

Sudan: Business perspectives

Country Report on Non-Tariff Measures



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About the paper

Lack of transparent and timely trade-related information is a key hurdle for Sudanese exporters.

ITC's business survey on non-tariff measures found that most Sudanese exporters face regulatory or procedural trade-related obstacles.

The report recommends streamlining trade procedures, upgrading domestic infrastructure and adopting digitally oriented solutions such as a trade information portal.

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For more information on NTM surveys, see www.ntmsurvey.org

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Acronyms

Unless otherwise specified, all references to dollars (\$) are to United States dollars, and all references to tons are to metric tons.

EU	European Union
ISO	International Standards Organization
ITC	International Trade Centre
GCC	Gulf Cooperation Council
NTM	Non-tariff measure
PO	Procedural obstacle
SDAC	Sudanese Accreditation Council
SME	Small and medium-sized enterprise
SSMO	Sudan Standards and Metrology Organisation
SPS	Sanitary and phytosanitary
TBT	Technical barriers to trade
UNCTAD	United Nations Conference on Trade and Development
WTO	World Trade Organization

Executive summary

Most Sudanese exporters struggle with trade regulations

Most Sudanese exporters find it hard to comply with trade-related regulations or procedures in Sudan and abroad. Governments impose measures such as testing, certification and licensing to regulate markets, protect their consumers and preserve their natural resources. Traders in developing and least developed countries, in particular, have the most difficulty dealing with these non-tariff measures (NTMs).

The NTM Business Survey in Sudan finds that almost 79% of the challenges these firms reported stem from Sudanese rules such as financial restrictions applied by the Central Bank of Sudan, permit to export and export inspection.

These invisible barriers to trade affect exporters and importers differently, and their impact varies across sectors. Regulations and the procedures to comply with them are difficult for 95% of Sudanese exporters and 100% of importers.

Domestic regulations are the top challenge

Sudanese regulations account for about 79% of the troublesome measures that exporters face. Most of these involve restrictions imposed by the Central Bank (34%), permit to export (19%) and export inspection (10%). The frequent devaluation of the national currency and the short period to recover export earnings are among the key obstacles for businesses.

Technical regulations create obstacles

Technical measures are also an obstacle for exporters. These include conformity assessment requirements such as testing, product certification (6%), and rules related to quality standards, safety, and production processes (6%). Businesses face difficulties with technical measures not only because the rules are strict but also because it is hard to prove compliance with these foreign regulations.

Issues such as the pre-shipment and border clearance procedures of partner countries, rules of origin, quality-control measures are relatively minor, the survey finds.

Gulf Cooperation Council countries regulations are the most reported

Destination partners apply 21% of the measures that are troublesome for Sudanese exporters.

Almost 83% of the difficulties involve regulations of Gulf Cooperation Council members. Around 13% of burdensome foreign regulations are Asian (excluding Gulf Cooperation Council countries or GCC), and the rest (4%) are African.

At the individual partner country level, Saudi Arabia is responsible for the most reported regulations, accounting for 39%. Emirati measures account for 26%, while Kuwait and Turkey account for 9% each.

Procedures cause serious problems

The survey identifies the measures that affect exporters as well as the reasons they are burdensome. Exporters often face difficulties with a regulation not only because it is too strict or complex, but also – and at times solely – because of the steps they must take to comply with that regulation.

Sudanese exporters say the regulations are overly strict or compliance is difficult in 33% of the cases. In contrast, the procedures are the problem in 36% of the cases – and most of these occur in Sudan itself. The remaining 31% are difficult due to both the regulation itself and related procedures.

Most of these obstacles occur in Sudan. Slow processes on the necessary paperwork are the most reported. High fees and charges to obtain required certification or testing, and inadequate facilities for testing and certification in Sudan, and transparency issues were also frequently reported.

The way forward: Improve transparency and streamline procedures

The survey results and report recommendations aim to help the Government and businesses understand the biggest problems facing Sudanese traders and tackle these issues. The survey identifies numerous challenges, especially regarding the availability of trade information and quality infrastructure in the country. It is critical to address these issues to support private-sector development and to strengthen export competitiveness.

Exporters lack the resources and the skills to acquire and process trade-related information. Traders need a proper portal that can provide reliable export- and import-related information. This portal should store information about trade regulations and procedures, and provide facts about relevant agencies, port authorities and customs.

Improving quality infrastructure and enforcing quality compliance are key to export development. For instance, Sudan must increase the capacity of local laboratories to carry out required testing and certification. There is also a need to strengthen the capacity of small and medium-sized enterprises to comply with international market access requirements.

The absence of proper infrastructure such as scanners and cold storage facilities at major borders points is a serious problem that must be fixed. Sudan also needs to streamline its trade procedures and automate paperwork at government offices and customs offices to reduce the administrative burdens and costs shouldered by Sudanese exporters.

The scarcity of foreign currency and its implications on import of raw materials need to be addressed. It is also necessary to improve export inspection processes at the customs.

Survey sample is representative of Sudanese traders

The results presented in this report are based on a business survey (See Appendix I) carried out by the International Trade Centre between July 2018 and March 2019. The NTM Business Survey in Sudan aims to provide a better understanding of the hurdles that hold back exporters and importers, and to identify potential bottlenecks related to trade procedures and cross-border operations. ITC interviewed around 100 trading companies in Sudan, targeting active exporters.

The recommendations made in the report are based on consultations with relevant stakeholders and are in line with ITC's action plan aimed at supporting small businesses in developing countries affected by the COVID-19 pandemic.

UNDERSTANDING NON-TARIFF MEASURES

What are non-tariff measures?

Non-tariff measures (NTMs) are 'policy measures, other than customs tariffs, that can potentially have an economic effect on international trade in goods, changing quantities traded, or prices or both'.¹ The concept of NTMs is neutral and does not imply a direction of impact.²

Being 'defined by what they are not',³ these measures comprise many policies other than tariffs. They are complex legal texts specific to the product and the applying country. They are more difficult to quantify or compare than tariffs.

Classifying NTMs

NTMs may be applied for legitimate reasons, including the protection of human, animal and plant health. As such, this report does not make a judgement on intentions or the legitimacy of a measure.

By design, the survey only captures measures that cause difficulties for trading companies. NTMs analysed in this report refer to 'burdensome NTMs'. Because obstacles to trade are complex, understanding their terminology and classification is important.

The diversity of non-tariff measures requires a classification system. ITC NTM surveys are based on the international classification developed by the Multi-Agency Support Team, incorporating minor adaptations to the ITC NTM survey approach.⁴

Procedural obstacles and the business environment

Procedural obstacles refer to practical challenges directly related to the implementation of non-tariff measures. Examples include problems caused by the lack of adequate testing facilities to comply with technical measures or excessive paperwork in the administration of licences.

Inefficiencies in the trade-related business environment may have similar effects, but these are unrelated to specific NTMs. Examples include delays and costs due to poor infrastructure or inconsistent behaviour of officials at customs or ports.

¹ Multi-Agency Support Team (2009).

² The term 'non-tariff barrier' implies a negative impact on trade. The Multi-Agency Support Team and the Group of Eminent Persons on Non-Tariff Barriers proposed that non-tariff trade barriers be a subset of NTMs with a 'protectionist or discriminatory intent'.

³ Deardorff and Stern (1998).

⁴ For further details on the Multi-Agency Support Team NTM classification, see Appendix II.

A BUSINESS SURVEY ON NON-TARIFF MEASURES



A business perspective is imperative

As exporters and importers deal with NTMs and other challenges firsthand, a business perspective on these measures is indispensable. For governments, understanding the main concerns of companies about non-tariff measures, procedural obstacles and trade-related business environments can help define national strategies to overcome trade obstacles.

The International Trade Centre (ITC), in collaboration with the Ministry of Industry and Trade of Sudan, carried out the NTM Business Survey in Sudan between July 2018 and March 2019. The survey seeks to provide a better understanding of the trade obstacles confronting Sudanese companies and to identify potential bottlenecks related to trade procedures and cross-border operations.

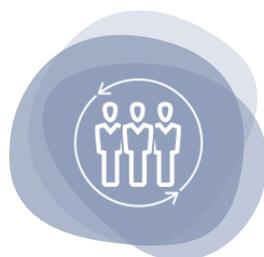
Information obtained from the survey will help both the private sector and the Government create an enabling environment for private sector development and improve the export competitiveness of Sudan.



Methodology and survey implementation

ITC adapted the general methodology of the survey to meet the needs and requirements of Sudan.⁵ ITC compiled a registry of more than 2,500 active exporters in the country to determine the population size and to contact the companies. A stratified random sampling method was used to calculate the sample size for each sector. This approach ensures that survey results are representative by sector.

Interviews with Sudanese enterprises were held between July 2018 and March 2019. Additional interviews were also conducted with representatives of various public agencies and business associations between June and August 2020.



Stakeholder consultations

ITC has also engaged bilaterally with representatives of public sector agencies and business associations, as well as experts on Sudanese trade policy, customs procedures and quality infrastructure, to gain a comprehensive understanding of NTM-related hurdles faced by exporters and importers in the country.

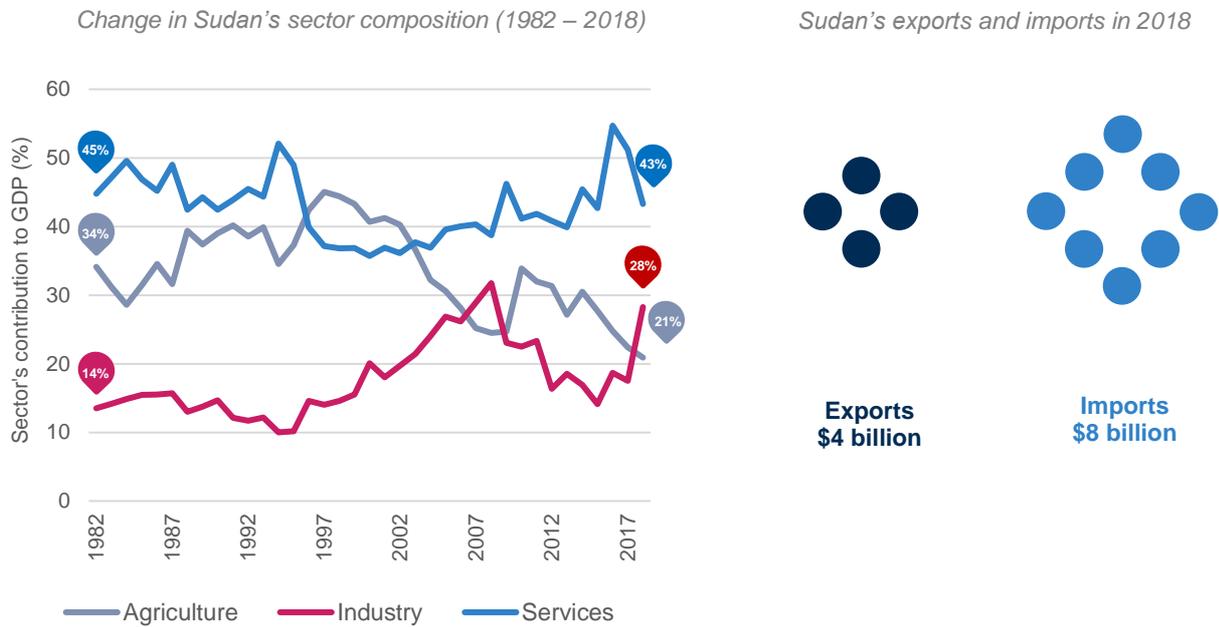
Recommendations presented in this report have been drafted in consultation with relevant experts and stakeholders.

⁵ For details on the methodology, see Appendix I.

⁶ See agenda of the meeting in Appendix IV.

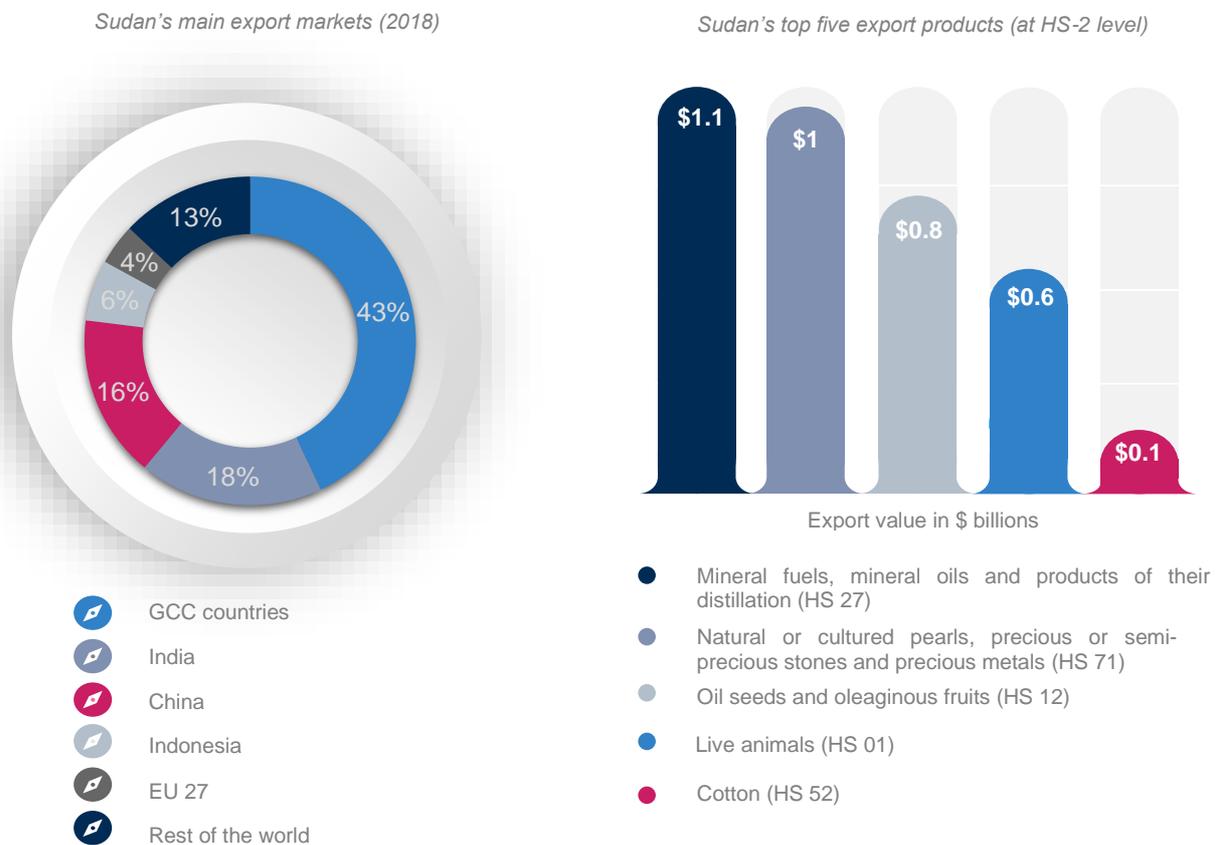
SUDAN'S ECONOMY: THE BIG PICTURE

Figure 1 Sudan relies heavily on imports while its industrial sector continues to grow



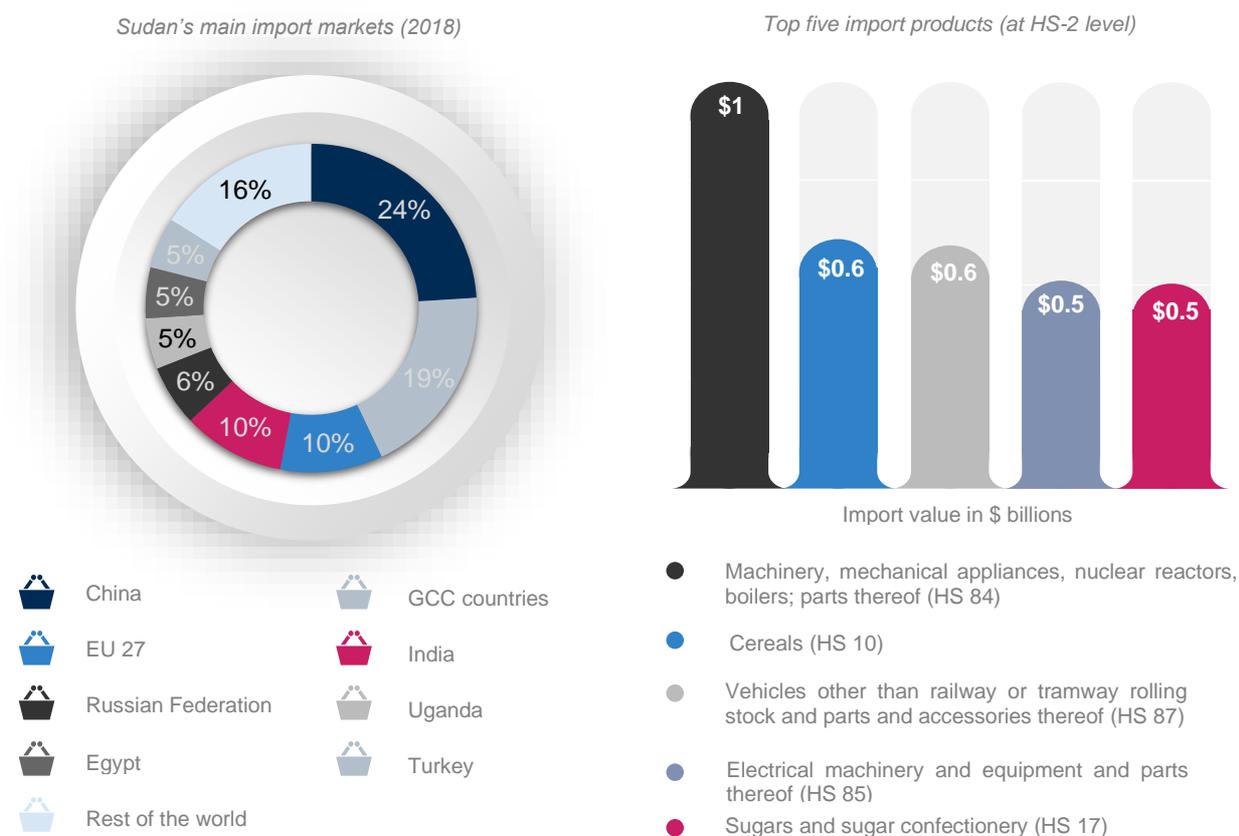
Source: World Development Indicators, World Bank (2019) and ITC Trade Map, 2018.

Figure 2 GCC countries are the biggest export market, mineral fuels and oils are the top exports



Source: ITC Trade Map, 2018.

