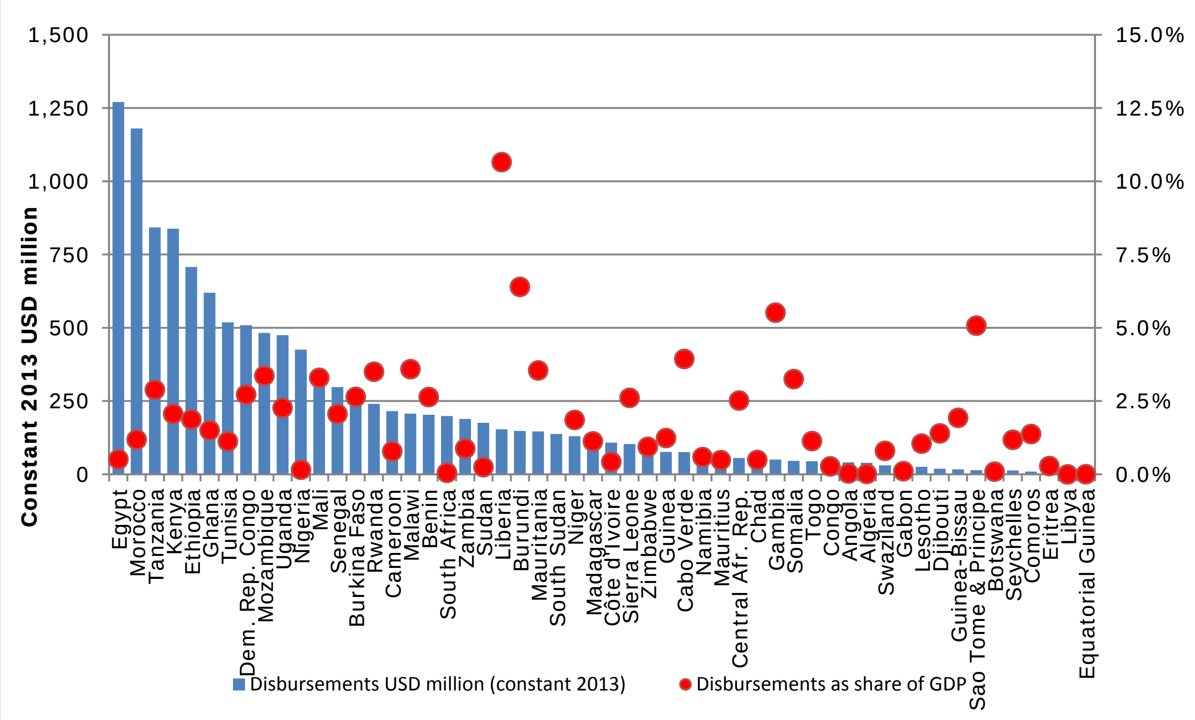
Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

Beyond absolute values of Aid for Trade disbursements, their incidence relative to the domestic economy or the size of the population varies hugely from one country to the other (see Annex 5 and 6 respectively). As evident from Figure 3, Aid for Trade flows to most African top recipients account for a relatively small share of GDP, particularly in the case of middle income countries such as Egypt, Morocco, Nigeria, or South Africa. Conversely, although in absolute terms they are not large recipients, small economies such as Liberia, Burundi, Gambia and Sao Tome and Principe received Aid for Trade disbursements for over 5% of GDP in the 2011-2013 period. If instead Aid for Trade disbursements relative to the size of population is taken into account, then it is the small islands that stand out visibly, with Cabo Verde, Seychelles, and Sao Tome and Principe receiving respectively in 2013 USD 119.80, USD 111.90 and USD 66.90.[4]

Small economies such as Liberia, Burundi, Gambia and Sao Tome and Principe received Aid for Trade disbursements for over 5% of GDP.

[4] Similar figures confirm the so-called "Island paradox", namely the fact that SIDS tend to have comparatively high levels of GDP per capita, but their economies depend largely on external flows (REFERENCE).

Figure 3: Aid for Trade disbursements by country (2011-2013 average)



Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

Heterogeneity and unpredictability characterize the pattern of year-on-year growth in Aid for Trade disbursements across African country, as shown in Annex 7. Notwithstanding the expansion in Aid for Trade flows mentioned earlier on, in each year of the period considered the number of African countries witnessing a real term decline in Aid for Trade disbursements hovered between a minimum 16 and a maximum of 30. Indeed 2013 was one of the two years in which "only" 16 African countries were recording such contraction, but the number of countries in that situation was as high as 30 in 2012. Moreover, it remains as a fact that the prolonged downturn in key donor countries has somewhat dampened the expansion of Aid for Trade disbursements to Africa: in 34 out of 54 African countries the average real growth rate of Aid for Trade disbursements between 2011 and 2013 was lower than the one recorded in the period 2008-2010. Similarly, even though Aid for Trade disbursement to Africa grew by a factor of 2.5 between 2006 and 2013, in the same period the median African country witnessed 2 years of real decline in Aid for Trade disbursements (see Annex 7).

Even though some of Africa's biggest Aid for Trade recipients are middle income countries, the incidence of disbursements relatively to GDP is much higher in small economies and countries with special needs.

Unpredictability also appears to be a defining trait of Aid for Trade flows in Africa, both at regional as well as at country level where simple disbursement-to-commitments ratios display ample fluctuations from one year to the other (Annex 8). Averaging over the 2006-2013 period, Africa appears to be the region with the lowest Aid for Trade simple disbursement-to-commitments ratio: on average 71%, compared to 73% in Asia, 77% in Oceania, 83% in America, and as much as 86% in Europe.[5] Moreover, the two instances when the ratio improved significantly for the region as a whole (2011 and 2013) correspond precisely to those years when Africa recorded sharp fall of Aid for Trade commitments; for the rest of the time the ratio hovered between 60 and 70% (see Figure 4). As clarified by practitioners' views, this situation is plausibly related, not only to the

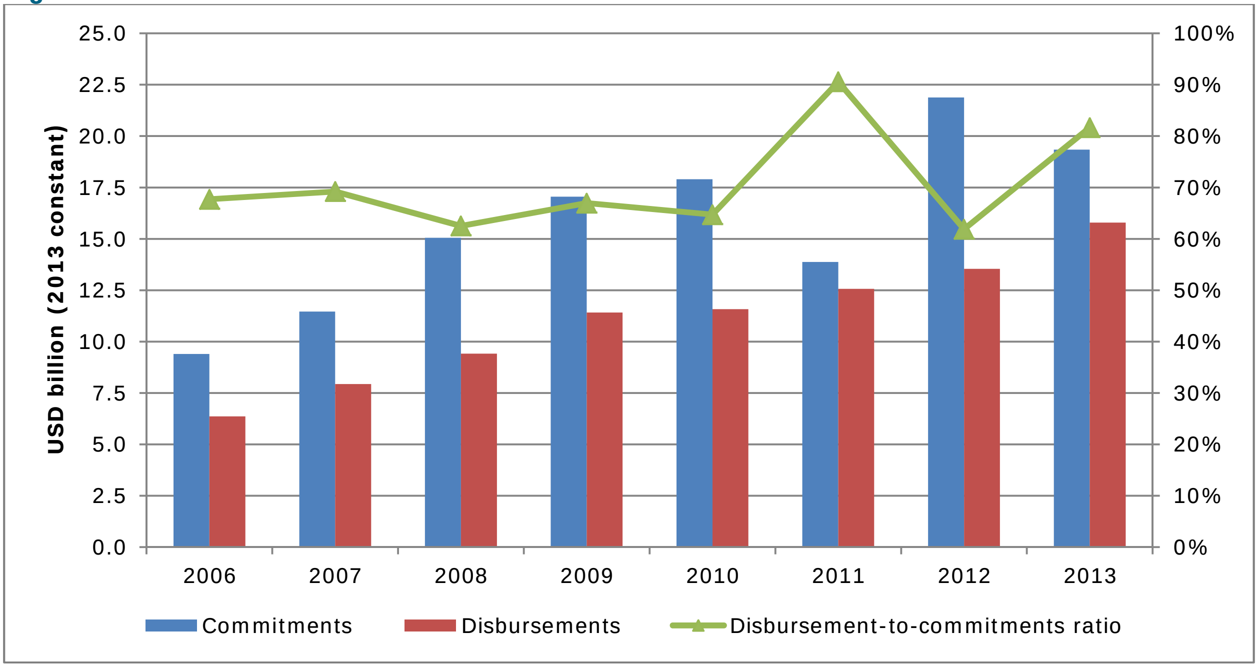
[5] Notice that the figures reported here are national averages, which refer to the ratio between total disbursements and total commitment to a certain country in a given year, not project-by-project comparisons.

channels through which the downturn in donor countries affects the Aid for Trade variables, but also to difficulties in formulating bankable Aid for Trade projects and accessing multiple funding windows (ECA, 2013a).[6]

2.1 Composition of Aid for Trade flows

In the 2011-2013 period an average of 51% of Aid for Trade disbursements to Africa have consisted of grants instruments, concessional loans represented another 45% of Aid for Trade disbursements to the region, while the remaining was accounted for by equity investments (Figure 5). Whilst the prominence of grants in Africa compares unfavourably with Oceania (which received 77% of funds in the form of grants, but accounts for an overall limited share of Aid for Trade funds), it is in line with that observed in America, and far higher than those of Europe and Asia (where loans constituted respectively 62 and 81% of total disbursements). Over time, the weight of grant instruments as a proportion of total Aid for Trade disbursements appears to be slightly declining in Africa, as well as in 30 out of 54 African countries, with the corresponding expansion of concessional loans. This slowly emerging trend appears, however, to be mainly in non-LDC recipients, whereas grant instruments have maintained their relevance for LDC countries, in line with their structural needs. Indeed in the 2011-2013 period, grant instruments accounted for over 70% of Aid for Trade disbursements to African LDCs, compared to roughly 45% for African non-LDCs (see Annex 9).

Figure 4: Aid for Trade commitments and disbursements to Africa



Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

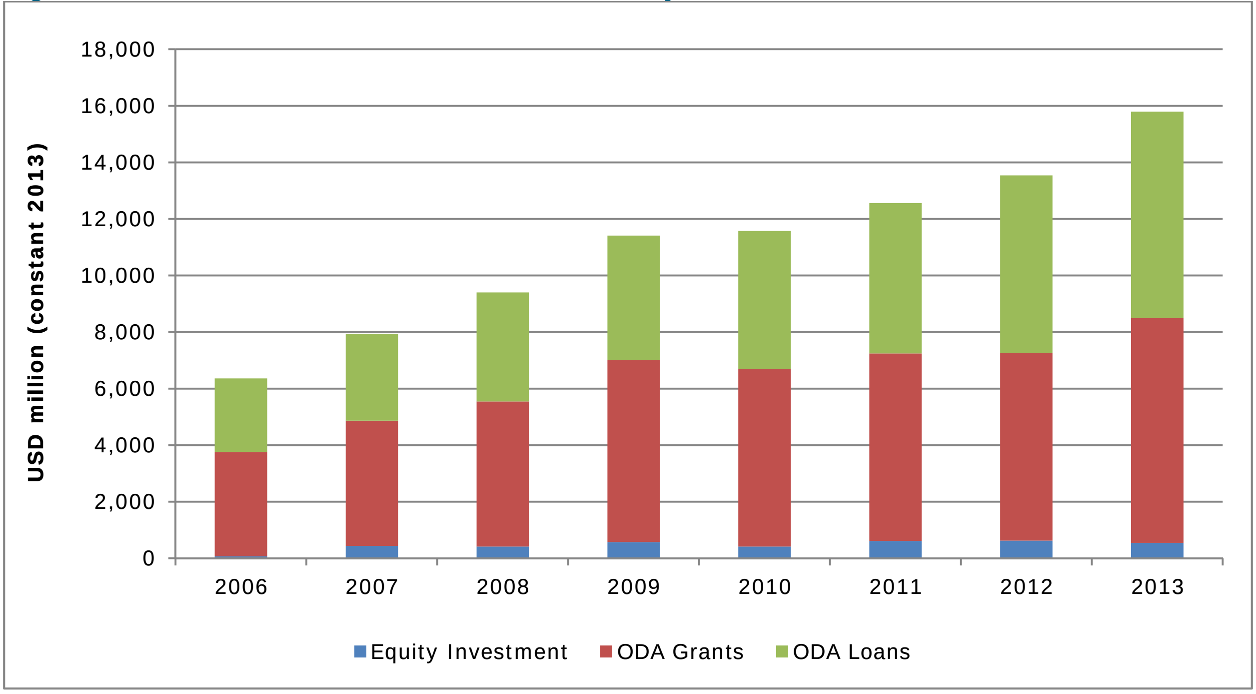
Grant element and "donor-mix" have remained stable over time, but there is a noticeable shift towards regional programmes

In terms of donors, Aid for Trade support to Africa is almost equally accounted for by bilateral and multilateral donors. World Bank's International Development Association (IDA) is by far the largest Aid for Trade donor to Africa, disbursing roughly 19% of total Aid for Trade in 2011-2013, followed by European Union institutions and United States, accounting for 18% and 10%, respectively (Table 1). Amongst continental institutions, the African Development Bank (AfDB) also plays a very prominent role in financing Aid for Trade projects and programmes, mainly through its

[6] Interestingly, evidence documented in ECA 2013 suggested that the disbursement-to-commitments ratio tends to be significantly lower for the support dedicated to trade-related infrastructure, than for other Aid for Trade proxies; this is consistent with the nature of infrastructural projects, which tend to be characterized by complex formulation phase, longer gestation periods, and large disbursements which extend over multi-year periods.

concessional window targeting 40 eligible countries: the African Development Fund.[7] Interestingly, although only a few non-DAC donors report to the OECD Creditor Reporting System database, even this limited evidence confirms the growing involvement of non-traditional partners in supporting the development of African trade capacities (see ECA 2013a). Entities such as the Arab Fund (AFESD), the United Arab Emirates, Kuwait (KFAED), and the OPEC Fund for International Development OFID are gradually playing a more visible role as providers of Aid for Trade, to the extent that non-DAC donors accounted for over 4% of total Aid for Trade disbursements in the last three years for which data are available.

Figure 5: Aid for Trade disbursements to Africa by flow



Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

The bulk of Aid for Trade financing to Africa supports economic infrastructure and productive sectors (mainly agriculture, and to a lower extent banking and industry)

From African regional perspective it is important to observe that, although the overwhelming majority of funds are still disbursed at a bilateral level (i.e. to a single recipient country), regional or sub-regional programmes are gradually acquiring a growing prominence, in Africa more than in other regions (Figure 6The sectoral composition of Aid for Trade disbursements to Africa is broadly in line with worldwide trends. The bulk of Aid for Trade funds is channelled towards trade-related infrastructure (54% in the 2011-2013 period) and productive capacities (44%); trade policy and regulations account for a further 3% of disbursements, whereas a negligible share of the funds is earmarked for trade-related adjustment (see Figure 7). In other words, at the peak of Aid for Trade disbursements to the region in 2013 Africa received USD 8.5 billion for trade-related infrastructure, USD 6.8 billion for productive capacities, USD 490 million for trade policy and regulation, and finally a mere USD 1 million for trade adjustment.

Figure 6). The share of Aid for Trade disbursements accounted for by regional programmes in the continent has climbed from 9% of the total, between 2006 and 2008, to 12% over the 2011-2013 period. At a time when regional integration features as a top priority for Africa's policy-makers – as epitomized by the launch of the negotiations for the establishment of the Continental Free Trade Area, and the implementation of the African Union Action Plan for Boosting Intra-African Trade – this trend is encouraging and promises to intensify in the future. As emerged also from the responses to the questionnaire carried out by ECA, AUC and WTO in preparation for the Fourth

[7] For more information on the Africa Development Fund, kindly refer to http://www.afdb.org/en/about-us/african-development-fund-adf/about-the-adf/.

Global Review of Aid for Trade, this tendency testifies donors' movement towards closer alignment with continentally agreed development strategies (ECA, 2013a).

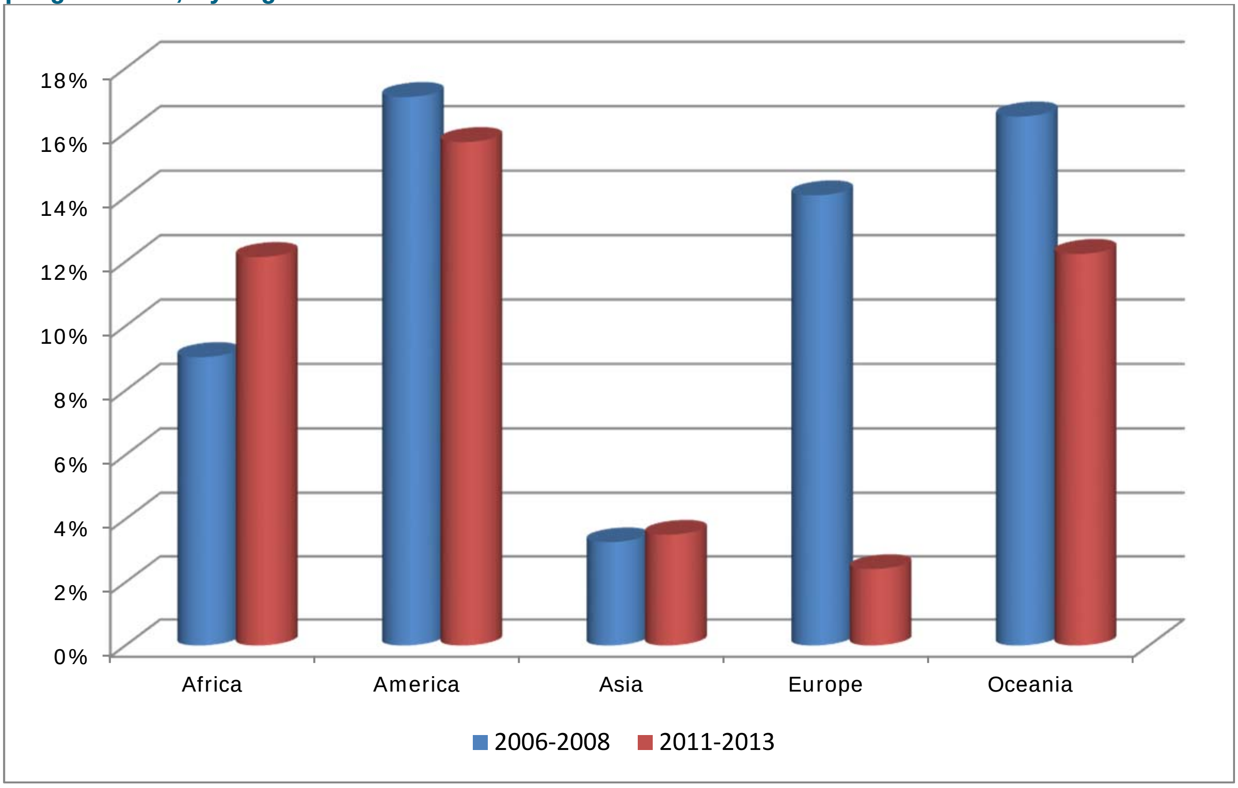
Table 1: Top 20 Aid for Trade donors to Africa (disbursements; 2011-2013 average)

	Millions USD constant 2013	**% share**
IDA	2,609.73	19%
EU Institutions	2,538.38	18%
United States	1,333.63	10%
AfDF (African Dev.Fund)	1,127.87	8%
France	879.48	6%
Japan	781.81	6%
Germany	716.84	5%
United Kingdom	595.68	4%
Arab Fund (AFESD)	546.12	4%
United Arab Emirates	400.00	3%
Norway	335.74	2%
Denmark	278.48	2%
Canada	253.88	2%
Kuwait (KFAED)	235.21	2%
Netherlands	180.23	1%
Belgium	170.28	1%
Sweden	169.52	1%
Spain	138.08	1%
Korea	112.21	1%
OFID	94.21	1%

Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

The sectoral composition of Aid for Trade disbursements to Africa is broadly in line with worldwide trends. The bulk of Aid for Trade funds is channelled towards trade-related infrastructure (54% in the 2011-2013 period) and productive capacities (44%); trade policy and regulations account for a further 3% of disbursements, whereas a negligible share of the funds is earmarked for trade-related adjustment (see Figure 7). In other words, at the peak of Aid for Trade disbursements to the region in 2013 Africa received USD 8.5 billion for trade-related infrastructure, USD 6.8 billion for productive capacities, USD 490 million for trade policy and regulation, and finally a mere USD 1 million for trade adjustment.

