

**INTEGRATED FRAMEWORK (IF) FOR TRADE-
RELATED TECHNICAL ASSISTANCE**

DIAGNOSTIC TRADE INTEGRATION STUDY (DTIS)

ETHIOPIA

ACTION PLAN FOR THE PRIORITIZED DTIS RECOMENDATIONTIONS

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ACRONYMS

AHE	Association of Horticulture Exporters
CoC	Chamber of Commerce
CCD	Commission for Cooperatives Development
CDE	Chemin de fer Djibouto- Ethiopien
CEA	Coffee Exporters' Association
CSA	Central Statistics Authority
CTTI	Catering and Tourism Training Institute
DTIS	Diagnostic Trade Integration Study
EAE	Ethiopian Air port Enterprise
EAL	Ethiopian Airlines
EARO	Ethiopian Agricultural Research Organisation
ECA	Ethiopian Customs Authority
EIC	Ethiopian Investment Commission
EPAE	Environment Protection Authority of Ethiopia
EPPESA	Ethiopian Privatization and Public Enterprises Supervising Authority
ESL	Ethiopian Shipping Lines
ESTC	Ethiopian Science & Technology Commission
ETA	Ethiopian Tanners' Association
ETA	Ethiopian Telecommunications Agency
ETC	Ethiopian Tourism Commission
FeMSEDA	Federal & Micro & Small Enterprises Development Agency
HoR	House of Representatives
IF	Integrated Framework
IMF	International Monetary Fund
IPO	Intellectual Property Office
ITC	International Trade Centre
LDC	Least Developed Country
LLPTI	Leather & Leather Products Technology Institute
MA	Manufacturers' Association
MOARD	Ministry of Agriculture & Rural Development
MoCB	Ministry of Capacity Building
MoE	Ministry of Education
MoFA	Ministry of Foreign Affairs
MoFED	Ministry of Finance & Economic Development
MoFedA	Ministry of Federal Affairs
MoH	Ministry of Health
MoI	Ministry of Infrastructure
MoJ	Ministry of Justice
MoTI	Ministry of Trade & Industry
MoWR	Ministry of Water Resources
NBE	National Bank of Ethiopia
QSAE	Quality and Standards Authority of Ethiopia
RARO	Regional Agricultural Research Organization
RBoA	Regional Bureau of Agriculture
RS	Regional States
RTITB	Regional Trade, Industry & Tourism Bureau
SDPRP	Sustainable Development and Poverty Reduction Programme
TRTA	Trade-related Technical Assistance
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
WTO	World Trade Organization

1. INTRODUCTION & BACKGROUND

1.1 The Integrated Framework (IF) Process

- The Integrated Framework (IF) was established in 1997 by a high-level meeting of the World Trade Organisation in order to facilitate the coordination of trade-related technical assistance (TRTA) to least developed countries (LDCs) and to promote an integrated approach to such assistance to ensure integration of trade with national development strategies. The six agencies participating in the IF are the IMF, ITC, UNCTAD, UNDP, the WTO, and the World Bank and they are supported by major bilateral development partners.
- Forty of the forty-eight LDCs, including Ethiopia prepared Needs Assessment documents between 1997 and 1999 for TRTA. However, a review of the IF completed in June 2000 found that the IF was not working as well as expected due to a) lack of linkages to overall development strategies, b) weak ownership by the LDCs, c) inadequate coordination among the six agencies as well as among the LDCs, and d) inadequate funding for the IF.
- On the basis of the review mentioned above, the IF was revamped to ensure better integration of trade with national development strategies and supported by a Trust Fund for IF activities. A revamped IF was launched in July 2001 with a pilot scheme, defining the principles of coordinating TRTA, funding and management of the IF process. The scheme introduced Diagnostic Trade Integration Studies (DTIS) as a means of integrating trade issues into development strategies of countries.
- The DTIS has been found to be a substantial improvement on the Needs Assessments done under the previous IF programme. It gives policy and strategy content to trade issues identified in the Poverty Reduction Strategy Papers (PRSPs).

1.2 DTIS for Ethiopia

1.2.1 Objectives

1.2.1.1 Trade and the SDPRP

- In the case of Ethiopia, the DTIS was conducted on the basis of the terms of reference presented in the concept paper that was discussed and enriched at the workshop held in late November 2002.
- The Sustainable Development and Poverty Reduction Programme (SDPRP) was completed prior to the DTIS and therefore DTIS recommendations could not be included in the SDPRP. Both the WB/IMF Joint Staff Assessment and the DAG Joint Partner Review raised some concern about the lack of a detailed articulation of issues related to trade and private sector development (PSD) in the SDPRP. The DTIS prepared for Ethiopia complements the SDPRP by a) treating trade, private sector and investment issues in a more comprehensive manner, b) showing linkage between trade and poverty reduction, and c) providing specific recommendations on systemic and

sectoral issues such as diversification of exports, improved market access, removal of trade constraints, reform of trade support institutions and facilitation, improvement of productivity and outputs in agriculture, livestock and meat, and manufacturing industry, as well as on development of tourism.

- Alike the PRSP, the IF is a rolling process. It provides for the main venue to address a wide array of issues related to both trade and PSD, as well as a means to leverage trade, investment and other resources to achieve the Millennium Development Goals.

1.2.1.2 Trade Integration & TRTA

- The DTIS identifies key issues related to Ethiopia's integration into the multilateral trade system and the global economy. For Ethiopia, the prime aim of trade integration into the global economy is to reap the benefits of transforming its subsistence agricultural economy into a modern commercial and industrial economy. Greater participation in world trade could provide additional opportunities to address the challenging issues of economic growth and poverty reduction, provided that it is complemented and supported by poverty-alleviation interventions.
- The DTIS looks at both supply and demand factors that influence the present level of trade with the rest of the world and identifies the key constraints to the country's integration into the multilateral trade system and into the global economy. The DTIS proposes a program of technical assistance needed to remove these constraints in order to enhance Ethiopia's participation in world trade by improving its competitiveness to derive larger benefits from trade.

1.2.1.3 WTO Accession

The study is also intended to help Ethiopia's accession to the World Trade Organization by getting a detailed and well documented picture of the trade regime, the legal and institutional features of the regime and to enlist support from the donor community to assist in the process.

1.3 Oversight of the IF Process

- Two committees have been set up to oversee and provide continuous support and advice during the IF/DTIS process, namely, a) the National Steering Committee, and b) the National Technical Committee.
- The National Steering Committee is comprised of, among others, officials of the Ministry of Trade & Industry, Ministry of Finance and Economic Development which was responsible for the preparation of the PRSP, Ministry of Agriculture and Rural Development, key bilateral development partners, the heads of the three IF agencies represented in Ethiopia, the President of the Ethiopian and the Addis Ababa Chambers of Commerce and other business community representatives. H.E Girma Birru, Minister of Trade & Industry, is the Chair of the National Steering Committee.