Figure 3 China and GCC countries provide most Sudanese imports



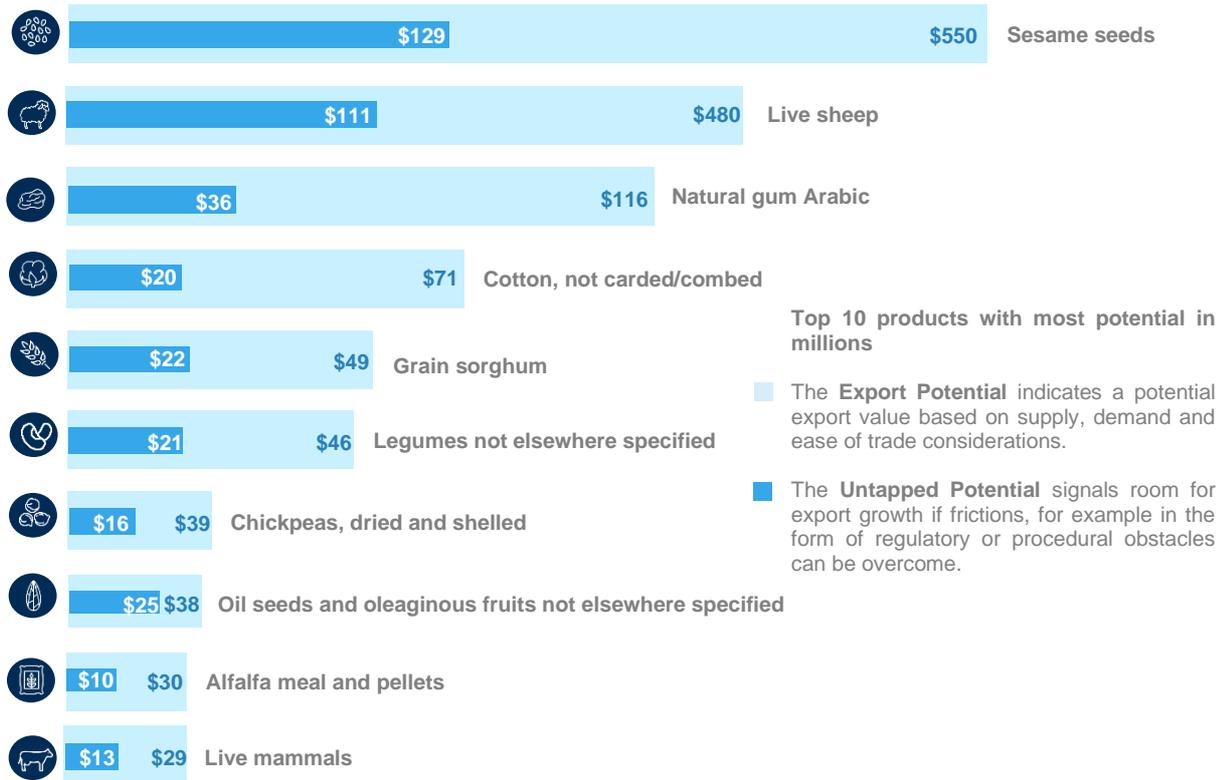
Source: ITC Trade Map, 2018.

Figure 4 Sudanese exports enjoy preferential tariffs to most of its major markets

Sudan's major export markets (2018)	Diversification 95% trade in number of		Average MFN of traded tariff lines		Preference margin	Duty-free imports	
	HS-2 digit	HS-6 digit	Simple	Weighted	Weighted	Tariff lines (% of total)	Value (% of total)
Agricultural products							
Saudi Arabia	2	4	15.3%	0.4%	0.4%	100.0%	100.0%
China	4	4	10.3%	10.3%	7.0%	93.8%	79.5%
European Union	7	9	14.2%	12.2%	12.2%	100.0%	100.0%
Egypt	4	4	7.9%	0.0%	0.0%	100.0%	100.0%
United Arab Emirates	5	11	16.6%	1.2%	1.2%	100.0%	100.0%
Non-agricultural products							
United Arab Emirates	1	1	4.3%	0.0%	0.0%	100.0%	100.0%
China	1	1	5.8%	0.2%	0.2%	98.9%	100.0%
Indonesia	1	1	13.8%	0.0%	0.0%	7.7%	99.9%
Republic of Korea	2	2	5.1%	1.0%	1.0%	100.0%	100.0%
European Union	13	24	4.2%	1.6%	1.6%	100.0%	100.0%

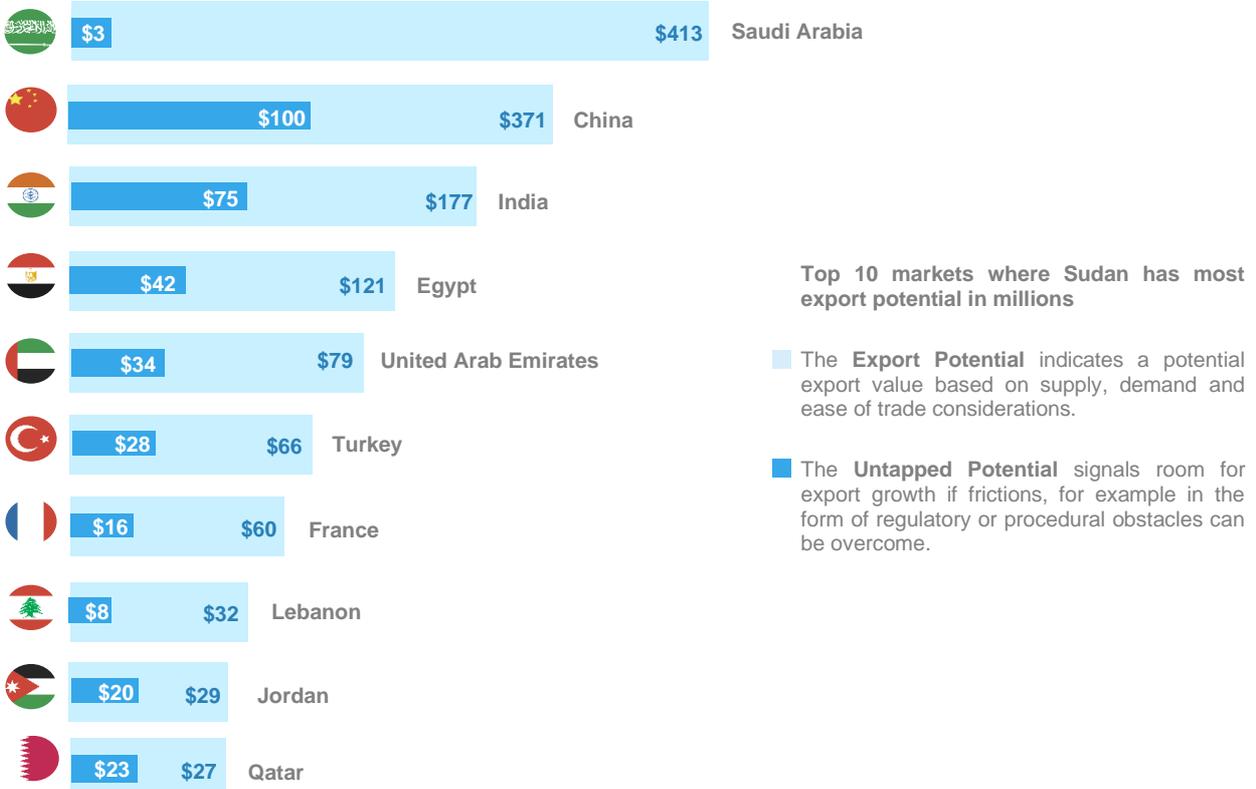
Source: World Tariff Profiles, World Trade Organization (2019).

Figure 5 Sesame seeds, live sheep and natural gum Arabic have the greatest export potential



Source: ITC Export Potential Map, 2019.

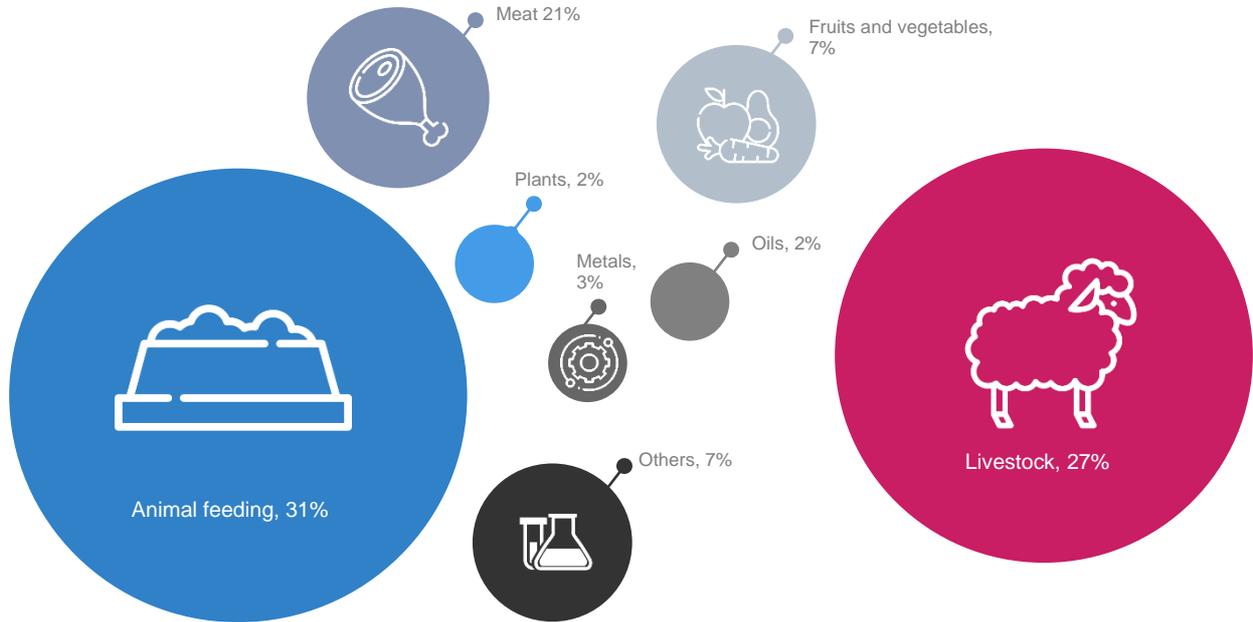
Figure 6 Saudi Arabia, China and India are the most promising markets



Source: ITC Export Potential Map, 2019.

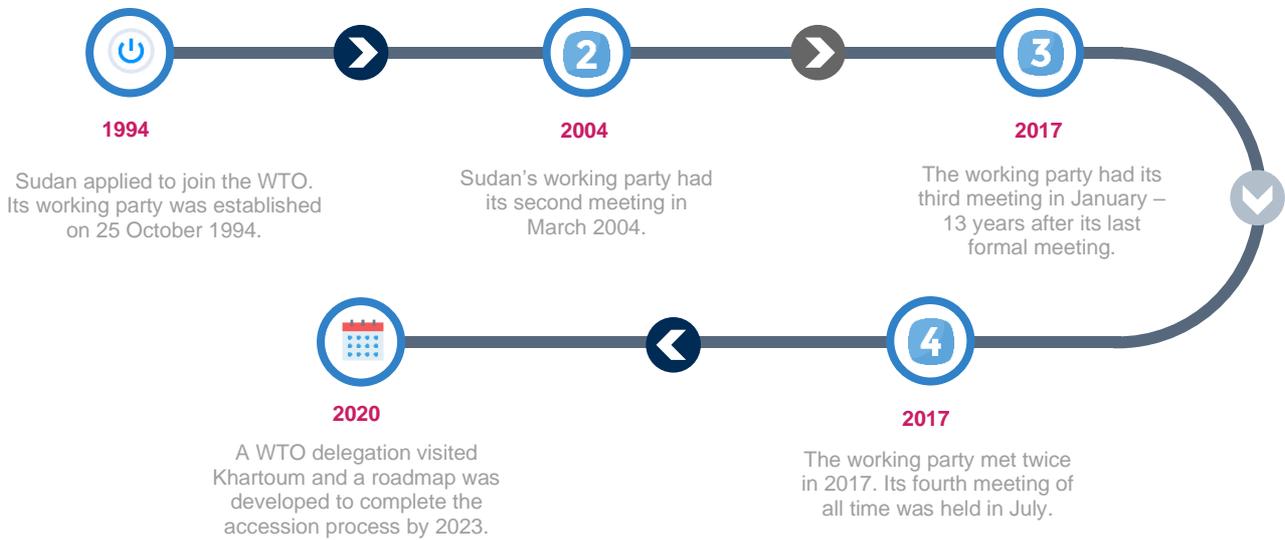
Figure 7 Exporters in Sudan, by product

Most exporters are from the agriculture sector



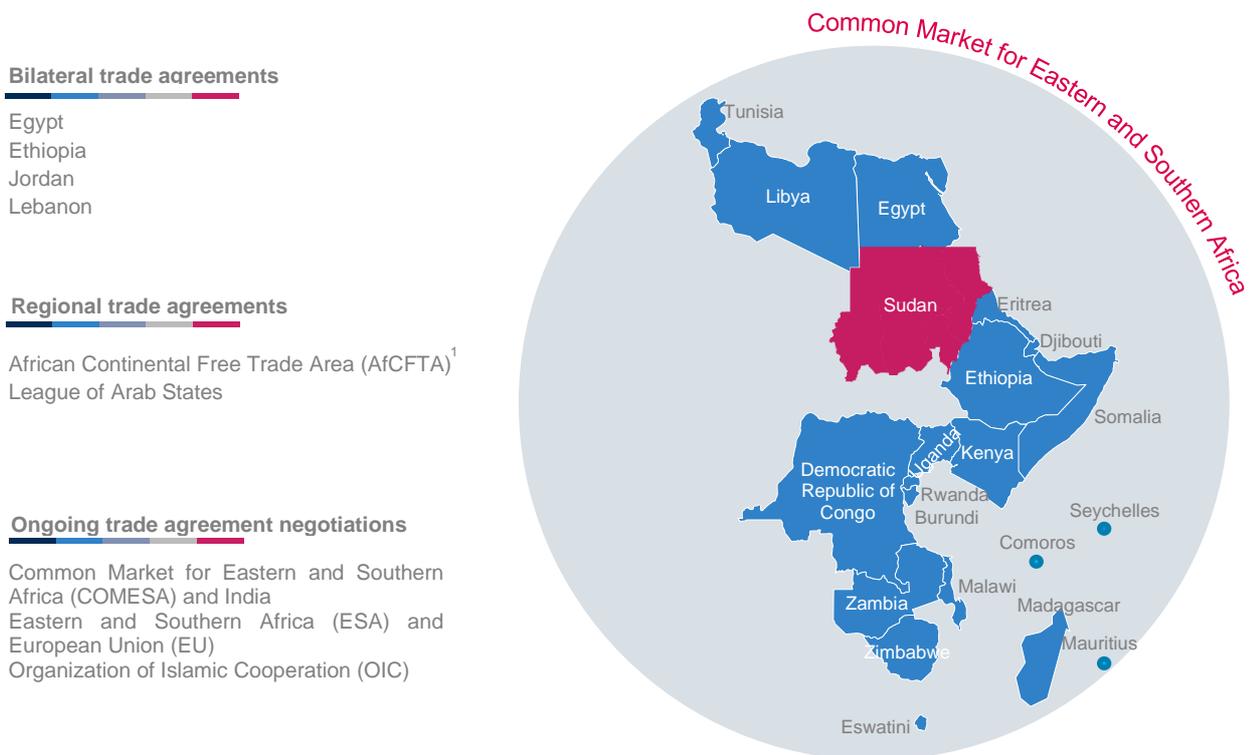
Source: Based on a registry of exporters compiled by ITC. Company information was sourced from Union of Sudanese Chambers and business associations.

Figure 8 Sudan’s WTO accession progress



Source: WTO, April 2020.

Figure 9 Sudan has signed a few multilateral and bilateral trade agreements



¹Agreement has been signed but has not yet entered into force.

Note: To the best of ITC's knowledge, this figure reflects the situation as of December 2020. The number and list of products for which preferences are granted varies from country/territory to country/territory. Only agreements with reciprocal preferences are shown. Sudan may be granted preferential tariffs resulting from trade regimes such as the Generalized System of Preferences, i.e. from countries providing non-reciprocal preferential tariffs to developing and least developed countries.

Source: ITC Market Access Map, 2020.

CHAPTER 1 PROFILES OF SURVEYED COMPANIES



Focus on exporters

ITC interviewed companies in Sudan in a two-stage process:

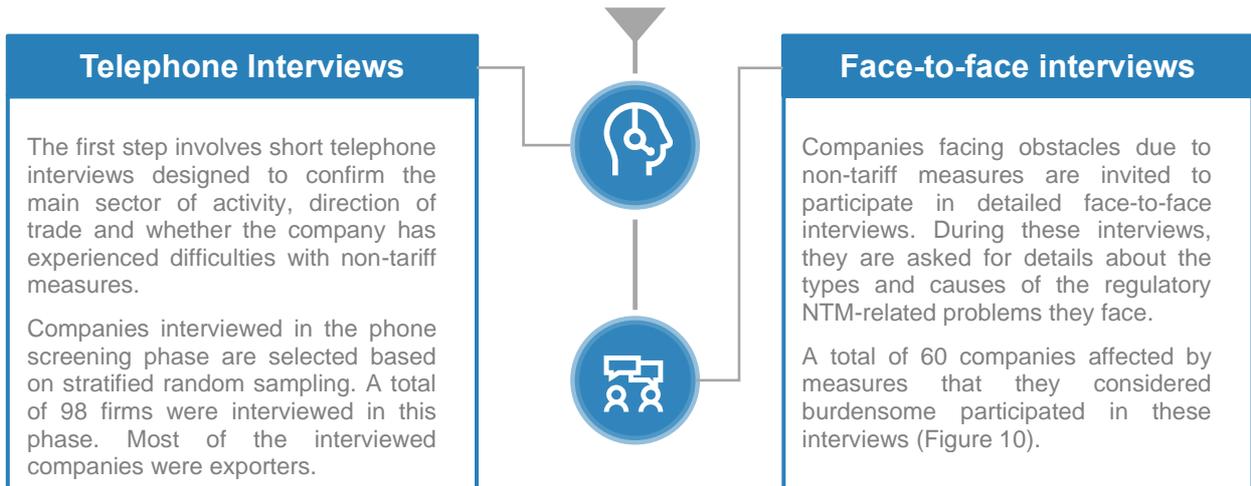
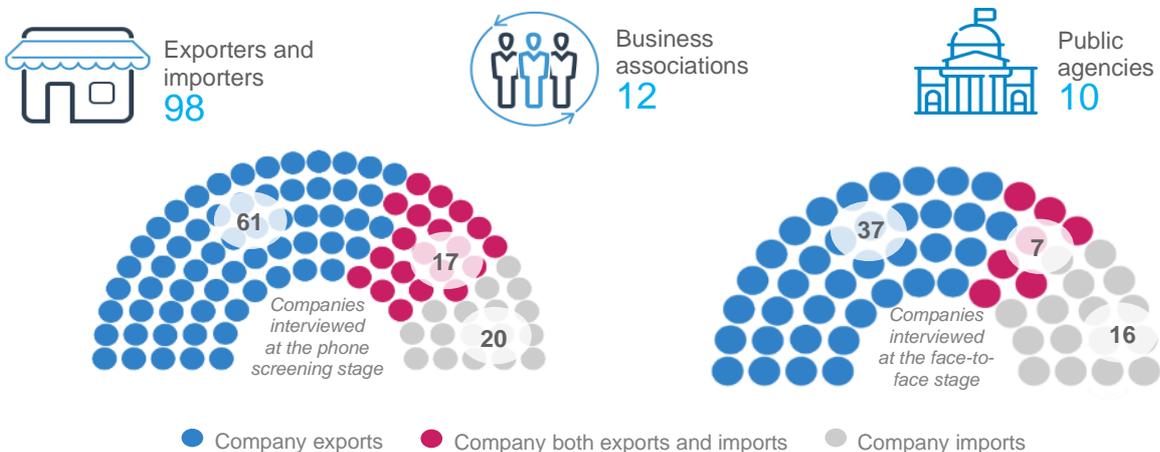


Figure 10 The survey interviewed Sudanese companies, business associations and public agencies



Source: ITC NTM Business Survey in Sudan, 2019.