Figure 6: Share of Aid for Trade disbursements earmarked for regional and sub-regional programmes, by region

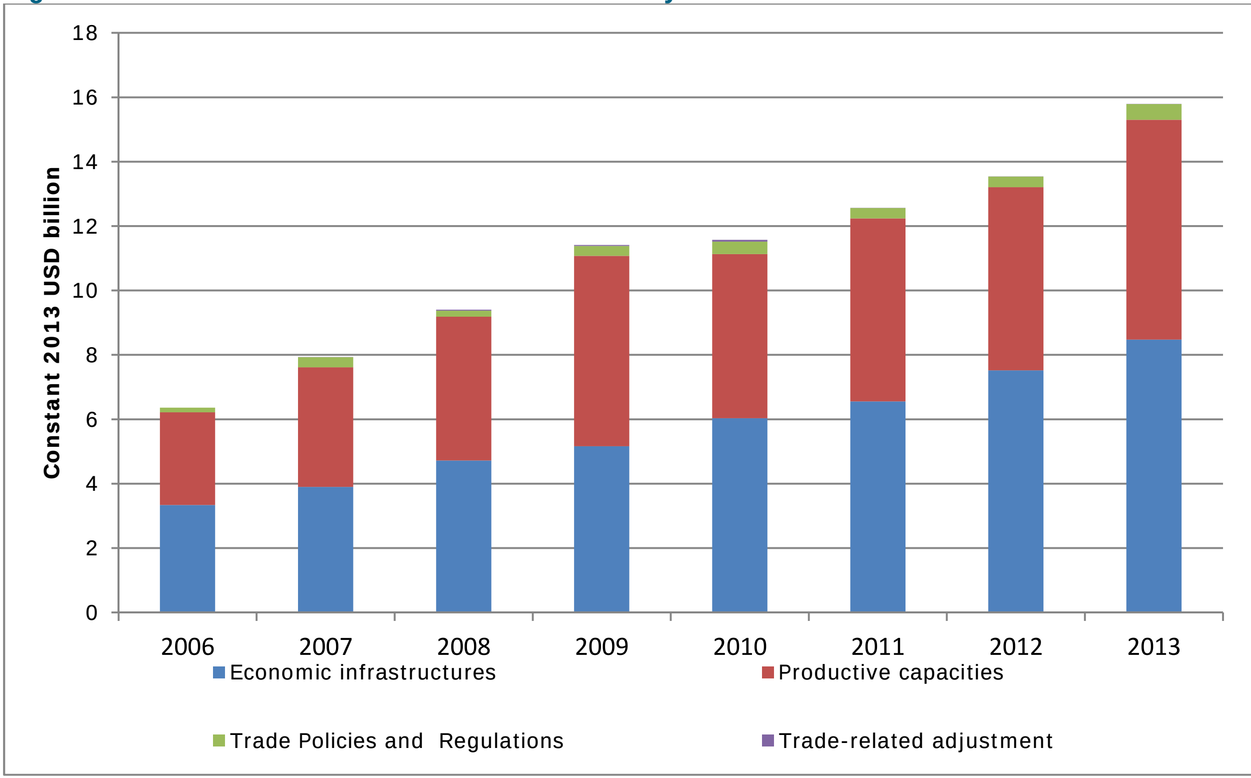


Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

If, as mentioned earlier, Aid for Trade disbursements to Africa grew on average at a 14% per year between 2006 and 2013, it is worth observing that the different main sectors contributed in distinct ways to this overall performance (Figure 8). Economic infrastructure projects and programmes underpin more than half of the above expansion, consistently posting a positive and significant increase.[8] Support for productive capacity development also explains a large proportion of the overall boost in Aid for Trade disbursements; however they have displayed a much more erratic dynamic in the wake of the 2009 "great recession", alternating years of buoyant growth to years of contraction. Whilst many plausible factors may explain these distinct performances, one element to keep in mind is the fact that donors seem to align more closely to some continentally agreed frameworks (like the Programme for Infrastructural Development in Africa - PIDA or Comprehensive Africa Agriculture Development Programme - CAADP) that to others (such as the Accelerated Industrial Development in Africa - AIDA or the African Agribusiness and Agro-Industry Development Initiative - 3ADI). In other words, the different performance of the various main sectors may signal a distinct level of "buy-in" on the parts of the donors (see also ECA, 2013a).

[8] Indeed, the contribution to Aid for Trade growth accounted for by the economic infrastructure sector exceeded 5%, even in 2010 when overall disbursements increased only by 1%.

Figure 7: Aid for Trade disbursements to Africa by main sector

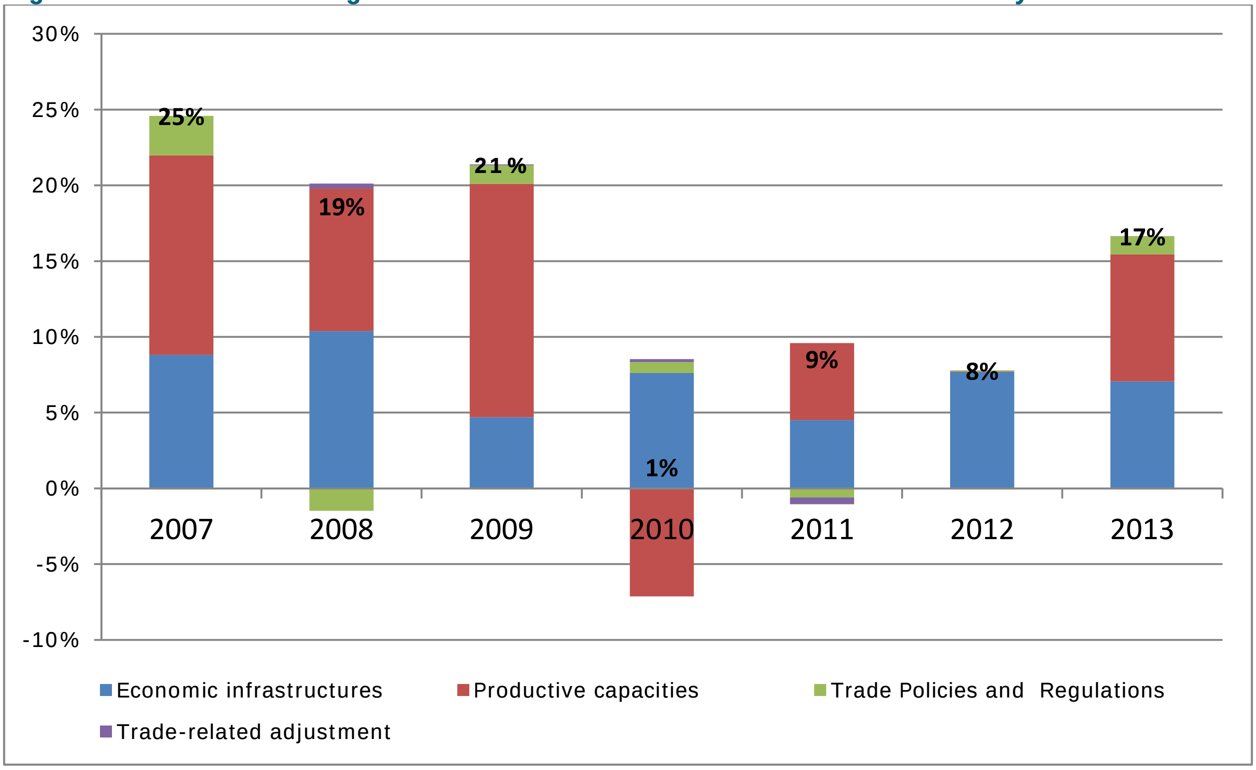


Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

To get a more refined picture of which sectors in Africa receive support through Aid for Trade, it is instructive to investigate the composition of disbursements to Africa at a deeper level of disaggregation, as done in Figure 9. Averaging over the 2011-2013 period, the prominence of economic infrastructure can be gauged by the fact that transport and storage alone accounted for nearly one third of all Aid for Trade disbursements to Africa (mainly financing roads, and to a much lesser extent rails, water and air transport). Still with reference to infrastructure another 20% of total Aid for Trade disbursements was accounted for by energy generation and distribution, and a further 1% by communication infrastructure.[9] Amongst productive sectors, agriculture forestry and fishing accounted for the lion's share of Aid for Trade disbursements, receiving 24% of the total (mainly in support of agricultural development, irrigation and food production issues). Industry and banking and financial services also play a significant role, receiving 6% of total disbursements, followed by mining (4%), business services (3%) and tourism (1%). Finally, Trade policies and regulations accounted for a mere 3% of total Aid for Trade disbursements.

[9] It should be noted, however, that the African ICT sector typically lends itself to a much more prominent involvement of private investors, including through Public-Private Partnerships (Gutman et al., 2015).

Figure 8: Contribution to growth in Aid for Trade disbursements to Africa by main sector



Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

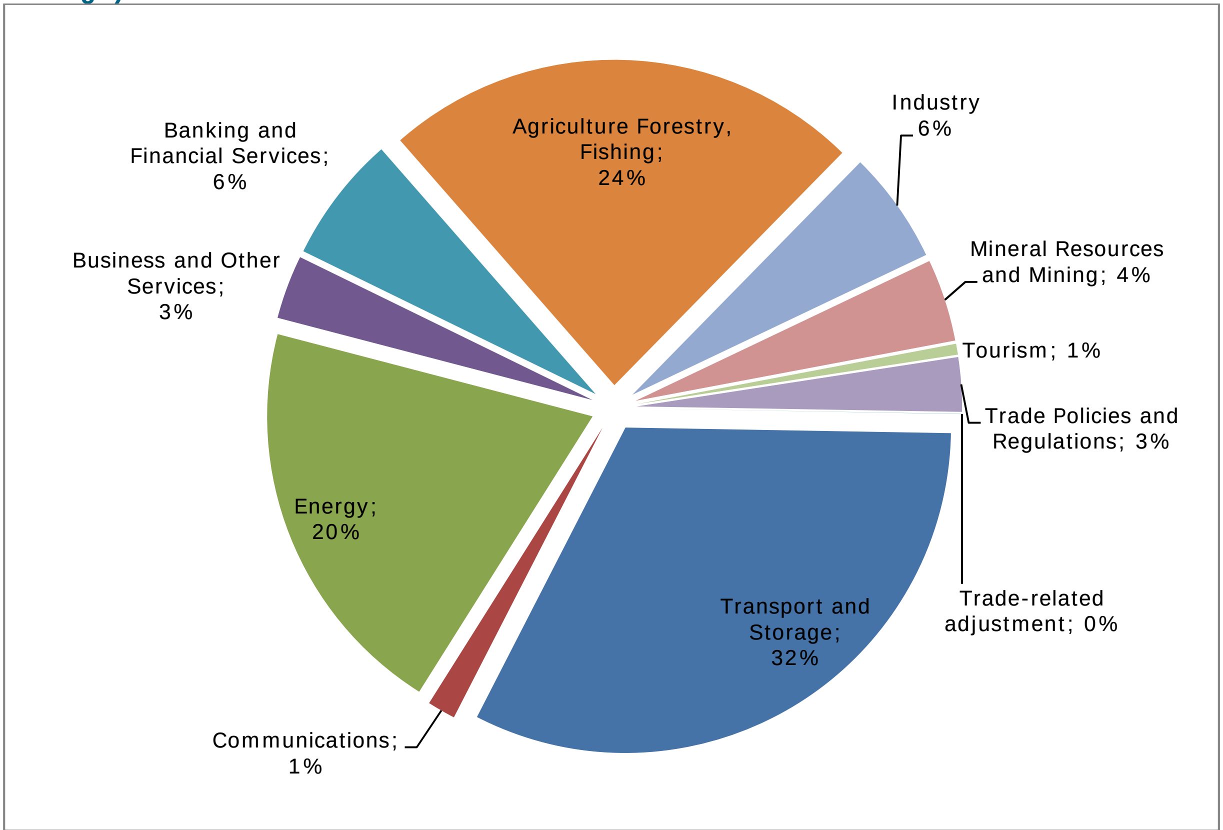
As could be expected, the sectoral composition of Aid for Trade disbursements varies greatly from one country to another (see Annex 10). Such variability stems from country-specific geographic and economic factors, as well as from the interplay between the precise development strategies of the recipient countries and the frameworks of reference of donor partners. At one end of the spectrum, in countries like Angola, Equatorial Guinea, Eritrea, Libya, Malawi, Niger, and Zimbabwe more than two thirds of Aid for Trade disbursements were devoted to building productive capacities in the period 2011-2013. Conversely, in countries such as Cabo Verde, Central African Rep., Djibouti, Mauritania, and Seychelles over three quarters of the funds financed economic infrastructure.

Since the beginning of the Aid for Trade initiative, the sectoral composition of Aid for Trade disbursements has remained rather stable over time at the regional level. For Africa as a whole, the only noticeable changes compared to the corresponding composition five years before (i.e. over the 2006-2008 period) has been an increase in the weight of energy (+4%) at the expenses of business services, and a smaller increase in the share of mining (+2%) corresponding to a decline in banking and financial services. More pronounced shifts have been be observed, instead, at a country-level especially in small recipients where the approval or the end of a few large projects could entail a dramatic changes in the underlying composition (see Annex 10)

Generally speaking, the above allocation appears to be broadly in line with Africa's development priorities – as enshrined notably in the Common African Position (CAP) on post-2015 or in the Agenda 2063– even though it could be argued that the support provided to the industrial sector does not make full justice to the emphasis paid by African policy-makers to structural transformation. This situation, however, is likely to reflect both "supply and demand" factors, whereby donors have not aligned themselves fully with Africa's development strategies, while at the same time African countries may find it more difficult to convincingly articulate their project proposals related to industrialization (ECA, 2013a). A related concern is the degree of alignment of Aid for Trade allocations with African countries development strategies, and the degree of ownership of the latter. Generally speaking, results from a survey conducted by ECA, AUC and the WTO in 2013 suggest that African countries are gradually assuming more ownership of their development strategies, including through policy coordination at the level of Regional Economic Communities, and this process ultimately improves the degree of alignment by donors. However, a more proactive stance by recipient countries, including in the formulation as well as monitoring and evaluation of Aid for Trade activities, could reinforce the degree of alignment (*ibidem*).

Given the theme of the Fifth Global Review of Aid for Trade, "Reducing Trade Costs for Inclusive, Sustainable Growth", Aid for Trade disbursements for trade facilitation activities deserve closer attention. Though starting from a very low base, disbursements for trade facilitation have increased by a factor exceeding 25 times since the start of the Aid for Trade initiative, climbing up from 0.2% of total Aid for Trade disbursement to 1.6% of the total (see Figure 10).[10] Equally interesting, regional and sub- regional trade facilitation activities appear to play a significant role in Africa, to the extent that regional programmes accounted for an average of 43% of the total in the 2011-2013 period, albeit with significant variability from one year to the other.

Figure 9: Composition of Aid for Trade disbursements to Africa by sector (2011-2013 average)



Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

Aid for Trade disbursements for trade facilitation activities have skyrocketed from roughly USD 10 million in 2006 to USD 260 million in 2013, with a significant proportion of funds disbursed through regional projects

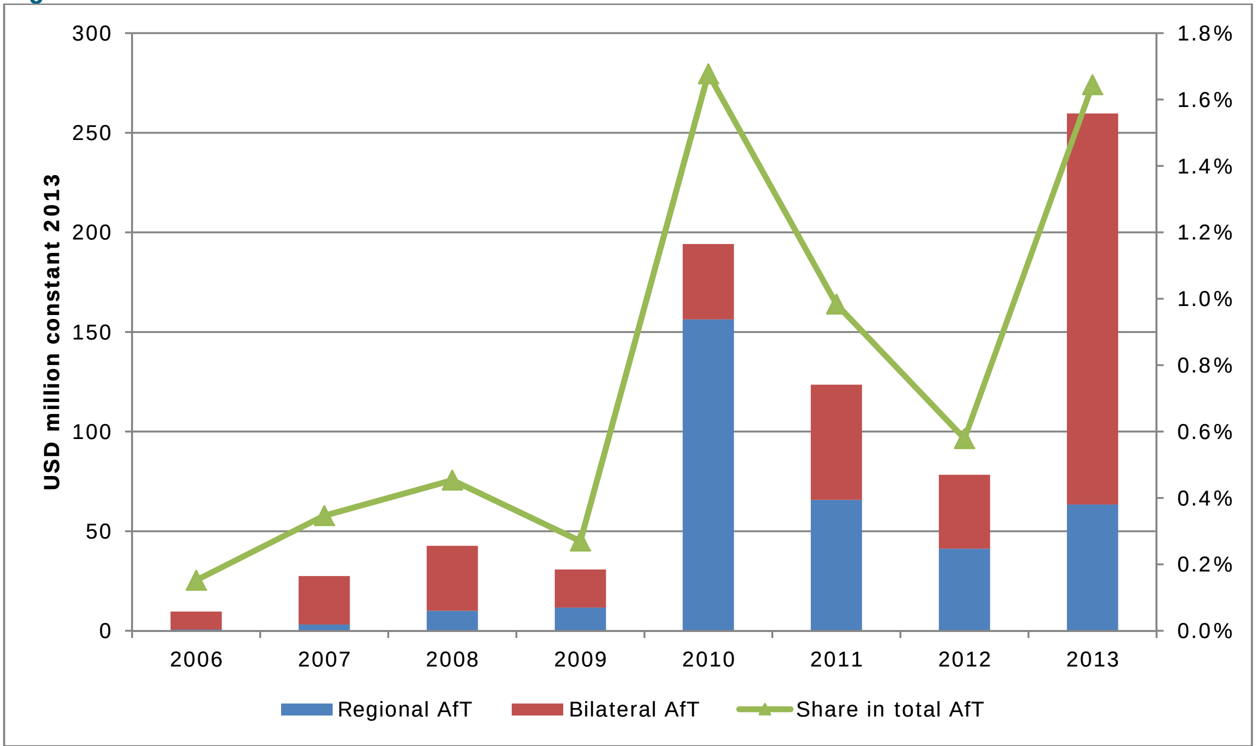
In the African context – where custom procedures are often cumbersome, time-consuming, and fraught with unnecessary transaction costs – such an emphasis on trade facilitation is a welcome sign. Empirical analysis suggests that sizeable reductions of trading costs could be achieved by enhancing the efficiency of custom and administrative procedures across the continent, thereby benefitting the competitiveness of African firms (refer to ECA, 2013b; and Valensisi, Lisinge and Karingi, 2014, among others). In the framework of global value chains, the constraints posed by time-consuming and costly custom procedures assume an even higher relevance, since goods are likely to be exported and imported several times along the value chains. Moreover, such administrative barriers and red tape often affect SMEs disproportionately, given their lower volumes and the fix cost nature of many custom procedures (notably document preparation). In

[10] Notice, however, that the bulk of this increase took place in 2010, and since then real disbursements for trade facilitation have declined by over 30%, though remaining well above USD 120 million.

line with these considerations, inefficient border procedures are univocally regarded as one of the key bottlenecks hampering not only Africa's participation in the global market, but also – and perhaps more fundamentally – its own regional integration.