- The Technical Committee oversees technical issues of the DTIS process and provides technical advice to the National Steering Committee. The committee is comprised of technical experts from relevant government ministries, agencies and major sectors engaged in international trade and trade facilitation, including the chambers of commerce, as well as officers of major bilateral and multilateral agencies represented in Ethiopia. Ato Gashaw Debebe, Head of the Foreign Trade Coordination Department of the Ministry of Trade & Industry is the Chair of the Technical Committee and the Focal Point for IF. He is also a member of the National Steering Committee, providing a close link between the two committees.

The World Bank, UNDP, and the EU have been actively supporting the IF process in Ethiopia through the regular participation of their staff in the IF/DTIS TC, with the EU playing the role of a facilitator.

1.4 Findings of DTIS

1.4.1 Constraints And Issues

- The DTIS has identified a number of constraints and issues that affect the performance of the trade sector in Ethiopia. They are related to trade policies, legal and regulatory environment, institutions, trade facilitation as well as economic sectors such as agriculture, manufacturing industry and tourism. These constraints and issues are wide-ranging and presented in the relevant sections of the study. They will not be reproduced in this report. However, a summary of the constraints and issues is presented along with recommendations, action plans as well as technical assistance in the form of matrices in Annex II of this report.

For more details on any aspect of the study, please refer to the relevant annexes of DTIS in which a) each topic is fully discussed, reviewing the status quo, new developments as well as constraints and issues; b) recommendations are made; and c) proposals for technical assistance are presented.

Annex 1:	The Synthesis
Annex 2:	Trade and Incentive Structure
Annex 3:	Market Access Opportunities
Annex 4:	FDI and Trade
Annex 5:	Legal and Regulatory Environment for Trade and Investment
Annex 6:	Trade Facilitation
Annex 7:	Institutions and Institutional Support for Trade
Annex 8:	Agriculture and Trade
Annex 9:	Livestock and Meat
Annex 10:	Manufacturing Sector
Annex 11:	The Tourism Sector
Annex 12:	Trade and Poverty

1.4.2 DTIS Recommendations

- The full set of DTIS recommendations validated by the Workshop of November 10-11, 2003 and sharpened by the IF/DTIS Technical Committee is presented in Annex 2. The essence of the main conclusions and recommendations of DTIS can be articulated as follows.

Improvements in trade policies, legal and regulatory environment, institutions, and trade facilitation as recommended in the DTIS will serve the goal of greater integration into the world economy. As such, they are necessary but not sufficient to address the issues of poverty reduction and industrialization of Ethiopia.

To address issues of poverty and raise agricultural productivity and modernise the economy to commercial agriculture, the following are deemed essential:

- Higher level of investment and savings
- Adequate access to credit facilities for sectors such as agriculture, manufacturing industry and tourism
- Investment in infrastructure, particularly rural infrastructure
- Greater access to export market: EU, COMESA, Middle East, Japan, and USA
- Trade-related Technical Assistance (RTA) has to be complemented by higher levels of financial assistance to the country.

2. THE DTIS VALIDATION PROCESS

2.1 The Validation Workshop

On November 10-11, 2003, the Ministry of Trade and Industry of Ethiopia hosted the “DTIS Validation Workshop”. More than 150 representatives from public and private sector, civil society organisations, and the donor community contributed to the review of the DTIS and discussed the next steps of the Integrated Framework for RTA in Ethiopia.

2.2 Major Outcomes of the Validation Workshop

- The DTIS identified issues and constraints and proposed recommendations to address them under each thematic area with the following specific objectives:
 - a) Creating a conducive incentive structure for trade
 - b) Improving market access for Ethiopian's exports
 - c) Poverty reduction through trade, particularly export growth
 - d) Increasing Foreign Direct Investment (FDI)
 - e) Creating a conducive legal and regulatory framework for trade and investment
 - f) Improving trade facilitation services and thus removing “at the border” and “behind the border” constraints
 - g) Building the capacity of trade support institutions

- h) Increasing agricultural productivity and diversifying and enhancing the volume of exports from such sub-sectors as horticulture, livestock and meat, sugar, leather and textiles as well as enhancing the performance of the tourism sector.

The discussions at the Workshop indicated that issues and constraints identified in the DTIS, as well as recommendations made and TRTA proposed under each thematic area, are overall valid and acceptable. However, the need for further clarification, sharpening, and updating of facts in some areas was also remarked. Key observations and recommendations are summarised below.

- The Government has been engaged in a number of reform programmes such as the Civil Service Reform Programme, which have resulted in changes in some areas since the DTIS was conducted. Customs clearance, and business registration and investment licensing procedures have been rationalized through cutting down on the number of steps involved, resulting in reduced time and cost.
- There is a need to update the DTIS in relation to legislative reforms and new developments in such areas as the investment regime, competition, and business registration and investment licensing.
- The recommendation made with respect to the 6-band Customs tariffs was based on out-of-date information and not valid anymore, as the 6-band tariffs have been implemented since before the DTIS study mission took place in November 2002, having also eliminated the fractional tariff rates in between the bands.
- The Workshop participants suggested action plans under each thematic area, so far as the time available allowed, except for Agriculture, Livestock and Meat. Some of these actions plans were not sufficiently specific, requiring further work by way of sharpening.
- In light of the large number of stakeholders who would be involved in the implementation of the recommendations of the DTIS, the need for coordination of activities of stakeholders was underlined.
- At the closing session of the Workshop, the Minister of Trade & Industry, H.E. Ato Girma Birru, entrusted the IF/DTIS TC with the consolidation of inputs of the Workshop and the preparation of a more sharpened draft Plan of Action than that attempted at the Workshop for the consideration of the IF/DTIS Steering Committee.

2.3 The Deliberations of IF/DTIS TC

2.3.1 Objective

The objectives of the deliberations of the TC are:

- To sharpen the action plans suggested at the Workshop in accordance with the instruction given by H.E. Ato Girma Birru, the Chair of the National Steering Committee
- To propose a framework for implementation of top priority actions
- To engage with donor partners and other stakeholders in supporting a coordinated and effective response to the IF process

2.3.2 Approach Adopted

The IF /DTIS TC has held 12 meetings since the Validation Workshop. The deliberations of the IF /DTIS TC involved the following tasks:

- Review and updating of the recommendations of the DTIS as per the outcome of the Workshop;
- Prioritisation of action plans;
- Identification of institutions responsible for the implementation of recommended action plans; and
- Preparation of recommendations on the way forward.