The NTM Business Survey sought to uncover export bottlenecks, and its results are representative of the export sector. However, as many exporters rely on imports of intermediate inputs, companies were also asked about their importing activities and difficulties, if any. The rest (20 companies) were exclusively importers.

ITC interviewed 98 trading enterprises in Sudan, of which 62% were exporters, almost 20% were importers and 17% were involved in both exporting and importing (Figure 10).

One-third of Sudanese exporters are producers

Around one third (29%) of the surveyed companies identify themselves as producers; they either manufacture the goods they export or at least contribute some value addition (Figure 11).

Some 71% of the exporters are traders, sourcing goods from other Sudanese producers and exporting them to foreign buyers without any value addition.

Figure 11 Only a third of exporters are producers of goods



Source: ITC NTM Business Survey in Sudan, 2019.

Over half of companies handle their own export processes

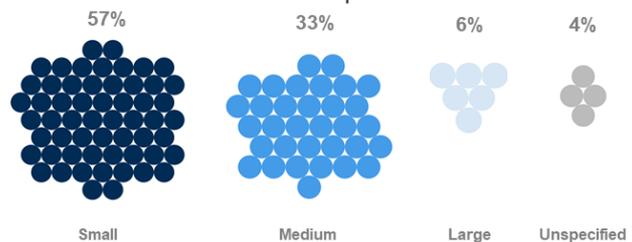
More than half (56%) of Sudanese enterprises manage the export process without the support of a specialized forwarding company. On the other hand, 30% rely on specialized forwarding companies and 14% entrust exporting activities to their partners abroad (Figure 11).

Most exporters are small or medium-sized firms

Most of the surveyed companies in Sudan are small and medium-sized enterprises, which in general are also the main economic workhorse of the country.

Overall, 57% of the survey respondents were small enterprises, followed by medium-sized firms (33%) and large companies (6%) (Figure 12). The classification of companies according to size is based only on the number of employees.⁷

Figure 12 Small businesses form the largest group of interviewed companies



Note: Each dot represents a percentage point.

Source: ITC NTM Business Survey in Sudan, 2019.

⁷ Researchers and international organizations classify Sudanese companies with 10 or fewer employees as small, those with 11–50 employees are classified as medium-sized, and businesses with more than 50 employees are classified as large.

Exporting companies are largely based in Khartoum

Most of Sudan’s businesses are concentrated in the country’s capital and the economic hub, Khartoum. In the case of NTM business survey over 90% of the companies interviewed were based in or around Khartoum. Furthermore, the survey also covered enterprises based in 6 other towns and cities. At the state level, Al Qadarif, Gezira, Khartoum, and Red Sea states were covered.

Most surveyed exporters are from the agricultural sector ⁸

Over 93% of the surveyed enterprises export agricultural goods. The largest group export fresh food and raw agro-based products (83%), such as live animals, fresh vegetables and fruits, and meat, as well as exporters of processed food and agro-based products (10%). About 6% operate in the manufacturing sector (Figure 13) exporting products such as chemicals, metal and other basic manufacturing, non-electric machinery, and transport equipment.

Figure 13 Most Sudanese firms export fresh food and raw agro-based products

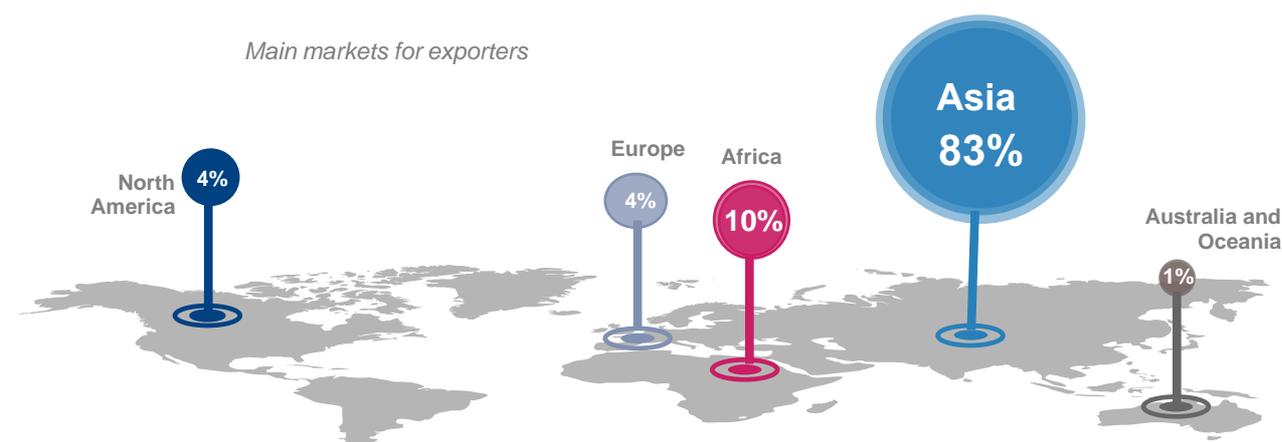


Source: ITC NTM Business Survey in Sudan, 2019.

Asia is the main market for most exporters ⁹

Asia is the main destination market for 83% of exporters, followed by Africa (10%), Europe (4%) and North America (4%) (Figure 14). A small percentage of exporters consider Australia and Oceania as their main buyers.

Figure 14 Asia is the top market for most exporters



Source: ITC NTM Business Survey in Sudan, 2019.

⁹ During the initial telephone interviews, companies are asked to identify their main export market (region) based on the value of their sales. In the subsequent face-to-face interviews (where companies report difficulties with non-tariff measures), firms are asked to identify the destination markets (country level) for each of their export products (at HS-6 digit level). In addition, they are asked if they have faced any regulatory or procedural obstacles to trade when exporting each of their goods to their corresponding market(s).

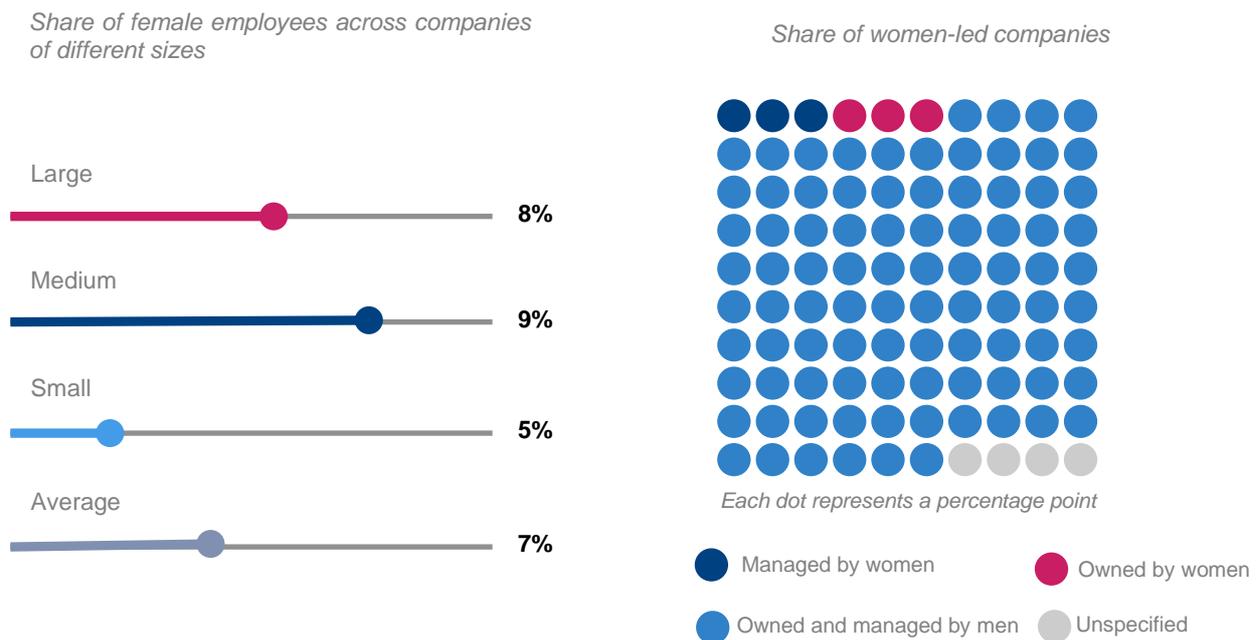
Female employment in Sudanese companies is low

In general, participation of women in trading companies – either as part of the workforce or ownership - is very low in Sudan. On average, only 7% of the workers employed by the surveyed companies are women (Figure 15). More than half (52%) of the companies have no female workers, while in 81% of the companies less than 1 in 10 employees were women. Only 1% of companies employed more women than men.

There are some variations across companies of different sizes. Medium-sized and large firms tend to employ a larger proportion of women, 9% and 8% respectively, compared with small enterprises (5%).

Men owned or managed 90% of the surveyed companies; only 6% were headed by women. These firms are managed by a woman (3%), owned by a woman (3%).

Figure 15 Sudan has a low female employment rate and few women in key company positions



Source: ITC calculations based on NTM Business Survey in Sudan, 2019.

CHAPTER 2 THE COMPANY PERSPECTIVE



Common challenges

Non-tariff measures affect almost every exporter

NTMs are a major concern for most of the surveyed companies (95%). Firms said they had faced restrictive regulations or related obstacles to trade in Sudan or abroad when exporting. These difficulties are related to their current experiences or experiences in the past year.

Companies may find compliance with any given non-tariff measure difficult for various reasons. The conditions of a regulation may be overly complex or trade-restrictive – for instance, businesses may be unable to export due to export prohibitions or because they are unable to meet high-quality requirements.

Furthermore, exporters may struggle with a particular regulation because of the related procedural obstacles. These obstacles can arise in Sudan, transit countries or destination countries, irrespective of which country applies the measure. NTMs are official regulations applied by the authorities in the exporting or importing country, while procedural obstacles are problems that firms face due to the way the regulations are implemented.

Non-tariff measures also affect importers

These regulations affect importers and exporters differently, and their impact varies across different sectors in Sudan. The share of affected companies is higher among importers than exporters, for example. All importers have experienced regulatory or procedural obstacles (Table 1). Most of these companies import goods for further processing rather than direct sales.

Share of exporters affected by NTMs



Table 1 Non-tariff measures affect Sudanese exports and imports

Company type	Sector	Sudan's export or import value in 2018 (\$ '000)	Sector's share in total exports or imports	Number of surveyed companies ^{1/}	Share of companies facing difficulties with NTMs
Exporters	Agri-food	1,399,900	96%	73	97%
	Manufacturing	53,596	4%	5	60%
	Subtotal	1,453,496	100%	78	95%
Importers	Agri-food	1,416,626	24%	16	100%
	Manufacturing	4,489,928	76%	21	100%
	Subtotal	5,906,554	100%	37	100%
Total				115	97%

Note: ^{1/} A total of 17 surveyed firms were involved in both exporting and importing. These companies were interviewed separately about each activity and are included separately in the count for exporters and importers. The total of exporting and importing companies (98) represents the number of individual companies interviewed rather than the sum of the subtotals in the table (115).

^{2/} Export/import of arms and minerals are excluded as both sectors are outside of ITC NTM Business Survey scope.

Source: ITC Trade Map, 2018, and ITC NTM Business Survey in Sudan, 2019.

Companies of all sizes are affected

Exporters, irrespective of their sizes, are all affected by non-tariff measures. Among the few of the large firms that were interviewed all report to be facing difficulties due to non-tariff measures. Large firms usually trade in more products and with more countries. As a result, larger companies have many more possible product-partner pairings. As per the survey methodology, even if one of those trade in one of those product-country pairings is made difficult by any NTMs, the exporter is considered to be affected.

However, it has to be noted that the actual impact of the obstacle might be harder on smaller firms than on larger firms. Smaller companies usually do not have the resources of larger firms at their disposal or the required expertise to deal with these hurdles. The burden of tackling a non-tariff measure or procedural obstacle in one or more of its few markets can be huge. In Sudan, 93% of medium-sized enterprises and 98% of small companies reported difficulties complying with official regulations or procedures.

Regulatory obstacles that exporters find burdensome

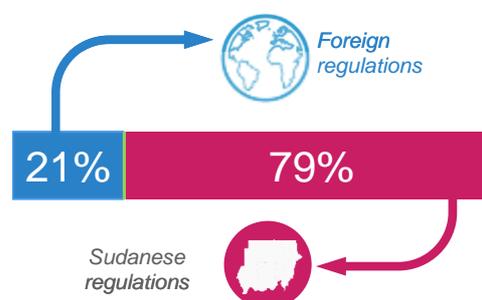
Local regulations are more burdensome

The majority of the challenging measures reported by exporters are Sudanese regulations on exports. The rest are regulations of partner (importing) countries (21%).

NTM survey results in Sudan differ substantially from those of other Arab States surveyed by ITC. In Sudan, most of the reported non-tariff barriers stem from domestic regulations (79%). In the other Arab States, difficulties with domestic regulations account for just 22% of the NTM reported cases.¹⁰

Similarly, domestic regulations represent 35% of all the difficulties reported in East Africa, and 27% in West Africa. In the Asia-Pacific region, only 20% of the difficulties are due to domestic regulations on exports.

Share of the reported burdensome NTMs that are applied by partner countries and Sudan



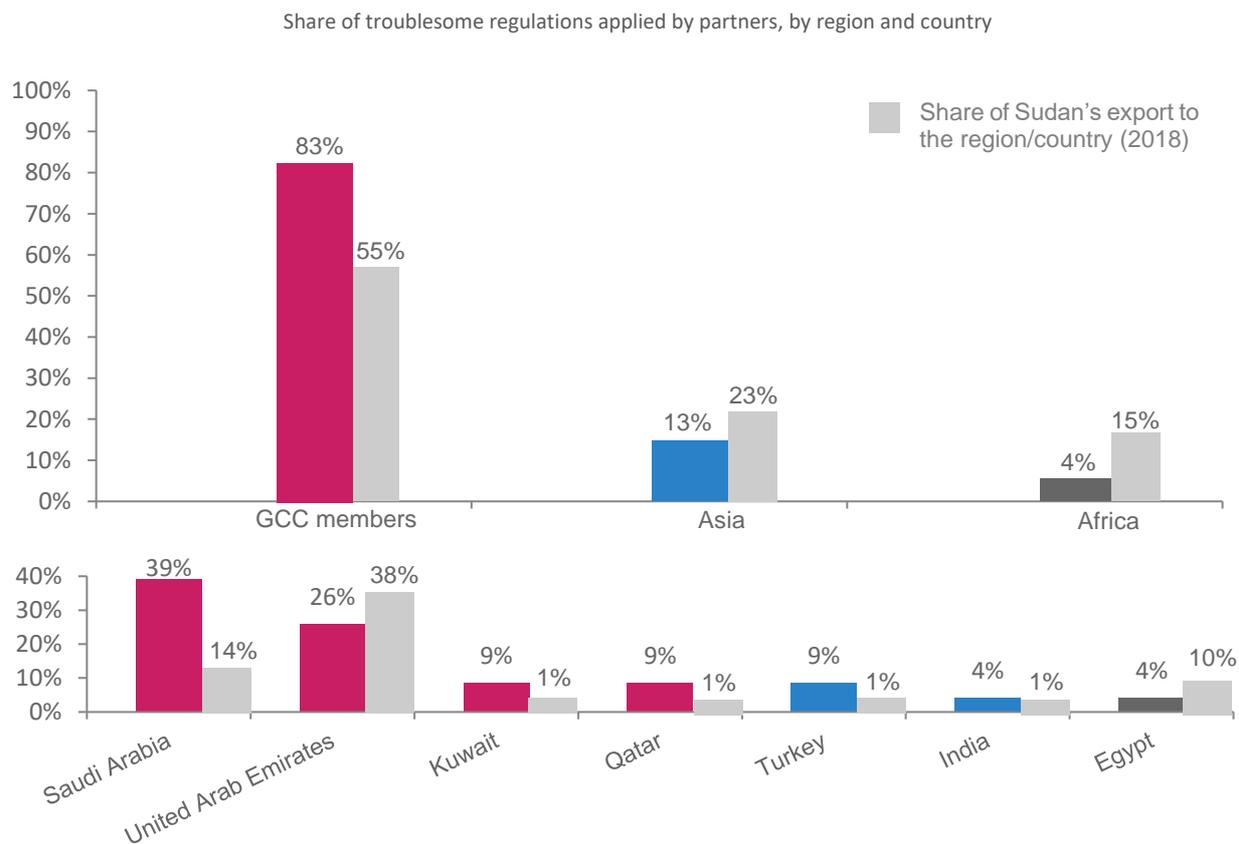
¹⁰ Making regional integration work - Company perspectives on non-tariff measures in the Arab States (2015).

Gulf Cooperation Council countries account for most onerous NTMs

GCC countries import over half (55%) of Sudan's exports. They also apply most of the burdensome regulations (83%), according to surveyed exporters. Most of the burdensome NTMs are from Saudi Arabia and the UAE (Figure 17).

Asian countries (excluding GCC members) account for 13% of burdensome foreign regulations, though the markets buy around 23% of Sudan's exports. Similarly, the share of burdensome regulations originating in Africa (4%) is lower than the share of Sudan's exports to its continent (15%).

Figure 16 Gulf Cooperation Council countries impose most of the challenging regulations



Source: ITC NTM Business Survey in Sudan, 2019; and ITC Trade Map, 2018.

Technical regulations hinder Sudanese firms

Technical regulations, which include technical requirements and related conformity assessment measures, account for the largest share (12%) of foreign regulations that hinder Sudanese exporters.

Difficult technical requirements (6%) trouble Sudanese exporters as much as conformity assessment requirements such as testing and product certification (6%). In fact, Sudanese exporters face difficulties with technical measures not only because the rules are strict but also because it is hard to prove compliance with these foreign regulations.

Difficulties with technical regulations are more pronounced among agricultural exporters than exporters of manufactured products.

Technical measures include

Conformity assessment

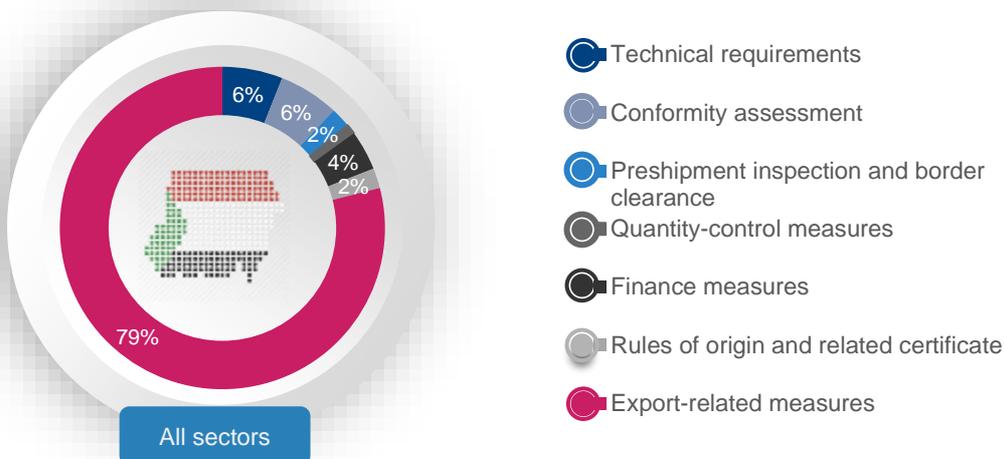
Procedures such as certification that prove compliance with underlying technical requirements.

