Volume 1: Multilateral Services

- African Development Bank (AFDB)
- Asian Development Bank (ADB)
- Caribbean Development Bank (CDB)
- European Bank for Reconstruction and Development (EBRD)
- Food and Agriculture Organization (FAO)
- Inter-American Development Bank (IDB)
- International Atomic Energy Agency (IAEA)
- International Civil Aviation Organization (ICAO)
- International Fund for Agricultural Development (IFAD)
- International Labour Organization (ILO)
- International Maritime Organization (IMO)
- International Monetary Fund (IMF)
- International Telecommunication Union (ITU)
- International Trade Centre (ITC)
- United Nations Commission On International Trade Law (UNCITRAL)
- United Nations Conference on Trade and Development (UNCTAD)
- United Nations Department of Economic and Social Affairs (UNDESA)
- United Nations Development Programme (UNDP)
- United Nations Economic and Social Commission For Asia and the Pacific (UNESCAP)
- United Nations Economic Commission for Africa (UNECA)
- United Nations Economic Commission for Europe (UNECE)
- United Nations Economic Commission for Latin America and the Caribbean (UNECLAC)
- United Nations Environment Programme (UNEP)
- United Nations Human Settlements Programme (UN-HABITAT)
- United Nations Industrial Development Organization (UNIDO)
- United Nations Relief and Works Agency for the Palestine Refugees in the Near East (UNRWA)
- World Bank Group (WB)
- World Health Organization (WHO)
- World Intellectual Property Organization (WIPO)
- World Tourism Organization (UNWTO)
- World Trade Organization (WTO)

Volume 2: Bilateral Services

- Argentina
- Australia
- Austria
- Belgium
- Brazil
- Canada
- China
- Czech Republic
- Denmark
- Estonia
- European Commission
- Finland
- France
- Germany
- Greece
- Hungary
- Indonesia
- Ireland
- Italy
- Japan
- Korea (Republic of)
- Luxembourg
- Mexico
- Netherlands
- New Zealand
- Norway
- Poland
- Portugal
- Russia
- Slovak Republic
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- United Kingdom
- United States of America

UNITED NATIONS SYSTEM
Chief Executive Board for Coordination
High Level Committee on Programmes
Working Group on Market Efficiency and Integration

Multilateral and Bilateral Development Partners

Strategies & Services: Introduction

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UNIDO

TRADE CAPACITY BUILDING

[Resource Guide]

2015

UNITED NATIONS SYSTEM
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TRADE CAPACITY BUILDING

[Resource Guide]

Multilateral and Bilateral Development Partners

Introduction

UNITED NATIONS
Vienna, 2015

Details of trade-related services of bilateral and multilateral agencies are electronically enclosed.

ACKNOWLEDGMENTS

This third edition of the Trade Capacity Building Resource Guide builds on and further expands the collaborative effort which contributed to the success of the second Edition in 2010.

In addition to the continued participation of the 30 multilateral agencies, a new agency, UNCITRAL has joined in this collaborative effort for the first time. The five regional development banks - African Development Bank (AfDB), Asian Development Bank (ADB), the Caribbean Development Bank (CDB), European Bank for Reconstruction and Development (EBRD) and Inter-American Development Bank (IDB), have also continued their participation. Six inter-agency collaboration mechanisms have updated their input.

The first and enhanced second edition of the Inter-agency TCB Resource Guide attracted attention far beyond the UN system, of policy-makers in developing countries and bilateral development partners. In addition to the Organization for Economic Co-operation and Development (OECD), Development Assistance Committee (DAC) members, a large number of bilateral assistance providers and donors made use of the second edition of the Guide and expressed strong interest in participating in the endeavour. As a result, and again with the decisive support of the OECD DAC, this third edition now contains an enhanced second volume comprising, not only the profiles and services of all 24 DAC members, but eight additional OECD members (Czech Republic, Estonia, Hungary, Mexico, Poland, Slovak Republic, Slovenia and Turkey) as well as five G-20 members (Argentina, Brazil, China, Russia and Indonesia).

The Guide includes now 37 bilateral profiles. The trade-related services of altogether 31 OECD and 17 G-20 countries, some of which are also OECD members are reflected in the Guide. This compilation of major bilateral and multilateral technical assistance services as well as inclusion of South-South and triangular cooperation initiatives in the area of trade capacity building represents a milestone, which is expected to significantly increase both the coverage and potential use of the Guide.

Sheila Page, Senior Research Fellow at the Overseas Development Institute (ODI), London, again greatly contributed to the 2015 edition, in particular through her analytical contribution to the costs of trading, adding a value chain perspective and South-South and triangular cooperation, her support to the further conceptualization of the volume on bilateral donors, her review of country profiles and through the overview sections for both volumes of the Guide.

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This time, extensive contributions of the multilateral system and bilateral development partners allowed us to put together the so far most comprehensive compilation of trade-related technical assistance services.

FOREWORD

Ever since its first publication in 2008, the Trade Capacity Building Inter-agency Resource Guide has been welcomed by the multilateral agencies, bilateral donor community and policy-makers in developing countries as a useful and informative tool in the area of trade capacity building. In response to growing demand, a new and further enhanced third edition has now been prepared.