Specific actions proposed during the Validation Workshop under each thematic area were discussed and checked for clarity, specificity, relevance, and plausibility in terms of their implementation in the short-, medium-, and long term.

2.3.3 Findings and Conclusions of DTIS/IF TC

The TC noted that:

- The actions proposed during the Validation Workshop can be taken as a general guide, but do not offer the necessary level of detail in terms of a) specific set of activities or tasks to be accomplished under major actions, and b) requirements in terms of human resources, equipment, and facilities to establish estimates of costs of related TA for implementation of DTIS recommendations.

In light of the above, the TC undertook the task of enhancing the level of detail and specificity of the recommended actions so that it is possible to prepare terms of references or to define the scope of services to be provided under the corresponding TA with more certainty.

- In the majority of cases, institutions, agencies or parties responsible for implementing the action plans were not identified during the Workshop and, therefore, the TC handled the task of identification.
- There is a need for the institutions, agencies or parties responsible for implementation of the proposed action plans to be entrusted with the responsibility of further defining the activities to be undertaken to execute the plans.
- There is a need for the TC to take the responsibility to coordinate closely the specification of action plans by stakeholders.
- As the Government is undertaking various reforms measures to improve service delivery such as the Civil Service Reform, Customs Reform, Justice Reform, etc., some of the measures recommended by the DTIS are already being implemented, thereby reinforcing the validity of the DTIS and affirming the readiness of the Government to improve the efficiency of institutions engaged in trade facilitation.
- Some DTIS recommendations such as those proposed with respect to a) access to land and tenure security, b) access to bank credit and establishment of capital (share) market and c) public-private partnerships in infrastructure development entail policy and legislative reform and decisions at the highest Government level. Therefore, it is important to facilitate further discussions and consultations on these and related issues among the Government, various stakeholders and development partners.
- Bilateral as well as multilateral development partners provide trade-related technical assistance to Ethiopia under different initiatives, which means that there is a need to harmonise such initiatives by taking inventory of the programmes of development partners in order to optimize the benefits of TRTAs.
- There is a need for the Ministry of Trade and Industry to coordinate and harmonise TRTAs.

2.3.4 Prioritisation of Action Plans & Recommendations

2.3.4.1 Criteria for Setting Priorities

The TC employed the following criteria to prioritise DTIS recommendations and actions to be taken to address issues and constraints identified in the DTIS, i.e., priority consideration is given to those recommendations:

1. That are specific and clear,
2. That are not wide-ranging or too ambiguous to take action on,

3. That are in line with issues/constraints that are widely accepted and can be readily implemented,
4. That are complementary to, or have added value, to government policies and strategies,
5. For which there is an implementing institutional capacity, and
6. With relatively higher leverage in terms of impact on trade facilitation and integration.

2.3.4.2 Recommended Priorities

After conducting a general review of all the DTIS recommendations, the TC prioritised the action plans and corresponding TA's using the above criteria. The details under each major thematic area are presented in the form of matrices in Annex I. A summary of the recommendations, including the corresponding implementing agency/agencies (stakeholder/s), is given hereunder¹.

I. Priorities under Trade Reform & Incentive Structure

1. Revamp present privatisation program to bring about a greater private sector participation in trade and industrial activities, addressing the problem of access to capital of the private sector.

Implementing Agency/Agencies: MoTI & EPPESA

2. Build capacity of MOTI, MoR and ECA and other relevant agencies to operate the duty rebate scheme and bonded warehouse system more efficiently and effectively in order that exporters have access to raw materials and inputs at world market prices.

Implementing Agency/ Agencies: MoTI, MoR and ECA

II. Priorities under Market Access – “Beyond The Border Issues”

1. Enhance negotiating capacity of institutions to overcome tariff- and non-tariff barriers imposed in both developing and developed countries on Ethiopian export bundle.

Implementing Agency/Agencies: MoTI, MoARD and QSAE

2. Take measures for the diversification of Ethiopia’s export bundle, which is relatively small and concentrated to mainly agricultural products and which also faces negative growth in world markets, through bilateral and multilateral agreements such as COMESA and the implementation of EBA and negotiation of EPA.

Implementing Agency/ Agencies: MoTI

¹ Where there are two or more implementing agencies, the lead implementing agency is the one that comes first in the list.

III. Priority under Trade And Poverty

The DTIS recommendations under this heading are similar to recommendations made elsewhere in the study having their respective contribution to trade development and impact on poverty reduction, whether in the form of export growth of agricultural products and manufactures, or rural market infrastructure development, trade facilitation as well as physical infrastructure development which calls for official development assistance that goes beyond TRTA to improve the poverty situation in Ethiopia. Therefore, the TC proposes no separate priority under this heading.

IV. Priorities under Foreign Direct Investment & Trade

1. Ensure that the legal and regulatory framework is conducive to attract FDI and strengthen the institutional capacity of the Ethiopian Investment Commission so that it can deliver efficient and effective services in accordance with the latest investment code, while at the same time reviewing areas of improvement and making changes as necessary; and also create awareness amongst investors about the legal and regulatory framework through familiarization workshops, web-based information, brochures, investment fora, exhibitions, etc.

Implementing Agency/ Agencies: EIC and MoTI

2. Improve the image of the country through special events to promote Ethiopian culture abroad, strengthening linkages with Ethiopian overseas and through diplomatic missions to attract FDI.

Implementing Agency/ Agencies: EIC, MoTI, MoFA, MoYC & ETC

3. Consider fast accession to WTO to enhance credibility and overcome perceptions of high risk of policy reversals and uncertainty.

Implementing Agency/ Agencies: MoTI and MoFA

4. Review the present land lease system to make it conducive to FDI by making it more affordable, accessible and by enhancing tenure security.

Implementing Agency/ Agencies: MoFedA, MoTI and EIC

5. Implement the new simplified procedures for trade registration, business license as well as investments permits; and continue improving service delivery thereon in a sustained manner.

Implementing Agency/ Agencies: MoTI and EIC

6. Provide better access to irrigation schemes, electricity, water, road, and telecommunication facilities through more efficient utilisation of existing infrastructure as well as by building new infrastructure as a

basic requirement for trade and investment growth; and also promote Public-Private Partnerships in infrastructure development.

Implementing Agency/Agencies: MoI, MoWR, MoTI and EIC

V. Priorities under Legal and Regulatory Structure and Trade and Investment

1. Develop a legal framework to create a stock exchange, or capital market, to pool finance for investment and for buying and selling shares to address the current setback the privatization effort has faced due to the absence of a viable capital market, particularly the absence of an entry and exit mechanism through an established share market.