If trade facilitation activities promise to be "quick wins", especially when buttressed with significant improvements of infrastructural provisions, the underlying costs should not be overlooked. Automating custom procedures, realizing "one-stop-border-posts", and even streamlining administrative processes require financial and technical resources to purchase the appropriate technologies, upgrade the skills of civil servants, as well as strong political will to address the "political economy dimension" of trade facilitation reforms. As will be discussed later in the report, adequately assessing these challenges is of paramount importance to spur the implementation of trade facilitation reforms.

Figure 10: Aid for Trade disbursements for trade facilitation in Africa



Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

2.2 Comparative analysis across various groups of vulnerable countries

It was noted earlier, and it is patent from the various annexes, that once analysis of Aid for Trade flows is done at an individual country level, what stands out is the great heterogeneity across African countries. Acknowledged this aspect, it remains worth comparing the situation across various categories of structurally disadvantaged countries, namely Least Developed Countries (LDCs), Land-Locked Developing Countries (LLDCs) and Small Island Developing States (SIDS). The purpose of such comparison is assessing the extent to which Aid for Trade allocation reflects the special needs and vulnerabilities of these internationally recognized categories of countries.
Currently, 34 African countries belong to the LDC category, and in 2013 they accounted for approximately half of Africa's total population and 21% of its GDP.[11] Between 2011 and 2013, African LDCs received on average 52% of the Aid for Trade flows to the African region, excluding regional and sub-regional programmes; that is an average disbursements of USD 6.4 billion a year

[11] Aid for Trade data distinguish South-Sudan from Sudan only from 2011 onwards, as the former became an independent nation only on 9 July 2011, and was subsequently identified for inclusion in the LDC category in the 2012 triennial review by the Committee for Development Policy. Before 2011, South Sudan was hence part of Sudan, which in turn was – and still is – included amongst the LDCs, but not as landlocked countries. Since Figure 11 refers to the period 2011-2013 South Sudan is categorized there amongst the LDCs as well as LLDCs.

(in constant 2013 dollars). As shown in Figure 11, this pattern of allocation implies a relative small difference in Aid for Trade disbursements per capita between LDCs and non-LDCs (USD 11.36 and USD 11.04 per person, respectively). The difference however is more significant when disbursements are normalized relative to the size of the recipient economies: indeed African LDCs received on average 1.5% of GDP through Aid for Trade, whereas non-LDCs in the region received on average 0.4% of GDP

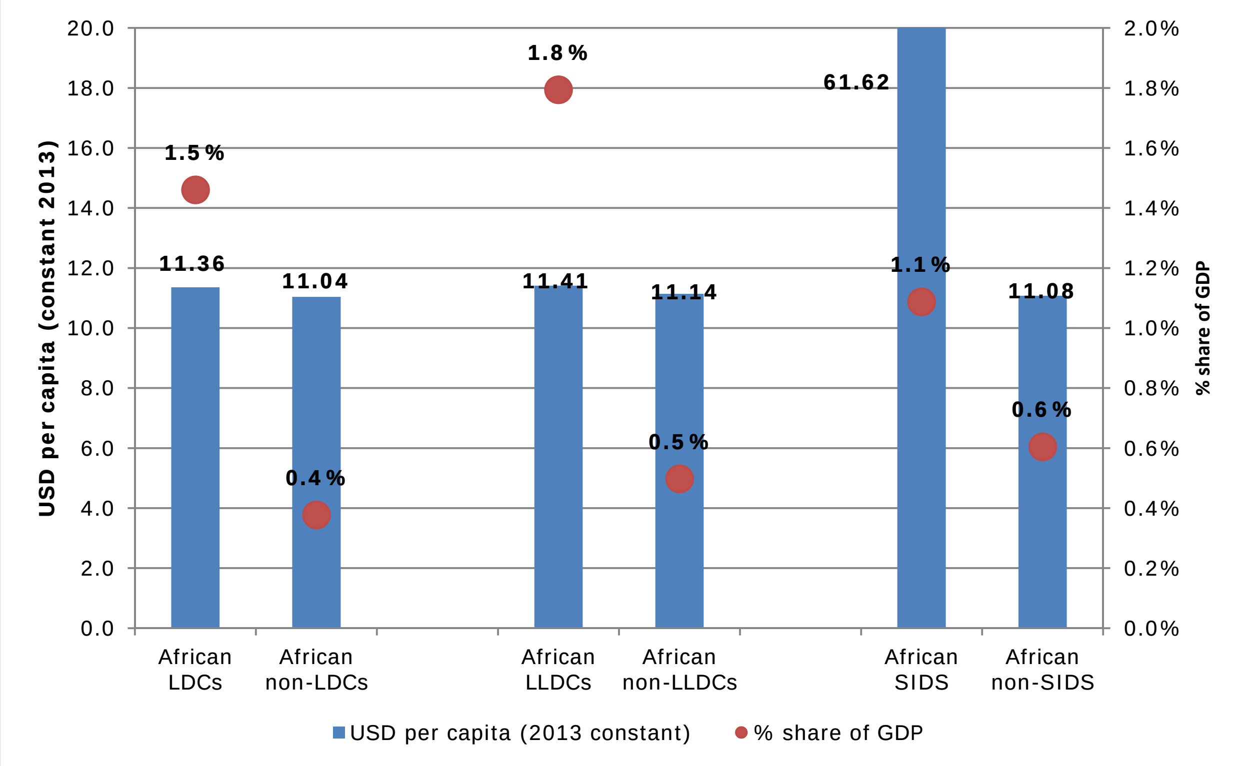
Relative to the size of their economies, LDCs, LLDCs and SIDS receive larger Aid for Trade flows than other African countries not belonging to these categories of countries with special needs

The African continent hosts a relatively large number of landlocked countries (LLDCs), 16 out of 54 nations, and in 2013 LLDCs accounted for 26% of Africa population and 9% of its GDP. During the period spanning from 2011 to 2013, African LLDCs received roughly USD 3 billion a year in Aid for Trade disbursements (in constant 2013 dollars); that is roughly one fourth of the total disbursements to the region, excluding regional and sub-regional programmes. This translates into an average disbursement of USD 11.41 per capita over the same period, compared to USD 11.14 to non-landlocked African economies (see Figure 11). Again, the difference between LLDCs and non-LLDCs is clearer when disbursements are normalized according to the size of the economy, than in per capita terms: averaging over the 2011-2013, Aid for Trade disbursements amounted to 1.8% of GDP in the case of African to LLDCs, but a mere 0.5% of GDP for non-LLDCs.

Accounting for roughly 0.2% of Africa's total population and 0.8% of the continent's GDP, African SIDS received an average Aid for Trade disbursement of USD 168 million, i.e. about 1.4% of total Aid for Trade disbursement to the region.[12] When one takes into due account their small size, African SIDS appear to be particularly favoured in terms of Aid for Trade allocation. To see this, suffices to notice that between 2011 and 2013 their Aid for Trade receipts averaged USD 61.62 per person, compared to USD 11.08 per person in non-SIDS African countries. The significance of Aid for Trade flows for SIDS economies is only slightly lowered when measured in relation to their economic size: SIDS received an average 1.1% of their GDP through Aid for Trade, compared to 0.6% for non-SIDS African countries. The lower magnitude of Aid for Trade when normalized to the size of the economy, rather than to the size of the population, is a reflection of the so-called "Island paradox", meaning the tendency of SIDS to display relatively higher GDP levels, but to also remain highly dependent on external financial flows, and vulnerable to exogenous shocks.

[12] Lacking established criteria to determine an official list of SIDS, this report utilizes UNCTAD's unofficial list according to which the following African countries are considered SIDS: Cabo Verde, Comoros, Mauritius, Sao Tome and Principe, and Seychelles. UNCTAD's unofficial list is available at http://unctad.org/en/pages/aldc/Small%20Island%20Developing%20States/UNCTAD per centC2 per centB4s-unofficial-list-of-SIDS.aspx (http://unctad.org/en/pages/aldc/Small Island Developing States/UNCTAD%C2%B4s-unofficial-list-of-SIDS.aspx)

Figure 11: Aid for Trade disbursements across special categories of countries (2011-2013 average)



Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

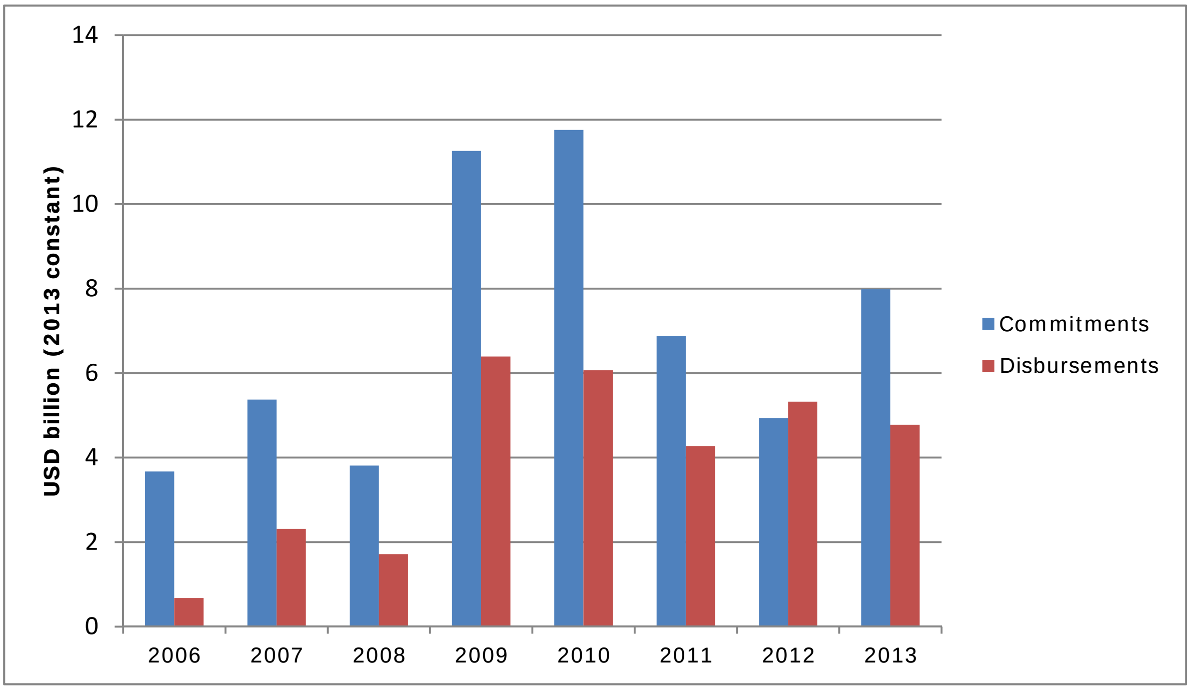
In conclusion, donors appear to continue taking into account, at least to some extent, the special needs of LDCs, LLDCs and SIDS, in so far as their Aid for Trade receipts remain significantly higher than for other African countries, especially when assessed in relation to the size of the recipient economies. Nevertheless, within Africa there may be less evidence to suggest that Aid for Trade is increasingly targeting these groups of countries: at least if one considers the totality of ODA flows (i.e. equity investments, grants and loans), in absolute terms African middle income countries are still playing a prominent role as recipients of Aid for Trade flows. Vulnerable groups of countries, however, appear to be somewhat favoured in terms of Aid for Trade instruments utilized, receiving a significantly higher share of grants. This said, country-specific elements still appear to largely drive the trend in Aid for Trade flows, regardless of the category a certain country belongs to.

2.3 Other Official flows

The analysis of aid for Trade flows has so far focused on ODA, as explained in Box 1. For the sake of completeness, it is worth mentioning that in addition to ODA, developing countries also receive trade-related other official flows, meaning official sector transactions which but do not meet the ODA criteria. Worldwide, the magnitude of trade-related other official flows has increased significantly faster than trade-related ODA, going from USD 7.8 billion in 2006 to USD 32.7 billion in 2013, and this growth accelerated in the aftermath of the 2009 global financial and economic crisis. These flows, however, appear to be largely concentrated in middle-income countries (especially upper-middle income ones); accordingly Africa accounts for 15% of world total disbursements of trade-related other official flows.

Trade-related other official flows to Africa have also increased substantially, reaching total disbursements of 4.7 billion in 2013; the bulk of these funds is accounted for by middle income countries

Figure 12: Trade-related other official flows to Africa



Source: authors' calculations based on OECD Creditor Reporting System Database (consulted in April 2015)

Even though in the African region their magnitude still overshadows vis-à-vis trade-related ODA, commitments of trade-related other official flows have more than doubled since 2006, climbing from nearly USD 4 billion to USD 8 billion. Such an expansion has been even faster for disbursements: the latter went from USD 0.7 billion in 2006 to USD 4.7 billion in the last year for which data are available (Figure 12). Like in the rest of the world, other official flows typically target middle income countries; accordingly in the African context the bulk of these funds is accounted for by a handful of Northern African economies – namely Egypt, Morocco, and Tunisia – as well as South Africa (see Annex 11).

2.4 Aid for Trade Modalities

The previous analysis has provided a factual account of the monitoring of Aid for Trade flows to Africa. Against this backdrop, and in the context of the preparation towards the Third International Conference on Financing for Development, it is worth to conclude this section of the report by drawing a few considerations on the modalities of this support. Four main issues stand out for discussion from an African point of view.

First, the Aid for Trade initiative has undoubtedly been successful in terms of mobilizing resources to support developing countries' trade capacities – between 2006 and 2013 commitments and disbursements to Africa grew at an average rate of 10 and 13% per year respectively, notwithstanding the global financial and economic crisis.

Second, the underlying flows have continued to display considerable volatility over time. This feature can be illustrated by a simple fact: between 2006 and 2013 the median African country witnessed 5 years of growth and 3 years of decline in Aid for Trade commitments, and 6 years of growth and 2 years of decline in disbursements. Similar levels of volatility, even in a broader context of upward trending flows, pose significant challenges to economic policy, possibly adding up to macroeconomic uncertainty, especially in contexts where Aid for Trade flows account for a significant share of GDP.

Secondly, Aid for trade flows to Africa are unpredictable, as evidenced by relatively low level of simple disbursements-to-commitments ratios, with ample fluctuations from one year to the other. Again, this heightened level of unpredictability may pose challenges to policy-makers in recipient countries, and should feature in the Aid for Trade debate. Admittedly the unpredictable nature of

Aid for Trade flows stems from a combination of "demand and supply" factors, ranging from the difficulties African countries face in formulating and timely implementing bankable projects, to the uncertainty in the budgeting process in donor countries. There is scope to reduce volatility and unpredictability, and these options should be discussed addressed in the context of global for a, such as the Global Review of Aid for Trade, or the Third International Conference on Financing for Development.

Third, issues related to the accessibility of Aid for Trade funds, and their alignment to African development priorities have also featured prominently in the debate (ECA, 2013a). It is precisely to address some of these challenges that ECA has produced a guideline document on formulation of bankable Aid for Trade project proposals, distilling the lessons learnt in the course of a development project carried our between 2013 and 2014.More broadly, however, it is clear that the strengthening of Africa's trade capacities will require a renewed approach towards resource mobilization: one that seeks to engage more closely private actors and non-traditional partners, strengthening domestic resource mobilization (especially in resource-rich countries), curbing illicit financial flows, and enhancing the effectiveness of public private partnership schemes.

3 REDUCING TRADE COSTS FOR INCLUSIVE, SUSTAINABLE GROWTH – THE OECD/WTO MONITORING EXERCISE IN AFRICA

The previous section of the report has analysed the evolution of recent trends in Aid for Trade flows to Africa, highlighting their magnitude, sectoral composition, and distribution across countries. Amongst other considerations, the evidence presented earlier on pointed to the growing emphasis paid to trade facilitation activities, by both donor and recipient countries. With the aim of elaborating more in detail on the relevance of trade facilitation in the context of the Aid for Trade initiative, this section outlines the African responses to the OECD/WTO monitoring and evaluation exercise underpinning the Fifth Global Review of Aid for Trade "Reducing Trade Costs for Inclusive, Sustainable Growth".

Building on the work done for the Fourth Global Review of Aid for Trade, the objective of the OECD/WTO monitoring exercise was to survey how trade costs affect developing countries' competitiveness and ability to connect to regional and global value chains. The exercise also collected information on what is being done to address this issue, and how Aid for Trade can help reduce trade costs and the associated impacts to deliver inclusive, sustainable growth. The non-exhaustive list of trade costs considered for the purpose of the monitoring exercise is summarized schematically in Table 2.

Table 2: Schematic list of trade costs considered in the OECD/WTO monitoring exercise

Merchandise Goods	Border procedures (i.e. trade facilitation); Tariffs, fees and other charges; Non-tariff measures; Transport infrastructure; and Access to trade finance
Services	Network infrastructure (ICT, power, telecoms); transport infrastructure; Non-recognition of professional qualifications; restrictions on commercial presence; Restrictions on movement of natural persons; poor regulatory environment for services; Tariffs on product inputs (e.g. on computers for ICT services); and Low skill levels in the services sector

Source: OECD/WTO 2015

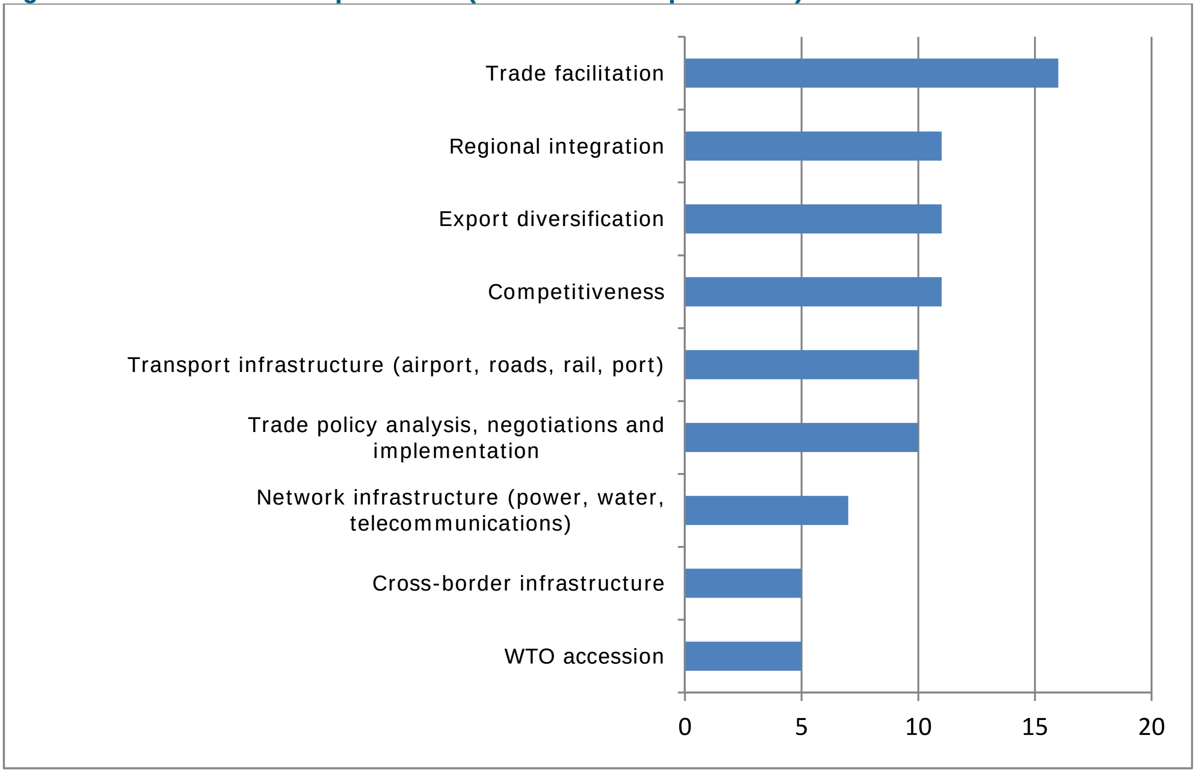
Overall, a total of 26 responses to the OECD/WTO monitoring exercise were received from Africa countries; five more responses came from Regional Economic Communities (RECs) and Transport Corridors; and furthermore 37 donor responses are also included in this analysis. The present section is also informed by the 42 case stories of initiatives to reduce trade costs in Africa, which were submitted by African governments, donors, the private sector and NGOs/Academia. These case stories provide further details on best practices as well as associated outcomes and impacts.