The 2015 edition comprises 31 multilateral agencies, including five regional development banks and six inter-agency coordination mechanisms. This Guide also presents the trade-related services of 37 bilateral donors. It includes 31 OECD countries, including all OECD-DAC members and 17 G20 members, some of which also OECD members.

I am particularly happy that the 2015 edition of the Resource Guide is available as a web tool to facilitate its use by policy-makers, especially in developing countries. This will result in an even wider outreach and relevance.

The mandate of the Resource Guide derives from a decision in 2005 by the High-Level Committee on Programmes (HLCP) of the United Nations System Chief Executives Board for Coordination (CEB) to undertake coordinated action in the field of economic development by identifying the wide range of United Nations (UN) System services related to trade capacity building that are available to developing countries as well as by ensuring a wide dissemination of this information.

The Resource Guide has since become a major tool for the development of country and regional technical assistance programmes, in particular as part of the One UN efforts, including the joint programmes of the United Nations Development Assistance Frameworks. The development and progressive enhancement of the Resource Guide has also significantly contributed to an increased level of coordination of capacity building activities in the trade and productive sectors at the country level.

I am confident that the Resource Guide will once again make a major contribution to sustainable development, in particular towards a forthcoming new global development framework that will guide our efforts in the years to come.

The Resource Guide has also proven useful for the UN agencies themselves, facilitating coordination, fostering synergies and joint delivery of technical assistance. Most of all, the Resource Guide has established its usefulness as a policy-making tool all over the world, reaching far beyond the UN System.

I would like to thank all the UN system organizations, OECD and bilateral development partners for their substantive contributions in making this publication such a crucial resource to support trade capacity building. I especially thank UNIDO, which has again coordinated the preparation of this third edition of the Resource Guide.

Achim Steiner
Chair
High-Level Committee on Programmes (HLCP)

PREFACE

I am pleased to present the third edition of the Trade Capacity Building Inter-agency Resource Guide. The success of the first (2008) and second (2010) editions of the Resource Guide led to calls for inclusion of other development partners far beyond the United Nations (UN) system. The Resource Guide for the first time now comprises trade-related services of 37 bilateral donors and 31 multilateral agencies, including five regional development banks and six inter-agency cooperation mechanisms.

Recent years have witnessed important new developments in the delivery of trade-related technical assistance. Thus, the Aid for Trade (AfT) Initiative led by the World Trade Organization (WTO) has evolved into a powerful tool, enabling policy-makers to develop focused and concrete measures in the area of trade-related technical assistance. At the same time, the UN System is focused on achieving greater coherence in its technical assistance delivery.

Meanwhile, we are also witnessing extensive efforts by the global community to formulate a new post-2015 development agenda built on the foundation of a new set of sustainable development goals, including inclusive and sustainable industrial and economic development. It is clear that trade and trade capacity building can make a powerful contribution to this new development framework.

South-South and triangular cooperation mechanisms have taken on an increasingly important role in strengthening the capacity of developing countries and economies in transition to participate in global trade, increasingly critical for the future economic growth of these countries. At the same time, patterns of trade have changed: supply and value chains are becoming more prominent, while the costs of trading have remained a major obstacle for trade by developing countries.

The 2015 edition of the Resource Guide has incorporated these dynamic trends and reflects their relevance for trade capacity building. The 2015 Resource Guide therefore again provides strategic decision-making support for policy makers in countries and development agencies.

The 2015 Resource Guide also reflects a further increase in the interest of development partners to feature their trade-related services. In addition to the UN system agencies and all members of the Development Assistance Committee (DAC) of the Organization for Economic Co-operation and Development (OECD), eight additional OECD members (Czech Republic, Estonia, Hungary, Mexico, Poland, Slovak Republic, Slovenia and Turkey) are now first-time contributors. Moreover, 17 members of the G-20 have also contributed to this edition of the Resource Guide, some of which are also OECD members, with five additional countries contributing for the first time (Argentina, Brazil, China, Indonesia and the Russian Federation). The Resource Guide therefore now contains information on trade-related services provided by a total of 37 bilateral development partners.

I would like to extend a particular thanks to the Chairman of the OECD Development Assistance Committee (DAC) for the very valuable contribution that he and his staff have made to this extension of the Resource Guide. This has greatly enriched and enhanced the Guide.

In response to growing demand, the 2015 edition of the Resource Guide is also available as a web tool to facilitate further its outreach and use.

It is my sincere hope that the Resource Guide, with its wider coverage of development partners, will facilitate the development of more coherent and consistent policies in the area of trade capacity building, which, in turn, can significantly contribute to wealth-creation and inclusive and sustainable development in many countries.

LI Yong
UNIDO Director-General

INTRODUCTION

The first edition of this *Trade Capacity Building Resource Guide* was published in 2008 as a UN system driven initiative to provide a summary of 'who does what for whom' at time when both donors and recipients were looking again at how aid could best assist countries to use trade as part of their development strategies. It was obvious that the United Nations (UN) organisations, taken together, had an important role in this, but it was also clear that the large number of donors, differing in areas of interest, types of expertise, modes of working and rules on eligibility, made it difficult for an individual country to identify which agencies could help it on a particular project and what types of capacity building could be combined into a trade and development strategy. This edition was widely welcomed, but it was limited to the UN system. Some international and regional agencies had not taken part. The second edition, in 2010, added more agencies and through cooperation with the OECD (Organization for Economic Co-operation and Development) included bilateral programmes and services from the twenty four DAC members (Development Co-operation Directorate of OECD). This third edition now has added more bilateral donors, with an attempt to focus on the growing importance of South-South and triangular cooperation. It now includes eight members of the OECD which are not members of the DAC, **Czech Republic**, **Estonia**, **Hungary**, **Mexico**, **Poland**, **Slovak Republic**, **Slovenia** and **Turkey** and some additional "South-South" donors, being members of the G20: **Argentina**, **Brazil**, **China, Indonesia**, and **the Russian Federation.** It has also added **UNCITRAL** (United Nations Commission on International Trade Law) to the UN agencies.