Technical requirements

Product specifications related to quality standards, safety, production processes and sanitary requirements. They are usually implemented to protect consumers, animal health or the environment, or for national security.

Figure 17 Exporters have the most trouble with export-related measures and technical regulations

Types of non-tariff measures Sudanese exporters find burdensome



Source: ITC NTM Business Survey in Sudan, 2019.

Sudanese exporters also find it hard to comply with other regulations, such as finance measures and preshipment inspection and entry formalities as well as rules of origin. Finance measures present more of a hindrance to exporters (4%) than preshipment inspections and border clearance (2%) and problems with rules of origin or obtaining a certificate of origin (2%). Less than 1% of the reported hurdles are related to quantity-control measures.

Proving compliance with technical requirements is challenging

Conformity assessment requirements make up 6% of reported NTM cases, which include difficulties with product certification and testing obligations. Factors such as limited infrastructure and administrative hurdles have contributed to compliance problems in Sudan.

These requirements, which aim to ensure quality or safety, are imposed by GCC countries, Saudi Arabia (83%), followed by the UAE (17%).

Most of the burdensome technical regulations reported in the survey pertain to quality and safety certificates for live animals and meat. Exporters find it difficult to obtain health certificates from the Ministry of Health in Sudan due to unnecessary delays. This process can take up to three weeks so exporters resort to informal payments to speed it up.

To get a health certificate, a veterinary has to inspect our animals. This process takes around 20 days and we need to pay additional fees for the inspection.

Live animals exporter

What are conformity assessment requirements?

The World Trade Organization Agreement on Technical Barriers to Trade defines conformity assessment as 'any procedure used, directly and indirectly, to determine that relevant requirements in technical regulations or standards are fulfilled'. These requirements include procedures for sampling, testing and inspection; evaluation, verification and assurance of conformity; and registration, accreditation and approvals (ITC, 2005).

Exporters must present a certificate of conformity of their goods, a mark on the product label or both. National standards bodies, trade and industry associations, or third-party certification bodies usually issue the certifications. Though the importing country requires the certification, it may be issued in either the exporting or the importing country.

In the context of the NTM survey, the term 'conformity assessment' is also used for procedures to prove compliance with SPS measures.

Concerns about conformity assessment include the inability of Sudanese laboratories to do the necessary testing and issue the required certificates. As a result, exporters find themselves forced to get fake certificates.

Technical requirements are demanding

The main concerns of exporters about technical requirements are the product conditions to be satisfied in terms of quality or performance requirements. Most problems with this measure involve GCC countries (83%) and Indian (17%) requirements. The strict rules applied by destination markets create major barriers for Sudanese exports.

The UAE sends the shipment back if the nuts are broken. Due to the lack of adequate infrastructure in Sudan, exporters find it difficult to comply with such regulations. Fresh fruit and vegetables exporters raise similar concerns. Goods are usually damaged because of the poor road conditions in Sudan. As a result, buyers occasionally return exported goods.

Moreover, exporters of fresh fruits complain that India has strict quality requirements. For instance, melon seeds should not be too large. It requires a considerable amount of effort and time to separate large and small seeds.

What are technical requirements?

Technical requirements are product-specific properties that define the characteristics and technical specifications of a product or the production process and post-production treatment. They are legally binding and set by the destination or origin country. Technical requirements include mandatory administrative provisions.

Many of these measures protect consumers – for example, from health or safety risks – as well as plants, animals, the environment or the national security of a country. Technical requirements include sanitary and phytosanitary measures designed to safeguard human, animal and plant life and health from pests and diseases.

Export-quality management and infrastructure in Sudan

The Sudan Standards and Metrology Organisation (SSMO), established in 1993, is the government body responsible for the National Quality Infrastructure (NQI), which includes standardization, testing and inspection, certification, metrology and accreditation. It is presently responsible for the administration of the following laws:

- The Standards Law 2008
- The Metrology Law 2008
- The Precious metals and gemstones 2008

SSMO has some 1600 employees working at its headquarters and main laboratories in Khartoum. It also has 25 stations located in different parts of the country.

Standards setting

SSMO adopts an integrated approach to standardisation, whereby it offers standards development, promotion, metrology (including legal metrology), testing, product certification and inspection services.

SSMO has developed over 5000 standards through 51 technical committees, comprising different stakeholders. Around 45% of the standards are adoptions of international standards (ISO; IEC; CODEX) and regional standards such as COMESA, African Regional Standardization, Standards and Metrology Institute for Islamic Countries (SMIC). However, SSMO does not fully follow the Code of practice of the WTO Agreement on TBT, as the public comment period of 60 days is not respected.

Sudan has adopted mandatory standards for 44 products and SSMO is the regulatory body responsible for inspection for these products. Some agencies and private companies can carry out preshipment inspections for imported products, while SSMO inspects exports.

Testing

The testing laboratories of SSMO are equipped with the latest technology to test pesticide residues, heavy metals, mycotoxins and microbiological contaminants in agro-products and food. The laboratories are accredited to ISO 17025 by the Tunisian Accreditation body (TUNAC) with which the Sudanese Accreditation Council (SDAC) is having a twinning arrangement.

Accreditation

The Government established the SDAC in 2015 as an independent organization, falling under the aegis of the Ministry of Cabinet. It has three technical departments dealing with accreditation of laboratories, inspection bodies and certification bodies.

SDAC is a member of the Arabic Accreditation Council (ARAC), the Standards and Metrology Institute for the Islamic Countries Accreditation Council (SMIIC – AC) and the African Accreditation Cooperation (AFRAC). It has a memorandum of understanding (MoU) with the Tunisian accreditation body (TUNAC) for undertaking a joint assessment of conformity assessment bodies to train the assessors of SDAC. In this context, three laboratories are jointly under assessment.

According to information from SDAC, the organisation also offers inspection services. Furthermore, there are two or three private laboratories. SDAC considers offering accreditation services for inspection bodies and medical testing laboratories. It has developed a road map for starting its operations and needs some assistance for its implementation. SDAC is receiving assistance from the Asia Pacific Laboratory Accreditation Cooperation (APLAC) through ARAC in the area of proficiency testing.

Technical barriers to trade (TBT) matters

There is no national TBT enquiry point in Sudan. Meanwhile, there are provisions to create this service in the new legislation governing SSMO. There is also a need to establish a TBT committee.

Sudan is drafting a National Quality Policy with the support of the United Nations Industrial Development Organization (UNIDO). Some activities related to the establishment of national enquiry point and national TBT committee has already started to speed up Sudan's accession to WTO, without undue waiting for finalising the document.

Sanitary and phytosanitary measures (SPS) matters

Sudan has applied sanitary and phytosanitary measures to protect animal, plant or human life or health. This is in accordance with the international standards, guidelines and recommendations issued by the IPPC, CODEX and OIE and harmonized with the African Union and COMESA guidelines.

The Plant Protection Department of the Ministry of Agriculture is responsible for phytosanitary issues. The Animal Health and Epizootic Disease Control Department of the Ministry of Animal Resources deal with animal health issues, while the Environmental Health and Food Control deals with food safety issues. The focal point for Codex Alimentarius is the Quality Control and Export Unit of the Ministry of Agriculture.

Several councils have been set up to facilitate the implementation of the laws, including the National Pesticides Council, the National Drug and Poison Council and the National Biosafety Council.

The extension services of the Ministry of Agriculture and the Ministry of Animal Resources provide training and advisory support to farmers regarding good agricultural practices. The National Industrial Research Council provide support to the food processing industry.

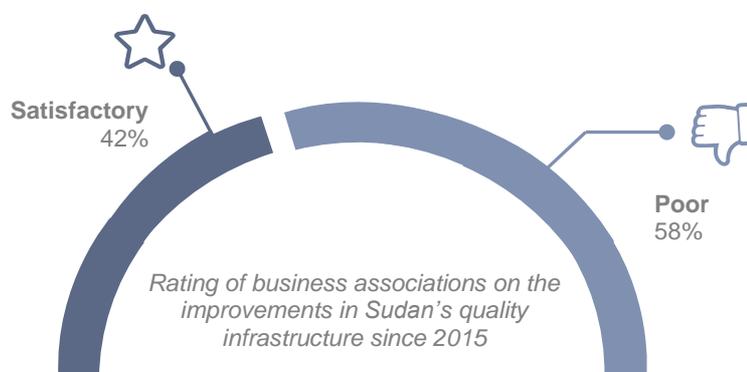
Implementation of SPS measures is done at three levels: Federal which is responsible for border control (7 border stations) and overall coordination, state (18 states) and locality (182 localities).

There is the need to establish and operationalize the National SPS enquiry point at the WTO Accession Unit of the Ministry of Agriculture. This unit – initiated in 2013 – is the secretariat of the National SPS Committee. Three working groups, namely in the areas of plant health, animal health and food safety were created to support the National SPS Committee draft of the National SPS action plan which was submitted to WTO. The Government needs to reactivate the SPS committee, as it is presently dormant.

Business associations see a need for upgrading quality infrastructure

Business associations echoed the concerns of traders about the absence of appropriate quality facilities in Sudan. More than half (58%) believe the efforts made over the last five years have not been satisfactory, while the rest say it has been satisfactory (Figure 18). Certificates issued by the few labs in Sudan are not recognized internationally. Additionally, domestic laboratories lack adequate equipment and well-trained staff, which affect the quality of service they provide. Hence, many exporters have to use laboratories in other countries, leading to higher costs and longer processing times.

Figure 18 Half of business associations are satisfied with improved quality infrastructure



Source: ITC NTM Survey in Sudan, 2019.

Respondents from public agencies share the same view. Most of them said progress made over the last five years had been satisfactory. International organizations developed several roadmaps to upgrade domestic

quality infrastructure. However, these did not come forward due to Sudan's political unrest and frequent changes in leadership in the Government.

Finance restrictions and difficulties with other non-technical measures

Finance restrictions (4%) are the main non-technical issues faced by exporters (Figure 17). Banks in destination markets countries, such as Turkey and Saudi Arabia, refuse to deal with Sudanese companies. Survey respondents link such restrictions to the US sanctions imposed on Sudan since 1997.¹¹ These include a trade embargo and blocking government assets, which have significantly affected the country's credibility. The US government has announced the lifting of sanctions in 2017. However, Sudan is still part of the US sponsors of terrorism list.¹² As a result, many Sudanese businesses opened branches in other countries such as the UK and the UAE for smoother trade with the rest of the world.

Sudanese exporters experience few difficulties related to rules of origin or the process of obtaining certificates of origin. These issues account for only 2% of the reported NTM cases. High fees for a certificate of origin are also a burden, in particular for small exporters. Furthermore, there are cases of not recognizing the certificate issued by Sudanese authorities in destination. As a result, exporters end up paying duties on their goods despite the existence of a trade agreement with the importer country.

Egypt requires us to submit a certificate of origin. However, it is so expensive to obtain it. If we want to export a lot, we need to pay around 3000 SDG (\$54).

Sheep meat exporter

Exporters also report few problems (2%) with preshipment inspection due to the lack of transparency and the arbitrary behaviour of customs officials in destination countries.

Most associations highlight an improvement of customs procedures

Most business associations agree with public agencies that Sudanese customs have improved. Around 17% believe the efforts made over the last five years have been excellent, while over half (58%) say it has been good. About 25% rate the progress to date as satisfactory (Figure 19).

Figure 19 Over half of business associations are happy with improved customs procedures



Source: ITC NTM Survey in Sudan, 2019.

Customs administration is by far the most efficient public entity in Sudan, business associations say. However, traders face long delays at ports due to the lack of adequate infrastructure. It can take a few days to handle the goods at national ports, as there are only a few old cranes available. The absence of large scanners and cooling facilities is also a major concern for traders.

Streamlining procedures and digitalizing customs declarations have been the biggest improvement, according to these associations. Despite the lack of appropriate infrastructure, it usually takes a few hours

¹¹See <https://2001-2009.state.gov/p/af/rls/fs/2008/103970.htm>

¹²See <https://www.state.gov/state-sponsors-of-terrorism/#:~:text=Currently%20there%20are%20four%20countries,iran%2C%20Sudan%2C%20and%20Syria.>

to complete customs procedures. Respondents ask for the implementation of an electronic single window to further enhance export and import procedures.

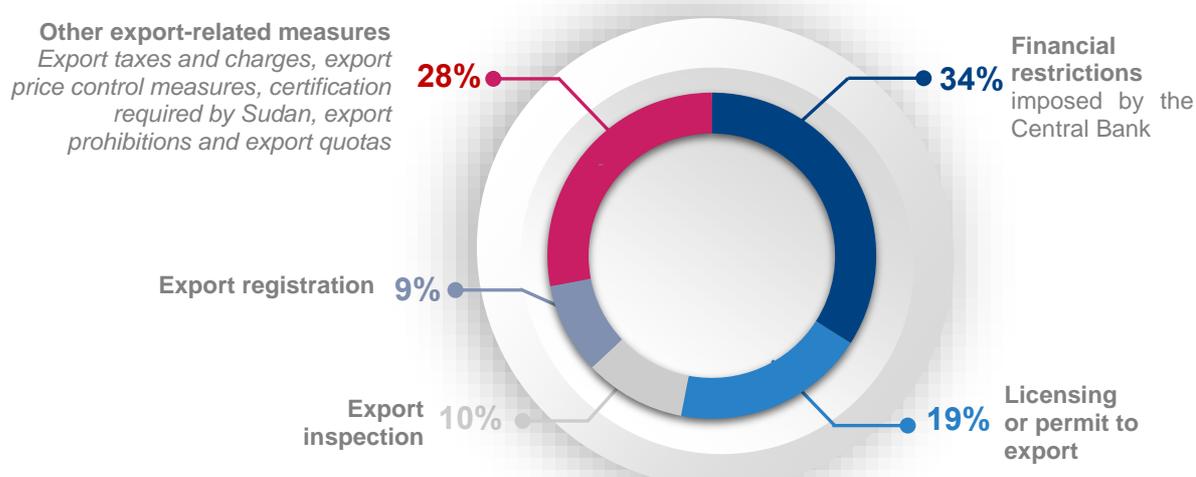
Firms stumble over domestic regulations

Roughly, 79% of the difficulties that Sudanese exporters face stem from domestic regulations. Among these 'export-related measures' (Figure 20), the most frequently mentioned are financial restrictions imposed by the Central Bank of Sudan (34%), licensing or permit to export (19%) and export inspection (10%).

Similar to the measures applied by destination markets, compliance with Sudanese regulations is deemed burdensome mainly because of the associated procedures.

Figure 20 Finance measures are the leading domestic regulatory challenge for exporters

Types of domestic regulations exporters find burdensome



Source: ITC NTM Business Survey in Sudan, 2019.

Strict finance measures create obstacles

Survey respondents raised concerns over the export-related regulations of the State Bank of Sudan. Firms are obliged to receive their export proceeds on their bank accounts within 30 days. Many exporters claim that it is usually impossible to recover their earnings in such a short period.

Additionally, exporters cannot keep their earnings for more than a month. They have either to use them to import or sell them to other importers or banks. Otherwise, the Central Bank purchases these earnings with the official exchange rate. Sudan imposes these measures to ensure sufficient foreign reserves liquidity within the country.

Furthermore, exporters find the USD official exchange rate, set by the Central Bank of Sudan,¹³ unreasonable. Sudan has devalued its currency six times since 2012. It currently pursues a managed float exchange rate regime. However, the Central Bank finds it difficult to maintain this regime due to the lack of foreign reserves. As a result, the USD price offered by commercial banks is volatile and considerably lower than the black market rate. Hence, exporters face huge losses when they receive foreign payments through Sudanese banks.

Additionally, companies complain that they must open a bank account called an "office account" prior to any export activity. They report facing high charges to open an account, as the commercial banks are free to set the associated fees. It is impossible to get an export license without this bank account.

¹³ See <https://www.france24.com/en/20181007-sudan-sharply-devalues-currency-economic-crisis-grows>

Moreover, exporters have limited access to foreign currency. This makes it difficult to import raw materials necessary for their production (see the section on importers' difficulties for details about these restrictions).

Getting an export permit is a tedious process

Companies face administrative hurdles to get an export permit. The most common problems associated with this process are unnecessary delays and high fees.

Another concern is the need to provide many documents to the Ministry of Industry and Trade for this permit. It can be issued within two days if the applicant provides: (i) its registration at the chamber of commerce, (ii) a certificate of tax release, (iii) a certificate of zakat release (citizens or foreign Muslims), (iv) a certificate of bank account, (v) a national identification number for Sudanese or a passport copy for foreigners, (vi) a tax identification number and (vii) a certificate of real state ownership or a copy of the rental contract for the shop or office.

It is so expensive to export because we need to obtain a permit from the Central Bank of Sudan. This costs a lot of money and the bank staff does not respect our time, which causes delays.

Sesame exporter

Export inspections cause delays

Exporters consider Sudanese inspection requirements to be burdensome. The biggest problem with these inspections is the long waiting time. Exporters of live animals complained that the Ministry of Health keeps their products in quarantine for several weeks for inspection, leading to delays and additional expenses. Moreover, unnecessary delays during inspection affect the quality of perishable goods, in particular given the lack of proper facilities such as cold storage.

Other hurdles

Firms complained about submitting many documents to the national authorities. Nine documents are required for export activities: Bank of Sudan's export form (EX), bill of lading, certificate of export, certificate of origin, commercial invoice, customs export declaration, export license, packing list and phytosanitary certificate. Additionally, the authorities are slow in processing the requests due to the involvement of many agencies.

Similarly, the Government requires exporters of live animals to submit numerous documents for certification. Companies must provide these documents for each exported animal, which is time-consuming and costly.

Furthermore, some goods are subject to a minimum export price. Companies reported that these measures do not only disadvantage their goods in destination markets but also the authorities usually impose them without prior notice.

Moreover, exporters of wheat products are subject to a 200% export duty, while exporters of waste iron and scrap, and exporters of hides and skin pay a duty of 25% and 15%, respectively. Sudan imposes such duties to ensure sufficient domestic supply.

Procedures cause serious problems

Regulations that are overly strict or demanding cause 33% of the problems that exporters face. By contrast, 36% of NTMs are onerous only because of the related procedures. Both regulatory and procedural obstacles account for the remaining 31% of the difficulties that exporters experience (Figure 21). These POs occur both at home and in destination countries.

Most of the reported POs (96%) occur in Sudan. Slow procedures are the top impediment for exporters (Figure 22). Delays account for 21% of the reported POs, while 14% are caused by high fees and charges to obtain the required certification or testing. Lack of adequate facilities for testing, transport and storage makes up 14% of the reported difficulties.

Companies also indicate information and transparency issues (13%) and a large number of documents requirements (11%).