In terms of structure, the next sub- section discusses the evolution of Aid-for-Trade priorities overtime in Africa. This is followed by an assessment of trade costs faced by African respondents according to survey responses and Aid-for-Trade initiatives to help reduce these costs case stories.

3.1 Aid for Trade Priorities

Figure 13 shows that among the 26 African countries responding to the monitoring and evaluation exercise, trade facilitation was highlighted by the highest number of respondents as an Aid for Trade policy objective followed by regional integration, export diversification and competitiveness. For 28% of Africa respondents that indicated some degree of refocusing of their priorities, mainly driven by factors such as new development priorities, competitiveness objectives, and trade facilitation.

Figure 13: Aid-for-Trade priorities (number of respondents)



Source: OECD/WTO 2015

Many respondents indicate that trade facilitation objectives were linked to national development strategies/national trade strategies. 50% of them also highlighted the importance of regional development and regional infrastructure strategies. Sierra Leone for example reports that further prioritization of trade facilitation reforms is on-going with the extension of the ASYCUDA system from the main sea port to two other borders between Sierra Leone and Guinea and Sierra Leone and Liberia respectively. With a majority of African respondents also being LDCs, Diagnostic Integrated Trade Studies (DTISs) through the Enhanced Integrated Framework (EIF) were often mentioned as occasions to recalibrate priorities. Respondents also stated that this evolution has been reflected in national strategies and dialogue with development partners.

This evolving situation is mirrored in donors' responses to the OECD/WTO questionnaire. The monitoring exercise indeed reveals that donors have also modified their priorities and Aid for Trade strategies. In particular, many of them now focus their support more on trade facilitation, inclusive and sustainable growth, private sector development, and regional integration.

3.2 Aid for Trade and Trade Costs

The trade literature has long identified the detrimental effects of trade frictions, pointing to Africa's disproportionately high trade-costs as one of the binding constraints preventing the continent from fully unleashing its trade potential.[13] Research has also highlighted how heightened transaction costs remain a significant hindrance to Africa's integration into the global market, but also – and perhaps more importantly – to its own regional integration (ECA, AUC and AfDB, 2012 and ECA, 2013b).

"... as a land locked country, Uganda's trade costs are high affecting the competitiveness of Uganda's exports" – Uganda

In line with this evidence, in the monitoring exercise, 90% of Africa respondents claimed that trade-related costs are very important for the competitiveness of their imports and exports. Focusing on the exports of merchandise goods, according to African respondents to the OECD/WTO

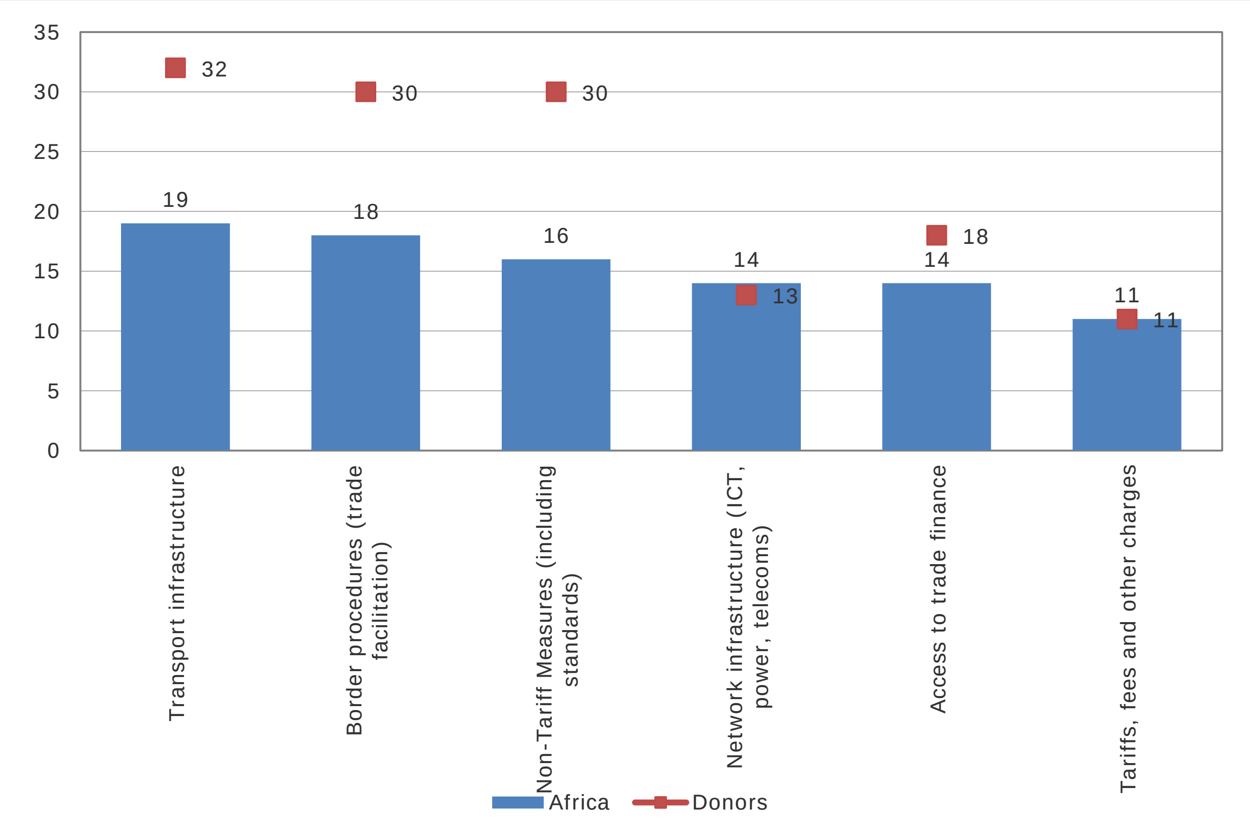
[13] For a more detailed examination of trade costs in Africa refer to ECA 2013.

questionnaire, the most important factors pushing up trade-related costs are transport infrastructure, border procedures (trade facilitation) and non-tariff measures (Figure 14). Donors' responses appear to match very closely the above ranking, signalling the perceived complementarity between transport infrastructures and trade facilitation issues.

With reference to services exports, African respondents ranked network and transport infrastructure as the most important sources of trade costs, followed by inadequate skills' availability, poor regulatory framework, non-recognition of professional qualifications and restrictions on movement of natural persons (Figure 15). Perceptions of donors where somewhat dissimilar in this case: they identified poor regulatory environment, poor network infrastructures and low levels of skills as the three top causes of trade costs.

"Poor internet connectivity country-wide and poor transport infrastructure especially in the attractive tourist destinations in the country remain the biggest bottlenecks or sources of trade cost for services" - Sierra Leone

Figure 14: What are the most important sources of trade costs for the export of merchandise goods? (number of responses)

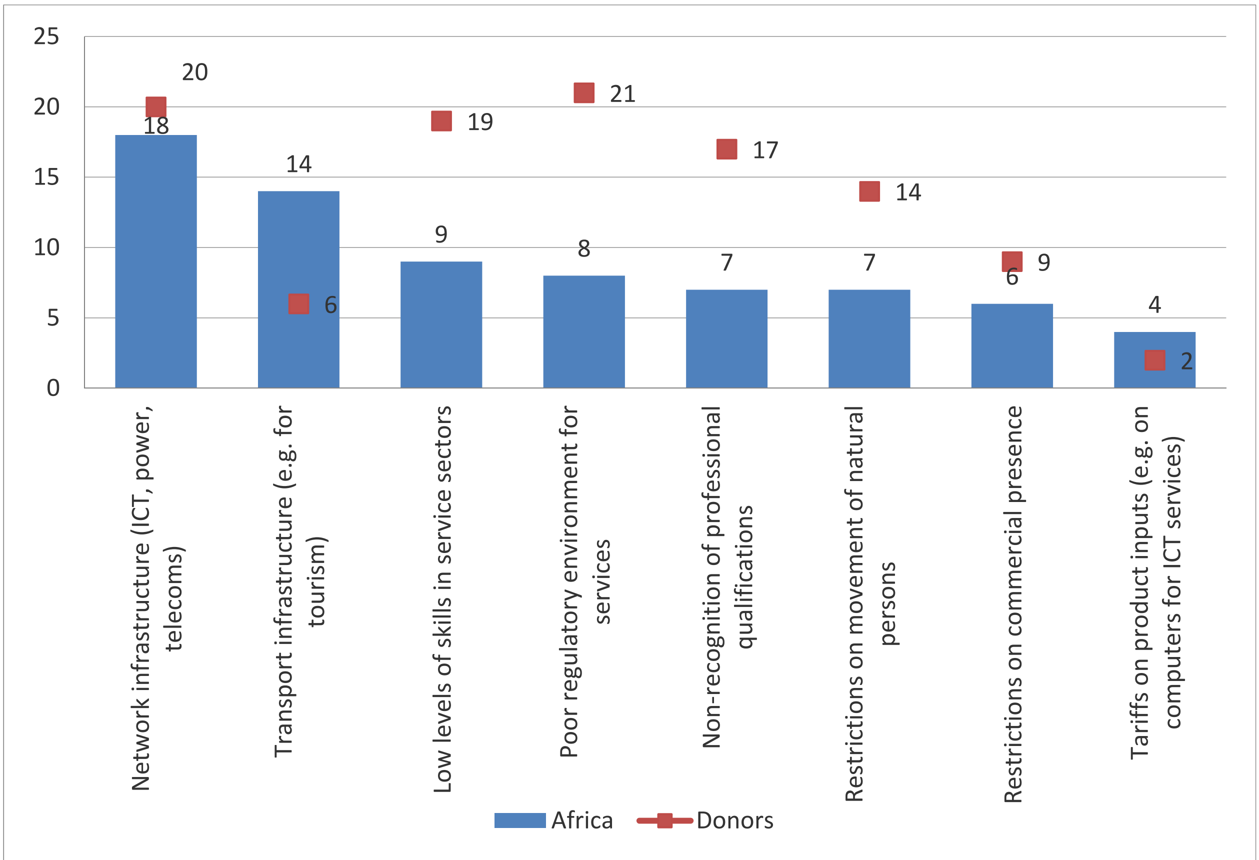


Source: OECD/WTO 2015

Many African respondents also highlighted the degree of interconnectedness between trade in goods and trade in services, suggesting that high costs of goods were accompanied by the cost in services. This consideration is indeed consistent with the fact that, in the context of Global Value Chains, services account for a significant share of the value added embodied in the final product.

"Export procedures have still not been harmonized as there is no one-stop-shop for the processing of export documents." - Sierra Leone

Figure 15: What are the most important sources of trade costs for the export of services? (number of responses)

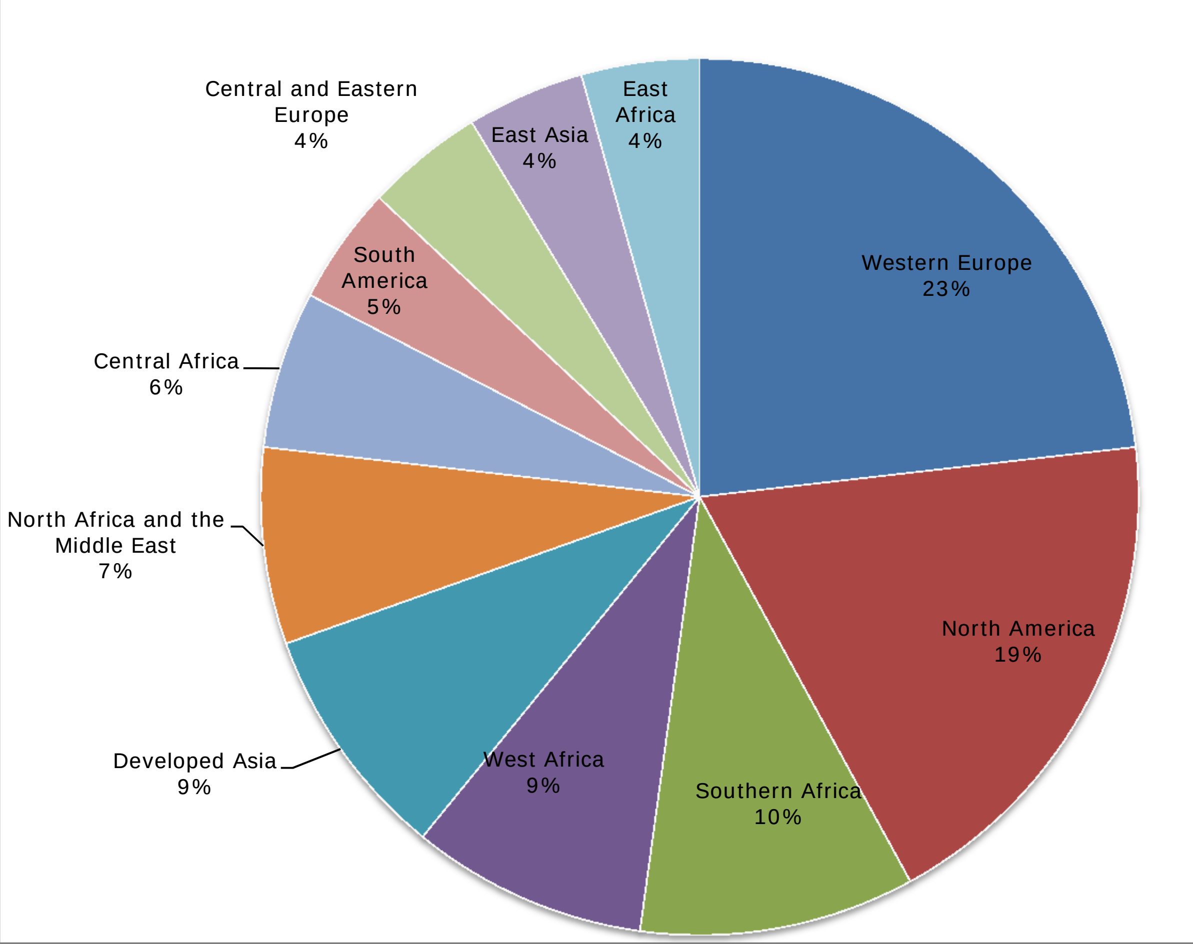


Source: OECD/WTO 2015

"Trade costs affecting the trade in goods are also passed on to accompanying services" - Cote d'Ivoire

Traditional partners remain the markets where African goods and services exports face the highest trade costs (Figure 16). Western Europe and North America are considered to have the highest trade costs followed by Southern Africa, West Africa and developed Asia. A number of countries specifically mentioned the stringent sanitary and phyto-sanitary standards for their exports to the European Union.

Figure 16: In which regional markets to which you export merchandise goods and services do you face the highest trade costs?

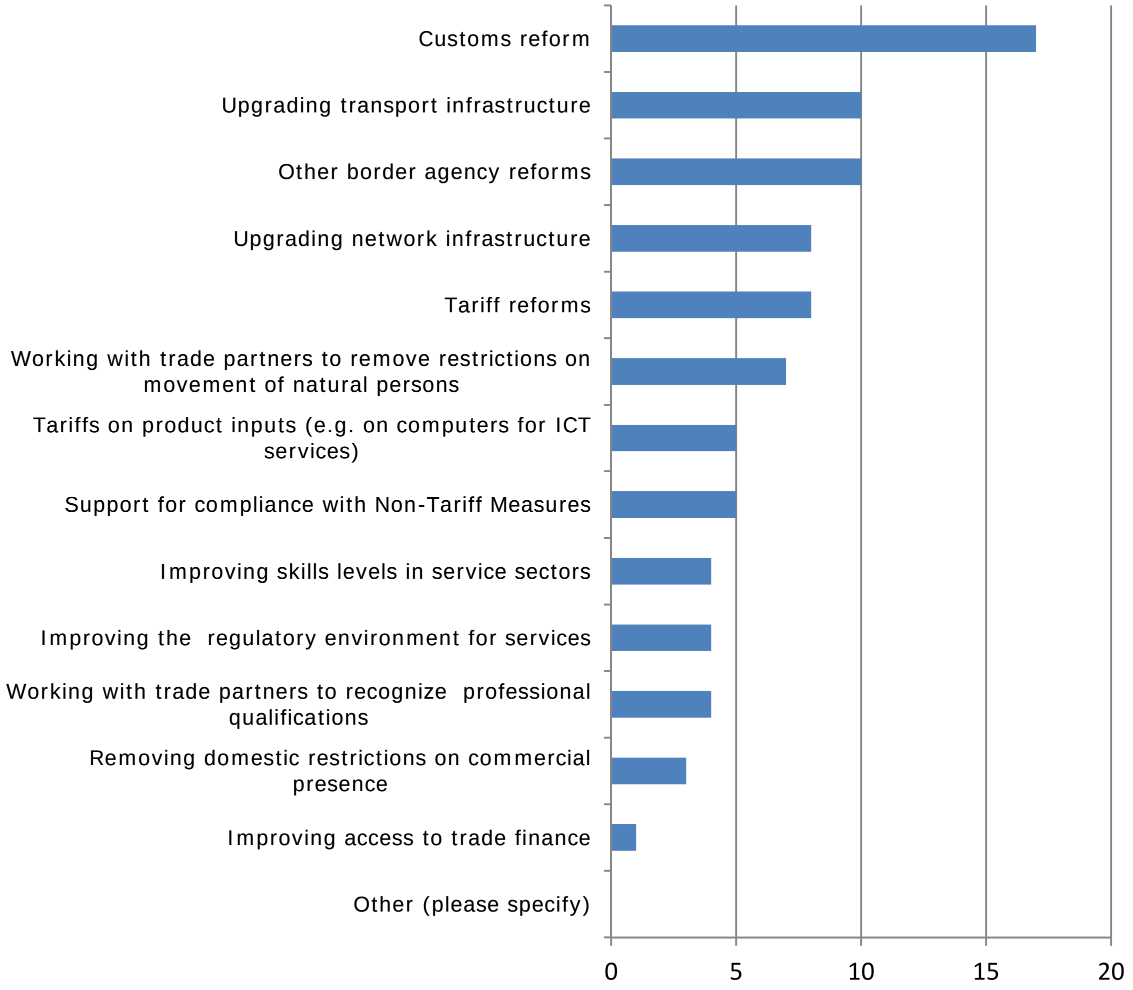


Source: OECD/WTO 2015

The 2015 monitoring exercise questionnaires gathered relevant information on what countries perceived as the best ways to reduce trade costs. In addition, the call for case stories on initiatives to reduce trade costs provided a wealth of information regarding best practices, outcomes and impacts. Figure 17 shows that African respondents view customs and other border reforms, infrastructure upgrading and tariff reforms to have the most positive results in terms of reducing trade costs for goods and services. Donors identify similar measures but also stress the importance of infrastructure.

African respondents also stressed that these actions whilst important, should be coupled with private sector engagement and commitment, sustained political engagement and commitment by national authorities and the use of regional approaches to achieve success. Private sector involvement in reducing trade costs has also been highly cited as a potential factor of success. In this respect, case story submissions on private sector initiatives to reduce trade costs in Africa range from support to disaster management by a Czech firm in Ethiopia to providing support to horticultural out-growers in The Gambia and investments and public private partnerships (PPPs) for renewable energy in Uganda. Senegal is starting to see the fruit of a number of public and private sector investments in trade-related sectors (see Box 2).