This introduction first discusses recent policy initiatives related to Trade Capacity Building from the WTO (World Trade Organization) and from UNIDO (United Nations Industrial Development Organization): the WTO work programme on Aid for Trade for 2014-2015 (WTO 2014) and the new UNIDO priority for Inclusive and Sustainable Industrial Development (UNIDO 2014). It also presents some results of two strands of recent research, one supporting the importance of helping countries to reduce the costs of trading and the other taking a new approach to understanding how countries are integrated into world markets, with possible implications for the types of assistance needed. It uses the evidence from the two main volumes (Volume 1: Multilateral Services and Volume 2: Bilateral Services) in order to indicate how well current trade capacity building programmes relate to these initiatives and respond to the needs identified. For this, it uses the typology of trade capacity building which has been used in all three editions. Finally it describes how the multilateral and regional agencies and the bilateral donors are improving how they work together and identifies some of the ways in which they are taking a South-South or triangular approach in their programmes.

The Executive Summaries to the two main volumes (Volume 1: Multilateral Services and Volume 2: Bilateral Services) look at whether there are identifiable changes in the programmes of the agencies and bilateral donors which were already covered in the 2010 edition of the *Resource Guide*. The volume on bilateral donors then discusses the donors included for the first time in more detail. Each introduction summarizes the activities of the donors by standard category. For bilateral donors, there is also a summary of their participation in triangular aid.

Both volumes are electronically available on-line at www.unido.org/tcbresourceguide2015.

Current areas of focus for Aid for Trade

The adoption of the Agreement on Trade Facilitation (WTO 2013a) at the WTO Ministerial meeting in Bali (WTO 2013b) at the end of 2013 and the adoption by WTO members in November 2014 of a Protocol of Amendment to insert the new Agreement into Annex 1A of the WTO Agreement, gave increased legal force to efforts to reduce the costs and risks of trading. Following this, the WTO adopted a new work programme on Aid for Trade for 2014-2015 (WTO 2014) with assistance to developing countries on implementation of the Agreement as a priority. A second priority is infrastructure development, including services such as logistics. The new work programme also suggests that value chain analysis (discussed below) can be used to guide work on reducing the costs of accessing export markets.

Inclusive and sustainable industrial development (ISID)

In 2013, UNIDO adopted the objective of inclusive and sustainable industrial development. It is possible to identify three aspects of this which are relevant to evaluating trade capacity building. It supports industrialization as way to reach a higher stage of economic and social development, first as an essential element of structural transformation, as it upgrades both the economic structure and working conditions, and secondly as a way of increasing employment by absorbing increasing numbers of workers. It also emphasizes the need for environmental sustainability, including both cleaner and resource-efficient production.

The importance of reducing the costs of trading

Previous editions have argued that funding for trade capacity building matters because of the importance of trade for development and have looked at the role of trade during the financial crisis. But it is important to look also at the evidence of what obstructs trade by developing countries in order to draw conclusions on whether aid can help and, if so, what types of aid. If the binding barriers are policy restrictions (import barriers, discrimination through regional trading areas, etc.), aid measures cannot have a major impact, and even aid to adjust to changes in policy (the original purpose of the WTO Aid for Trade (AfT) initiative), would have a limited role at a time when many trade negotiations are stalled. If the most important constraints on trade are from weaknesses in production (supply side problems), then aid will have a role, but it will not necessarily be directly "trade-related" aid. The evidence is growing, however, that the costs of trading are a significant barrier for developing countries trying to increase their participation in world markets. To the extent that this is true, aid targeting these costs will have a significant effect on countries' ability to use trade in their development strategies.

There are several types of new evidence on trade costs. Work at UNESCAP and at the World Bank (Arvis et al 2013) has confirmed what has been found in a variety of regional and bilateral trade studies, that trading costs are higher for developing countries than for developed. Worse, they found that the differential was increasing, so that the disadvantage of developing countries in trade is increasing. The principal problems appear to be in maritime transport and logistics. Their data, however, are limited and their discussion is at a general level. Two very specific studies start to identify more precisely the types of cost which matter, although one is not directly based on developing countries. A study of the effect of the introduction of containers in maritime trade among developed countries (Bernhofen et al 2013) found that it increased bilateral trade flows on average by 320%, an effect much larger than the authors (or others) could find from formation of free trade agreements or General Agreement on Tariffs and Trade (GATT) membership. Looking at land transport, Bonfatti and Poelhekke (2013) have found that transport systems designed to take mining products to ports have a strong and continuing impact on the pattern of a country's trade even in other goods because the existence of transport links creates a lasting cost differential between these routes and others. One result, of course, is to reduce intra-regional trade, even where this would, given cost-neutral transport links, be efficient.