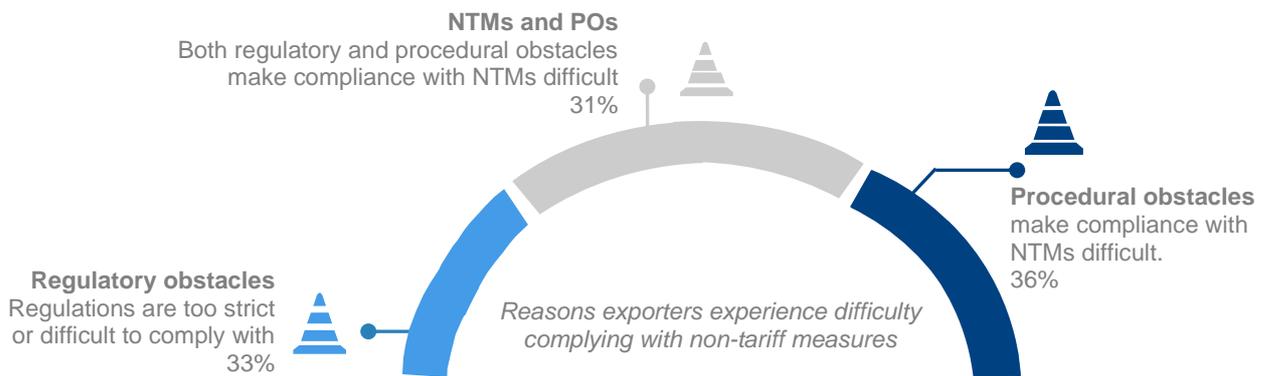
What are procedural obstacles?

To provide a better understanding of the nature of problems faced by exporters, the NTM survey methodology identifies the measures that are burdensome to exporters as well as the underlying reasons they are burdensome.

Exporters often find it difficult to comply with a particular regulation not only because it is too strict or complex, but also (and at times solely) because of the related procedures.

Non-tariff measures are official regulations applied by the competent authorities in the exporting or importing country, and traders must comply with them. Procedural obstacles are hurdles that companies face due to the way a regulation is applied or implemented.

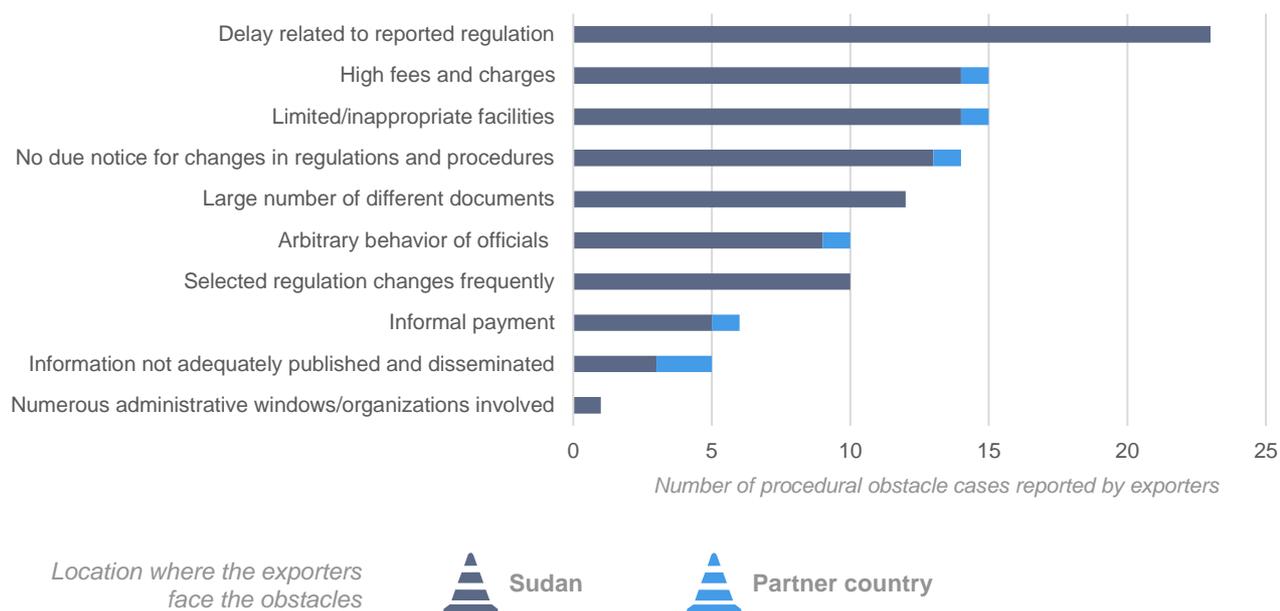
Figure 21 Procedures make compliance with regulations difficult for Sudanese exporters



Source: ITC NTM Survey in Sudan, 2019.

Figure 22 Domestic procedures are the most troublesome

Types of procedural obstacles exporters face in Sudan and abroad



Source: ITC NTM Business Survey in Sudan, 2019.

Business environment in Sudan is challenging

Surveyed companies identified challenges in the domestic trade-related business environment. Inefficiencies in the business environment are generic problems unrelated to specific regulations, but they affect the ability of enterprises to export or import.

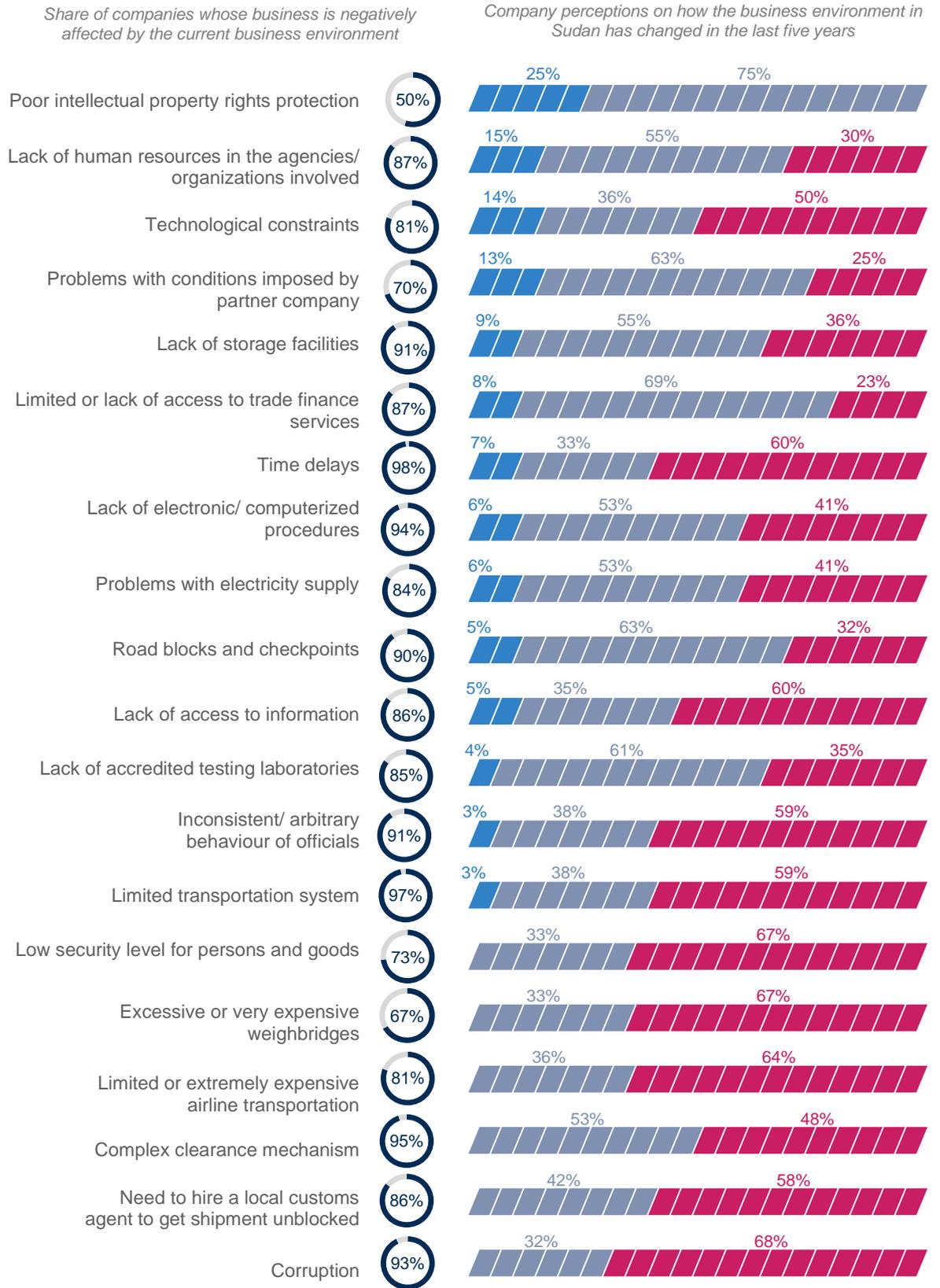
Firms were asked to identify factors that made it difficult for them to conduct business and how these conditions had changed in the last five years.

The main concern about the business environment is time delays, identified by 98% of surveyed companies (Figure 23). Limited transportation system (97%) and complex clearance mechanism (95%) are their second- and third-biggest criticisms of the trade-related business environment. The majority of respondents believe that problems with time delays and limited transportation system have become worse in the past five years.

Moreover, the majority of respondents believe that the trade-related business environment has not improved in the last five years. Yet, there are improvements in intellectual property rights protection (25% of respondents) and availability of human resources in the public agencies (15%).

Additionally, exporters encountered problems with the transport of their shipments. Most commercial freight is transported by road, while the road conditions in Sudan are inadequate. Perishable products, such as agri-food goods, are damaged on their way to destination markets.

Figure 23 Traders view the business environment as challenging



Share of companies negatively affected by current business environment conditions in Sudan

Improved Remained the same Deteriorated

Source: ITC NTM Business Survey in Sudan, 2019.

Table 2 Sudanese exports – non-tariff measures and why they are

Number of cases reported for each measure type and the reason it is burdensome				POs making the measure difficult and where they occur			
NTM type	Measures are too strict or difficult	Due to procedural obstacles	Both NTMs and POs are difficult	Type of procedural obstacles faced (POs)	Sudan	Partner or Transit	Subtotal
Technical requirements	1	2	3	Limited/inappropriate facilities	5		5
Conformity assessment		3	3	Delay related to reported regulation	5	1	6
				Limited/inappropriate facilities	4		4
				High fees and charges	3		3
				Informal payment		1	1
Preshipment inspection and border clearance	1		1	Information not adequately published		1	1
Quantity-control measures			1	No due notice for changes in regulation		1	1
Finance measures	4						
Rules of origin and related certificate		1	1	High fees and charges	2		2
				Limited/inappropriate facilities			
				Others			
Export-related measures				Transparency issues	28		28
				Delay related to reported regulation	17		17
	27	30	22	High fees or informal payments	14		14
				Large number of documents	12		12
				Others	15		15
Total	33	36	31		105	4	109

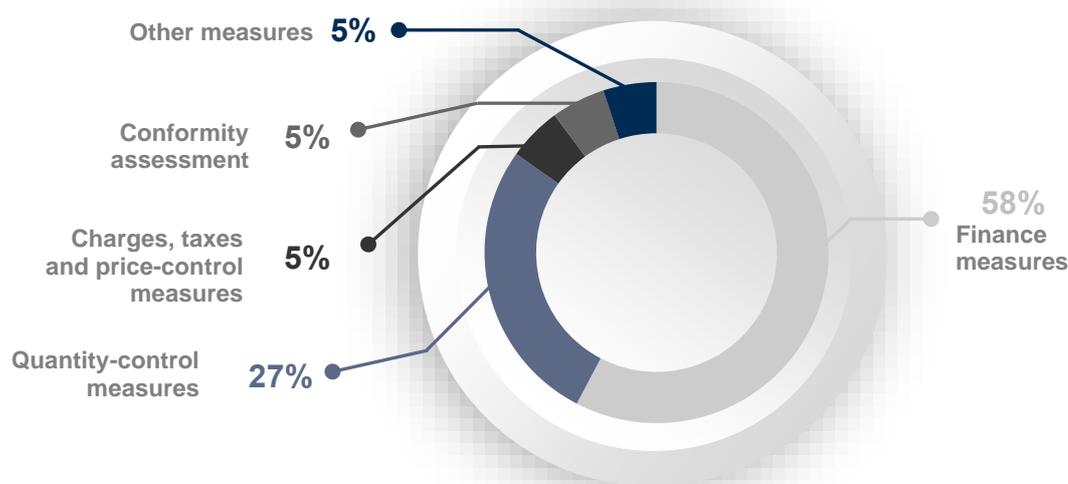
Source: ITC NTM Business Survey in Sudan, 2019.

Importers struggle most with non-technical measures

A total of 37 importers participated in the NTM survey. About 90% of the burdensome measures they face are non-technical in nature. The top challenges for importers are finance measures (58%), quantity-control measures (27%) and charges, taxes, and price-control measures, and conformity assessment procedures (5%), each (Figure 24).

Figure 24 Finance measures are the biggest challenge for Sudanese importers

Types of burdensome non-tariff measures importers face



Source: ITC NTM Business Survey in Sudan, 2019.

Concerns about foreign exchange rates

Importers complained that the dollar price offered by banks (in exchange for domestic currency) is significantly higher than the black market rate. This is not in favour of Sudanese companies since an expensive foreign currency makes imports more costly. Additionally, Sudan has devalued its national currency on several occasions over the last few years.¹⁴ This volatility has created uncertainty among importers about the real value of the Sudanese pound.

Limited access to foreign currency constrains importers

The Central Bank of Sudan has implemented a special arrangement called the “rational allocation mechanism” to use its limited foreign reserves for import purposes. Banks should prioritize imports of essential and strategic commodities. The list, updated regularly, includes, among others, wheat, medicines, sugar, and raw materials.¹⁵ Hence, many companies cannot get foreign currency to import goods outside the list of strategic commodities. As a result, some firms had to stop importing.

High cash margins are a hurdle for small importers

Firms need to deposit enough import cash margin in their bank accounts before any transaction. The required cash margins may range between 1% and 100% of the imported value, depending on the importer’s

¹⁴ See <https://www.reuters.com/article/sudan-economy/update-2-sudan-sets-daily-exchange-rate-at-475-pounds-per-dollar-in-sharp-devaluation-idUSL8N1WN04Q>

¹⁵ See <https://cbos.gov.sd/ar/content/%D8%A5%D8%AC%D8%B1%D8%A7%D8%A1%D8%A7%D8%AA-%D9%88%D8%B6%D9%88%D8%A7%D8%A8%D8%B7-%D8%A7%D9%84%D8%A5%D8%B3%D8%AA%D9%8A%D8%B1%D8%A7%D8%AF-0>

credibility and risk of a transaction. This requirement is a real hindrance particularly for small importers, according to many survey respondents.

Sudden imports bans generate huge losses

Sudan bans imports of alcohol and pork for religious reasons, while the Council of Ministries imposes temporary bans on other products to either reduce its trade deficit or stimulate local production. However, transparency issues are a major concern for importers. The Government often imposes import bans without any prior notice. Many survey respondents were importing fresh fruits for several years. However, Sudan suddenly imposed a ban to stimulate local production. Importers of manufacturing products echoed the concerns of agri-food companies.

Technical issues are due to administrative hurdles

Conformity assessment requirements are a bigger concern for importers (5%) than technical requirements (2%). Procedural obstacles such as slow processes and submitting many documents related to conformity assessment make proving compliance to regulations harder than complying with them. For instance, companies said that the import inspection processes are burdensome because of time delays and the need to submit a large number of documents.

CHAPTER 3 REGULATORY REFORMS AND THE PUBLIC SECTOR



Sudan trade laws and regulations

The Ministry of Industry and Trade is the only authority responsible for setting trade policies, laws, systems and regulations related to the exchange of goods and services at the level of foreign and domestic trade, including taxes, subsidies, and import or export regulations.

Ministry of Industry and Trade's mandate

As per the presidential decree 32 of 2015, the functions of the Ministry of Industry and Trade include, among others: (i) promote and stimulate foreign trade, (ii) set trade-related policies, (iii) participate in setting export and import pricing policies, (iv) follow up on the implementation of trade agreements, and (v) provide the private sector with necessary trade-related information.

In terms of export policies, the Ministry of Industry and Trade targets the production of goods and services destined for exports. It has also to ensure food security and preservation of environmental resources. While the Ministry applies flexible policies to import essential goods, it encourages importing raw materials for the production of goods destined for export.

The current transitional Government focuses on increasing domestic production and productivity of export¹⁶, specifically major exports such as gold mining, animal resources, gum Arabic, oil products and cotton. It also aims to import-substituting commodities namely wheat, sugar, oilseeds and pharmaceutical products to restore the trade balance after the loss of 85% of Sudan's export earnings after the secession of South Sudan.¹⁷

Additionally, the Government has established 12 export commodity boards consisting of representatives of the private sector by the Trade Ministerial decree no. 15 of 2015. These boards aim to give the traders a better understanding of international markets. These boards include oilseeds, sorghum grain, livestock, meat, hibiscus, plants and herbs, vegetables and fruits, manufactured products, gum Arabic, cotton, gold and minerals, livestock and leather.

¹⁶ Sudan's Transitional Government Programme 2019, priorities of STG.

¹⁷ Draft Trade Policies 2017, Ministry of Industry and Trade.

The key laws governing Sudanese trade include:

Customs Law of 1968, amended in 2010

It determines the Customs authority's functions and working hours. It also includes provisions on the checking of goods and estimation of customs duties. Furthermore, it indicates the procedures that have to be followed at the borders for imported and exported goods.

Exports and imports of live animals and meat (veterinary quarantine) Act, 2004

The Ministry of Livestock and Animal Resources is in charge of the veterinary quarantines, as per this act. No export animals shall be entered into the centre of inspection and veterinary quarantines unless they satisfy the health conditions set by the Ministry. The Ministry shall issue a health certificate recognized internationally for export of animals and fresh meat.

Exporters and Importers (registration) Act, 2008

This law replaced the exporters and importers' registration act of 1984. It states that the Ministry of Industry and Trade has to maintain a commercial register of all exporters and importers. Chapter 3 of the act specifies the required documents for registration and the procedures to renew it.

Duty-free zones and shops regulations, 2013

Companies have to meet the conditions mentioned in Chapter 2 of this act to operate in a free-duty zone. The act also cites the required documents to register in such zones and how to renew the registration. It also contains provisions on the movement of goods within these zones.

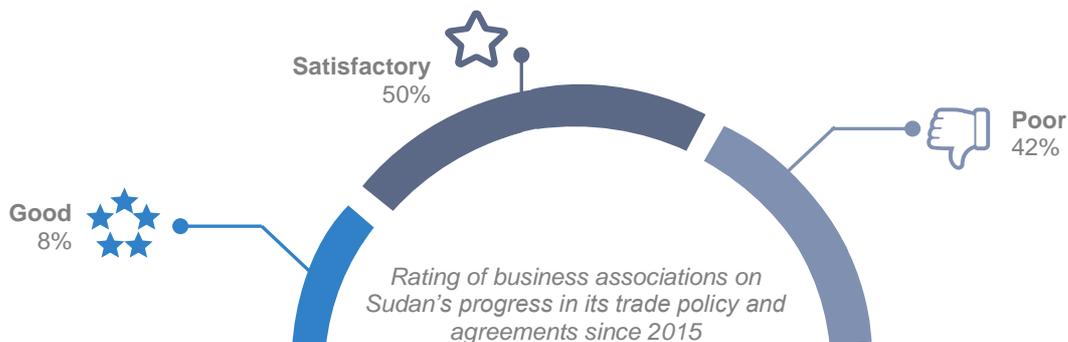
Sudanese Accreditation Council Act, 2015

This act established the Sudanese Accreditation Council (SDAC), which deals with the accreditation of laboratories, inspection bodies and certification bodies. The SDAC aims to upgrade the quality of services provided by the entities involved in the field of conformity assessment. It also has to ensure that the services provided by Sudanese entities comply with international standards and requirements.