Implementing Agency/Agencies: MoFED, NBE, MoTI and CoC

2. Implement the competition law by creating the necessary institutional arrangements to ensure that both state and private enterprises are engaged in fair trade practices and that there is a level playing field for all participants in trade, and make improvements to the law as appropriate.

Implementing Agency/Agencies: MoTI

3. Enforce the right to pledge leased land for collateral purposes, particularly to secure loan from banks.

Implementing Agency/Agencies: MoFedA and RS

4. Improve the export credit guarantee scheme through the separation of the two risks, namely the non-performance of the exporter and that of the buyer as well as by minimizing delays in effecting payment.

Implementing Agency/Agencies: NBE

VI. Trade Facilitation

1. Take measures to ensure that ETA provides efficient and quality service at internationally competitive tariff rates.

Implementing Agency/Agencies: MoI, ETA and ETB

2. Move containerised goods on the land bridge between Djibouti and main inland destinations in boxes, not break bulk.

Implementing Agency/Agencies: MoTI and ESL

VII. Priorities under Institutions and Institutional Support

1. Strengthen the institutional capacity of MoTI in order that it can effectively discharge its apex responsibility of a) formulation of all

trade related policies, through the involvement of the private sector, and b) coordination of trade issues.

Implementing Agency/ Agencies: MoTI

2. Undertake legislative reforms to conform to WTO requirements and employ within MoTI additional staff with adequate management as well as technical expertise in trade policy and related issues.

Implementing Agency/ Agencies: MoTI, MoFA, MoJ and HoR

3. Involve MoTI in the recruitment and supervision of diplomatic personnel engaged in trade matters.

Implementing Agency/ Agencies: MoTI and MoFA

4. Strengthen the chambers of commerce so that they provide efficient and effective advocacy and trade support services.

Implementing Agency/ Agencies: CoC

5. Establish an internationally recognised conformity assessment system to enhance trade competitiveness in terms of quality and performance.

Implementing Agency/ Agencies: MoARD & QSAE

6. Improve access to information on international trade policy and market development through investment in ICT and strengthen the institutional capacity of trade support institutions such as MoTI and chambers of commerce in the gathering and dissemination of trade related information to all stakeholders.

Implementing Agency/ Agencies: MoTI and CoC

VIII. Priorities under Agriculture and Trade

i) Cereals, Coffee, and Horticulture

Develop database/information system on pattern of land usage (land inventory) for accurate reporting and monitoring of agricultural production and practices by agro-ecological zones.

Implementing Agency/ Agencies: MoARD, MoFA and RBoA

ii) Cereals

To improve productivity and contain fragmentation of farm land a) promote the development of high yielding variety of cereals, b) promote the formation of farmers' cooperatives, c) promote off-farm activities through enhanced access to credit; and d) implement an appropriate population policy, taking into consideration economies of scale in agricultural production.

Implementing Agency/ Agencies: MoARD, EARO, CCD, and RBoA

iii) Coffee

1. a) Introduce a strict quality assurance regime on coffee grading and branding.
b) Encourage measures to increase the export of washed coffee.
c) Promote different coffee qualities such as organic, gourmet, and specialty coffee.
d) Create a certification program that could uphold the authenticity of coffee.

Implementing Agency/ Agencies: MoARD, and Cooperatives

2. Improve the Coffee Auction System as follows:

- a) Allow washed coffee to be exhibited both raw and roasted.
b) Improve the information system about the coffee crop relevant to buyers by allowing both buyers and sellers to interact and establish relationships.
c) Free the coffee market and set up a coffee exchange, making the auction system optional, allowing exporters to buy from wholesalers.

Implementing Agency/Agencies: MoARD

3. Train liqueurers (coffee tasters) in coffee-tasting skills.

Implementing Agency/Agencies: MoARD

4. Fund further research to improve current coffee varieties in both liquorizing characteristics and disease resistance.

Implementing Agency/ Agencies: MoARD and EIRO

iv) Horticulture

1. Strengthen horticultural training in higher institutions such as Jimma University to raise awareness about the benefits of the industry as well as to develop skilled manpower for the industry.

Implementing Agency/Agencies: MoE and AHE

2. Improve transport and storage facilities for horticulture products to maintain freshness and minimize spoilage.

Implementing Agency/ Agencies: MoTI, EAL, EAE and AHE

v) Sugar

Conduct research into new sugar cane variety and soil improvement.

Implementing Agency/ Agencies: Sugar Companies

IX. Livestock and Meat

i) Livestock

1. Develop a more efficient sanitary system for livestock and meat:

- a) Establish an enabling environment for private animal health providers as a long-term objective, strengthening public services until such time as the private sector can take over; i.e., promote effective public-private partnership in disease control.

- b) Develop adequate quarantine and disease-free zones for export in the long term, while creating an export zone with quarantine facilities in the meanwhile.

Implementing Agency: MoARD

2. Develop physical infrastructure for livestock on trekking routes:

- a) Invest in infrastructure, in particular in trek routes, to reduce weight losses of marketed livestock.
- b) Devise strategies for provision of service such as feed, water, veterinary service at reasonable intervals.
- c) Develop a central market area with necessary facilities to which routes converge.

Implementing Agency: MoARD

3. Simplify regulatory procedures and documentation and reduce to a “one-window” arrangement, managed by LMA as the focal point at Federal level and Agricultural Bureaux in the regions to overcome regulatory constraints, and cumbersome documentation requirements and service charges.

Implementing Agency/ Agencies: MoARD and RBoA

ii) Meat

1. Develop technical capacity to meet stricter standards in export markets and improve disease surveillance and quarantine infrastructure.

Implementing Agency: MoARD

2. Strengthen the main export and trade organizations to make them effective participants in quality improvement and international trade discussions.

Implementing Agency/ Agencies: MoARD and CoC

X. Manufacturing Sector

i) Industry-wide Priorities

1. Provide enhanced and quality training at all levels, including On-the-Job Training; and create working relationship between industry and institutions of higher learning to address problems of inadequate skill levels and unmotivated labour force as well as low entrepreneurial and managerial capacity in the industrial sector.

Implementing Agency/ Agencies: MoTI, MoE, MoCB and EMIA

2. Promote public-private partnership in infrastructure development for industrial development and speed up the implementation of industrial zones.

Implementing Agency/ Agencies: MoI and MoTI

ii) Leather Industry

1. Provide training in improved animal husbandry, techniques of slaughtering and handling of skins and hides, and veterinary services; and eradicate Ekek disease.