A careful comparison by Moïsé and Sorescu (2013) of the relationship of trade facilitation indicators (using the definitions in current WTO negotiations) to trade performance indicates what types of changes would have the largest impact on different types of country. For the low income and Sub-Saharan African categories, the largest impact comes from "harmonization and simplification of *documents*" and/or automation of processes. For middle income countries, it comes from "streamlining of *procedure*s" (emphasis in original). For land-locked countries, not surprisingly, the greatest improvement comes from reforming transit procedures and agreements. For low income countries, more documents and more time are required to trade. They also found that the simple provision of information (ensuring that agreements and customs classifications and procedures are published on websites and easily available) differs between low income and other countries. An important result is that the impact of "comprehensive trade facilitation reform" is greater than the sum of individual effects, because of the interaction among the different obstacles.

These results indicate that there are areas where change is likely to have strong effects on recipients' trade and development potential, and thus where targeted trade capacity building can have an important role. In particular, the significance that several studies have found for transit costs identifies an area which may be neglected in programmes designed country-by-country. Some estimates suggest that African border costs are particularly high, but there are well-known problems in other regions; for example, Brazilian food exports in 2013 were held back by transport bottlenecks. The detail in these and other studies of what increases the costs of trading could be used to guide priorities in trade capacity building.

Adding a value chain perspective

As cross-border integration of production has extended to more commodities and more countries, trade analysis has turned more attention to looking at the whole "chain" of supply, rather than at production of specific goods or at particular stages of production. Dividing production across borders is not new. Both hard and soft commodities have always been partially processed in their country of production and partially in the country of consumption, sometimes with intermediate stages in other countries. Complex commodities, whether clothing in the 18th century or televisions in the 20th, have been sent back and forth across borders to take advantage of cheap or alternatively of highly skilled labour or of different climates or of other differences in factors of production. But it is probably true that a higher proportion of world trade is now involved in trading in single stages of production, and that improved communication and transport have raised awareness of, and reduced the costs of, other potential locations for production. If goods or services cross borders more than once, then reducing border costs becomes more significant. Analysis of value chains has also drawn attention to the importance of market and other types of power relationships in determining how the gains from trade are shared among the different parts of the chain.

If trade is analyzed in this way, then targeting aid to have the maximum impact requires examining all the actual and potential stages of production which could be located in a recipient country (the increasing separability of stages of production means that the number of stages to consider is constantly increasing) and identifying which chains are most in need of assistance and then where along the chain aid would be most effective, rather than looking at individual goods and services which may be traded and the costs or barriers to each of these. Keane (2013) identifies a range of possible market failures in value chains which can be read as an agenda for aid interventions (Table1).

Table 1: Market Failures Affecting Entry and Participation with Global Value Chains (GVCs), and Responses

Type	Examples	Responses	AfT Category
Coordination	Externalities, complementarities ignored; linkages not exploited; no policy coherence	Capacity building for industrial policy	Trade Development; Trade Related Infrastructure; Building Productive Capacity
Technology: Developing, adapting and adopting	Incomplete and imperfect information; network externalities	Promotion of technology transfer and adoption	Trade Development and Trade Related Infrastructure
Skills formation	Externalities, imperfect information	Coordination and/or subsidies for training	Building Productive Capacity
Environment: Protection, conservation, cleaner technologies	Negative externalities not accounted for	Product and process standards and regulations	Trade Policy and Regulations

Both legal and private standards can be important at every level of production. Intervention may alter the allocation of returns within chains as well as increasing the total gains from trade. The importance of looking at a chain, rather than at individual stages of production or products, like the finding (above) that trade facilitation improvements are more effective when taken together, suggests that approaches to trade capacity building should start from a broad view of how a country is trying to change its trade, and then an assessment of all the obstacles to this. Clearly, individual donors with their own priorities, expertise, and, in the case of specialist agencies, legal areas of responsibility cannot be expected to provide on their own a comprehensive response to the needs identified. This reinforces the need for coordination, not merely within individual types of assistance or individual countries, but across a programme of assistance.

Comparing the Trade Capacity Building programmes to current priorities

Six possible areas for trade capacity building can be derived from the WTO Aid for Trade programme, the UNIDO ISID, and recent research on barriers to trade:

- Reducing trade costs
- Infrastructure
- Identifying requirements for value chains
- Industrialization
- Sustainability
- Building institutions.

Costs and infrastructure

In terms of the classification used in this *Guide* (Table 2), some multilateral and regional donors identify Trade Facilitation and Physical Infrastructure as areas of activity but these are fewer than half the number engaged in Global Advocacy, Trade Policy Development and Legal and Regulatory Framework support (the areas which imply a view that policy matters) or Supply Capacity (relevant when internal production costs matter). Compliance Support, which also reduces the costs of trading (see UNIDO 2011), shows only a few donors. Among bilateral donors, the numbers offering support to Trade Facilitation and Physical Infrastructure are as high as those for the policy and supply categories.