Business associations identify trade policy shortcomings

The majority of business associations in Sudan believe the country has not made satisfactory progress on trade policy and trade agreements (Figure 25). Changing and uncertain trade policies have created serious problems for traders. Furthermore, the Government do not properly consult traders and stakeholders when developing trade policy or negotiating trade deals, according to business associations. In addition, companies are expected to adjust to the new realities when a new policy or a trade agreement is implemented, which is not always easy for them to do or in their best interest, they said.

Figure 25 Most business associations are unhappy with progress on trade policy and agreements



Source: ITC NTM Survey in Sudan, 2019.

Business associations also criticized the inability of the Government to negotiate with the US to remove Sudan from its list of sponsors of terrorism. They also believe that the country is in international isolation due to the limited number of trade agreements.

Additionally, there is no consultation with the private sector when negotiating new trade agreements. The respondents call for more free trade agreements in particular with the EU and neighbouring countries such as South Sudan, Chad and the Central African Republic for better integration into global value chains.

The issues highlighted by business associations mirror those brought up by exporters and importers on domestic policies. The scarcity of foreign currency and fluctuation of the exchange rate have significantly affected the private sector.

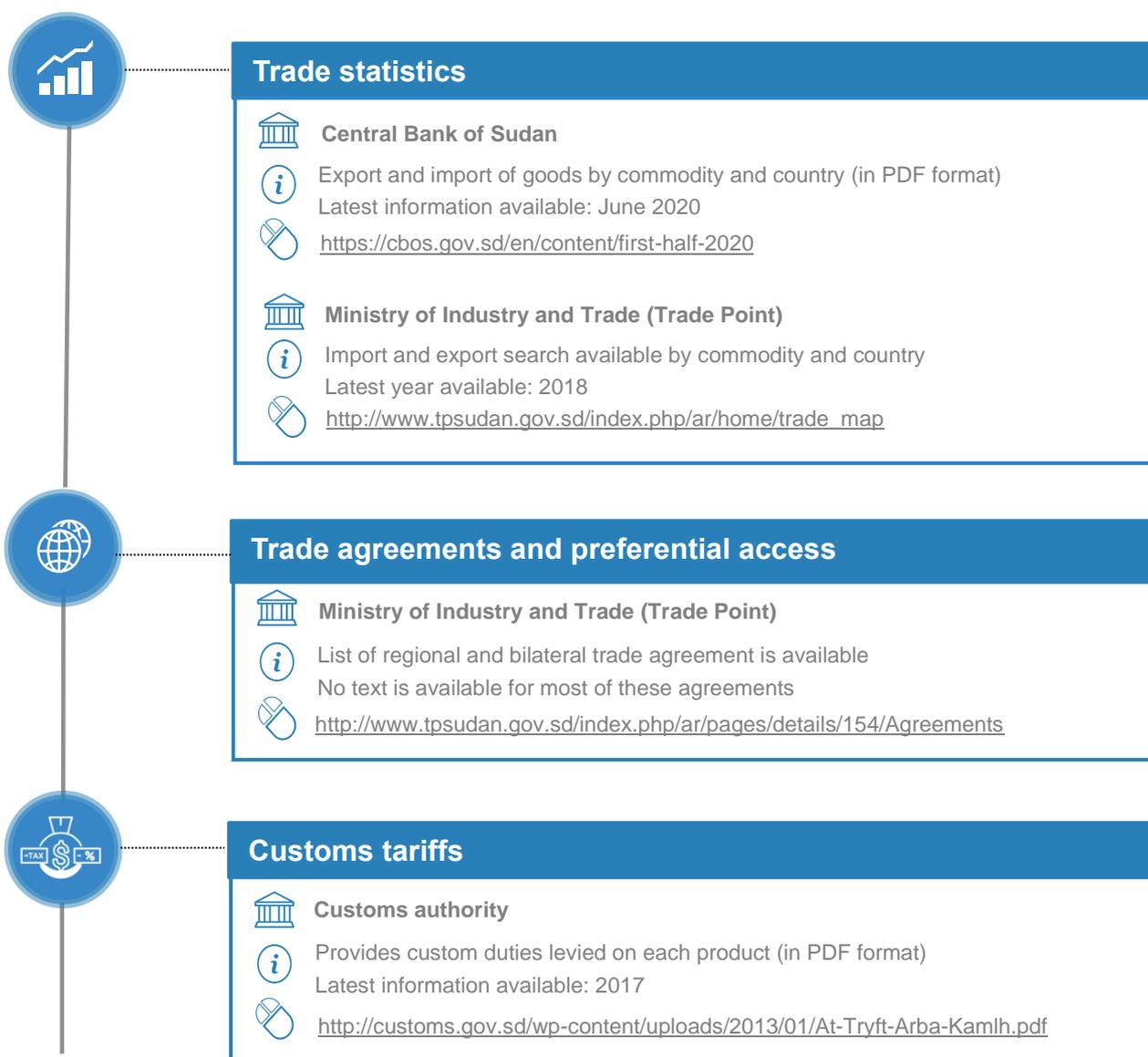
Most interviewees from the public sector rate the progress made by their institutions on trade policy as satisfactory. There is not enough coordination between public agencies involved in cross-border trade, the respondents say. Additionally, political instability and economic uncertainty have hold Sudan back in the last few years.

Availability of trade-related information

Lack of transparent and consistent information is one of the key major market access obstacles for Sudanese businesses. Exporters are not aware of many trade regulations, in particular TBT and SPS measures. Many governmental bodies are involved in cross-border trade, so exporters need to go through their different websites to stay informed. The fragmentation of information is a clear issue for businesses.

In addition, public agencies do not properly disseminate changes in regulations. This is a big concern for exporters since domestic regulations witnessed frequent changes in the last few years. Business associations also say that many exporters are unaware of the benefits that emerge from the trade agreements signed by Sudan.

Mapping the availability of trade-related information online





Non-tariff measures

 **Ministry of Industry and Trade (Trade Point) • Sudanese Standards and Metrology Organization (SSMO) • Central Bank of Sudan (CBOS) • Ministry of Agriculture and Forestry (MOAF)**

 Trade point website provides statutory text of several laws regulating trade such as foreign trade law (2009), free zones and market law (2009) and trade point law (2001). SSMO offers an e-service that sends notifications to users on TBT regulations. Users can also submit an enquiry through this online platform. Exporters can consult MOAF for SPS matters.

CBOS provides information on finance measures affecting traders such as limits on foreign currency and grace period to recover export proceeds.

 Trade point: <http://www.tpsudan.gov.sd/index.php/en>
 SSMO: <http://www.ssmo.gov.sd/>
 CBOS: <https://cbos.gov.sd/en>
 MOAF: http://www.moaf.gov.sd/index_en.html#gsc.tab=0



Foreign trade procedures

 **Ministry of Industry and Trade (Trade Point)**

 Information on documents required by public agencies (Ministry of Trade, Central Bank, Ministry of Health) for several export and import procedures.

 <http://www.tpsudan.gov.sd/index.php/en/pages/details/199/Exports%20procedures>



Daily rates for foreign currency

 **Central Bank of Sudan**

 Publishes the daily exchange rates for more than 15 foreign currencies.

 <https://cbos.gov.sd/en/exchange-rates>

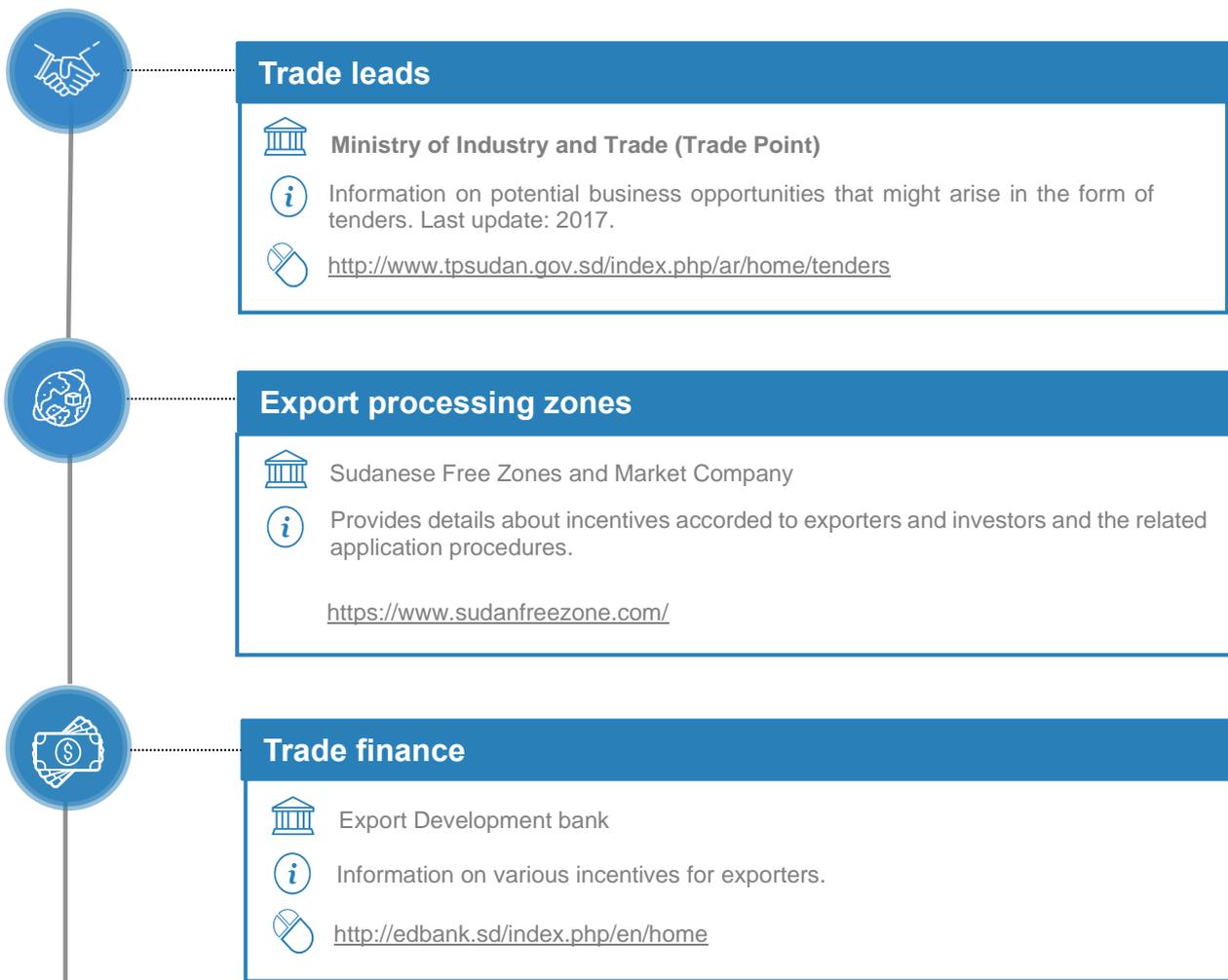


Market price Information

 **Ministry of Industry and Trade (Trade Point)**

 Provides domestic and international prices for major commodities.

 http://www.tpsudan.gov.sd/index.php/ar/home/all_prices



Providing transparent trade information is the first step to address private sector concerns. Additionally, exporters need to understand trade regulations and how they can fulfil domestic and foreign requirements. Regulations might be available online but one of the biggest obstacles for traders is how they apply to them and the implications for their businesses. The legal language used in such regulations is too difficult to digest by firms, in particular SMEs. Business associations believe there is a clear need for additional workshops to build the capacity of companies. Individual efforts made by firms are not enough to boost exports.

The majority of business associations (84%) are dissatisfied with the efforts made over the last five years, 8% said progress had been satisfactory and 8% reported good progress (Figure 26).

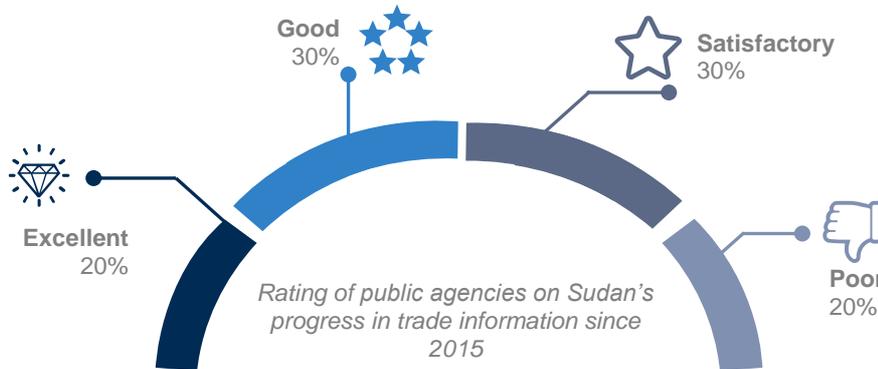
Figure 26 Most of business associations say availability of trade information has not improved



Source: ITC NTM Survey in Sudan, 2019.

On the other hand, respondents from public entities are happy with the progress made by their institutions regarding the availability of trade-related information. Around 50% reported good or excellent progress, while 30% believe the efforts made have been satisfactory and about 20% say it has not been satisfactory (Figure 27). Public agencies profit from their meetings with chambers of commerce to disseminate trade information. While the private sector is reluctant to participate in these meetings, respondents think their institutions need to reach out to companies through other means such as customized emails and social media networks.

Figure 27 Many public agencies are happy with progress on availability of trade-related information



Source: ITC NTM Survey in Sudan, 2019.

Public entities pinpoint key shortcomings

Inadequate infrastructure hinders public agencies

Respondents from Government agencies feel that poor domestic infrastructure is affecting their services' quality. This includes IT, transport and quality infrastructure.

Furthermore, government officials need proper and relevant training to improve their efficiency. Lack of coordination between agencies and the lack of a clear work vision are also among the key issues.

Exporters face difficulties to comply with TBT and SPS measures

Over half of public agencies rate the ability of traders to comply with domestic and foreign regulations as satisfactory (Figure 28). Respondents believe the knowledge of businesses on market access conditions in Sudan and abroad has improved over the last few years, thanks to the efforts made by the Government. Public entities disseminate trade-related information through different means such as customized pamphlets and official websites. Furthermore, the Sudan Standards and Metrology Organisation (SSMO) provides technical assistance to improve traders' compliance with foreign standards.

However, the respondents highlighted the traders' difficulties in complying with SPS and TBT measures. There is a need for technical assistance through seminars and workshops on technical measures to enhance private sector compliance.

Figure 28 Traders' compliance with regulations has been satisfactory



Source: ITC NTM Survey in Sudan, 2019.

Public agencies take steps to tackle trade obstacles

National single window implementation

The United Nations Economic and Social Commission for Western Asia (ESCWA) prepared a study in 2012 to analyse the impact of a single-window establishment in Sudan. The study included a detailed analysis of how this window can facilitate trade in Sudan. The window intends to streamline trade procedures to reduce the administrative burdens, time and costs faced by Sudanese traders. The political instability and frequent change of policymakers disrupted the implementation of this project for several years. In August 2020, the transitional Government announced the formation of a national committee to establish the single window. This committee, including representatives from the private sector, has to come with a plan to implement the single window shortly.

Establishment of trade-related focal points within public agencies

Government entities provide advice to exporters on trade-related regulations when needed. Additionally, some public agencies such as the Central Bank of Sudan and the Sudan Standards and Metrology Organisation launched a focal point to address trade-related inquiries. The focal point also supports the dissemination of timely and relevant information to exporters and importers.

Creation of trade financing fund

Foreign exchange shortages are a key hurdle for traders. Hence, the Ministry of Finance announced the creation of a trade-financing fund with a portfolio of \$2 billion.¹⁸ This will support exports of key products such as livestock and gold while funding the import of key commodities, namely wheat, fuel and medicine.

A new public entity to enhance the public-private dialogue

The transitional Government has established the Authority of Investment and Development of the Private sector in January 2020. Under the umbrella of the Ministry of Finance & Economic Planning, this body aims to create outstanding public-private dialogue and resolving all obstacles facing the private sector. The new authority aims to strengthen the partnership with the private sector to promote Sudan major exports.

Continuous efforts to finalize WTO accession

Sudan has started its WTO accession process in 1994 but its journey towards membership took a thirteen-year pause.¹⁹ The Arab country has submitted required technical documents and the working party on its accession met for the fourth time in 2017. Additionally, a WTO delegation visited Khartoum in 2020 to develop a roadmap to complete the accession process. While the political instability has slowed down Sudan's accession to the WTO, the current Government is committed to finalizing the process by 2023.

Significant improvements in the public-private dialogue

The frequent changes of officials, due to the country's political instability, have significantly affected the public-private sector dialogue. Business associations believe the situation has improved since 2018. Representatives of the private sector are meeting regularly with the Government to discuss the trade obstacles hindering exporters. Public agencies are also reaching out directly to exporters through emails and annual meetings to communicate the changes in regulations and procedures.

Youth and women need additional support

Most respondents from public agencies are unsatisfied with their institutions' youth and women support programmes (Figure 29). The National Agency for Insurance and Finance of Exports (NAIFE) launched a few projects targeting youth and women. The Central Bank of Sudan also offers financial incentives to young and women entrepreneurs. However, these efforts did not bear fruit yet. Many young people and women are

¹⁸ <http://www.fao.org/giews/food-prices/food-policies/detail/en/c/1296621/>

¹⁹ https://www.wto.org/english/news_e/news17_e/acc_sdn_31jan17_e.htm

unaware of the Government's incentives aimed at supporting them. There is also an absence of consultation between public institutions and business associations focusing on women. Hence, their voices are absent when public agencies formulate trade policies.

Gender discrimination can be an additional key hurdle when it comes to women. Many women feel that business and trade support institutions are biased towards men. Business associations focusing on women traders say that their members might experience harassment when approaching these institutions for information and advice. This is due to the lack of gender sensitization among male officials. Furthermore, social constraints hinder women entrepreneurship. Families often do not support the business aspirations of women.

Figure 29 Most public agencies are unhappy with progress on youth and women support



Source: ITC NTM Survey in Sudan, 2019.

The COVID-19 crisis has magnified the challenges faced by businesses

Sudan imposed a total lockdown²⁰ and restrictions on internal movement between the states to curb the spread of COVID-19. Furthermore, public agencies had to reduce their working hours and workforce to less than 50%, which led to longer delays and additional costs for traders. While the government focused on supporting poor communities, business associations provided advice to traders on how to deal with the crisis. Domestic restriction measures and the decline in global demand pushed many Sudanese firms to stop exporting.

Normal life returned partially to the country in July 2020 when the government eased lockdown measures. National stakeholders believe the situation might improve in the next six months. The Central Bank of Sudan issued temporary measures²¹ to mitigate the impact of the effects of the COVID-19 crisis. In the area of foreign trade, the Central Bank extended the recovery period of export earnings by two additional months. Exporters are normally supposed to bring back their earnings to Sudan within one month. Furthermore, other public entities such as the Customs Authorities and the Ministry of Finance and Economic Planning intend to shift most of their services online.