Implementing Agency/ Agencies: MoARD and ETA

2. Enforce legal measures to build effluent treatment plants.

Implementing Agency/ Agencies: MoTI

iii) Leather and Textiles

1. Take legislative measures of protection against unfair competition of illegal and dumped imports and strengthen enforcement capacity of Customs Authority.
2. Enhance the quality/capacity of management of the textile and leather industries and also upgrade the level of technology in these industries.

Implementing Agency/ Agencies: MoR, MoTI, ECA and MA

XI. Tourism

1. a) Develop a coherent detailed action-oriented strategic plan, including a restructuring and capacity building programme for the Ethiopian Tourism Commission and regional tourism support institutions, as well as a tourist development code related to tourist destinations as an immediate priority.
b) Develop and impose local content requirements.
c) Facilitate community involvement and integrate their needs in tourism planning.
d) Assist in developing the handicraft sector to produce souvenirs and gift articles and so enhance its participation in the tourism trade.

Implementing Agency/ Agencies: ETC and RBoTIT

2. Improve the tourism market intelligence system; and devise promotional strategy based on target market and improve tourism information available at hotels, airports and tourist attractions.

Implementing Agency/ Agencies: ETC and RBoTIT

3. Encourage investment in training through incentives, and upgrade CTTI as a hotel management school and permit greater number of paying students.

Implementing Agency/ Agencies: ETC

NUMBER OF PRIORITIES RECOMMENDED BY DTIS/IF TECHNICAL COMMITTEE
BY THEMATIC AREA

No.	Thematic Area/ Topic	Annex of DTIS	Matrix No. of Annex 2	Number of Priorities	Item No. of Priority in Matrix & Remark	Total No. of Issues/ Constraints
1	Trade Reform & Incentive Structure	2	1	2	1 & 2	4
2	Market Access - "Beyond the Border Issues"	3	2	2	1 & 2	4
3	Trade and Poverty	12	3	-	-	4
4	FDI & Trade	4	4	6	1-6	6
5	Legal & Regulatory Structure and Trade	5	5	4	1-4	11
6	Trade Facilitation	6	6	2	1-2	7
7	Institutions & Institutional Support for Trade	7	7	6	1-6	6
8	Agriculture & Trade <ul style="list-style-type: none"> • Cereals, Coffee & Horticulture • Cereals • Coffee • Horticulture • Sugar 	8	8	9		
				1	1	5
				1	1	5
				4	1-4	5
				2	1-2	8
				1	1	6
9	Livestock & Meat	9	10	5	1-3 & 1-2	13
10	Manufacturing Sector <ul style="list-style-type: none"> • General • Leather • Leather & Textiles 	10	11	6	1 & 2	10
				2	1 & 2	4
				2	1 & 2	5
11	Tourism	11	12	3	1-3	6
	Total	-	-	45		108

3. THE WAY FORWARD

3.1 Implementation of DTIS Recommendations /Action Plans

- The TC identified 45 top priorities out of 108 DTIS recommendations. This does not mean in any way that the remaining recommendations are considered less important. These, too, have been validated by the Workshop as well as by the IF/DTIS TC. They must be addressed in a phased manner, as and when resources and institutional capacity allow to ensure that trade growth and integration into the world economy would be achieved to the extent possible and the trade reform process will be complete.

- The institutions, agencies or parties responsible for implementation of action plans should also be delegated the responsibility of defining the specific actions to be undertaken to execute the plans, mainly because the TC has neither the expertise nor the time to undertake such a responsibility.
It is therefore recommended that a focal point that liaises with the TC be set up in each implementing agency.
- There is a need to coordinate closely the specification of action plans, project formulation and costing by stakeholders. The TC should be responsible for the coordination and monitoring of these activities. This should be done in a sustainable manner, with the necessary human resources and office facilities to respond to the volume of activity emerging as result of the DTIS implementation.
Donor support to facilitate the activities of the TC is essential.

3.2 Building the Institutional Capacity of MoTI

- The prime responsibility for coordinating the implementation of the DTIS recommendations lies with MoTI. However, there are capacity limitations at MoTI in the area of qualified human resources. There is an immediate need to build the capacity of MoTI in the areas of trade policy formulation, analysis, and monitoring and evaluation, particularly, now that it has to oversee the trade reform measures to be undertaken in accordance with the DTIS recommendations.
- **This entails:**
 - a) recruitment of additional staff and training of junior as well as senior officers of MoTI to discharge the responsibilities of trade policy formulation, analysis, and monitoring and evaluation more effectively;
 - b) developing trade support infrastructure at MoTI, involving the development of trade data base/information, computer facilities, wide band connectivity, etc; and
 - c) external advisory services, where in-house capacity is lacking, especially, in the fields of trade policy formulation and implementation, and negotiations with trading partners as well as institutions such as the WTO for accession.

3.3 Coordination of Donors' Assistance

- The TC notes that the DTIS recommendations may in one way or another be related to
 - a) the various economic reform measures being undertaken by the Government,
 - b) those proposed by other studies or strategy documents such as Sustainable Development and Poverty Reduction Programme (SDPRP), and
 - c) Private Sector Development (PSD) initiatives.

The articulation of trade-related constraints, issues, recommendations and technical assistance in the DTIS in the context of the Integrated Framework (IF) not only complements the above efforts but also expedites the process of addressing trade reform measures in that, due to the diagnostic nature of DTIS, development partners can readily identify those areas of trade-related technical assistance they can take on board in connection with their ongoing or future technical support programmes.

- There is a need to coordinate donor support to the IF/DTIS process, in view of the large number of areas of interventions and technical assistance recommended in the DTIS.

MoTI should be responsible for soliciting as well as coordinating donor support to the IF process.

In this regard, the TC proposes that MoTI present TA priorities recommended by the DTIS/IF TC and supported by the IF/DTIS National Steering Committee to development partners so that those priorities in line with their respective programmes of support can be taken up as part of their package of technical assistance, thus rationalizing and streamlining trade-related support to the country. Of course, these priorities will be further developed into projects amenable to costing and implementation.

- A framework for collaboration between stakeholders and development partners may be devised for specification of detailed action plans, projects formulation and costing, particularly where the stakeholder lacks institutional capacity in these areas. Such a framework would facilitate speedy implementation of the recommendations of DTIS and, therefore, trade reform in Ethiopia.

The involvement of development partners in this regard may entail assistance of experts from their local offices and/or recruitment of external experts in the relevant discipline or field.

- The TC proposes that support to the IF process in Ethiopia be channelled through the pooled fund of the DAG-CG, set up to assist the SDPRP implementation, taking into account a) the linkages between trade, private sector development, and poverty reduction, and b) better coordination of donor assistance.

Through the DAG-CG, UNDP will provide necessary facilitation and support services for the administration of these resources on behalf of the Government, the private sector and the donors.