Figure 17: Which types of actions have achieved the most positive results in reducing trade costs for goods and services?(number of responses)



Source: OECD/WTO 2015

Box 2: Linking West Africa through the Port of Dakar

Senegal was the first LDC to notify its Category A Trade Facilitation Agreement commitments. In Senegal's questionnaire, the country states that trade facilitation was on top in terms of their Aid-for-Trade priorities and that it had been prioritized in national and regional strategies. Government commitment to trade facilitation is starting to bear fruit for Senegal, and the broader region.

Senegal is strategically located to serve as a regional trade hub in West Africa. Neighbouring countries, namely; Burkina Faso, Mali, Mauritania and Niger rely on the Port of Dakar to connect to international markets. Reducing trade costs in Senegal has therefore been crucial in the regional integration process of the region.

The African Development Bank in collaboration with a number of public and private partners co-financed the "Mali/Senegal: Road Development and Transport Facilitation Project: The Southern Bamako-Dakar Corridor" from 2008 to 2012. The Dakar-Bamako corridor now serves as the main entry and exit point for trade in the region via the Port of Dakar. Dubai Ports World (DP World) took over the management of the Port of Dakar in 2008. Through a EUR47.5 million loan from the African Development Bank to finance the upgrading of the container terminal in 2010, upgrading

and expansion of the facility resulted in trade and economic benefits for the country and the region. Since its officially opening in November 2011, the capacity of the port rose from less than 300,000 TEU (twenty foot equivalent container units) to more than 600,000 TEU. Good road network connections offer swift transit times for cargo bound for Guinea-Bissau, Mauritania, and Gambia. With its onsite rail terminal, Dakar Port is the historic gateway to Bamako, Mali.
The reduction in transport costs has also benefited people living in the project area, specifically women who account for 52% of the population in the area and 60% of the economic activity. Illicit fees and charges have fallen considerably; in the first quarter of 2011, they were an estimated US$ 140 per truck per trip on the Bamako-Dakar corridor, versus US$ 351 per truck per trip on the Bamako-Abidjan corridor. These figures are backed up by the USAID supported Borderless Alliance, a coalition of private sector organizations working in close collaboration with public sector stakeholders to facilitate the free movement of persons, goods, and vehicles within ECOWAS and increasing trade across West Africa. Its last Road Governance Report in 2013 concluded that significant strides were made by Senegalese authorities to tackle road governance issues along this corridor.[14]

The Dakar Financing Summit for Africa's Infrastructure in June 2014 aimed at strengthening public private partnerships to mobilize financial investments and sustain the implementation of the Programme for Infrastructure Development in Africa (PIDA). The Summit prioritized the financing of 16 infrastructure projects as a pilot to accelerate the implementation of PIDA. This included the "Modernization of Dakar-Bamako Rail Line" estimated at USD3 billion. The project involves investment in new rail infrastructure (track and rolling stock), and signalling system for the rail line between Dakar port and Bamako. The existing metric gauge railway, built between 1907 and 1927, is currently non-operational.[15]

ECOWAS is working with the AfDB and the European Commission on the West Africa Joint Border Post Programme to reduce border crossing times between ECOWAS Member States. Thus far, the Togo/Ghana and the Benin/Niger JBPs have been completed. Currently ongoing include the Nigeria/Benin, Benin/Togo and the Gambia/Senegal bridge (the latter two is being implemented by the African Development Bank.

Source: OECD/WTO public/private sector case stories

"The DRC is committed to the process of participation in free trade areas including COMESA-EAC-SADC tripartite as well as the AU" – Democratic Republic of Congo

All African respondents indicated that regional actions are being taken to reduce trade costs, through Regional Economic Communities (RECs), corridor initiatives and initiatives supported by development partners. Similar regional approaches are particularly important for landlocked countries whose access to ports is determined by transit countries. This point is emphasized by a number of case stories from member countries of the East African Community (EAC). Regional integration through the EAC process has been a key driver to reducing trade costs and providing access to international markets also for EAC landlocked members, namely – Burundi, Rwanda and Uganda.

Case stories submitted on projects to modernise customs and streamline border procedures include the World Bank's International Financial Corporation's work on Rwanda's Investment Climate Reform Program, Korea International Cooperation Agency's project for the modernization of the Tanzanian customs administration and TradeMark East Africa's work on Uganda's Revenue Authority Customs Business System Enhancement Project. Though these projects were implemented at the national level, they complement the framework for the EAC's Single Customs Territory. Electronic single windows (ESW) serve this function. Kenya's TradeNet System, an ESW aims to enable traders who depend on the seaport of Mombasa to efficiently track, clear and move their good across borders.

[14] http://www.borderlesswa.com/sites/default/files/resources/jun14/24th%20IRTG%20report.pdf (http://www.borderlesswa.com/sites/default/files/resources/jun14/24th IRTG report.pdf)
[15] http://www.nepad.org/system/files/DFS%20Brochure%20-%20English%20version.pdf (http://www.nepad.org/system/files/DFS Brochure - English version.pdf)

"The potential benefits of the Kenya TradeNet System to the economy based on the present volume of goods imported and transited through Kenya as a result of streamlined procedures will result in annual savings to the Kenyan economy ranging between US$ 150 million and US$250 million during the first three years. This is expected to increase to between US$300 million and US$450 million annually in subsequent years." – Kenya Revenue Authority

Box 3: Small cost for big gains: Rwanda's Electronic Single Window

According to a recent study by Rwanda's Private Sector Foundation, only 43% of truck transport time along the trade corridors is spent moving. The rest of the time is spent waiting at border crossings or road blocks, or resting. For a landlocked country these additional hurdles further push up the time and costs to trade. The Government of Rwanda has put considerable emphasis on regional integration as a national goal including adoption of Rwanda Electronic Single Window (RESW).

TradeMark East Africa's support to Rwanda's Electronic Single Window encompasses i) introducing an IT Single Window and Integrated Border Management (IBM) system, ii) upgrading the ASYCUDA customs management system and iii) reviewing the EAC Customs Management Act.
This project has already reported results in reducing time taken to clear goods from 34 hours in 2010 to 23 hours in 2014. Trade costs were also reported to have reduced from US$350 to US$64.5 during this period. Return on investment based on savings for an authorized economic operator is estimated at US$18 million per year. Importers for example have experienced a reduction of costs as result of RESW from $350 per declaration to $243; this totals to estimated savings of over $2 million annually. Additionally, importers and exporters, businesses and consumers are reaping benefits because of the reduced clearance times and transaction costs. This will consequently drive down cost of doing business as well as stabilizing and reducing retail costs in the long run.

TradeMark East Africa notes that this project is complemented by other regional initiatives particularly One-Stop Border Posts.

Source: TradeMark East Africa Case Story (2015)

In their questionnaire responses, RECs and Transport Corridors similarly underscore the relevance of customs and other border reforms as the most successful actions in reducing trade costs – an issue of particular concern for transport corridors. Also highlighted by African respondents as well as RECs and Transport corridors was the importance of regional approaches to infrastructure development. Respondents regularly cited Regional Infrastructure Strategies as documents where the issues of trade costs, in particular trade facilitation could be found. After customs and other border agency reforms, RECs and Transport corridors in Africa indicated that the upgrading of transport and network infrastructure are important in achieving positive results in reducing trade costs in the region. Regional actions particularly for costly interventions such as infrastructure are said to provide value for money.

"As a member of the ECOWAS, Sierra Leone is fully participating in the ECOWAS Infrastructure Development Agenda which is guided by Goal 2 of the ECOWAS regional strategic plan, 'To facilitate the development of infrastructure for the attainment of a Competitive Business Environment and Investment Capacities'" - Sierra Leone

Sub-Saharan Africa's current annual infrastructure financing shortfall is estimated at some US$45 billion.[16] An African Development Bank (AfDB) report states that if regional integration is pursued effectively and if all countries and leaders embrace the shared responsibility of the Programme for Infrastructure Development (PIDA), by 2040 Africa's share of world trade will be much higher; at least twice today's share of 2%.[17] Africa's largest deficits are found in *power* and

[16] Taylor, Nicholas., "Bridging the Global Infrastructure Gap", Australian Institute of International Affairs, 2013. Available at: http://www.internationalaffairs.org.au/bridging-the-global-infrastructure-gap/

[17] African Development Bank, "Closing the Infrastructure Gap Vital for Africa's Transformation", PIDA, 2014. Available at: http://www.afdb.org/fileadmin/uploads/afdb/Documents/Generic-

road sectors.[18] Power emerges as a particular limiting infrastructure factor, being cited by more than half of firms surveyed by the World Bank in enterprise surveys as a major business obstacle.[19] Both in public sector and official development assistance, there is a growing emphasis on attracting private sector investors through public-private partnerships (PPPs). In the last two decades, PPPs have been used as a mechanism to leverage greater private investment participation as they exploit synergies and realize economies of scale. "Blended finance" approaches (approaches that pool public and private resources and expertise), are one approach that development partners have sought to promote private sector engagement in infrastructure financing. Box 4 provides some examples.

Box 4: Closing Africa's Infrastructure Gap through Blended Finance

The *EU-Africa Infrastructure Trust Fund* blends grants from EU member States and the European Commission with long-term loan finance from eligible public and private financiers. Its main objective is to promote investment in regional infrastructure in Africa, thereby contributing to poverty reduction and increasing access to transport and communication services, water, and energy. In 2012, it committed approximately US$113 million for 17 projects primarily in the energy and transport sectors, leveraging approximately US$1.6 billion of investment.

The *NEPAD Infrastructure Project Preparation Facility* (NEPAD-IPPF) Special Fund aims to assist African countries, Regional Economic Communities (RECs), specialized agencies and related institutions by providing grant resources for: (i) preparing high quality and viable regional/continental infrastructure projects with a view to requesting financing from public and private sources; (ii) developing a consensus and partnership for project implementation; and (iii) promoting infrastructure projects and programs aimed at enhancing regional integration and trade. To date, a total of 43 projects have been approved for total commitments of US$29.469 million across regions. Disbursement has increased from 20% in 2007 to reach 49% of committed funds by the end of 2010, reflecting the implementation level on the ground. The preparation of 16 of the 43 projects has been completed and some of those are under physical implementation (an investment worth more than US$5 billion) as a result of NEPAD-IPPF support.[20]

3.3 Aid for Trade and the Trade Facilitation Agreement (TFA)

Developing countries realize that the implementation of the TFA could bring significant opportunities in terms of supporting a reduction of trade-related costs; however, they are also cognizant of the cost of implementation of the TFA, not only in monetary terms, but also in terms of institutional reforms and technical assistance needs. At the same time, it is clear that trade facilitation has surged as one of the priorities of the Aid for Trade initiative, for partners and donors alike.

Against this background, the OECD/WTO questionnaire also investigated how Aid for Trade could support the implementation of the TFA. In this respect, all African respondents indicated that they have already sought or intend to seek assistance to implement the TFA once it will be adopted. Figure 18 shows the areas where support may be sought. African respondents ranked

Documents/PIDA%20brief%20closing%20gap.pdf
(http://www.afdb.org/fileadmin/uploads/afdb/Documents/Generic-Documents/PIDA brief closing gap.pdf)

[18] Banks, Bill., "Addressing Africa's Infrastructure Deficit" Ernst Young, 2014. Available at: http://www.ey.com/GL/en/Industries/Government---Public-Sector/Dynamics---collaborating-for-growth_Addressing-Africas-infrastructure-deficit

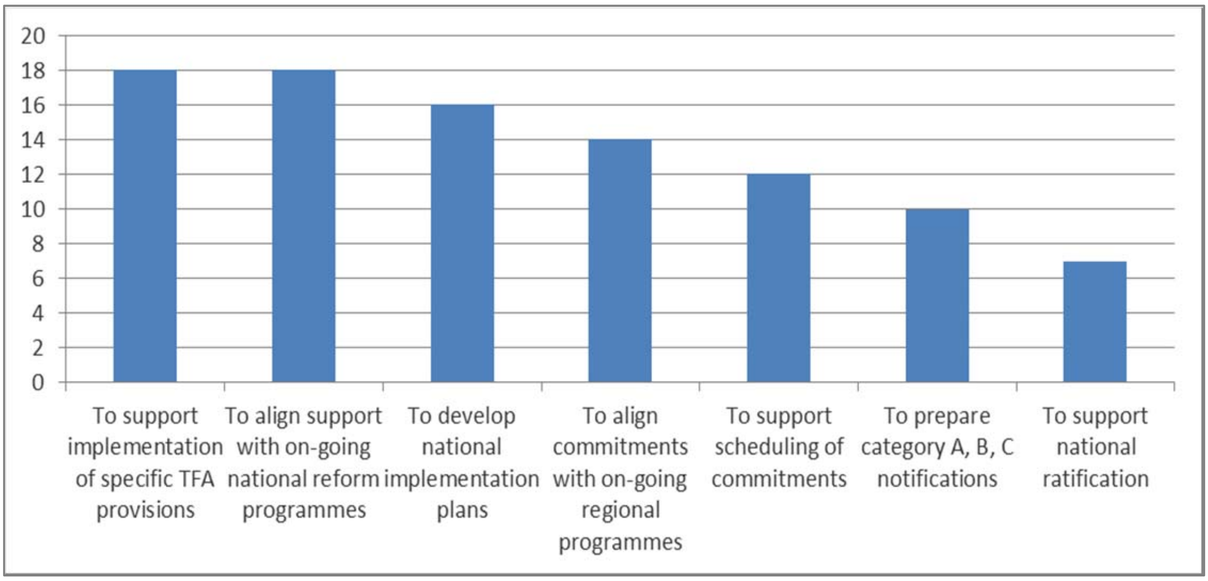
[19] African Development Bank, "Financing PIDA Projects", PIDA, 2014. Available at: http://www.afdb.org/fileadmin/uploads/afdb/Documents/Generic-Documents/PIDA%20brief%20financing.pdf (http://www.afdb.org/fileadmin/uploads/afdb/Documents/Generic-Documents/PIDA brief financing.pdf)

[20] African Development Bank " NEPAD Infrastructure Project Preparation Facility (NEPAD-IPPF)", Available at: http://www.afdb.org/en/topics-and-sectors/initiatives-partnerships/nepad-infrastructure-project-preparation-facility-nepad-ippf/

"implementation of specific TFA provisions" and "alignment with on-going national reform programmes" as the top priority areas for support; this was followed by development of national implementation plans and alignment with on-going regional programmes. RECs and Transport Corridors also noted that support would be required particularly to develop regional implementation plans, to align country commitments with on-going regional programmes and to help support implementation of specific TFA provisions. A limited number of respondents stated, conversely, that support might be needed for categorization of A, B, C commitments or for national ratification.

Focusing in on specific provisions within the TFA for which support may be needed, African respondents ranked first "border agency cooperation", followed by "publication and availability of information", "formalities connected with importation, exportation and transit" and "advance rulings" (Figure 19). It should be noted, though, that responses were rather evenly distributed across the various options, with each measure listed in the chart getting at least eight mentions. Donors' responses, conversely, suggested that the provisions that would prove hardest for developing countries to implement were "formalities connected with importation, exportation and transit" and "border agency cooperation".

Figure 18: Where might you need support to implement the Trade Facilitation Agreement, when adopted? (number of responses)

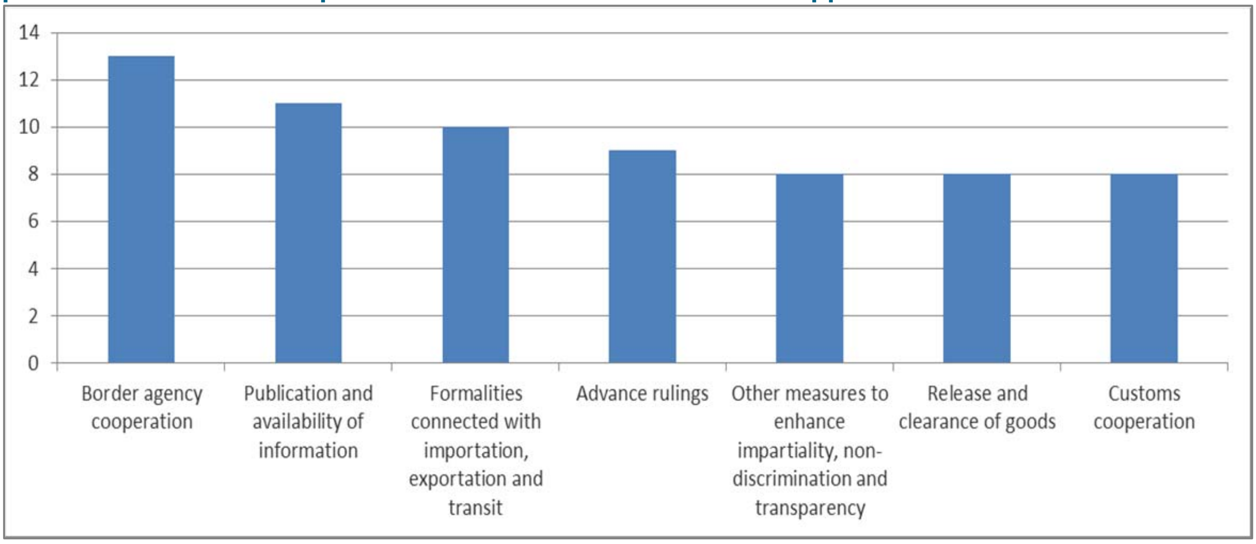


Source: OECD/WTO 2015

The monitoring exercise asked respondents on the difficulties they may expect to face in securing Aid for Trade support towards the implementation of the TFA when adopted. The most common difficulties, according to questionnaire responses, included "problems accessing external funding", "lack of information on funding opportunities" and differing priorities of in-country donors. Interestingly, Figure 20 suggests that donors do not perceive specific problems in accessing external funds. Rather, they are of the view that developing countries will face difficulties in ensuring national coordination and political will for TFA reform, in prioritizing and mainstreaming TFA in national development plans and in integrating implementation into on-going programmes.

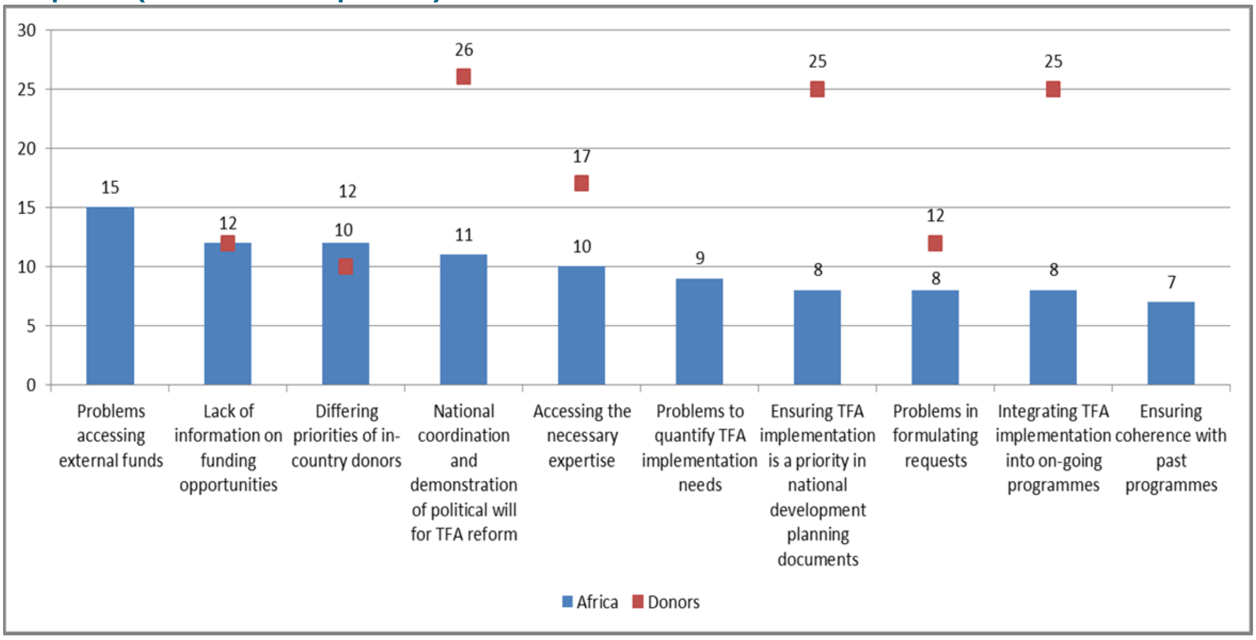
An encouraging finding from the monitoring exercise is that 22 of the 37 donor respondents indicated that they expected their support to trade facilitation to increase in the next five years – with 4 of the respondents (Australia, New Zealand, UNCTAD, African Development Bank) expecting a more than 10% increase in support offered. This expectation was in line with previous views expressed in the ECA/AUC/WTO monitoring exercise conducted for the Fourth Global Review, and – as seen in the previous session – is partly corroborated by the upward trend in Aid for Trade funds for trade facilitation. Several donors have also established dedicated funds to support developing countries in their trade facilitation efforts, as is the case of the African Development Bank's Africa Trade Fund and the WTO Trade Facilitation Assistance Facility (TFAF), among others.