Table 2: Overview of Trade Capacity Building Services and Initiatives

	Global Advocacy	Trade Policy Development	Legal and Regulatory Framework	Supply Capacity	Compliance Suport Infrastructure and Services	Trade Promotion Capacity Building	Market & Trade Information	Trade Facilitation	Physical Trade Infrastructure	Trade-related Financial Services	South-South & Triangular Cooperation	Other Trade-related Activities*	**Total**
Multilateral and regional agencies	22	21	18	21	8	4	11	12	8	7	16	8	31
DAC donors	13	21	18	24	21	15	17	19	20	22	10	7	24
Other EU donors *	1	0	1	0	0	1	1	1	0	1	0	0	4
Other G20 donors	0	5	4	3	3	0	1	5	3	0	6	0	7

*Hungary and Poland did not provide a breakdown of their trade capacity-building services.

Supporting value chains

Fewer than half the multilateral and regional donors mention value or supply chains in their responses to this Guide. The **ADB** (Asian Development Bank) has a programme to promote regional supply chains in South Asia in agro-processing and in leather. **UNIDO** also develops value chains in agro-processing. **UNCTAD** (United Nations Conference on Trade and Development), the **ITC** (International Trade Centre) and **UNESCAP** (United Nations Economic and Social Commission for Asia and the Pacific) have programmes for regional cotton and textile chains. Table 3 indicates which agencies' responses had identifiable policies or activities related to value chains. As there was not a specific question on this to donors, not mentioning supply chains does not necessarily show that the agencies do not take account of them.

Table 3: Focus of Multilateral Agencies and Regional Development Banks: Value Chain Perspectives, Sustainability and Sectoral Priorities

	Value Chain Perspectives	Sustainability	Sectoral Priorities or activities mentioned
UNDESA			
ITC	x	x	
UNCTAD	x	x	General, Tourism, Bio
UNDP	x	x	General, commodities
UNEP	x	x	Agriculture
UNCITRAL			
UN-Habitat		x	Rural development
UNRWA			General
UNESCAP	x	x	General, textiles
UNECA		x	General support
UNECE		x	
UNECLAC	x	x	General support
FAO	x	x	Agriculture
ICAO		x	
IFAD	x	x	
ILO	x	x	General support

	Value Chain Perspectives	Sustainability	Sectoral Priorities or activities mentioned
IMO			
IMF			
ITU		x	Telecom
UNIDO	x	x	General, Agriculture, Fish Textiles, Clothing, Energy
WB		x	General, Agriculture
WHO			
WIPO		x	
UNWTO		x	Tourism
IAEA			Energy
WTO			
AfDB		x	General, Agriculture
ADB			SMEs
CDB		x	General
EBRD		x	General, Agriculture
IDB	x	x	General

Many more bilateral donors now mention *value* or *supply chains* in their responses to this Guide, but it is not clear how far this has influenced their activities. In some cases the reference seems simply to mean encouraging production for export. Others, like **Portugal**, do have integrated programmes for production and marketing which recognise the need for such an approach, but do not call this a "value chain" approach. Table 4 indicates which bilateral donors' responses had identifiable policies or activities in the area of value chains. As there was not a specific question on this to donors, not mentioning them does not necessarily show that the agencies do not take account of them.

Only two of the non-DAC donors mention value chains, **Argentina** and **Brazil**, and, as is true for many DAC donors, their sectoral priorities are traditional: agriculture for both, with fish, textiles and clothing, and tourism added for **Argentina**. In the case of these countries, however, in contrast to many of the DAC donors, their own economies have strong agricultural sectors and they therefore have national expertise and experience in this area to offer as donors. The donors included in this volume do not include many of the Asian countries most active in promoting value chains; this may help explain the lack of attention to other types of chain.

Table 4: Focus of Bilateral Donors: Value Chain Perspectives, Sustainability and Sectoral Priorities

	Value Chain Perspectives	Sustainability	Sectoral Priorities or activities mentioned
DAC members			
Australia	x		Agriculture, Textiles & clothing
Austria			Agriculture, Energy, Shoes
Belgium	x	x	Agriculture, Fish
Canada	x	x	General, Agriculture, Artisan
Denmark	x	x	General, Agriculture, Industry
EC	x		Rum, Textiles & clothing
Finland	x	x	General, Agriculture, Energy, Construction
France	x	x	Agriculture, Tourism, Finance
Germany	x	x	General, Agriculture
Greece		x	Potatoes
Ireland			Agriculture, Fair Trade
Italy			Agriculture
Japan		x	Agriculture
Korea			General, Agriculture, Textiles & clothing
Luxembourg			General, Rural, ITC
Netherlands	x	x	General, Agriculture

	Value Chain Perspectives	Sustainability	Sectoral Priorities or activities mentioned
New Zealand	x		Agriculture, Fish, Tourism
Norway			Energy
Portugal		x	Agriculture, Rural development, Mineral resources
Spain	x	x	Agriculture, Fish
Sweden	x	x	General
Switzerland	x	x	General
United Kingdom	x	x	General, Agriculture, Textiles & clothing
United States	x	x	General, Agriculture, Tourism
Other EU Member Countries *			
Czech Republic			
Estonia			
Slovak Republic			
Slovenia		x	

* Hungary and Poland did not report in detail their trade-related activities

Other Members of G20			
Argentina	x	x	General, Agriculture, Fish, Textiles & Clothing, Tourism
Brazil	x	x	General, Agriculture
China			Agriculture, Cement
Indonesia			Textiles, Steel, Glass, Cars, Energy
Mexico			
Russian Fed.			General
Turkey			

Some of the multilateral and regional agencies have programmes in economic sectors which can promote integration in to global value chains. These are found both under Supply Capacity activities and, notably by the **Regional Commissions** and **Banks**, under Trade Facilitation. As was noted above, most of the activities reported are in the areas related to policy and production, rather than directed at the costs of trading. Those agencies with programmes in Physical Infrastructure are acting in the areas identified as most needed, including ports and regional roads. In the category of Trade Facilitation, there are activities to improve the efficiency of customs operations and some directed at the problems facing land-locked countries. The bilateral donors, both DAC and non-DAC donors, are much more active in these sectors. They have a range of activities in the categories of Physical Infrastructure and Trade Facilitation, and in particular in road, air and sea transport and in customs administration. Like the multilateral and regional agencies, many focus particularly on developing regional trading links.