3.4 Utilisation of the IF Trust Fund: Window II

- Window II of the IF Trust Fund is a modest sum earmarked to facilitate the implementation of the IF process. As such, it can be considered a bridging fund **before**

further mobilization of funds for full-fledged implementation of TRTA projects recommended by the DTIS.

- It is proposed that funds available under Window II of the IF Trust Fund be utilised to
 - a) implement DTIS projects that are mature, well defined and have immediate impact,
 - and b) to facilitate the activities of the TC to coordinate and monitor the IF process and at the same time speed up the pace of the implementation of DTIS recommendations.

In the light of the above considerations, the TC proposes that the following projects for funding under Window II:

- Master plan for human resources development and capacity building of MoTI and other trade support institutions
- Development of road map for WTO negotiations, including a study on impact assessment of WTO accession
- Development of information and communication technology for gathering and disseminating trade-related information required for policy formulation and analysis, particularly within MoTI and chambers of commerce
- Development of conformity assessment system for quality of goods and performance, including capacity building of Standards & Quality Authority of Ethiopia for certification and accreditation

3.5 Implementation Schedule

The implementation schedule for the top priorities recommended by the TC, covering a period of five years, is presented herein below in a chart form. It provides in a summary form the objectives of DTIS, assumptions used, institutional arrangements for implementation, stakeholders involved, time frame as well as the TA that corresponds to an activity.

Implementation Plan of Prioritized DTIS Recommendations

General objective	Contribute to building and strengthening human, institutional, and policy capacity in Ethiopia for effective participation in multilateral and other international trade negotiations, and for formulating and implementing trade and related policies that enhance Ethiopia's trade growth and integration into the world economy and support poverty reduction.		
Specific objectives	<ol style="list-style-type: none"> 1. Create a conducive incentive structure for trade development. 2. Increase market access. 3. Make the poor beneficiaries of trade development. 4. Increase foreign direct investment. 5. Have a conducive legal and regulatory structure for trade and investment. 6. Have proper instruments for trade facilitation. 7. Have effective institutions to support trade development activities. 8. Increased and diversified volume of tradable products. 		
General assumptions	<ol style="list-style-type: none"> 1. The IF process provides for successful mainstreaming of trade-related issues into the PRSP (SDPRP) and advances the trade/poverty agenda. 2. All partners mobilize around the IF Plan of Action and provide coordinated support to its implementation 		
Specific assumptions	<ol style="list-style-type: none"> 1. Government commitment to invest in infrastructure development, such as roads, water, electricity, waste management and telecommunications supported by development assistance by donors 2. Civil Service Reform, Custom, Justice and other government reform programmes would be fully implemented. 3. Synergies with the work done by the New Coalition for Food Security would be achieved. 4. DTIS recommendations proposed to remove trade-related constraints implemented by stakeholders with the assistance of development partners. 		
Organisational Arrangement for Implementation	<ol style="list-style-type: none"> 1. Recruit long-term national consultant for the IF Unit in MoTI 2. Support further investigation prior to development of bankable projects through short-term consultants 3. Appoint IF Focal points within partner institutions 4. Create an effective mechanism for donor coordination and information sharing on PSD and trade 5. Monitoring and evaluation of the implementation phase include indicators on poverty-focused interventions (factors owned by the poor, geographical areas, market access, informal sector, gender segregated data, etc) as well as assessment of the impact of the interventions on poverty-reduction. 	Stakeholders: MoTI, CoCs, MoARD, MoFED, CSA Donors	1. IF/DTIS Technical Committee fully operational 2. Donor WG on PSD&Trade operational
Implementation Schedule	The implementation schedule for prioritised DTIS recommendations is presented in bar charts in the next 9 pages. The solid bar represents the duration of an activity and the double arrow the technical assistance recommended.		

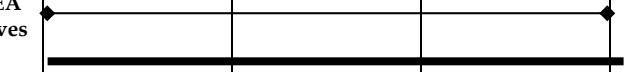
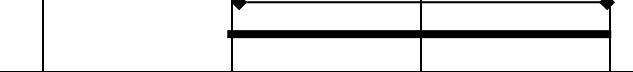
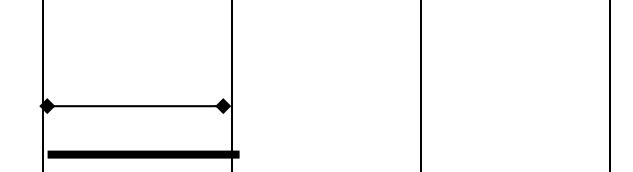
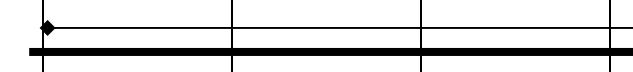
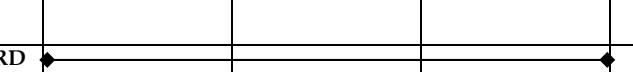
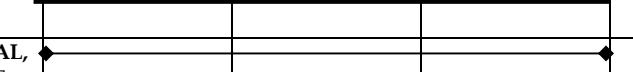
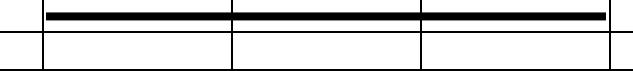
4. Detailed Action Plan for Prioritized DTIS Recommendations

S. NO	ACTIVITY DESCRIPTION	IMP. AGENCIES/ TEAM	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
1	PRIVATE SECTOR DEVELOPMENT AND COMPETITION		Key Result: Competitive private sector, with broad access to capital				
1.1	Strengthen the institutional capacity of the EPPESA through training and advisory services to accelerate privatisation.	MoTI & EPPESA	◆	◆			
1.2	Outsource services related to privatisation: such as company valuation, promotion and sales of enterprises.	MoTI & EPPESA	◆		◆		
1.3	Conduct a study on domestic competition among entities in the public as well as the private sector.	MoTI	◆	◆			
1.4	Refine and implement the present legislation on competition.		◆	◆			
1.5	Enforce the right to pledge leased land for collateral purpose.	MoFedA, RS & NBE	◆	◆			
2	INFRASTRUCTURE DEVELOPMENT		Key Result: Productive infrastructure improved.				
2.1	Develop road-rail container terminal at Addis Ababa with private-sector participation.	MoI, MoR & CoC					
2.2	Move containerized goods on the land bridge in boxes, not break bulk.	MoTI & ESL	◆	◆			
2.3	Make arrangements with port states to conclude agreement on through bill of lading system to facilitate containerised transport.	MoTI	◆	◆			
2.4	Sensitise sector participants about the through bill of lading system, including those relevant entities in Djibouti	MoTI & ESL	◆	◆			
2.5	Establish an inland dry port/ports.	MoTI, ESL & CoC					
2.6	Issue through bills of lading to Addis Ababa/regional dry port/s.	ESL					