Figure 19: Which disciplines of the Trade Facilitation Agreement, when adopted, will prove the hardest to implement and where Aid-for-Trade support should be focused?



Source: OECD/WTO 2015

Figure 20: What difficulties do you face, or do you expect to face, in securing Aid-for-Trade support to help implement the Trade Facilitation Agreement, when adopted? (number of responses)



Source: OECD/WTO 2015

3.4 Main messages

This section has briefly outlined the key findings of the OECD/WTO monitoring and evaluation exercise underpinning the Fifth Global Review of Aid for Trade "Reducing Trade Costs for Inclusive, Sustainable Growth", focusing in particular on African responses to the questionnaire. It has also provided some concrete examples of donors' support towards trade facilitation activities in the region, relying on the case stories submitted by the various countries.

Overall, the section confirms that inadequate infrastructure and inefficient custom procedures are widely perceived as key factors increasing trade frictions and weighing down African countries' competitiveness. In line with this, trade facilitation reforms are regarded as promising interventions to reduce trade-related costs, and various examples drawn from case studies seem to support the view that well-planned trade facilitation projects can indeed be very successful, and bring "value for money".

Respondents also confirmed the generalized expectations that support to trade facilitation through Aid for Trade Funds will increase in the years to come, and that this could significantly contribute towards the implementation of the TFA.

4 CONCLUDING REMARKS

This report puts the debate on Aid for Trade into the broader context of Africa's quest for structural transformation and of its ongoing process of regional integration. The analysis starts from the premise that trade has the potential to support structural transformation, but for this virtuous circle to materialize Africa needs to develop its productive capacities and set up a coherent policy framework, whereby trade policy is strategically geared to achieve economic diversification. As highlighted by a large body of research, regional integration plays a pivotal role in this respect, given that intra-African trade –albeit limited in size – is expanding rapidly and is considerably more diversified than Africa's trade with the rest of the world. Moreover, research has shown that fostering the emergence of regional supply chains can pave the way for the insertion of African producers into GVCs.

In this respect, the launch of the Tripartite free Trade Area, and the beginning of the negotiations for the CFTA represent two steps that promise to bring considerable benefits to the continent. It remains clear, though, that Africa's transformation agenda will require complementing trade integration with interventions addressing supply-side constraints – notably poor infrastructures and limited access to finance – as well as non-tariff barriers. Amongst them, trade-costs have emerged as a key determinant of trade performance and investment decisions, especially in the context of GVCs, where trade frictions assume even greater relevance, since goods are likely to be exported and imported several times along the value chain. Accordingly, addressing those trade frictions that put African traders at a disadvantaged position could go a long way in unleashing the region's trade potential, allowing a greater number of countries to reap the benefits from the trade liberalization envisaged in the Tripartite Free Trade Area or the CFTA.

Against this background, it should be clear that the Aid for Trade initiative can bring a significant contribution in supporting Africa's efforts to address the above challenges; and the present report aims precisely at highlighting how this goal can best be achieved. In line with this objective, the first part of the study outlines the recent trends in Aid for Trade flows, highlighting that the initiative launched in 2005 has been relatively successful in mobilizing financial resources to support Africa's trade capacities. In 2013, the continent accounted for over USD 19.3 billion in Aid for Trade commitments -2.5 times the average of the 2002-2005 period. Aid for Trade disbursement to Africa, touched USD 15.8 billion, with a 7% increase compared to 2012. Interestingly, the analysis also documents a growing shift towards regional and sub-regional programmes, suggesting that the international community is increasingly supportive of the continent's regional integration agenda.

The report also shows that the bulk of Aid for Trade funds is channelled towards trade-related infrastructure (54% in the 2011-2013 period) and productive capacities (44%); trade policy and regulations account for a further 3% of disbursements, whereas a negligible share of the funds is earmarked for trade-related adjustment. Over the same time span, nearly one third of the funds were accounted for by transport and storage, whilst agriculture and energy received respectively another 20% and 20% of disbursements. Whilst this sectoral allocation appears to be broadly in line with Africa's continentally agreed frameworks, notably PIDA and CAADP, donors support to African industrial sector arguably falls rather short of the continent's perceived needs, with industry only accounting for 6% of Aid for Trade disbursements in the 2011-2013 period.

In Africa as in the rest of the world, several of the largest Aid for Trade recipients are middle income countries. Yet, the analysis undertaken in Section 2 also demonstrates that the allocation of Aid for Trade across countries also reflects the vulnerabilities of countries with particular needs (i.e. LDCs, LLDC, and SIDS), particularly if Aid for Trade flows are assessed in relation to the size of the recipient economy. Looking ahead, there is scope to enhance the modalities of Aid for Trade, notably by reducing its volatility from one year to the other, and by enhancing the predictability of such flows. Furthermore, a more proactive involvement of recipient countries, both in terms of formulation of bankable Aid for Trade projects and in terms of monitoring and evaluation, could also enhance the effectiveness of this support.

The support provided for trade facilitation activities through the Aid for Trade initiative has increased significantly over the last few years, and this growing emphasis is confirmed by the responses to the OECD/WTO monitoring exercise underpinning the Fifth Global Review of Aid for Trade under the theme "Reducing Trade Costs for Inclusive, Sustainable Growth". This is consistent with the evidence that African countries have started to realize the importance of tackling disproportionately high trade-related costs and time-consuming custom procedures, which weigh down the competitiveness of their producers. On the other hand, the inclusion of trade facilitation as one of the priority clusters of the BIAT confirms the realization that trade-related costs hamper not only Africa's integration with the rest of the world, but also its own regional integration agenda.

Many African countries have been engaged in trade facilitation reforms even before the adoption of the WTO TFA, especially on issues related to formalities, and custom automation issues. Several African RECs have also played a critical role in advancing the transport and transit facilitation agenda, in some cases even taking the lead in harmonizing related provisions and forging concrete strategies for trade facilitation. In this respect, if implementation on the ground still remains uneven, it is encouraging to notice that donors are aware of the importance of RECs in this respect, and are providing significant Aid for Trade funds to regional trade facilitation programmes.

Beyond some encouraging progress, there are ample margins for improvements and for further advancing the trade facilitation agenda, thereby responding to the needs of the African private sector and enhancing its competitiveness. In this respect, one issue that warrants due consideration is the relationship between trade facilitation and infrastructural provision. Undeniably the effectiveness of many trade facilitation measures depends on the quality of infrastructure provision (notably the availability of electricity, good quality roads and railways, and connectivity at border posts). Accordingly, it is imperative that trade facilitation reforms be complemented by an upgrading of existing infrastructure and connectivity, in line with the evidence documented in various case-studies mentioned earlier on, and with the overall spirit of the Aid for Trade initiative.

Overall, the OECD/WTO monitoring and evaluation exercise confirms that trade facilitation reforms are regarded as promising interventions to reduce trade-related costs, and various examples drawn from case studies seem to support the view that well-planned trade facilitation projects can indeed be very successful, and bring "value for money". In this respect, respondents also confirmed the generalized expectations that support to trade facilitation through Aid for Trade funds will increase in the years to come, and that this could significantly contribute towards the implementation of the TFA.

Looking ahead, it should be clear from this report that the Aid for Trade initiative and trade facilitation can go a long way in addressing some of the binding constraints faced by African producers, thereby unleashing the region's trade potential. Building on the momentum provided by the adoption of the TFA, African countries are therefore called upon to take a proactive role in defining and duly implementing a coordinated strategy to harness trade facilitation thereby spur their transformation and integration agendas. Their growing involvement in forging national and regional Aid for Trade strategies, and monitoring the outcome of related project will be equally important to enhance the developmental impact of Aid for Trade support.

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6 STATISTICAL ANNEXES

ANNEX 1

METHODOLOGICAL NOTES

Unless otherwise specified, the ODA data presented in this report are drawn from the OECD-Creditor Reporting System (CRS) database, consulted during the second half of April and first half of May 2015. When, for comparison purposes, Aid for Trade data are presented in per capita terms (or as share of GDP), the relevant figures are combined with population/GDP series from the United Nation Statistics Division, consulted in the same period.

An important caveat is in order: to ensure consistency and comparability of data, the CRS database does not cover the support offered by a number of South-South partners – notably Brazil, India, and China – because of their distinct and often country-specific definition of what does and does not constitute "aid". Hence the OECD-DAC figures capture only partially the financial flows that address Africa's trade constraints. It is worth keeping in mind, that, even though accurate estimates of official flows from South-South partners are hard to get, there is no doubts that the latter do play a prominent role for Africa particularly in the context of infrastructural projects and of the support to productive capacity development (ECA, 2013a and 2013c; and Gutman, Sy and Chattopadhayay, 2015).

In the context of this debate, Aid for Trade can be defined as a sub-set of the Official Development Assistance (ODA) provided for programmes and projects which are identified, in recipient countries' development strategies, as trade-related priorities. Only grants and concessional lending with a grant element of 25% or above are counted as Aid for Trade, thus excluding a large proportion of other trade-related official flows (WTO and OECD, 2011 and 2013). In Africa, this definition implies that Aid for Trade has been slowly expanding its share of ODA flows, and accounts nowadays for roughly 35% of sector allocable ODA disbursements, or 26% of total ODA disbursements excluding debt relief (see Figure 1 - Annex 1).

Finally, the data presented in Section 3 are drawn from the responses to the questionnaire, jointly administered by WTO and OECD in preparation for the Fifth Global Review of Aid for Trade.

ANNEX 2

Aid for Trade commitments (2013 constant USD million)

	2002-05 avg.	2006-08 avg.	2009	2010	2011	2012	2013
Algeria	106.9	147.1	13.7	27.1	37.4	24.6	22.0
Angola	19.8	86.1	21.4	77.2	18.8	10.6	66.0
Benin	118.3	204.8	268.1	249.6	161.8	116.4	117.5
Botswana	16.3	5.7	5.3	19.5	5.0	98.3	4.1
Burkina Faso	258.7	203.6	597.2	348.6	345.8	326.6	449.8
Burundi	53.2	90.0	132.4	203.6	202.0	137.4	267.9
Cameroon	129.9	301.8	360.0	164.3	342.8	443.5	248.6
Cabo Verde	82.6	67.3	122.4	68.4	45.1	94.2	41.1
Central African Rep.	35.6	62.2	91.0	17.5	90.6	137.2	7.6
Chad	105.7	43.1	101.5	15.7	179.4	69.7	56.0
Comoros	3.8	6.5	33.8	7.1	5.3	28.1	50.2
Congo	40.5	39.2	46.6	28.6	91.5	64.0	20.7
Côte d'Ivoire	61.1	113.2	278.0	232.9	215.5	200.9	176.2
Dem. Rep. of Congo	517.0	311.7	731.4	732.9	795.6	433.8	501.7
Djibouti	23.1	11.2	23.5	59.5	55.5	67.9	94.2
Egypt	586.9	852.9	501.4	1,868.5	821.5	2,051.1	1,842.8
Equatorial Guinea	0.9	0.3	1.2	0.4	1.4	0.3	3.9
Eritrea	52.1	36.6	66.6	16.5	3.1	17.0	5.7
Ethiopia	543.9	782.2	777.3	951.8	447.7	2,016.2	1,017.9
Gabon	41.7	55.6	19.8	38.2	4.5	2.9	2.8
Gambia	36.1	19.1	35.2	75.3	70.6	154.0	58.3
Ghana	288.0	626.9	769.9	868.4	547.2	748.3	247.9
Guinea	74.0	78.4	40.8	11.1	129.6	142.6	200.7
Guinea-Bissau	27.3	16.2	15.3	24.3	12.8	1.7	16.6
Kenya	322.4	508.4	1,016.0	1,590.9	892.9	2,445.3	714.6
Lesotho	7.0	34.3	23.1	31.6	35.3	3.5	26.2
Liberia	0.9	78.1	301.1	201.8	202.0	382.7	432.7
Libya	2.3	4.7	8.8	18.7	3.1	3.1	20.2
Madagascar	304.0	273.1	57.1	36.5	69.5	266.5	271.4
Malawi	118.5	145.0	188.0	275.9	311.7	346.6	555.5
Mali	195.2	533.3	671.8	331.3	267.4	70.8	462.5
Mauritania	129.1	154.0	56.4	66.6	318.5	151.0	285.7
Mauritius	56.8	35.4	111.2	35.8	7.3	75.4	168.2
Morocco	328.3	895.9	1,028.9	1,329.1	614.0	2,375.2	1,297.8
Mozambique	363.9	484.2	404.4	672.6	331.8	374.0	1,011.4
Namibia	34.0	81.2	138.5	89.7	57.3	52.9	41.7
Niger	121.4	117.5	147.6	66.3	149.9	339.6	215.6
Nigeria	251.0	363.8	1,033.1	343.9	490.6	1,195.4	678.9
Rwanda	79.5	136.3	430.9	223.7	300.2	241.5	456.8
Sao Tome & Principe	8.0	6.8	24.3	4.5	24.8	3.3	11.7
Senegal	202.4	257.4	413.4	849.0	240.5	384.7	358.0
Seychelles	3.2	5.7	2.2	1.4	1.3	11.0	4.2
Sierra Leone	102.3	93.5	35.6	175.0	90.2	107.4	255.2
Somalia	4.6	15.2	40.5	14.6	39.3	98.2	105.8
South Africa	134.7	166.2	176.6	222.3	112.8	79.8	350.2
South Sudan	..	..	..	..	128.0	143.7	286.2
Sudan	29.7	233.8	261.1	391.9	615.6	284.6	450.1
Swaziland	18.3	23.0	23.9	25.8	76.8	9.9	5.1
Togo	9.3	42.2	75.0	157.9	77.7	40.6	100.8
Tunisia	221.1	293.0	304.6	527.3	272.3	1,098.2	732.8
Uganda	272.8	456.0	1,034.5	749.5	450.0	404.1	497.6
Tanzania	425.6	801.0	823.3	1,439.7	583.9	692.6	1,563.8
Zambia	228.5	238.4	294.4	178.8	446.5	460.9	246.8
Zimbabwe	10.8	16.3	118.3	122.9	77.2	99.1	56.3
Africa total	**7,891.1**	**11,970.3**	**17,050.8**	**17,897.5**	**13,873.1**	**21,880.9**	**19,343.1**

Note: The total for Africa exceeds the sum of all countries because of regional and unspecified commitments

ANNEX 3

Year-on-year growth rate in Aid for Trade commitments (measured in 2013 constant USD million)

	2007	2008	2009	2010	2011	2012	2013	Coefficient of variation of growth rate
Algeria	-24%	-79%	-62%	98%	38%	-34%	-11%	529%
Angola	287%	-43%	-74%	261%	-76%	-44%	523%	185%
Benin	-74%	100%	48%	-7%	-35%	-28%	1%	6827%
Botswana	353%	-49%	4%	270%	-75%	1881%	-96%	200%
Burkina Faso	-33%	69%	142%	-42%	-1%	-6%	38%	250%
Burundi	-7%	2%	50%	54%	-1%	-32%	95%	180%
Cameroon	1%	-29%	51%	-54%	109%	29%	-44%	601%
Cabo Verde	159%	48%	18%	-44%	-34%	109%	-56%	268%
Central African Rep.	-59%	-89%	1528%	-81%	417%	51%	-94%	231%
Chad	383%	-34%	123%	-84%	1040%	-61%	-20%	196%
Comoros	-19%	-67%	1233%	-79%	-26%	434%	79%	200%
Congo	172%	-63%	85%	-39%	220%	-30%	-68%	278%
Côte d'Ivoire	103%	535%	1%	-16%	-7%	-7%	-12%	220%
Dem. Rep. of Congo	194%	-41%	156%	0%	9%	-45%	16%	214%
Djibouti	8%	357%	0%	153%	-7%	22%	39%	151%
Egypt	-25%	110%	-59%	273%	-56%	150%	-10%	214%
Equatorial Guinea	2495%	-70%	475%	-69%	261%	-78%	1163%	147%
Eritrea	240%	-72%	245%	-75%	-81%	454%	-67%	220%
Ethiopia	30%	-27%	13%	22%	-53%	350%	-50%	318%
Gabon	-64%	144%	-70%	93%	-88%	-35%	-5%	2321%
Gambia	-36%	-57%	329%	114%	-6%	118%	-62%	230%
Ghana	143%	-21%	14%	13%	-37%	37%	-67%	537%
Guinea	76%	-82%	68%	-73%	1068%	10%	41%	237%
Guinea-Bissau	-20%	-73%	198%	58%	-47%	-87%	882%	246%
Kenya	66%	-90%	983%	57%	-44%	174%	-71%	227%
Lesotho	135%	-93%	411%	37%	12%	-90%	653%	171%
Liberia	606%	-67%	479%	-33%	0%	90%	13%	162%
Libya	76%	30%	36%	112%	-83%	-2%	557%	186%
Madagascar	37%	81%	-86%	-36%	90%	284%	2%	208%
Malawi	53%	-29%	44%	47%	13%	11%	60%	103%
Mali	392%	-27%	11%	-51%	-19%	-74%	553%	208%
Mauritania	-71%	325%	-75%	18%	378%	-53%	89%	201%
Mauritius	-66%	225%	131%	-68%	-80%	937%	123%	193%
Morocco	-41%	524%	-45%	29%	-54%	287%	-45%	223%
Mozambique	30%	7%	-26%	66%	-51%	13%	170%	224%
Namibia	-72%	205%	43%	-35%	-36%	-8%	-21%	794%
Niger	-48%	392%	-33%	-55%	126%	127%	-37%	226%
Nigeria	-15%	242%	55%	-67%	43%	144%	-43%	198%
Rwanda	-13%	56%	150%	-48%	34%	-20%	89%	180%
Sao Tome & Principe	-28%	-26%	405%	-81%	449%	-87%	253%	173%
Senegal	-53%	185%	12%	105%	-72%	60%	-7%	255%
Seychelles	-82%	1620%	-82%	-36%	-7%	743%	-62%	202%
Sierra Leone	488%	21%	-75%	391%	-48%	19%	138%	154%
Somalia	-4%	174%	56%	-64%	169%	150%	8%	127%
South Africa	-9%	98%	-27%	26%	-49%	-29%	339%	254%
South Sudan	..	..	..	..	..	12%	99%	78%
Sudan	109%	706%	-56%	50%	57%	-54%	58%	196%
Swaziland	177%	48%	-34%	8%	197%	-87%	-49%	275%
Togo	-67%	1827%	-28%	110%	-51%	-48%	148%	237%
Tunisia	23%	131%	-38%	73%	-48%	303%	-33%	199%
Uganda	328%	-65%	241%	-28%	-40%	-10%	23%	223%
Tanzania	25%	155%	-42%	75%	-59%	19%	126%	175%
Zambia	-36%	12%	35%	-39%	150%	3%	-46%	563%
Zimbabwe	572%	-70%	1061%	4%	-37%	28%	-43%	186%
Africa total	**22%**	**31%**	**13%**	**5%**	**-22%**	**58%**	**-12%**	**183%**