Industrialization

Textiles/apparel is the only industrial sector mentioned regularly by the multilateral agencies for regional value chains and South-South cooperation. Tourism, fishing and energy are also mentioned more than once, but the supply sector most often explicitly mentioned is Agriculture. It remains the case, as was noted in the previous edition, that almost all the bilateral DAC donors which have sectoral priorities for assistance (20 out of 24) include agriculture as one (frequently the only) area of interest. Industry (which, as for the multilaterals, usually means textiles and clothing, the stereotypical developing country entry to a value chain) and services (usually tourism trail, taken together are covered by only about a third. The coverage of the major bilateral agencies thus seems even more concentrated in traditional areas than that of the multilateral and regional agencies. The information for non-DAC donors is very incomplete. **Argentina** and **Brazil** both mention agriculture, with fish, textiles and clothing, and tourism added for **Argentina**. In the case of these countries, however, in contrast to many of the DAC donors, their own economies have strong agricultural sectors and they therefore have national expertise and experience in this area to offer as donors. **China** reports support for a wide range of industrial sectors and for energy, as well as for agriculture. The non-DAC donors covered in this Guide do not include many of the Asian countries most active in promoting value chains; this may help to explain the lack of attention to other sectors.

It does not appear that the priorities, and in particular the strong bias towards agriculture, are based on identification of appropriate supply chains and stages of production for individual recipients, or that they have changed in response to awareness of the importance of looking at all stages of production, and they do not meet the need for low income countries to avoid over-dependence on simple commodity production. There is no indication that donors are concerned to determine how best to promote industrial upgrading or that they see a role for structural change from agriculture to industry in promoting employment. The dominance of agriculture and textiles suggests a distinctly traditional view of economic activity.

Sustainability

In contrast to their limited attention to one of the new approaches, value chains, the responses of the multilateral and regional agencies show increasing awareness of how changes in the environment and in international regulations related to it may affect trade and trade policy, and therefore trade capacity building. Activities and priorities reflecting this concern are grouped here under the heading "sustainability", following the Brundtland Report (WCED p. 43) definition:

"Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs. It contains within it two key concepts:

- The concept of needs, in particular the essential needs of the world's poor, to which overriding priority should be given; and
- the idea of limitations imposed by the state of technology and social organization on the environment's ability to meet present and future needs."

Almost all the multilateral agencies mention this (Table 3). Some cite specific activities under Supply Capacity, while some mention this as an "other" type of support.

For the bilateral agencies, the proportion mentioning sustainability issues (Table 4) is smaller than for the multilateral, and only three of the non-DAC donors mention this (but with the same reservation as for value chains, that there was no direct question on this). This may be because trade and environment are treated as separate responsibilities in bilateral programmes, but this difference from the high number of mentions by the multilateral and regional agencies is particularly surprising in view of the emphasis on agriculture in the bilateral programmes. There is a risk that such a division will miss the important linkages between these types of support as countries must design trade strategies which will be sustainable in a changing environment.

Building institutions

Several of the categories used here for trade capacity building relate to institution building, but Legal and Regulatory Framework is probably the most relevant. About two thirds of multilateral and regional donors, and most bilateral donors, DAC and non-DAC, include some activities under this heading.

Programmes and priorities

The case for reducing the costs of trading, through both trade facilitation and better infrastructure, now seems well-established. It is supported by research, has been adopted legally (for example, in the new WTO Trade Facilitation Agreement) and is now accepted in donor programmes. Sustainability gets appropriate mentions, but it is not as clearly embodied in trade capacity building programmes, particularly by the bilateral donors.

Value chain analysis is now spreading, but many donors appear not to be using it, and there is little evidence that it is being used to develop a coherent view of the most important areas to target in trade capacity building as suggested by the WTO. Industrialization is rarely a target of the trade capacity building programmes reported in this Guide, and there is little indication that donors are trying to build coherent strategies for structural change.

Encouraging South-South and triangular cooperation

For the first time, the questionnaires sent to both the multilateral and regional agencies and the bilateral donors tried to identify how they encourage the sharing of knowledge or experience among recipients. Their responses are compiled separately in the relevant volumes (Volume 1: Multilateral Services and Volume 2: Bilateral Services). Almost all the multilateral and regional agencies responded with examples (see Table 5 and the Executive Summary, Volume 1: Multilateral Services). The agencies display a wide range of areas of cooperation, but for most the coverage is narrower than their direct activities. It is normal for the costs of cooperation to be a barrier to joint activities: some of the programmes are directly targeted at meeting the costs of South-South exchanges.