²⁰ <https://www.newdelhitimes.com/jump-in-sudan-coronavirus-cases-prompts-total-lockdown/>

²¹ <https://www.shorouknews.com/news/view.aspx?cdate=20052020&id=8af567ac-24a9-4a66-9abd-4004abc88763>

CHAPTER 4 RECOMMENDATIONS



The NTM survey reveals various obstacles, especially regarding the availability of trade-related information and export-quality management and infrastructure that must be addressed to make it easier for Sudanese traders to comply with regulations.

The following policy recommendations followed consultations with stakeholders from the public and private sectors, business association representatives and experts. The survey results and recommendations aim to help the government and private sector create an enabling environment for private-sector development and improve export competitiveness in Sudan.

Improve transparency in trade

Access to trade and market intelligence is critical to export success. However, Sudanese businesses often lack the resources and skills to obtain and process trade-related information. This places exporters at a disadvantage compared with competitors in other countries.

Rehabilitate the Trade Information Centre (TIC)

The Ministry of Industry and Trade created the Trade Information Centre (TIC) many years ago with the support of ITC to provide information about potential export opportunities in international markets. The centre also used to publish a business directory with contact details of Sudanese traders. Furthermore, it was actively organizing workshops and conducting market studies. However, the centre stopped most of its activities when the donor funding ended. The TIC needs technical and financial support, as it is currently understaffed and inadequately equipped.

Create an effective trade information portal

Sudan does not have a trade information portal for exporters and importers. Rather, there is fragmented information among different websites about trade and destination markets.

A trade information portal should be developed so Sudanese firms can obtain the information they need to enter and compete in the international market. This portal should be designed based on the target audiences – Sudanese traders and the international business community – and should aim to satisfy the needs of both groups. It would be a one-stop-shop for all trade-related information, including trade statistics, tariffs and non-tariff measures, standards, procedures, contact points, news and events.

Develop a business process guide

Sudan needs a reliable source and proper dissemination of information for exporters and importers. The Arab country should develop a business process guide for the trade information portal. This tool should make it easy for exporters that are unfamiliar with the process involved – especially newer companies – to understand the way forward.

The guide should list administrative procedures related to compliance with regulations (e.g. certification of origin, export and import registration) for different products. It should also include other necessary details, such as costs and waiting time.

Implement and train entrepreneurs on notification alert mechanism

Sudan should implement a mechanism to which SMEs can subscribe to receive alerts (e.g. by e-mail or text message) about information updates for markets and goods in which they are interested. The tool should also forewarn traders of WTO notifications about upcoming changes in SPS and TBT measures. This would require a customized local interface with a new global notifications alert system.

It is essential to organize workshops to train SMEs, business associations and national institutions on how to best use this tool.

Establish an online reporting mechanism and monitoring committee

Small and medium-sized enterprises in Sudan struggle with market regulations and trade procedures when they export or import goods. Yet there is no simple channel to collect and examine their concerns so the relevant institutions can coordinate actions to overcome these obstacles.

An online platform should be developed to monitor and address difficulties faced by exporters and importers. SMEs should be able to share their concerns and directly question relevant agencies about the challenges they face – for example, when trying to prove conformity with product quality and food safety requirements.

In addition to the online portal, it is necessary to create an institutional mechanism to ensure the continuity of communication between the public and private sectors and improve the business environment. The National Trade Facilitation Committee could take the lead on this to ensure the cooperation of different actors (policymakers and trade and investment support institutions) to address NTM-related trade obstacles and to interact with companies.

Enhance customs infrastructure and procedures

- Sudan must continue its efforts to implement a national single window. Automation and less paperwork at government offices and customs would reduce the administrative burdens, time and costs.
- It is critical to automate most customs procedures (especially export promotion schemes) in light of the provisions of the WTO Trade Facilitation Agreement and the revised Kyoto Convention.
- Upgrade infrastructure at the ports and provide more storage facilities and proper warehouses at borders and clearance points would improve the customs infrastructure. A special holding area with cold storage should be set up for perishable items.
- Provide proper and relevant training to customs officers dealing with exports to help them develop expertise and enforce the law without compromising trade facilitation.
- Procure modern equipment like scanners to reduce the need for manual inspections.
- Offer regular training for traders and clearing agents on customs laws, rules and procedures to improve compliance.

Infrastructure bottlenecks such as road transport and electricity need upgrading for smoother trade. Improvement of the overall transportation is necessary.

Upgrade domestic quality infrastructure and compliance

The NTM survey highlighted a significant absence of testing and certification services in Sudan. Better export-quality management and infrastructure are vital, given the critical role they play in the success of Sudanese exporters.

Improve the testing and inspection infrastructure

Sudan must improve the infrastructure regime encompassing the Sudanese Metrology and Standards Organization, Sudanese Accreditation Council, preshipment inspection bodies and laboratories. In particular:

- Address the budgetary constraints at public laboratories to improve the efficiency and quality of the services they offer. The strong commitment of the Government to this issue is important.
- Create a system to report incidents of noncompliance. No such system exists in Sudan today. Regulatory bodies should establish a centralized system to report noncompliance, which would serve food safety objectives more holistically.
- Develop advanced technologies so laboratories can meet new testing requirements and improve their services.
- Enhance staff capacity to ensure that workers are competent in the methods required for quality-related and food safety tests.
- Put in place a lab information system to manage activities such as inputting, processing and storing data. Most public labs do not use compatible systems.

Build capacity and enhance sector development

- Build the capacity of enterprises is necessary to streamline and expand trade. Workshops should include training sessions on topics such as identifying new markets, understanding market-access conditions, marketing strategies, supply chain management and advocacy. Equally important is the need to expand the capacity of government workers to ensure effective and efficient services and eliminate corruption.
- Sudan should diversify its export portfolio and export markets for better integration with international markets and global value chains. It must move beyond its traditional exports and develop new export goods. It has to address structural constraints such as inadequate infrastructure, access to finance, technological bottlenecks and information gaps.
- Sudanese traders face obstacles to engage in e-commerce due to their limited awareness of the legal implications of trading through digital channels and restrictions on online payments in Sudan. The Government must review its policies and the legal environment to support the development of e-commerce in Sudan. These digital channels would create business opportunities for youth and women entrepreneurs.
- Expedite the WTO accession process is critical for greater integration of Sudan into the global economy. The private sector believes negotiations with the US to remove Sudan from its list of sponsors of terrorism would also open doors for more trade opportunities.

Improve inter-agency communication and collaboration with the private sector

- Frequent interaction among customs officials, exporters, importers and cargo companies would help improve their relationship and resolve trade-related problems.
- Provide regular training and information to exporters, importers, logistics companies and customs officials about rules, regulations, bilateral and multilateral treaties, International Commercial Terms, transfer of risks and ownership, as well as international trade generally.

Streamline export regulations and procedures

- Firms are obliged to receive their export proceeds on their bank accounts within 30 days. Many exporters claim that it is usually impossible to recover their earnings in such a short period. The general business community has reacted positively to the Central Bank decision to extend the recovery period of export earnings by two additional months to mitigate the effects of the COVID-19 pandemic.
- The Central Bank of Sudan needs to review its special arrangement regarding the allocation of foreign currency for imports. This mechanism, designed to regulate outflows of foreign currency, has made it difficult for exporters to import raw materials. In the meantime, the Government has to continue its efforts to increase foreign reserve levels.

Support women and young entrepreneurs on business and export development

Targeted action to tackle issues that make it difficult for women and young exporters to succeed would improve the general business environment in Sudan and remove some of the burdensome regulations that affect all trading companies in the country.

Build the capacity of unprivileged groups in product-specific export marketing

Women and young entrepreneurs need proper guidance on making goods that meet international standards, identifying potential markets and buyers, and finding suitable ways to promote their products. It is essential to organize training and mentoring with proper follow-ups to enable these groups to gain the knowledge they need to export successfully.

Improve access to trade finance

Access to finance is a major obstacle for women and young entrepreneurs. Small loan schemes with low interest rates and limited collateral could benefit small-scale youth and women-led firms. It is also necessary to improve access to information and communication about existing schemes for young and women entrepreneurs.

Mainstream gender and youth in trade policy

Sudan should mainstream gender and youth in trade policy by promoting equitable and inclusive outcomes in export-led strategies. The Ministry of Industry and Trade has to put additional efforts to develop a coherent strategy for the socio-economic development of youth and women through cross-border trade.

Sensitize staff in public agencies and trade support institutions to better support women

Women entrepreneurs say that staff at various agencies and associations have harassed and treated them unfairly. It is essential to sensitize all staff to gender equality and the fair treatment of women.

APPENDICES

Appendix I Non-tariff measures surveys: global methodology

Non-tariff measure surveys

Since 2010,²² ITC has completed large-scale company-level surveys on burdensome non-tariff measures and related trade obstacles (NTM surveys hereafter) in over 70 countries on all continents.²³ The main objective of the NTM surveys is to capture how businesses perceive burdensome NTMs and other obstacles to trade at a detailed level – by product and partner country.

All surveys are based on a global methodology consisting of a core part and a country-specific part. The core part of the NTM survey methodology described in this appendix is identical in all survey countries, which enables cross-country analyses and comparison. The country-specific part of the survey allows flexibility in addressing the requirements and needs of each participating country.

The growing role of non-tariff measures in trade

Over several decades, trade liberalization has been used as a development tool based on evidence that benefits accrue to countries actively engaged in world trade. Multilateral, regional and bilateral trade negotiations as well as non-reciprocal concessions have led to a remarkable reduction in global, average tariff protection. With favourable market access conditions, international trade has soared to previously unseen levels, raising overall welfare and standards of living.

The misuse of NTMs may undermine the impact of falling tariffs. The sound use of NTMs to ensure consumer health, protect the environment and safeguard national security is legitimate. However, evidence suggests that countries are resorting to NTMs as alternative mechanisms to protect domestic industries. NTMs have been negotiated within the General Agreement on Tariffs and Trade and at the World Trade Organization (WTO) since the Tokyo Round (1973–1979) and are increasingly dealt with in regional and bilateral trade agreements. Many practitioners consider they have surpassed tariffs in their trade-impeding effect.

NTMs particularly impact exporters and importers in developing and least developed countries (LDCs) that struggle with complex requirements. Firms in these countries often have inadequate domestic trade-related infrastructure and face administrative obstacles. NTMs that would not normally be considered very restrictive can represent major burdens in LDCs. In addition, the lack of export support services and insufficient access to information on NTMs impede the international competitiveness of firms. As a result, both NTMs applied by partner countries as well as domestic burdens have

an impact on market access and keep firms from seizing the trade opportunities created by globalization.

An overview of previous research and evaluation

In the literature, different methods have been used to evaluate the effects of NTMs. An early approach employed a concept of incidence with NTM coverage ratios. Such studies rely on extensive databases mapping NTMs per product and applying country. The largest database of official government-reported NTMs used to be the Trade Analysis and Information System published by the United Nations Conference on Trade and Development (UNCTAD), but data has been incomplete and updates irregularly.

In a multi-agency effort, ITC, UNCTAD and the World Bank are collecting data for a global NTM database with a focus on technical barriers to trade and sanitary and phytosanitary standards. The ITC Market Access Map features information on NTMs. However, as complete as the database may be, it reveals little about the impact of NTMs on the business sector nor does it provide information about related POs.

Scope and coverage of the non-tariff measure (NTM) surveys

The objective of the NTM surveys require a representative sample allowing for the extrapolation of the survey result to the country level. To achieve this objective, the NTM survey covers at least 90% of the total export value of each participating country (excluding minerals and arms). The economy is divided into 13 sectors, and all sectors with more than a 2% share in total exports are included in the survey.

The NTM survey sectors are defined as follows:

1. Fresh food and raw agro-based products
2. Processed food and agro-based products
3. Wood, wood products and paper
4. Yarn, fabrics and textiles
5. Chemicals
6. Leather
7. Metal and other basic manufacturing
8. Non-electric machinery
9. Computers, telecommunications and consumer electronics
10. Electronic components
11. Transport equipment
12. Clothing
13. Miscellaneous manufacturing

²²The work started in 2006, when the Secretary-General of the United Nations Conference on Trade and Development (UNCTAD) established the Group of Eminent Persons on Non-Tariff Barriers. The main purpose of the group was to discuss the definition, classification, collection and quantification of non-tariff barriers – to identify data requirements, and consequently advance understanding of NTMs and their impact on trade. To carry out the technical work of the group, a Multi-Agency Support Team was set up. Since then, ITC is advancing the work on NTMs in three directions. First, ITC has contributed to the international classification of non-tariff measures (NTM classification) that was finalized in November 2009 and updated in 2012. Second, ITC undertakes NTM surveys in developing countries using the NTM classification. Third, ITC, UNCTAD and the World Bank jointly collect and catalogue official regulations on NTMs applied by importing markets (developed and developing). This provides a complete picture of NTMs as official regulations serve as a baseline for the analysis, and the surveys identify the impact of the measures on enterprises and consequently on international trade.

²³Pilot NTM Surveys were carried out in cooperation with UNCTAD in 2008–2009 in Brazil, Chile, India, the Philippines, Thailand, Tunisia and Uganda. The pilot surveys provided a wealth of materials allowing for the significant improvement to both the NTMs classification and the NTM survey methodology. Since then, ITC has implemented NTM surveys based on the new methodology in over 70 countries.

Companies trading arms and minerals are excluded. The export of minerals is generally not subject to trade barriers due to a high demand and the specificities of trade undertaken by large multinational companies. The export of arms is outside of the scope of ITC activities.

The NTM surveys cover companies exporting and importing goods. Companies trading services are excluded, as a survey on NTMs in services would require a different approach and methodology. The NTM survey includes companies specialized in the export-import process and services, such as agents, brokers, and forwarding companies (referred to collectively as 'trading agents'). These companies can be viewed as service companies because they provide trade logistics services. The answers provided by trading agents are in most cases analysed separately from the answers of the companies that export their own products.

The NTM surveys cover legally registered companies of all sizes and types of ownership. Depending on country size and geography, one to four geographic regions with high concentrations of economic activities (high number of firms) are included in the sample.

Two-step approach

The representatives of the surveyed companies, generally export/import specialists or senior-level managers, are asked to report trade-related problems experienced by their companies in the preceding year that represent a serious impediment for their operations. To identify companies that experience burdensome NTMs, the survey process consists of telephone interviews with all companies in the sample (Step 1) and face-to-face interviews undertaken with the companies that reported difficulties with NTMs during the telephone interviews (Step 2).

Step 1: Telephone interviews

The first step includes short telephone interviews. Interviewers asked respondents to identify the main sector of activity of their companies and the direction of trade (export or import). The respondents are then asked whether their companies have experienced burdensome NTMs. If a company does not report any issues with NTMs, the interview is terminated. Companies that report difficulties with NTMs are invited to participate in an in-depth face-to-face interview.

Step 2: Face-to-face interviews

The second-step interviews are required to obtain all the details of burdensome NTMs and other obstacles at the product and partner country level. These interviews are conducted face-to-face due to the complexity of the issues related to NTMs. Face-to-face interactions with experienced interviewers helps to ensure that respondents from companies correctly understand the purpose and the coverage of the survey, and accurately classify their responses in accordance with predefined categories.

The questionnaire used to structure face-to-face interviews consists of three main parts. The first part covers the characteristics of the companies: number of employees, turnover and share of exports in total sales, whether the company exports its own products or represents a trading agent providing export services to domestic producers.

The second part is dedicated to exporting and importing activities of the company, with all trade products and partner countries recorded. During this process, the interviewer also

identifies all products affected by burdensome regulations and countries applying these regulations.

During the third part of the interview, each problem is recorded in detail. A trained interviewer helps respondents identify the relevant government-imposed regulations, affected products, the partner country exporting or importing these products, and the country applying the regulation (partner, transit or home country).

Each burdensome measure (regulation) is classified according to the NTM classification, an international taxonomy of NTMs, consisting of over 200 specific measures grouped into 16 categories (see Appendix II). The NTM classification is the core of the survey, making it possible to apply a uniform and systematic approach to recording and analysing burdensome NTMs in countries with idiosyncratic trade policies and approaches to NTMs.

The face-to-face questionnaire captures the type of burdensome NTMs and the nature of the problem (so-called POs explaining why the measures represent an impediment), the place where each obstacle takes place, and the agencies involved, if any. For example, an importing country can require the fumigation of containers (NTM applied by the partner country), but fumigation facilities are expensive in the exporting country, resulting in a significant increase in export costs for the company (POs located in the home country). The companies can also report generic problems unrelated to any regulation, but affecting their exports or imports, such as corruption and lack of or inadequate export infrastructure. These issues are referred to as problems related to business environment (see Appendix III).

Partnering with a local survey company

A local partner selected through a competitive bidding procedure carries out the telephone interviews and face-to-face interviews. The partner is usually a company specializing in surveys. Generally, the NTM surveys are undertaken in local languages. The telephone interviews are recorded either by a Computer Assisted Telephone Interview system, computer spread sheets or on paper. The face-to-face interviews are initially captured using paper-based interviewer-led questionnaires that are then digitalized by the partner company using a spread sheet-based system developed by ITC.

Forcier Consulting implemented the survey in Sudan on behalf and under the guidance of ITC.

Open-ended discussions

During the surveys of companies and preparation of the report, open-ended discussions are held with national experts and stakeholders, for example trade support institutions and sector/export associations. These discussions provide further insights, quality checks and validation of the NTM survey results. The participants review the main findings of the NTM survey and help to explain the reasons for the prevalence of the issues and propose possible solutions.

Confidentiality

The NTM survey is confidential. Confidentiality of the data is paramount to ensure the greatest degree of participation, integrity and confidence in the quality of the data. The paper-based and electronically captured data is transmitted to ITC at the end of the survey.

Sampling technique

The selection of companies for the phone screen interviews of the NTM survey is based on the stratified random sampling. In a stratified random sample, all population units are first clustered into homogeneous groups ('strata'), according to predefined characteristics, chosen to be related to the major variables being studied. In the NTM surveys, companies are stratified by sector, as the type and incidence of NTMs are often product-specific. Then simple random samples are selected within each sector.

The NTM surveys aim to be representative at the country level. A sufficiently large number of enterprises should be interviewed within each export sector to ensure that the share of enterprises experiencing burdensome NTMs is estimated correctly and can be extrapolated to the entire sector. To achieve this objective, a sample size for the telephone interviews with exporting companies is determined independently for each *export sector*.²⁴

For importing companies, the sample size is defined at the country level. The sample size for importing companies can be smaller than the sample size for exporters, mainly for two reasons. First, the interviewed exporting companies are often import intermediaries and provide reports on their experiences with NTMs as both exporters and importers. Second, problems experienced by importing companies are generally linked to domestic regulations required by their home country. Even with a small sample size for importing companies, the effort is made to obtain a representative sample by import sectors and the size of the companies.

Exporting companies have difficulties with both domestic regulations and regulations applied by partner countries that import their products. Although the sample size is not stratified by company export destinations, a large sample size permits a good selection of reports related to various export markets (regulations applied by partner countries). By design, large trading partners are mentioned more often during the survey because it is more likely that the randomly selected company would be exporting to one of the major importing countries.

The sample size for face-to-face interviews depends on the results of the telephone interviews.

Average sample size

The number of successfully completed telephone interviews can range from 150 to 1,000, with subsequent 150 to 300 face-to-face interviews with exporting and importing companies. The number of telephone interviews is mainly driven by the

size and the structure of the economy, availability and quality of the business register and the response rate. The sample size for the face-to-face interviews depends on the number of affected companies and their willingness to participate.