ANNEX 4

Aid for Trade disbursements (2013 constant USD million)

	2006	2007	2008	2009	2010	2011	2012	2013
Algeria	143.2	118.9	112.0	107.4	44.4	50.7	29.4	37.3
Angola	27.2	28.2	46.7	59.7	82.7	41.3	37.3	43.3
Benin	77.5	108.7	182.7	182.8	193.2	277.0	143.0	189.6
Botswana	11.4	14.5	10.6	23.2	23.7	15.1	14.0	10.7
Burkina Faso	198.3	257.0	174.9	228.4	241.0	247.4	292.6	330.5
Burundi	53.8	97.5	74.4	89.4	124.2	119.0	166.2	157.9
Cameroon	128.1	157.4	132.6	143.2	161.2	144.2	211.3	291.5
Cabo Verde	48.1	46.3	99.1	75.9	161.6	91.1	76.1	59.8
Central African Rep.	62.3	29.8	18.6	28.2	36.1	91.5	57.2	18.0
Chad	57.5	34.4	69.0	78.4	27.7	58.0	46.3	50.4
Comoros	3.5	5.3	3.4	4.4	8.2	4.6	9.4	12.4
Congo	13.6	41.3	36.4	27.7	19.0	42.3	54.2	30.7
Côte d'Ivoire	20.1	28.2	248.4	211.2	187.9	123.0	90.6	110.3
Dem. Rep. of Congo	206.5	171.5	263.3	479.6	298.7	397.3	511.7	616.8
Djibouti	2.1	8.8	16.6	42.3	35.8	15.2	13.7	27.0
Egypt	517.3	439.6	784.3	651.2	903.7	644.2	1,521.1	1,645.4
Equatorial Guinea	0.0	0.7	0.6	0.5	0.4	1.4	1.2	0.2
Eritrea	23.8	15.2	18.6	20.7	25.6	9.3	6.5	8.5
Ethiopia	520.3	510.7	561.0	1,061.3	578.2	635.7	595.0	891.3
Gabon	18.6	35.3	19.9	17.8	53.3	24.7	29.5	24.4
Gambia	14.1	16.4	16.7	33.4	34.9	57.9	52.4	40.2
Ghana	332.7	338.3	387.1	423.9	573.9	701.5	636.9	519.6
Guinea	30.4	41.4	61.3	56.3	64.4	72.4	72.1	83.7
Guinea-Bissau	32.4	43.8	29.2	34.4	13.4	24.4	15.7	9.4
Kenya	219.7	353.1	325.7	359.4	402.9	538.0	784.7	1,192.3
Lesotho	15.7	18.7	21.3	12.3	25.6	36.6	19.8	20.0
Liberia	1.9	88.0	49.4	79.5	115.0	129.5	143.8	185.9
Libya	0.7	6.3	29.4	15.1	29.4	1.1	2.0	1.9
Madagascar	279.7	349.5	272.4	137.1	131.8	146.4	92.8	101.3
Malawi	88.1	117.3	113.7	136.9	188.0	173.5	226.5	220.6
Mali	200.5	315.8	241.2	272.9	351.4	476.3	325.7	251.3
Mauritania	49.3	102.4	95.3	111.5	121.7	179.1	180.8	79.3
Mauritius	1.9	13.9	4.6	24.0	17.2	29.6	48.5	93.5
Morocco	366.9	507.6	469.5	613.6	744.7	1,033.3	1,085.6	1,421.6
Mozambique	417.9	355.7	341.8	353.0	359.9	374.6	461.0	611.4
Namibia	22.9	32.8	36.9	57.2	56.7	107.2	49.8	57.9
Niger	75.4	99.3	106.9	84.5	132.5	104.7	126.9	157.8
Nigeria	184.3	333.1	227.6	257.7	448.1	346.2	372.9	557.1
Rwanda	76.4	95.9	149.3	171.2	211.9	298.9	194.7	226.4
Sao Tome & Principe	5.9	6.3	8.7	3.1	5.5	18.5	10.0	12.9
Senegal	208.2	192.6	292.0	216.4	252.4	309.7	265.1	317.6
Seychelles	6.6	1.4	2.2	9.1	4.6	7.3	21.3	10.4
Sierra Leone	40.9	48.5	78.3	107.3	119.9	99.3	103.9	106.2
Somalia	7.4	3.0	9.0	18.2	25.4	33.3	45.2	58.3
South Africa	95.5	239.6	271.6	130.3	136.0	269.2	102.4	224.4
South Sudan	..	..	..	..	..	132.2	129.8	149.7
Sudan	16.8	24.6	222.3	250.6	269.4	184.2	177.5	165.7
Swaziland	16.0	9.7	11.5	12.4	10.9	27.5	25.7	38.0
Togo	9.2	2.9	100.5	29.3	38.6	50.2	36.3	47.7
Tunisia	172.2	156.0	302.1	355.3	496.2	354.6	594.1	607.1
Uganda	260.9	527.6	445.0	470.6	439.2	467.2	386.8	570.8
Tanzania	403.3	398.3	489.0	582.1	764.0	606.8	807.1	1,113.1
Zambia	177.0	116.2	179.5	135.0	119.0	173.3	140.7	252.1
Zimbabwe	7.6	18.7	9.4	54.7	84.7	90.6	86.9	92.3
Africa total	**6,361.4**	**7,933.1**	**9,409.7**	**11,416.8**	**11,580.8**	**12,566.8**	**13,540.7**	**15,794.5**

Note: The total for Africa exceeds the sum of all countries because of regional and unspecified disbursements

ANNEX 5

Aid for Trade disbursements as share of GDP (both measured at current prices)

	2006	2007	2008	2009	2010	2011	2012	2013
Algeria	0.11%	0.09%	0.07%	0.08%	0.03%	0.03%	0.01%	0.02%
Angola	0.06%	0.04%	0.05%	0.07%	0.10%	0.04%	0.03%	0.03%
Benin	1.40%	1.83%	2.74%	2.69%	2.81%	3.77%	1.85%	2.30%
Botswana	0.10%	0.13%	0.10%	0.22%	0.18%	0.10%	0.10%	0.07%
Burkina Faso	2.92%	3.58%	2.10%	2.63%	2.57%	2.45%	2.70%	2.78%
Burundi	3.62%	6.79%	4.62%	4.86%	5.83%	5.31%	7.39%	6.50%
Cabo Verde	3.30%	2.91%	5.55%	4.36%	9.49%	5.07%	3.93%	2.83%
Cameroon	0.62%	0.73%	0.57%	0.60%	0.67%	0.56%	0.80%	1.01%
Central African Rep.	3.68%	1.67%	0.94%	1.39%	1.75%	4.22%	2.57%	0.77%
Chad	0.78%	0.45%	0.83%	1.01%	0.30%	0.57%	0.45%	0.47%
Comoros	0.75%	1.08%	0.66%	0.83%	1.49%	0.78%	1.52%	1.83%
Congo	0.15%	0.53%	0.36%	0.29%	0.15%	0.27%	0.36%	0.20%
Côte d'Ivoire	0.10%	0.14%	1.05%	0.87%	0.80%	0.52%	0.36%	0.40%
Dem. Rep. of Congo	2.05%	1.62%	2.24%	4.11%	2.18%	2.51%	2.69%	2.96%
Djibouti	0.24%	0.98%	1.66%	3.98%	3.23%	1.28%	1.07%	1.85%
Egypt	0.42%	0.31%	0.46%	0.34%	0.41%	0.29%	0.59%	0.66%
Equatorial Guinea	0.00%	0.01%	0.00%	0.01%	0.00%	0.01%	0.01%	0.00%
Eritrea	1.71%	1.07%	1.33%	1.08%	1.15%	0.42%	0.20%	0.24%
Ethiopia	2.99%	2.52%	2.19%	3.59%	2.12%	2.17%	1.43%	2.02%
Gabon	0.16%	0.27%	0.12%	0.12%	0.29%	0.11%	0.12%	0.09%
Gambia	1.87%	1.92%	1.72%	3.67%	3.53%	6.54%	5.60%	4.42%
Ghana	1.40%	1.27%	1.34%	1.55%	1.72%	1.78%	1.58%	1.15%
Guinea	0.86%	0.84%	1.17%	1.06%	1.19%	1.32%	1.17%	1.23%
Guinea-Bissau	4.71%	5.99%	3.41%	4.10%	1.54%	2.84%	1.89%	1.06%
Kenya	0.85%	1.22%	1.06%	1.13%	1.21%	1.61%	1.94%	2.65%
Lesotho	0.95%	1.09%	1.29%	0.68%	1.11%	1.50%	0.80%	0.86%
Liberia	0.23%	9.97%	5.05%	7.09%	10.07%	11.31%	9.44%	11.23%
Libya	0.00%	0.01%	0.03%	0.02%	0.03%	0.00%	0.00%	0.00%
Madagascar	4.36%	4.47%	2.85%	1.55%	1.45%	1.51%	0.93%	0.94%
Malawi	1.96%	2.40%	2.15%	2.12%	2.73%	2.45%	4.02%	4.30%
Mali	2.82%	4.16%	2.75%	2.90%	3.58%	4.51%	3.11%	2.27%
Mauritania	1.40%	2.88%	2.73%	3.75%	3.71%	4.12%	4.57%	1.95%
Mauritius	0.02%	0.17%	0.05%	0.25%	0.17%	0.27%	0.41%	0.78%
Morocco	0.48%	0.64%	0.53%	0.69%	0.81%	1.07%	1.12%	1.36%
Mozambique	4.96%	4.05%	3.37%	3.42%	3.69%	3.03%	3.13%	3.93%
Namibia	0.25%	0.34%	0.41%	0.71%	0.56%	0.91%	0.38%	0.48%
Niger	1.77%	2.19%	2.00%	1.53%	2.22%	1.66%	1.84%	2.07%
Nigeria	0.11%	0.20%	0.11%	0.14%	0.19%	0.14%	0.14%	0.20%
Rwanda	2.12%	2.39%	3.14%	3.15%	3.59%	4.78%	2.74%	2.99%
Sao Tome & Principe	3.70%	4.02%	4.24%	1.44%	2.52%	7.27%	3.75%	4.21%
Senegal	1.92%	1.62%	2.18%	1.65%	1.90%	2.20%	1.89%	2.10%
Seychelles	0.57%	0.12%	0.22%	1.17%	0.52%	0.71%	2.02%	0.81%
Sierra Leone	1.92%	2.16%	3.15%	4.33%	4.46%	3.46%	2.38%	2.00%
Somalia	0.28%	0.11%	0.36%	0.90%	2.28%	3.13%	3.37%	..
South Africa	0.03%	0.08%	0.10%	0.04%	0.03%	0.07%	0.03%	0.06%
South Sudan	..	..	..	..	..	..	..	..
Sudan	0.03%	0.04%	0.34%	0.39%	0.37%	0.25%	..	..
Swaziland	0.49%	0.29%	0.38%	0.36%	0.23%	0.68%	0.65%	1.07%
Tanzania	2.32%	2.12%	2.25%	2.50%	3.11%	2.51%	2.82%	3.33%
Togo	0.36%	0.10%	3.13%	0.87%	1.15%	1.38%	0.93%	1.10%
Tunisia	0.43%	0.38%	0.68%	0.83%	1.11%	0.82%	1.28%	1.28%
Uganda	2.02%	3.63%	2.69%	2.70%	2.46%	2.61%	1.76%	2.44%
Zambia	1.40%	0.91%	1.22%	1.00%	0.72%	0.93%	0.65%	1.07%
Zimbabwe	0.11%	0.30%	0.18%	0.81%	1.08%	1.03%	0.88%	0.91%
Africa, Total	**0.47%**	**0.56%**	**0.59%**	**0.74%**	**0.64%**	**0.67%**	**0.66%**	**0.76%**

ANNEX 6

Aid for Trade disbursements (USD per capita; 2013 constant)

	2006	2007	2008	2009	2010	2011	2012	2013
Algeria	4.2	3.4	3.1	3.0	1.2	1.3	0.8	1.0
Angola	1.6	1.6	2.5	3.2	4.2	2.0	1.8	2.0
Benin	9.2	12.5	20.4	19.8	20.3	28.3	14.2	18.4
Botswana	6.0	7.5	5.5	11.9	12.0	7.6	7.0	5.3
Burkina Faso	14.3	18.1	11.9	15.1	15.5	15.5	17.8	19.5
Burundi	6.7	11.7	8.6	10.0	13.4	12.5	16.9	15.5
Cameroon	6.9	8.2	6.8	7.1	7.8	6.8	9.7	13.1
Cabo Verde	99.9	95.6	204.5	156.3	331.3	185.8	153.9	119.8
Central African Rep.	15.4	7.3	4.4	6.6	8.3	20.6	12.6	3.9
Chad	5.6	3.2	6.3	6.9	2.4	4.8	3.7	3.9
Comoros	5.7	8.4	5.2	6.7	12.0	6.5	13.1	16.9
Congo	3.7	11.0	9.4	6.9	4.6	10.0	12.5	6.9
Côte d'Ivoire	1.1	1.6	13.6	11.4	9.9	6.3	4.6	5.4
Dem. Rep. of Congo	3.7	3.0	4.5	7.9	4.8	6.2	7.8	9.1
Djibouti	2.7	11.0	20.5	51.5	43.0	17.9	15.9	31.0
Egypt	7.1	5.9	10.4	8.5	11.6	8.1	18.8	20.1
Equatorial Guinea	0.0	1.1	0.9	0.8	0.6	2.0	1.7	0.2
Eritrea	4.7	2.9	3.4	3.7	4.5	1.6	1.1	1.3
Ethiopia	6.6	6.3	6.8	12.5	6.6	7.1	6.5	9.5
Gabon	13.1	24.4	13.4	11.7	34.2	15.5	18.0	14.6
Gambia	9.5	10.7	10.6	20.5	20.8	33.4	29.3	21.8
Ghana	15.2	15.0	16.8	17.9	23.7	28.3	25.1	20.1
Guinea	3.1	4.1	5.9	5.3	5.9	6.5	6.3	7.1
Guinea-Bissau	22.3	29.5	19.3	22.2	8.5	15.0	9.5	5.5
Kenya	6.0	9.4	8.4	9.0	9.8	12.8	18.2	26.9
Lesotho	8.1	9.6	10.8	6.2	12.8	18.0	9.7	9.6
Liberia	0.6	25.0	13.4	20.8	29.1	31.7	34.3	43.3
Libya	0.1	1.1	5.0	2.5	4.9	0.2	0.3	0.3
Madagascar	14.9	18.0	13.7	6.7	6.3	6.8	4.2	4.4
Malawi	6.6	8.6	8.0	9.4	12.5	11.2	14.2	13.5
Mali	16.3	24.8	18.4	20.1	25.1	33.0	21.9	16.4
Mauritania	15.2	30.7	27.8	31.7	33.7	48.4	47.6	20.4
Mauritius	1.6	11.4	3.8	19.6	14.0	24.0	39.2	75.1
Morocco	12.1	16.6	15.2	19.6	23.5	32.2	33.4	43.1
Mozambique	19.4	16.0	15.0	15.1	15.0	15.2	18.3	23.7
Namibia	11.2	15.8	17.5	26.7	26.0	48.4	22.0	25.1
Niger	5.5	7.0	7.3	5.5	8.3	6.3	7.4	8.9
Nigeria	1.3	2.3	1.5	1.7	2.8	2.1	2.2	3.2
Rwanda	7.9	9.7	14.6	16.3	19.6	26.8	17.0	19.2
Sao Tome & Principe	37.3	38.4	51.5	18.1	31.0	101.2	53.1	66.9
Senegal	18.0	16.2	23.9	17.2	19.5	23.2	19.3	22.5
Seychelles	75.1	15.4	24.1	100.1	51.0	79.1	230.9	111.9
Sierra Leone	7.7	8.9	14.1	19.0	20.8	16.9	17.4	17.4
Somalia	0.8	0.3	1.0	1.9	2.6	3.4	4.4	5.6
South Africa	2.0	4.8	5.4	2.6	2.6	5.2	2.0	4.3
South Sudan	..	..	..	..	..	..	12.0	13.3
Sudan	0.4	0.6	5.2	5.6	5.9	3.9	4.8	4.4
Swaziland	14.3	8.6	10.0	10.6	9.2	22.7	20.9	30.4
Togo	1.6	0.5	16.8	4.8	6.1	7.8	5.5	7.0
Tunisia	16.9	15.2	29.1	33.8	46.7	33.0	54.6	55.2
Uganda	8.8	17.2	14.0	14.3	12.9	13.3	10.6	15.2
Tanzania	10.1	9.7	11.5	13.3	17.0	13.1	16.9	22.6
Zambia	15.0	9.6	14.4	10.5	9.0	12.7	10.0	17.3
Zimbabwe	0.6	1.5	0.7	4.2	6.5	6.8	6.3	6.5
Africa TOTAL (incl. regional)	**6.8**	**8.3**	**9.6**	**11.4**	**11.2**	**11.9**	**12.5**	**14.2**

ANNEX 7

Year-on-year growth rate in Aid for Trade disbursements (measured in 2013 constant USD million)