Under half of the DAC donors mention triangular aid explicitly (Table 6), but this includes many of the larger donors. A few of the others indicate that they are considering introducing it. The **Russian Federation** and all the developing countries included in this *Guide* are active in it. Examples of triangular aid are given in the Executive Summary to Volume 2, Bilateral Services.

Table 5: Multilateral Agencies and Regional Development Banks: South-South Cooperation and Collaboration with other Agencies

	Encouragement of South-South Partnerships	Agencies reported as partners
UNDESA		UNCTAD, Regional Commissions
ITC	x	UNCTAD, WTO
UNCTAD	x	ITC, UNDP, Regional Commissions, FAO,IMF, UNIDO, WB, WIPO, WTO
UNDP	x	
UNEP	x	ITC, UNCTAD,FAO,UNIDO, Regional Commissions, WTO
UNCITRAL		UNCTAD, UNDP, Regional Commissions, WB, WIPO, WTO, EBRD, WCO
UN-Habitat		FAO,IFAD,ILO, UNIDO
UNRWA		
UNESCAP	x	ITC, UNCTAD, UNDP, UNECA, UNECE, UNECLAC, UNIDO, WTO, ADB, EC
UNECA		ITC, UNCTAD, UNDP, WTO
UNECE		UNDESA,ITC,UNCTAD,UNCITRAL, UNESCAP,UNECA,UNECLAC, UNESCWA, FAO, IMO, ITU, WB, WTO
UNECLAC	x	Regional Commissions
FAO	x	UNCTAD, UNIDO, WB, WHO,WTO
ICAO		
IFAD	x	
ILO	x	ITC,UNCTAD, UNDP,UNIDO, WIPO, WTO
IMO		
IMF		UN, WB, Regional Development Banks
ITU		UNCTAD,UNDP,UNEP, UN-Habitat, FAO, ICAO,ILO,UNIDO WB, WHO, WTO, IDB
UNIDO	x	ITC, UNCTAD, UNDP, UNEP,FAO, ITU, WB, IAEA, WTO
WB	x	
WHO		WIPO, WTO
WIPO	x	UN
UNWTO		UNDP, WB, WTO, ADB
IAEA		FAO
WTO	x	UNCTAD, Regional Commissions, IMF, UNIDO, WB, Regional Development Banks, WCO
AfDB	x	UN, UNECA,WB,WTO,ADB.WCO
ADB	x	UNESCAP, WB, WTO, AfDB, IDB, WCO
CDB		UN,IMF,WB, IDB
EBRD		UN,UNECE,WB
IDB	x	UN, WB, WTO, ADB,WCO,

Coordination among agencies

The lack of cross-agency coordination and its desirability have been themes of development literature for at least 30 years, since increasing numbers of agencies have become active. The difficulties and costs of coordination are, however, high. This is not only because agencies have different methods of working and areas of interest, but because they may have different objectives and different views on the appropriate strategies for trade and trade capacity building. For recipient countries, the costs of administering a large number of overlapping programmes are high, but so also are the costs of facing a limited number of potential donors.

The multilateral and regional agencies are increasingly emphasizing their cooperation among each other, and there are a number of formal coordination mechanisms, some of which are described in the second section (Inter-Agency Coordination Mechanisms) of Volume 1, Multilateral Services. There is also the UN's "Delivering as One" initiative, mentioned by **UNCTAD**, the **UNWTO** (World Tourism Organization), and the **regional commissions.** Table 5 indicates the partnerships they listed with other agencies or donors. Only agencies and countries included in this *Guide* are listed here as partner agencies, although some mentioned other partners. The only, exceptional, addition is the World Customs Organization (**WCO**), included because it is a major institution in trade and received a number of mentions.

The multilateral agencies which were most often mentioned by other multilateral or regional agencies were the **WTO**, the World Bank, UNCTAD, the **UN regional commissions**, and the **regional development banks** (The regional commissions and development banks are each treated as groups in this analysis.). But of these, only the WTO was mentioned by more than half the others. At the next level are **UNDP** (United Nations Development Programme), **UNIDO**, the **ITC** (international Trade Centre), and the **FAO** (Food and Agriculture Organization)**,** mentioned by around a quarter; the other had fewer mentions. Most of the multilateral and regional agencies mentioned at least five other agencies as partners, the exceptions being **UNDESA** (United Nations Department of Economic and Social Affairs), **ITC**, **UNDP**, **IMF** (International Monetary Fund), **World Bank**, **UNECA** (United Nations Economic Commission for Africa), **UNECLAC** (United Nations Economic Commission for Latin America and the Caribbean), and **EBRD** (European Bank for Reconstruction and Development) and some of the specialised agencies such as **UN-HABITAT** (UN Human Settlements Programme), **FAO**, **IFAD** (International Fund for Agricultural Development), **WHO** (World Health Organization), **WIPO** (World Intellectual Property Organization), and **IAEA** (International Atomic Energy Agency). Among other agencies, not covered in this Volume, there were five mentions of the WCO by the multilateral and regional agencies (and one by a bilateral donor, the **United States of America (US)**). The bilateral donors which were frequently mentioned as partners included **Canada**, the **EU** (European Union), **Japan**, **Korea (Republic of)**, **Norway,** the **United Kingdom (UK),** and the **US.**

The examples given by each agency are probably incomplete and reflect different types of collaboration, and some of the agencies may have considered that mentioning formal coordination mechanisms such as **CEB** (the UN Chief Executives' Board for Coordination) covered their partnerships. It would therefore be wrong to attach too much weight to the differences here. The pattern suggested is that there are overlapping groups which work together, especially at regional level.