Sudan business registry

Prior to the survey, ITC compiled a registry of more than 2,500 active exporters in Sudan, containing information on the type of products imported or exported by companies, together with their contact details. This registry was used to calculate the sample size and contact the companies for interviews.

Union of Sudanese Chambers provided information on more than 1,100 companies. Additional contacts were obtained from Sudanese Businessmen and Employers Federation and Africa Trade Directory (2019).

Survey data analysis

The analysis of the survey data consists of constructing frequency and coverage statistics along several dimensions, including product and sector, NTMs and their main NTM categories (for example, technical measures, quantity control measures), and various characteristics of the surveyed companies (for example, size and degree of foreign ownership).

The frequency and coverage statistics are based on 'cases'. A case is the most disaggregated data unit of the NTM survey. By construction, each company participating in a face-to-face interview reports at least one case of burdensome NTMs, and, if relevant, related POs and problems with the trade-related business environment.

Each case of each company consists of one NTM (a government-mandated regulation, for example a sanitary and phytosanitary certificate), one product affected by this NTM, and partner country applying the reported NTM. For example, if there are three products affected by the same NTM applied by the same partner country and reported by one company, the results would include three cases. If two different companies report the same problem, it would be counted as two cases.

The scenario where several partner countries apply the same type of measure is recorded as several cases. The details of each case (e.g. the name of the government regulations and its strictness) can vary, as regulations mandated by different countries are likely to differ. However, if the home country of the interviewed companies applies an NTM to a product exported by a company to several countries, the scenario will

²⁴The sample size depends on the number of exporting companies per sector and on the assumptions regarding the share of exporting companies that are affected by NTMs in the actual population of this sector. The calculation of a sample size will be based on the equation below (developed by Cochran, 1963) to yield a representative sample for proportions in large populations (based on the assumption of normal distribution).

$$n = \frac{t^2 * p(1-p) * N}{d^2 * N + t^2 * p(1-p)}$$

Where

n_o : Sample size for large populations

t : t-value for selected margin of error (d). In the case of the NTM Survey 95% confidence interval is accepted, so t-value is 1.96.

p : The estimated proportion of an attribute that is present in the population. In the case of the NTM survey, it is a proportion of companies that experience burdensome NTMs. As this proportion is not known prior to the survey, the most conservative estimate leading to a large sample size is employed, that is $p=0.5$.

d : Acceptable margin of error for the proportion being estimated. In other words, a margin of error that the researcher is willing to accept. In the case of NTM survey $d=0.1$.

Source: Cochran, W. G. 1963. *Sampling Techniques*, 2nd Ed., New York: John Wiley and Sons, Inc.

be recorded as a single NTM case. When an interviewed company both exports and imports, and reports cases related to both activities, it is included in the analysis twice – once for the analysis of exports and once for the analysis of imports. The distinction is summarized in the Table below.

Dimensions of an NTM case

Dimensions	Country applying	
	Home country (where survey is conducted)	Partner countries and transit countries
Reporting company		
Affected product (HS 6-digit code or national tariff line)		
Applied NTM (measure-level code from the NTM classification)		
Trade flow (export or import)		
Partner country applying the measure		

Cases of POs and problems with the business environment are counted in the same way as NTM cases. The statistics are provided separately from NTMs, even though in certain instances they are closely related. For example, delays can be caused by the preshipment inspection requirements. As many of the POs and problems with the business environment are not product specific, the statistics are constructed along two dimensions: type of obstacles and country where they occur, as well as agencies involved.

Enhancing local capacities

The NTM surveys enhance national capacities by transmitting skills and knowledge to a local partner company. ITC does not implement the NTM surveys, but guides and supports the local survey company and experts.

Before the start of the NTM survey, the local partner company, including project managers and interviewers are fully trained on the different aspects of the NTMs, the international NTM classification and the ITC NTM Survey methodology. ITC representatives stay in the country for the launch of the survey and initial interviews, and remain in contact with the local partner during the entire duration of the survey, usually around six months, to ensure a high quality of survey implementation. ITC experts closely follow the work of the partner company and provide regular feedback on the quality of the captured data (including classification of NTMs) and the general development of the survey, which helps the local partner to overcome any possible problems.

ITC also helps to construct a business register (list of exporting and importing companies with contact details), which remains at the disposal of the survey company and national stakeholders. The business register is a critical part of any company-level survey, but unfortunately it is often unavailable, even in the advanced developing countries.

ITC invests much time, effort and resources into constructing a national business register of exporting and importing

companies. The initial information is obtained with the help of national authorities and other stakeholders (for example, sectoral associations). In cases where it is not available from government sources or a sectoral association, ITC purchases information from third companies, and in certain cases digitalizes it from paper sources. The information from various sources is then processed and merged into a comprehensive list of exporting and importing companies.

Upon completion of the NTM Survey, the local partner company is fully capable of independently implementing a follow-up survey or other company-level surveys as it is equipped with the business register and trained on the survey methodology as well as trade and NTM-related issues.

Caveats

The utmost effort is made to ensure the representativeness and the high quality of the NTM Survey results, yet several caveats must be kept in mind.

First, the NTM Surveys generate perception data, as the respondents are asked to report burdensome regulations representing a serious impediment to their exports or imports. The respondents may have different scales for judging what constitutes an impediment. The differences may further intensify when the results of the surveys are compared across countries, stemming from cultural, political, social, economic and linguistic differences. Some inconsistency may be possible among interviewers. For example, these are related to matching reported measures against the codes of the NTM classification due to the complex and idiosyncratic nature of NTMs.

Second, in many countries a systematic business register covering all sectors is not available or incomplete. As a result, it may be difficult to ensure random sampling within each sector and a sufficient rate of participation in smaller sectors. Whenever this is the case, the NTM survey limitations are explicitly provided in the corresponding report.

Finally, certain NTM issues are not likely to be known by the exporting and importing companies. For example, exporters may not know the demand-side constraints behind the borders. An example is 'buy domestic' campaigns. The scope of the NTM survey is limited to legally operating companies and does not include unrecorded trade, for example shuttle traders.

Following up on the ITC Non-Tariff Measure Survey

The findings of each ITC NTM Survey are presented and discussed at a stakeholder workshop. The workshop brings together government officials, experts, companies, donors, non-governmental organizations (NGOs) and academics. It fosters a dialogue on NTM issues and helps identify possible solutions to the problems experienced by exporting and importing companies.

The NTM survey results serve as a diagnostic tool for identifying and solving predominant problems. These problems can be addressed at the national or international level. The NTM survey findings can also serve as a basis for designing projects to address the challenges identified and for supporting fundraising activities.

Appendix II Non-tariff measures classification

Importing countries are very idiosyncratic in the ways they apply non-tariff measures (NTMs). This called for an international taxonomy of NTMs, which was prepared by the Multi-Agency Support Team, a group of technical experts from eight international organizations, including the Food and Agricultural Organization of the United Nations, the International Monetary Fund, ITC, the Organisation for Economic Co-operation and Development, the United Nations Conference on Trade and Development, the United Nations Industrial Development Organization, the World Bank and WTO. It is used to collect, classify, analyse and disseminate information on NTMs received from official sources such as government regulations.

For the purpose of the large-scale company surveys on NTMs, ITC uses a simplified version of this international classification.

The NTM classification for surveys differentiates measures according to 16 chapters (denoted by alphabetical letters, see below), each comprising sub-chapters (denoted by two letters) and the individual measures (denoted by two letters and a number). The following sketches the content of each of the 16 chapters.

Chapter A – Technical Regulations

Product-related requirements that are legally binding and set by the importing country. They define the product characteristics, technical specifications of a product or the production process and post-production treatment and comprise the applicable administrative provisions, with which compliance is mandatory. Technical requirements include sanitary and phytosanitary measures, which are generally implemented to protect human, animal and plant life, and health.

Chapter B – Conformity Assessment

Measures determining whether a product or a process complies with the technical requirements specified under Chapter A. It includes control, inspection and approval procedures – such as testing, inspection, certification and traceability – which confirm and control that a product fulfils the technical requirements and mandatory standards imposed by the importing country, for example to safeguard the health and safety of consumers.

Chapter C – Preshipment Inspection and Other Formalities

Practice of checking, consigning, monitoring and controlling the shipment of goods before or at entry into the destination country.

Chapter D – Charges, Taxes and Other Para-tariff Measures

Measures other than tariffs that increase the cost of imports in a similar manner, i.e. by a fixed percentage or by a fixed amount. They are also known as para-tariff measures. Customs surcharges and general sales taxes are examples.

Chapter E – Licences, Quotas, Prohibitions and Other Quantity Control Measures

Measures that restrain the quantity of goods that can be imported, regardless of whether they come from different sources or from one specific supplier. These measures can take the form of restrictive licensing, fixing of a predetermined quota or through prohibitions.

Chapter F – Charges, taxes and other para-tariff measures

Measures implemented to control the prices of imported articles in order to: support the domestic price of certain products when the import price of these goods is lower; establish the domestic price of certain products because of price fluctuation in domestic markets, or price instability in a foreign market; and counteract the damage resulting from the occurrence of 'unfair' foreign trade practices.

Chapter G – Finance measures

Measures that are intended to regulate the access to and cost of foreign exchange for imports and define the terms of payment. They may increase import costs in the same manner as tariff measures.

Chapter H – Anti-Competitive Measures

Measures intended to grant exclusive or special preferences or privileges to one or more limited groups of economic operators.

Chapter I – Trade-Related Investment Measures

Measures that restrict investment by requesting local content, or requesting that investment be related to export to balance imports.

Chapter J – Distribution Restrictions

Restrictive measures related to the internal distribution of imported products.

Chapter K – Restrictions on Post-Sales Services

Measures restricting the provision of post-sales services in the importing country by producers of exported goods.

Chapter L – Subsidies

Measures related to financial contributions by a government or government body to a production structure, be it a particular industry or company, such as direct or potential transfer of funds (e.g. grants, loans, equity infusions), payments to a funding mechanism and income or price support.

Chapter M – Government Procurement Restrictions

Measures controlling the purchase of goods by government agencies, generally by preferring national providers.

Chapter N – Intellectual Property

Measures related to intellectual property rights in trade. Intellectual property legislation covers patents, trademarks, industrial designs, layout designs of integrated circuits, copyright, geographical indications and trade secrets.

Chapter O – Rules of Origin

Covers laws, regulations and administrative determinations of general application applied by the governments of importing countries to determine the country of origin of goods.

Chapter P – Export-related Measures

Encompasses all measures that countries apply to their exports. It includes export taxes, export quotas or export prohibitions, among others.

The structure of the NTM classification for ITC surveys

Non-tariff measures classification for surveys

A to O. Import related measures

Measures imposed by the country importing the goods. From the perspective of an exporter, these are the measures applied by the destination country of your product. From the perspective of an importer, these are the measures applied by your own country on the goods that you import.

Technical measures	A. Technical requirements	
	B. Conformity assessment	
Non-technical measures	C. Pre-shipment inspection and other entry formalities	
	D. Trade remedies (antidumping, countervailing and safeguards)	
	E. Quantity control measures (e.g. licences, quotas, prohibitions)	
	F. Charges, taxes and price control measures	
	G. Finance measures	
	H. Anti-competitive measures	L. Subsidies
	I. Trade-related investment measures	M. Government procurement restrictions
	J. Distribution restrictions	N. Intellectual property
K. Restriction on post-sales services	O. Rules of origin and related certificate of origin	

P. Export related measures

Measures imposed by the country exporting the goods. From the perspective of an exporter, these are the measures imposed by your own country on the goods you export from your country. From the perspective of an importer, these measures are imposed by the country of origin on the goods you import from this country.

P.O. List of procedural obstacles

This list provides a categorization of the problems related to NTMs that exporters and importers experience.

February 2015

Source: International Trade Centre, NTM classification adapted for ITC surveys, 2015 (unpublished document).

Appendix III Procedural obstacles

Following is a list of POs related to compliance with non-tariff measures and to an inefficient trade-related business environment and infrastructure.



Administrative burdens related to regulations

- A1. Large number of different documents
- A2. Documentation is difficult to fill out
- A3. Difficulties with translation of documents from or into other languages
- A4. Numerous administrative windows/organizations involved, redundant documents



Information or transparency issues

- B1. Information on selected regulation is not adequately published and disseminated
- B2. No due notice for changes in selected regulation and related procedures
- B3. Selected regulation changes frequently
- B4. Requirements and processes differ from information published



Discriminating behaviour of officials

- C1. Arbitrary behaviour of officials regarding classification and valuation of the reported product
- C2. Arbitrary behaviour of officials with regards to the reported regulation



Time constraints

- D1. Delay related to reported regulation
- D2. Deadlines set for completion of requirements are too short



Informal or unusually high payments

- E1. Unusually high fees and charges for reported certificate/regulation
- E2. Informal payment, e.g. bribes for reported certificate/regulation



Lack of sector-specific facilities

- F1. Limited/inappropriate facilities for testing
- F2. Limited/inappropriate facilities for sector-specific transport and storage, e.g. cold storage, refrigerated trucks
- F3. Other limited/inappropriate facilities, related to reported certificate/regulation



Lack of recognition or accreditations

- G1. Facilities lacking international accreditation/recognition
- G2. Other problems with international recognition, e.g. lack of recognition of national certificates

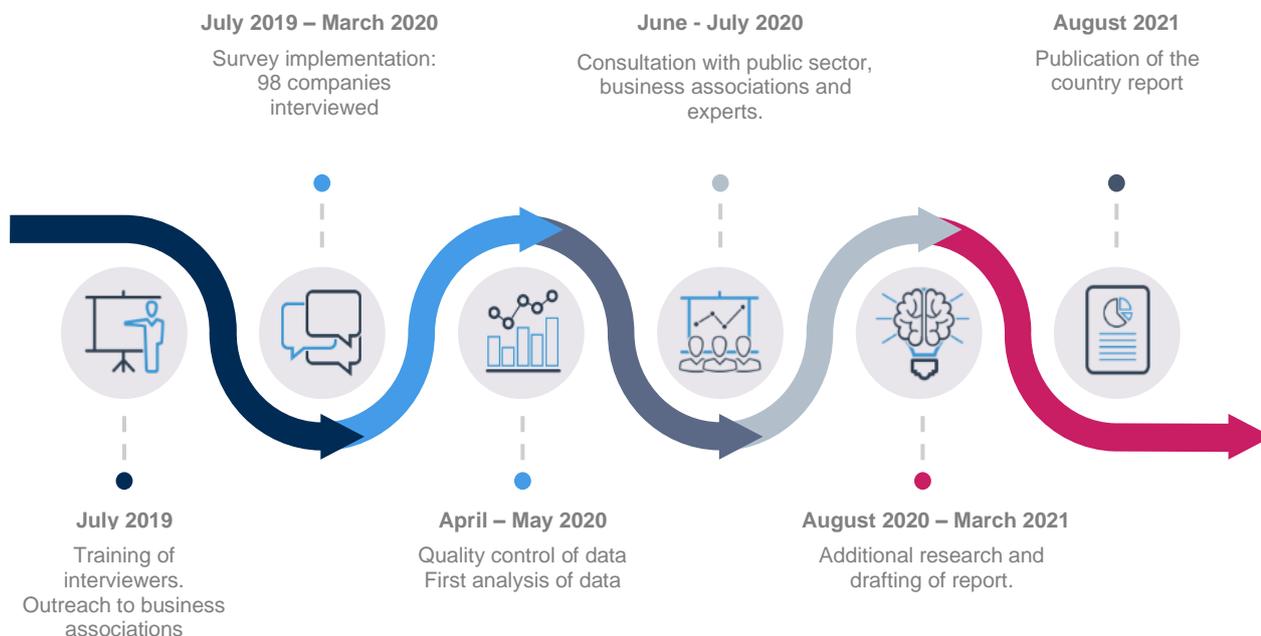


Other procedural obstacles

- H1. Other procedural obstacles

Appendix IV Project timeline and stakeholder consultation

Timeline of NTM Business Survey implementation in Sudan



List of Public agencies and business associations consulted by ITC

Public agencies

- Central Bank of Sudan
- Customs Authority
- Ministry of Agriculture and Forestry (Agriculture Quarantine Inspection)
- Ministry of Animal Resources (Livestock Quarantine Inspection) / (Veterinary quarantine Inspection)
- Ministry of Finance and Economic Planning)
- Ministry of Health (Quality and Safety Directorate)
- Ministry of Industry and Trade
- Sea Ports Corporation
- Sudanese Standards and Metrology Organization (SSMO)
- The National Agency of Export Development

Business associations

- Arabic gum exporters' department
- Businessmen and Employers Federation
- Cotton exporters' department
- Exporters' chamber of commerce
- Femcom COMESA
- Hides and leather exporters' department
- Importers chamber of commerce
- Meat exporters' department
- Seeds exporters' department
- Vegetables and fruits exporters department

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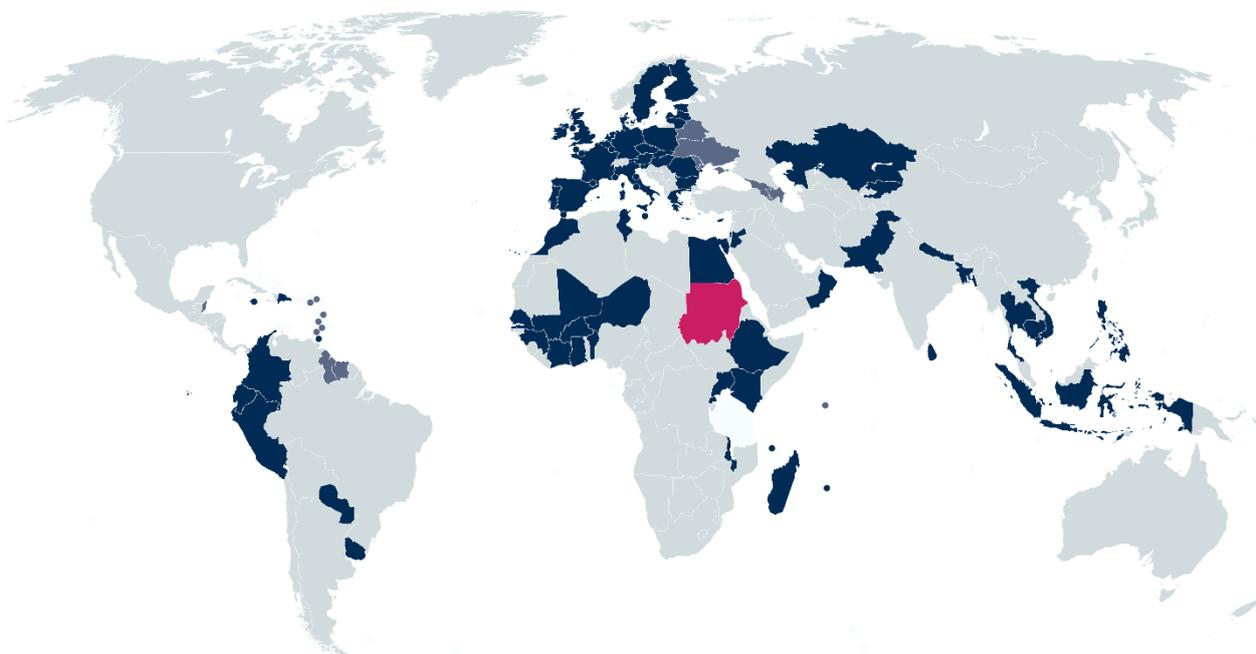
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