	2007	2008	2009	2010	2011	2012	2013	Coefficient of variation of growth rate
Algeria	-16.9%	-5.8%	-4.1%	-58.6%	14.2%	-41.9%	26.6%	224%
Angola	3.6%	65.5%	27.8%	38.7%	-50.0%	-9.8%	16.2%	261%
Benin	40.4%	68.0%	0.0%	5.7%	43.4%	-48.4%	32.6%	174%
Botswana	26.6%	-26.9%	119.3%	2.3%	-36.1%	-7.8%	-23.3%	640%
Burkina Faso	29.6%	-32.0%	30.6%	5.5%	2.7%	18.3%	12.9%	204%
Burundi	81.3%	-23.7%	20.2%	38.9%	-4.1%	39.6%	-5.0%	157%
Cameroon	22.9%	-15.8%	8.0%	12.6%	-10.5%	46.5%	38.0%	148%
Cabo Verde	-3.9%	114.3%	-23.4%	112.8%	-43.6%	-16.5%	-21.4%	368%
Central African Rep.	-52.1%	-37.8%	52.0%	27.7%	153.7%	-37.5%	-68.6%	1360%
Chad	-40.2%	100.7%	13.7%	-64.7%	109.2%	-20.2%	9.0%	404%
Comoros	50.6%	-36.3%	31.7%	84.2%	-43.9%	104.8%	32.5%	162%
Congo	203.2%	-11.8%	-23.9%	-31.3%	122.3%	28.2%	-43.3%	248%
Côte d'Ivoire	40.2%	779.9%	-15.0%	-11.0%	-34.6%	-26.3%	21.7%	255%
Dem. Rep. of the Congc	-17.0%	53.5%	82.2%	-37.7%	33.0%	28.8%	20.5%	161%
Djibouti	319.3%	88.5%	155.2%	-15.3%	-57.6%	-10.1%	97.9%	144%
Egypt	-15.0%	78.4%	-17.0%	38.8%	-28.7%	136.1%	8.2%	195%
Equatorial Guinea	2497.1%	-18.6%	-9.4%	-28.2%	263.7%	-11.9%	-87.4%	235%
Eritrea	-36.1%	22.1%	11.5%	23.4%	-63.6%	-30.5%	32.2%	587%
Ethiopia	-1.8%	9.9%	89.2%	-45.5%	9.9%	-6.4%	49.8%	266%
Gabon	90.3%	-43.6%	-10.5%	198.9%	-53.7%	19.3%	-17.0%	317%
Gambia	16.6%	1.8%	99.9%	4.5%	65.9%	-9.5%	-23.2%	184%
Ghana	1.7%	14.4%	9.5%	35.4%	22.2%	-9.2%	-18.4%	214%
Guinea	36.4%	48.1%	-8.2%	14.4%	12.5%	-0.4%	16.1%	107%
Guinea-Bissau	35.2%	-33.2%	17.7%	-60.9%	81.5%	-35.6%	-40.3%	931%
Kenya	60.7%	-7.8%	10.3%	12.1%	33.5%	45.9%	51.9%	79%
Lesotho	19.1%	13.9%	-42.3%	108.1%	42.9%	-45.9%	0.9%	353%
Liberia	4583.4%	-43.9%	61.1%	44.6%	12.6%	11.0%	29.2%	238%
Libya	834.5%	369.3%	-48.5%	94.4%	-96.1%	77.0%	-4.3%	173%
Madagascar	24.9%	-22.0%	-49.7%	-3.9%	11.1%	-36.6%	9.2%	265%
Malawi	33.1%	-3.1%	20.5%	37.3%	-7.7%	30.6%	-2.6%	116%
Mali	57.5%	-23.6%	13.1%	28.8%	35.5%	-31.6%	-22.8%	394%
Mauritania	107.6%	-6.9%	17.0%	9.1%	47.2%	0.9%	-56.2%	276%
Mauritius	625.8%	-66.9%	423.2%	-28.4%	71.9%	63.9%	92.5%	141%
Morocco	38.3%	-7.5%	30.7%	21.4%	38.8%	5.1%	30.9%	72%
Mozambique	-14.9%	-3.9%	3.3%	2.0%	4.1%	23.1%	32.6%	226%
Namibia	43.1%	12.4%	55.2%	-0.9%	89.1%	-53.6%	16.3%	182%
Niger	31.7%	7.7%	-21.0%	56.8%	-21.0%	21.2%	24.4%	183%
Nigeria	80.7%	-31.7%	13.2%	73.9%	-22.7%	7.7%	49.4%	170%
Rwanda	25.5%	55.7%	14.6%	23.7%	41.1%	-34.9%	16.3%	129%
Sao Tome & Principe	6.0%	38.1%	-63.8%	76.6%	235.1%	-46.1%	29.3%	233%
Senegal	-7.5%	51.6%	-25.9%	16.7%	22.7%	-14.4%	19.8%	273%
Seychelles	-79.3%	57.9%	318.6%	-48.7%	56.3%	193.5%	-51.3%	212%
Sierra Leone	18.4%	61.5%	37.1%	11.7%	-17.1%	4.6%	2.3%	140%
Somalia	-59.2%	200.3%	101.6%	40.0%	30.9%	35.6%	29.2%	137%
South Africa	150.8%	13.4%	-52.0%	4.4%	97.9%	-62.0%	119.2%	201%
South Sudan	..	..	..	..	..	-1.9%	15.3%	127%
Sudan	46.2%	802.8%	12.7%	7.5%	-31.6%	-3.6%	-6.7%	237%
Swaziland	-39.4%	18.3%	8.1%	-11.8%	151.2%	-6.6%	48.0%	241%
Togo	-68.5%	3362.9%	-70.8%	31.8%	30.0%	-27.7%	31.3%	252%
Tunisia	-9.4%	93.6%	17.6%	39.6%	-28.5%	67.5%	2.2%	154%
Uganda	102.2%	-15.7%	5.8%	-6.7%	6.4%	-17.2%	47.5%	229%
Tanzania	-1.3%	22.8%	19.1%	31.2%	-20.6%	33.0%	37.9%	112%
Zambia	-34.4%	54.5%	-24.8%	-11.8%	45.5%	-18.8%	79.1%	330%
Zimbabwe	146.1%	-49.7%	481.8%	54.9%	6.9%	-4.0%	6.2%	184%
Africa total	**24.7%**	**18.6%**	**21.3%**	**1.4%**	**8.5%**	**7.8%**	**16.6%**	**55%**

ANNEX 8

Aid for Trade disbursements-to commitments ratio

	2006	2007	2008	2009	2010	2011	2012	2013
Algeria	62%	68%	307%	785%	164%	136%	120%	170%
Angola	75%	20%	58%	279%	107%	220%	352%	66%
Benin	23%	120%	101%	68%	77%	171%	123%	161%
Botswana	520%	145%	208%	440%	122%	305%	14%	259%
Burkina Faso	91%	176%	71%	38%	69%	72%	90%	73%
Burundi	57%	112%	84%	68%	61%	59%	121%	59%
Cameroon	39%	47%	56%	40%	98%	42%	48%	117%
Cabo Verde	177%	66%	95%	62%	236%	202%	81%	146%
Central African Rep.	49%	57%	332%	31%	206%	101%	42%	237%
Chad	401%	50%	152%	77%	176%	32%	66%	90%
Comoros	38%	70%	133%	13%	115%	87%	33%	25%
Congo	55%	61%	144%	59%	66%	46%	85%	148%
Côte d'Ivoire	94%	65%	90%	76%	81%	57%	45%	63%
Dem. Rep. of Congo	125%	35%	92%	66%	41%	50%	118%	123%
Djibouti	44%	170%	70%	180%	60%	27%	20%	29%
Egypt	67%	76%	65%	130%	48%	78%	74%	89%
Equatorial Guinea	100%	100%	272%	43%	99%	100%	397%	4%
Eritrea	116%	22%	96%	31%	155%	303%	38%	151%
Ethiopia	72%	54%	82%	137%	61%	142%	30%	88%
Gabon	25%	131%	30%	90%	139%	550%	1002%	873%
Gambia	47%	85%	204%	95%	46%	82%	34%	69%
Ghana	95%	40%	57%	55%	66%	128%	85%	210%
Guinea	40%	31%	253%	138%	580%	56%	51%	42%
Guinea-Bissau	134%	226%	567%	224%	55%	190%	929%	56%
Kenya	41%	40%	347%	35%	25%	60%	32%	167%
Lesotho	54%	27%	471%	53%	81%	104%	570%	76%
Liberia	8%	55%	95%	26%	57%	64%	38%	43%
Libya	24%	126%	456%	172%	158%	36%	66%	10%
Madagascar	165%	151%	65%	240%	361%	211%	35%	37%
Malawi	73%	64%	87%	73%	68%	56%	65%	40%
Mali	119%	38%	40%	41%	106%	178%	460%	54%
Mauritania	27%	192%	42%	198%	183%	56%	120%	28%
Mauritius	4%	94%	10%	22%	48%	407%	64%	56%
Morocco	72%	169%	25%	60%	56%	168%	46%	110%
Mozambique	106%	69%	62%	87%	54%	113%	123%	60%
Namibia	20%	103%	38%	41%	63%	187%	94%	139%
Niger	87%	221%	48%	57%	200%	70%	37%	73%
Nigeria	80%	171%	34%	25%	130%	71%	31%	82%
Rwanda	60%	87%	87%	40%	95%	100%	81%	50%
Sao Tome & Principe	65%	96%	180%	13%	122%	75%	302%	110%
Senegal	76%	149%	79%	52%	30%	129%	69%	89%
Seychelles	165%	192%	18%	411%	331%	555%	193%	246%
Sierra Leone	205%	41%	55%	301%	69%	110%	97%	42%
Somalia	74%	32%	35%	45%	174%	85%	46%	55%
South Africa	71%	196%	112%	74%	61%	239%	128%	64%
South Sudan						103%	90%	52%
Sudan	48%	33%	38%	96%	69%	30%	62%	37%
Swaziland	183%	40%	32%	52%	42%	36%	259%	748%
Togo	56%	53%	96%	39%	24%	65%	89%	47%
Tunisia	99%	73%	61%	117%	94%	130%	54%	83%
Uganda	129%	61%	147%	45%	59%	104%	96%	115%
Tanzania	91%	72%	35%	71%	53%	104%	117%	71%
Zambia	58%	60%	83%	46%	67%	39%	31%	102%
Zimbabwe	151%	55%	92%	46%	69%	117%	88%	164%
Africa TOTAL (incl. regional)	**68%**	**69%**	**63%**	**67%**	**65%**	**91%**	**62%**	**82%**
Median African country	72%	69%	84%	62%	69%	101%	81%	75%

ANNEX 9

Share of Aid for Trade disbursements by flow (measured in 2013 constant USD million)

	Equity Investment		ODA Grants		ODA Loans	
	2008-2010	2011-2013	2008-2010	2011-2013	2008-2010	2011-2013
Algeria	1%	4%	50%	66%	48%	30%
Angola	7%	8%	42%	48%	51%	44%
Benin	0%	0%	76%	84%	24%	16%
Botswana	1%	3%	71%	51%	28%	46%
Burkina Faso	0%	0%	61%	65%	39%	35%
Burundi	0%	0%	89%	88%	11%	12%
Cabo Verde	0%	0%	48%	33%	52%	67%
Cameroon	0%	0%	49%	50%	51%	50%
Central African Rep.	0%	0%	100%	100%	0%	0%
Chad	0%	0%	77%	71%	23%	29%
Comoros	0%	0%	82%	86%	18%	14%
Congo	0%	0%	97%	77%	3%	23%
Côte d'Ivoire	5%	5%	91%	89%	4%	6%
Dem. Rep. of Congo	1%	0%	81%	83%	18%	16%
Djibouti	2%	2%	44%	51%	54%	47%
Egypt	3%	4%	40%	25%	57%	72%
Equatorial Guinea	0%	0%	100%	100%	0%	0%
Eritrea	0%	0%	78%	89%	22%	11%
Ethiopia	0%	0%	53%	49%	47%	51%
Gabon	0%	0%	60%	57%	40%	43%
Gambia	0%	0%	72%	79%	28%	21%
Ghana	2%	1%	56%	53%	43%	46%
Guinea	0%	0%	87%	90%	13%	10%
Guinea-Bissau	0%	0%	95%	93%	5%	7%
Kenya	4%	3%	32%	31%	64%	66%
Lesotho	0%	0%	49%	58%	51%	42%
Liberia	1%	0%	99%	96%	0%	4%
Libya	0%	19%	20%	30%	80%	51%
Madagascar	1%	1%	52%	44%	47%	55%
Malawi	0%	0%	84%	82%	16%	18%
Mali	0%	0%	64%	64%	36%	36%
Mauritania	0%	1%	37%	32%	63%	68%
Mauritius	15%	34%	62%	12%	23%	54%
Morocco	0%	0%	25%	27%	75%	73%
Mozambique	1%	2%	66%	68%	33%	31%
Namibia	-3%	-10%	48%	46%	54%	65%
Niger	0%	0%	81%	67%	19%	33%
Nigeria	10%	11%	22%	22%	68%	67%
Rwanda	0%	0%	79%	78%	20%	21%
Sao Tome & Principe	0%	0%	94%	100%	6%	0%
Senegal	1%	1%	54%	54%	45%	45%
Seychelles	0%	0%	100%	98%	0%	2%
Sierra Leone	0%	1%	80%	74%	20%	25%
Somalia	0%	0%	100%	100%	0%	0%
South Africa	47%	39%	39%	37%	14%	24%
South Sudan		0%		100%		0%
Sudan	1%	0%	50%	46%	48%	54%
Swaziland	20%	15%	70%	74%	10%	11%
Tanzania	2%	2%	46%	49%	52%	49%
Togo	16%	14%	73%	73%	11%	13%
Tunisia	1%	1%	12%	10%	87%	88%
Uganda	3%	3%	44%	46%	53%	51%
Zambia	0%	5%	83%	78%	17%	17%
Zimbabwe	0%	0%	100%	100%	0%	0%

ANNEX 10

Sectoral composition of Aid for Trade disbursements (measured in 2013 constant USD million)

	Building Productive Capacity		Economic infrastructure		Trade Policy and regulation		Trade-related adjustment	
	2008-2010	2011-2013	2008-2010	2011-2013	2008-2010	2011-2013	2008-2010	2011-2013
Algeria	27%	65%	70%	30%	4%	5%	0%	0%
Angola	77%	73%	22%	26%	1%	1%	0%	0%
Benin	33%	31%	67%	67%	0%	2%	0%	0%
Botswana	50%	36%	49%	61%	1%	3%	0%	0%
Burkina Faso	57%	62%	42%	37%	1%	1%	0%	0%
Burundi	41%	43%	54%	53%	4%	4%	0%	0%
Cabo Verde	18%	9%	82%	91%	0%	0%	0%	0%
Cameroon	24%	23%	73%	73%	3%	5%	0%	0%
Central African Rep.	35%	12%	63%	84%	2%	5%	0%	0%
Chad	41%	46%	57%	53%	2%	2%	0%	0%
Comoros	69%	52%	30%	48%	1%	0%	0%	0%
Congo	28%	31%	71%	66%	1%	3%	0%	0%
Côte d'Ivoire	69%	52%	30%	45%	1%	3%	0%	0%
Dem. Rep. of Congo	39%	26%	58%	65%	3%	9%	0%	0%
Djibouti	10%	22%	89%	78%	0%	0%	0%	0%
Egypt	36%	45%	59%	54%	5%	1%	0%	0%
Equatorial Guinea	95%	81%	3%	19%	3%	0%	0%	0%
Eritrea	39%	79%	61%	21%	0%	0%	0%	0%
Ethiopia	39%	36%	61%	62%	0%	1%	0%	0%
Gabon	50%	42%	50%	57%	0%	0%	0%	0%
Gambia	52%	31%	46%	69%	0%	0%	2%	0%
Ghana	56%	46%	43%	52%	1%	1%	0%	0%
Guinea	32%	32%	67%	68%	1%	0%	0%	0%
Guinea-Bissau	48%	51%	51%	48%	1%	2%	0%	0%
Kenya	44%	29%	56%	70%	0%	1%	0%	0%
Lesotho	19%	29%	79%	71%	2%	0%	0%	0%
Liberia	28%	31%	72%	67%	0%	1%	0%	0%
Libya	4%	74%	96%	18%	0%	7%	0%	0%
Madagascar	58%	60%	42%	39%	0%	1%	0%	0%
Malawi	75%	69%	24%	30%	1%	1%	0%	0%
Mali	67%	57%	30%	42%	2%	1%	0%	0%
Mauritania	32%	20%	68%	80%	0%	0%	0%	0%
Mauritius	83%	50%	14%	49%	3%	1%	0%	0%
Morocco	18%	35%	81%	65%	1%	0%	0%	0%
Mozambique	49%	42%	49%	58%	2%	0%	0%	0%
Namibia	31%	57%	69%	41%	0%	2%	0%	0%
Niger	50%	70%	49%	29%	0%	1%	0%	0%
Nigeria	55%	45%	43%	53%	2%	2%	0%	0%
Rwanda	50%	46%	47%	49%	1%	5%	2%	0%
Sao Tome and Principe	47%	39%	51%	58%	2%	2%	0%	0%
Senegal	46%	46%	51%	54%	2%	1%	1%	0%
Seychelles	99%	11%	0%	89%	0%	0%	0%	0%
Sierra Leone	37%	29%	59%	70%	4%	1%	0%	0%
Somalia	85%	63%	15%	25%	0%	12%	0%	0%
South Africa	81%	40%	15%	54%	4%	6%	0%	0%
South Sudan		44%		51%		6%		0%
Sudan	32%	64%	59%	36%	0%	0%	9%	0%
Swaziland	94%	63%	4%	36%	2%	2%	0%	0%
Tanzania	50%	30%	49%	69%	1%	2%	0%	0%
Togo	85%	36%	12%	62%	0%	2%	2%	0%
Tunisia	24%	47%	75%	53%	0%	0%	0%	0%
Uganda	38%	42%	61%	56%	1%	3%	0%	0%
Zambia	56%	45%	42%	52%	2%	3%	0%	0%
Zimbabwe	84%	87%	11%	11%	3%	2%	2%	0%

ANNEX 11

Disbursements of trade-related other official flows (USD million; 2013 constant)

	2006	2007	2008	2009	2010	2011	2012	2013
Algeria	7.39	1.33	5.64	..	687.97	..	0.80	91.38
Angola	..	..	10.16	..	74.09	11.62	..	..
Benin	..	..	..	..	..	..	2.41	..
Botswana	..	..	7.06	1,029.71	2.79	59.52	39.76	14.86
Burkina Faso	..	..	..	..	4.70	..	..	..
Burundi	..	..	..	..	..	..	0.01	..
Cameroon	14.87	39.79	2.09	60.87	44.84	33.26	70.02	32.36
Cabo Verde	..	..	..	41.25	13.66	72.58	3.87	19.47
Central African Rep.	..	..	..	..	..	..	..	..
Chad	..	11.34	4.15	..	..	..	1.21	..
Comoros	..	..	..	..	2.73	..	..	..
Congo	..	..	..	..	..	..	..	0.06
Côte d'Ivoire	..	-1.57	6.49	..	..	..	14.08	41.20
Dem. Rep. of Congo	..	..	..	..	7.54	..	13.70	..
Djibouti	..	..	..	120.10	26.08	11.69	0.28	0.19
Egypt	112.12	1,132.14	225.24	1,054.32	1,016.27	464.15	681.48	710.28
Equatorial Guinea	..	..	..	..	..	..	..	..
Eritrea	..	..	..	..	..	..	..	..
Ethiopia	..	..	..	..	1.38	92.23	1.35	..
Gabon	3.25	1.66	24.78	69.79	37.79	93.13	67.66	40.39
Gambia	..	..	..	5.24	..	6.71	..	14.50
Ghana	19.47	50.88	40.70	87.83	51.56	37.26	37.73	141.85
Guinea	..	..	..	..	..	..	0.38	..
Guinea-Bissau	..	..	..	..	..	..	..	..
Kenya	29.53	14.31	56.19	106.16	91.72	29.24	140.60	117.09
Lesotho	..	..	..	..	5.29	..	..	..
Liberia	..	1.83	0.88	27.34	1.87	31.19	32.96	4.81
Libya	0.62	..	..	0.01	..	..	0.08	..
Madagascar	2.40	6.54	515.34	551.95	259.46	209.55	44.56	0.74
Malawi	2.03	..	3.31	..	..	..	..	..
Mali	..	..	..	..	..	..	..	..
Mauritania	4.45	8.42	18.21	13.49	38.39	28.65	117.80	127.34
Mauritius	3.54	17.91	7.57	56.16	138.01	32.96	98.54	69.03
Morocco	222.04	285.79	266.34	603.97	614.60	719.26	720.24	1,051.58
Mozambique	56.36	3.52	4.38	30.85	76.64	0.68	2.00	..
Namibia	29.07	27.19	12.47	0.77	113.83	..	8.88	4.21
Niger	..	..	..	..	17.36	..	2.77	10.48
Nigeria	7.79	58.12	21.55	190.66	161.20	146.41	72.38	382.84
Rwanda	..	..	1.19	6.45	2.07	16.59	20.79	42.55
Sao Tome and Principe	..	..	..	..	..	..	2.02	..
Senegal	9.00	10.30	4.22	24.24	5.72	50.73	105.27	38.21
Seychelles	..	..	..	11.32	5.46	..	12.21	0.01
Sierra Leone	..	..	..	..	..	..	42.40	6.90
Somalia	..	..	..	..	..	..	..	..
South Africa	8.57	42.57	22.12	893.16	1,124.13	1,223.77	1,813.32	942.22
South Sudan	..	..	..	..	..	..	..	..
Sudan	..	6.94	..	8.35	23.30	46.33	19.51	1.66
Swaziland	21.51	9.32	0.98	6.70	4.47	2.23	0.21	..
Togo	..	..	..	127.29	..	23.03	47.97	12.89
Tunisia	116.11	457.78	104.39	854.21	880.68	279.55	368.80	223.72
Uganda	..	4.40	93.95	111.35	77.44	21.71	90.73	41.40
Tanzania	..	10.72	40.02	21.38	2.97	7.43	7.53	58.66
Zambia	0.96	37.41	63.59	7.28	9.01	15.71	5.09	..
Zimbabwe	..	..	..	-0.01	..	..	21.58	7.95
Africa Total	**677.46**	**2,315.63**	**1,714.87**	**6,393.79**	**6,065.49**	**4,273.27**	**5,325.60**	**4,777.82**

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