The bilateral donors were also asked for this information. Most mentioned fewer partners than the multilateral agencies, but **Brazil** and **China** were exceptions, mentioning eight or nine (Table 6). Only some of the DAC agencies explicitly mention cooperation which goes beyond funding with the multilateral and regional agencies, although descriptions of individual activities reveal that others have such arrangements (Table 6 includes both those mentioning such collaboration in their general descriptions and those giving examples for individual activities. It is not always clear if this is cooperation or just funding). The **WTO** is by far the most often mentioned (thirteen references), followed by the **World Bank** and **UNIDO** (ten each) and **ITC** (nine). The regional development banks taken together are at a similar level, followed by **UNDP** and **UNCTAD**. There were no mentions for the **regional commissions**.

Table 6: Bilateral Donors: Participation in Triangular Cooperation and Partner Agencies Aid and Partner Agencies

	Participation in Triangular cooperation	Agencies reported as partners
DAC Members		
Australia		ITC, WB,WIPO,WTO, ADB
Austria		UNIDO,WB, WTO
Belgium		WB
Canada		ITC,WTO
Denmark	x	WTO
EC *	x	ITC, ILO, WTO
Finland		
France		ITC,UNIDO, WTO, Regional Development Banks
Germany	x	UNCTAD, WTO
Greece		
Ireland		ITC, UNCTAD, WB, WTO
Italy		WIPO, WTO, AfDB
Japan	x	WB, WTO, WIPO, AfDB, ADB
Korea		IDB
Luxembourg		
Netherlands		UN, WB,WTO
New Zealand	x	UNDP, WB,ADB,
Norway		ITC,UNCTAD, UNIDO, WTO, WCO
Portugal		UNIDO
Spain	x	UNIDO
Sweden	x	
Switzerland	x	ITC,UNCTAD, ILO, UNIDO, EBRD
United Kingdom	x	ITC, WB
United States	x	ITC,WB,FAO,IFAD,IDB,WCO

*EC's South-South and triangular cooperation is under consideration

Other EU Member Countries *		
Czech Republic	no	
Estonia	no	
Slovak Republic	no	
Slovenia	no	UNIDO

*Hungary and Poland did not report in detail their trade-related activities

Other members of the G20		
Argentina	x	FAO
Brazil	x	UNDP, FAO, ILO, UNIDO, WHO, WIPO, AfDB, IDB
China	x	UNDP, FAO, UNCTAD, WB, IMF, WTO, UNIDO, ADB, AfDB
Indonesia	x	UNDP,FAO
Mexico	x	
Russian Fed.	x	UNDP, UNIDO
Turkey	no	UNDP

France reports on extensive cooperation in Africa with the **AfDB** (African Development Bank) and the Development Bank of Southern Africa. **Germany** also mentions various types of cooperation, and a high proportion of **Ireland**'s activities are in cooperation with or through multilateral agencies. **Japan** mentions cooperation with the **World Bank**, **ADB** (Asian Development Bank), **AfDB**, **WTO** and **WIPO**. **Korea (Republic of)** has a policy of using multilaterals to manage the increase in its aid, intending to channel 30% of its aid in this way. The **United Kingdom** conducts reviews of the effectiveness of multilateral and regional agencies in meeting UK development objectives, and restricts its collaboration to those which share its views. The US collaborates with **ITC** on market development and with various agencies on agriculture, as well as with the WCO. **Portugal** mentions collaboration on training with **UNIDO.** Other examples are covered in the sections on activities in the detailed Volumes 1 and 2.

Although some non-DAC donors (both developed and developing countries) say that they prefer to act through multilateral and regional agencies because of inexperience with aid in general or trade-related aid in particular, only some of them list such agencies as partners in this Guide. This may be because the others are funding such agencies, but not working with them. This would suggest that they do not intend to acquire experience and then shift to direct funding, but rather plan to continue to delegate this type of assistance to the agencies. **Argentina** works with **FAO**, and also with two agencies not described in this *Guide*, **UNICEF** (United Nations International Children's Emergency Fund) and **UNOPS** (United Nations Office for Project Services). **Brazil** mentions **UNDP**, **ILO** (International Labour Organization), **WIPO**, **FAO** and the **WHO**, and is additionally mentioned by the **AfDB**. **Turkey** has a joint programme with **UNDP** to promote private sector development. **China** stresses its cooperation with the **WTO**, and has signed a Memorandum of Understanding under the WTO's Aid for Trade initiative to help LDCs to accede to the WTO and strengthen their participation in it (WTO, 2012). It also mentions UNDP, the FAO, UNCTAD, the WB, IMF, UNIDO, ADB and AfDB. T**he Russian Federation** mentions **UNIDO**, **IMF** and **UNDP**; **Indonesia** mentions the **FAO** and **UNDP; Brazil**, **India** and **South Africa** are mentioned by the **ILO** as partners. **Mexico** reports that it works with multilateral partners. **Slovenia** has an agreement with **UNIDO**. These countries may be using the partnerships to gain experience or because they think that they can already offer useful expertise.

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