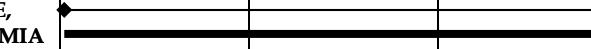
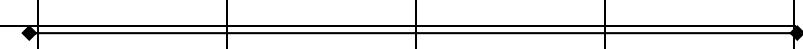
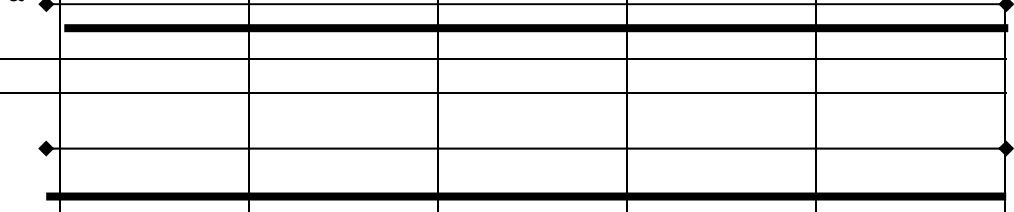
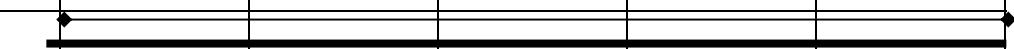
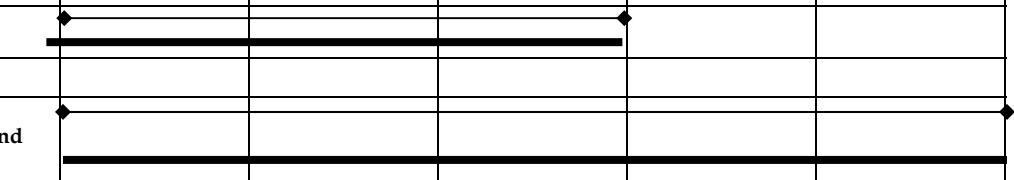
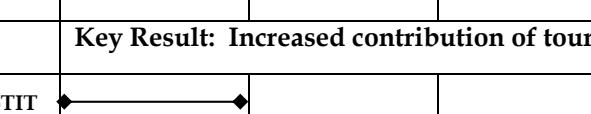
3	EXPORT SUPPORT SERVICES		Key Result: Improved services to exporters					
3.1	Improve the Export Credit Guarantee Scheme by separating the two risks as well as by making prompt payment.	NBE						
3.2	Strengthen MoTI and MoR in terms of human resources to operate the duty drawback scheme, voucher scheme and bonded warehouse facilities effectively.	MoTI & MoR	◆	◆	◆	◆	◆	◆
4	FOREIGN DIRECT INVESTMENT		Key Result: Increased FDI inflows to Ethiopia and trade supportive investment					
4.1	Strengthen the institutional capacity of the Ethiopian Investment Commission and regional bureaus of investment in terms of human resources and office equipment and facilities to implement the present investment regime.	EIC & RBoI	◆	◆	◆	◆	◆	◆
4.2	Implement the new simplified procedures for business registration and start-up and continue improving as called for.	MoTI	◆	◆	◆	◆	◆	◆
4.3	Conduct a comprehensive review of the land lease system and make improvements to facilitate access to land and finance and also attract FDI.	MoFEDA	◆	◆	◆	◆	◆	◆
4.4	Implement improved system of access to land and strengthen land use rights.	MoFedA	◆	◆	◆	◆	◆	◆
4.5	Review the impact of the present regulatory regime and take corrective measures as necessary, taking into consideration FDI-specific standards and a) tax regime, b) labour law, c) work and residence permits, and d) competition policy.	MoTI & EIC	◆	◆	◆	◆	◆	◆
4.6	Create awareness amongst investors about the legal and regulatory framework through familiarization workshops, web-based information, brochures and investment fora.	MoTI & EIC & RBoI	◆	◆	◆	◆	◆	◆
4.7	Upgrade human and material resources to facilitate implementation of investment projects (both domestic and foreign) at regional level.	EIC, RBoI and RBoTI	◆	◆	◆	◆	◆	◆
4.8	Improve the image of the country through special events to promote Ethiopian culture abroad, strengthening linkages with Ethiopian overseas and through diplomatic missions.	EIC, MoTI, MoFA, ETC & MoYC	◆	◆	◆	◆	◆	◆

4.9	Develop inventory/data base, i.e. cadastre, of suitable urban as well as rural land by pattern of land usage as well by agro-ecological zone, including information on infrastructure, for investment at regional and federal level and disseminate information to investors.	MoFedA, MoTI & EIC						
4.10	Develop technical capacity of key institutions to prepare land for more efficient allocation for investment purposes.	MoFedA, MoTI & EIC						
5	INSTITUTIONAL DEVELOPMENT & TRADE SUPPORT SERVICES		Key Result: Institutional capacity for trade analysis and negotiation increased and trade support services improved					
5.1	Recruit and train staff in MoTI, MoFA and Chambers of Commerce in the areas of design of trade information and analysis, including the multilateral trade system.	MoTI, MoFA & CoC						
5.2	Organise within MoTI and Chambers of Commerce trade related information from sources such as COMESA, ACP/EU, WTO, and trade promotion organisations through improved Internet access (websites and databases) and establish a network linking MoTI, CC, CSA and ECA.	MoTI & CoC						
5.3	Make twinning/training arrangements.	MoTI & CoC						
5.4	Perform a gap analysis for strengthen Chambers of Commerce to enable them to render efficient and effective trade support services such as training ,market research, information, etc.							
6	WTO ACCESSION		Key Result: Ethiopia takes full advantage of WTO accession					
6.1	Strengthen MoTI, including the WTO Department within MoTI, with adequate management and technical expertise in trade issues, including negotiations skills to overcome tariff and non-tariff barriers, etc.	MoTI and MoFED						
6.2	Undertake a trade-related legislative reform program to conform to WTO requirements and improve the drafting and legal skills of officials responsible for the legislative reform.	MoTI						

S. NO	ACTIVITY DESCRIPTION	IMP. AGENCIES/ TEAM	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
7	MARKET ACCESS		Key Result: Ethiopian products enjoy better market access				
7.1	Take measures for the implementation of EBA and COMESA agreements to access the EU market and the COMESA FTA as well as other markets.	MoTI & MoFED	◆	◆			
7.2	Encourage measures for the diversification of the export bundle, particularly into those products that have growing markets.	MoTI	◆	◆	◆		
7.3	Make preparations and establish and operate an internationally recognized Conformity Assessment System.	MoARD & QSAE	◆	◆	◆		
8	AGRICULTURE AND TRADE		Key Result: Diversified and enhanced volume and quality of Ethiopia's agricultural exports				
8.1	CEREALS						
8.1.1	Promote the development of high yielding variety of cereals.	MoARD& RBoA		◆	◆		
8.1.2	Promote the formation of farmers' cooperatives.	CCD, MoARD & RBoA	◆	◆			
8.1.3	Identify and deploy off-farm activities as alternative sources of employment and train development agents/extension workers to promote these activities.	MoARD & RBoA	◆	◆			
8.1.4	Plan and implement a system of increased access to credit.	MoARD & RBoA	◆	◆			
8.1.5	Provide increased access to credit through micro-finance intermediaries.	MoFED	◆	◆			
8.2	COFFEE						
8.2.1	Introduce a strict regime of quality assurance regarding grading and branding of coffee.	MoARD & Cooperatives	◆	◆			
8.2.2	Increase the export of washed coffee through investment in coffee washing facilities.	MoAREAD, CEA & Cooperatives	◆	◆			

8.2.3	Promote different value-added qualities such as organic, gourmet, and specialty coffee and exploit the vast potential for developing niche market and thus diversify products and markets.	MOARD, CEA & Cooperatives					
8.2.4	Create a certification program for organic as well as different coffee varieties that could uphold the authenticity of coffee.	MOARD					
8.2.5	Implement certification program that could uphold the authenticity of coffee.	MOARD					
8.2.6	Undertake the following reform in the Coffee Auction System: a) Exhibit washed coffee both raw and roasted. b) Improve information system about the crop relevant to the buyer; both buyers and sellers being able to interact and establish relationships.	MOARD					
8.2.7	Train liqueurers in coffee tasting skills and differentiating liquoring characteristics of different coffee varieties.	MoARD					
8.2.8	Conduct further research to improve current coffee varieties in both liquoring characteristics and disease resistance and put in place a system/s to ensure application of research outputs.	MoARD, EARO & RARO					
8.3	HORTICULTURE						
8.3.1	Strengthen horticultural training in higher institutions such as Jimma University to raise awareness about the benefits of the industry.	MoTI, MoARD & MoE					
8.3.2	Improve transport and storage facilities for horticulture products to maintain freshness and minimize spoilage.	MoTI, EAL, EAE , & AHE					
8.4	SUGAR						
8.4.1	Conduct research into new sugar cane variety and Apply tissue culture method to improve sugar cane variety and soil improvement	Sugar Companies					

9	LIVESTOCK AND MEAT		Key Result: Ethiopia fully exploits its potential in the commercialization of livestock and meat products.					
9.1	Assess the feasibility of establishing disease free zones and identify and select appropriate sites for quarantine stations.	MoARD	◆	◆				
9.2	Establish quarantine sites and an export zone/s with quarantine facilities.	MoARD	◆		◆	◆		
9.3	Develop disease-free zones for export.	MoARD			◆			◆
9.4	Allow private animal health providers to operate through effective public-private partnership in disease control and strengthen veterinary services.	MoARD		◆		◆		
9.5	Assess and delineate stock route and market areas.	MoARD	◆		◆			
9.6	Devise strategies for provision of services such as feed, water, veterinary service in trek routes at reasonable intervals.	MoARD	◆	◆				
9.7	Develop stock routes and export market areas.	MoARD		◆				◆
9.8	Simplify regulatory procedures and reduce to a "one window" arrangement, managed by LMA as the focal point at Federal level and Agricultural Bureaus in the regions.	MoARD & RBoA	◆	◆				
9.9	Operate one-window service for regulatory procedures.	MoARD BoA			◆			
9.10	Develop technical capacity to meet stricter standards in export markets and improve disease surveillance.	MoARD		◆				◆
9.11	Strengthen the main export and trade organizations to make them effective participants in quality improvement and international trade discussions on SPS.	MoARD & CoC	◆	◆				
10	MANUFACTURING SECTOR		Key Result: Ethiopia fully exploits its potential in the export of manufactured goods, particularly leather and textile goods					
10.1	General							
10.1.1	Create a close working relationship between industry and institutions of higher learning.	MoTI, MoE, MoCB & EMIA	◆					
10.1.2	Develop curricula for relevant training for manufacturing, and also improve Curricula of Technical and Vocational Education Training (TVET) to meet needs of industry.	MoTI, MoE, MoCB & EMIA						

10.1.3	Provide enhanced and quality training at all levels, including On-the-Job Training.	MoTI, MoE, MoCB & EMIA						
10.1.4	Strengthen technical training institutions at all levels.	MoE & MoCB						
10.1.5	Speed up establishment of Industrial Zones with the requisite infrastructure.	MoTI, EIC & RboI						
10.2	Leather Industry							
10.2.1	Introduce extension programs for the improvement of quality of raw hides and skins through the use of modern abattoirs, slaughterhouses and slabs and implement modern slaughtering techniques.	MoARD & RboA						
10.2.2	Train vets countrywide and strengthen veterinary training schools and colleges.	MoARD & RboA						
10.2.3	Launch control program of Ekek disease.	MoARD, & RboA						
10.2.4	Enforce legal measures to build effluent treatment plants	EPA						
10.3	Leather and Textiles							
10.3.1	Improve the quality/capacity of management in terms of human resource, and Environmental Protection of the textile and leather industries and upgrade the level of technology.	MoTI, EPPESA, and ETA						
11	TOURISM DEVELOPMENT			Key Result: Increased contribution of tourism to GDP				
11.1	Develop a coherent, detailed action-oriented strategic plan including a tourism development code related to tourist destinations as well as a restructuring and capacity building programme for ETC and regional tourism support institutions.	ETC& RBoTIT						
11.2	Implement the tourism strategic plan and restructure ETC.	ETC						
11.3	Develop guidelines for eco tourism.	ETC						
11.4	Encourage the participation of the handicraft sector, particularly women, in tourism industry, through production of souvenirs and artifacts.	ETC						

11.5	Facilitate community involvement and integrate their needs in tourism planning.	ETC					
11.6	Improve market intelligence system and tourism information available at hotels, airports and tourist attractions.	ETC					
11.7	Devise promotional strategy based on target markets & improve tourism promotion.	ETC					
11.8	Devise a strategy for developing and improving human resources of the tourism industry, ETC and regional tourism support institutions.	ETC & RBoTIT					
11.9	Implement the human resources strategy and upgrade Catering and Tourism Training Institute (CTTI) as a hotel management school and permit greater number of paying students.	ETC & CTTI	