



Digital and Sustainable Trade Facilitation

in the Association of Southeast Asian Nations (ASEAN) 2021

Based on the United Nations Global Survey on Digital and Sustainable Trade Facilitation





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FOREWORD

For all the negative impact the COVID-19 pandemic has had on people and economies across the globe, it has also highlighted the importance of trade facilitation and the benefits of streamlining trade procedures. As suggested by the findings of this report, many countries renewed their efforts to simplify and digitalize trade after realizing the essential role that international trade and supply chains play in accessing essential supplies.

The results of the fourth United Nations Global Survey on Digital and Sustainable Trade Facilitation of the Association of Southeast Asian Nations (ASEAN) countries show positive rates of implementation of a wide range of trade facilitation measures, going beyond those included in the WTO Trade Facilitation Agreement (TFA). It is worth noting that the Survey includes many advanced measures that ASEAN has been pioneering as part of implementing its ASEAN Single Window Agreement.

Accelerating trade digitalization remains a key priority as the next phase of the ASEAN digital transformation agenda begins, and the report shows that during the pandemic ASEAN as a group has continued to make progress on simplifying and digitalizing trade procedures. Several countries have achieved world leading performance, making ASEAN particularly ready for its consideration of the Framework Agreement on Facilitation of Cross-Border Paperless Trade in Asia and the Pacific, leveraging the UN treaty to address capacity gaps within the bloc as well as to promote its digital solutions to the wider Asia-Pacific region.

As ASEAN economies now strive to recover from the COVID-19 pandemic, more still needs to be done to make trade easier for all, including by implementing sustainable trade facilitation measures for SMEs and other most-affected groups and sectors. The ASEAN Member States also recognised that trade digitalization is critical in ASEAN's recovery efforts to exit the pandemic and sustain dynamic and resilient economic growth. It is therefore imperative to embark and accelerate strategic efforts that will support the transformation of ASEAN into a leading digital community that is innovative, inclusive, secure, integrated and digitally connected. In particular, applying technology and innovation to international trade procedures through deeper regional cooperation — building upon the collective efforts of the ASEAN countries, and supported by this report and the associated interactive database at unftsurvey.org — will ultimately pave the way in making trade simpler, cheaper, and more resilient and sustainable.

The Bandar Seri Begawan Roadmap (BSBR) on the ASEAN Digital Transformation Agenda adopted by the 53rd ASEAN Economic Ministers Meeting on 8 September 2021 and subsequently endorsed by the 20th ASEAN Economic Community (AEC) Council Meeting on 18 October 2021 would continue to harness and leverage on-going ASEAN trade digitalization initiatives to further advance an inclusive ASEAN paperless trading agenda going forward and lay the groundwork and clear roadmap toward the development of the ASEAN digital economy in the future.



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The report was jointly prepared by ESCAP and the ASEAN Secretariat. Jiangyuan Fu and Chorthip Utoktham, under the guidance of Soo Hyun Kim and the overall supervision of Yann Duval, all from the Trade, Investment and Innovation Division (TIID) of ESCAP, provided the analysis of data for ASEAN countries, collected as part of the UN Global Survey on Digital and Sustainable Trade Facilitation 2021. Cuong Ba Tran of the Trade Facilitation Division of the ASEAN Secretariat provided an analysis of recent ASEAN trade facilitation initiatives, which have been initiated and implemented during the time of conducting the survey, to further enrich and strengthen the report. He also provided factual validation in ASEAN countries, contributed and reviewed the report. The research assistance provided by Ruixin Xie, Yifan Tan and Linyi Chen in data collection and finalizing the report is appreciated. Anisa Hussein informally edited the earlier version of the report and formatted the report and Tony Oliver informally edited the final draft of the report.

Support from the following organizations and individuals is gratefully acknowledged. Sangwon Lim from ESCAP contributed to the survey efforts, particularly by facilitating data collection from relevant experts and data validation in several countries. The United Nations Network of Experts for Paperless Trade and Transport in Asia and the Pacific (UNNExT), a knowledge community supported by ESCAP and ECE, also greatly facilitated data collection.

Inputs to the expert group meeting on trade facilitation in times of crisis and epidemic in the Asia-Pacific region (virtual, July 2020). In addition, the results from a pilot survey on trade facilitation in times of crisis and pandemic – conducted in 2020 for the Asia-Pacific countries, the results of which were published in a regional report in January 2021 – contributed to the development of the additional trade facilitation measures in times of crisis. Comments and suggestions received from participants at the launch of the UN Global Survey on Digital and Sustainable Trade Facilitation 2021 (virtual, July 2021), at which the 2021 survey results were presented, are gratefully acknowledged. The authors are also grateful to the following organizations and individuals for their inputs and suggestions for the development of the 2021 survey: Alexander R. Malaket, formerly from the International Chamber of Commerce (ICC) Banking Commission and Andrew Wilson from the ICC for the trade finance facilitation component; Candice White from the World Economic Forum (WEF); and Alexandre Larouche-Maltais and Sijia Sun from UNCTAD for the women in trade facilitation component.

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EXECUTIVE SUMMARY

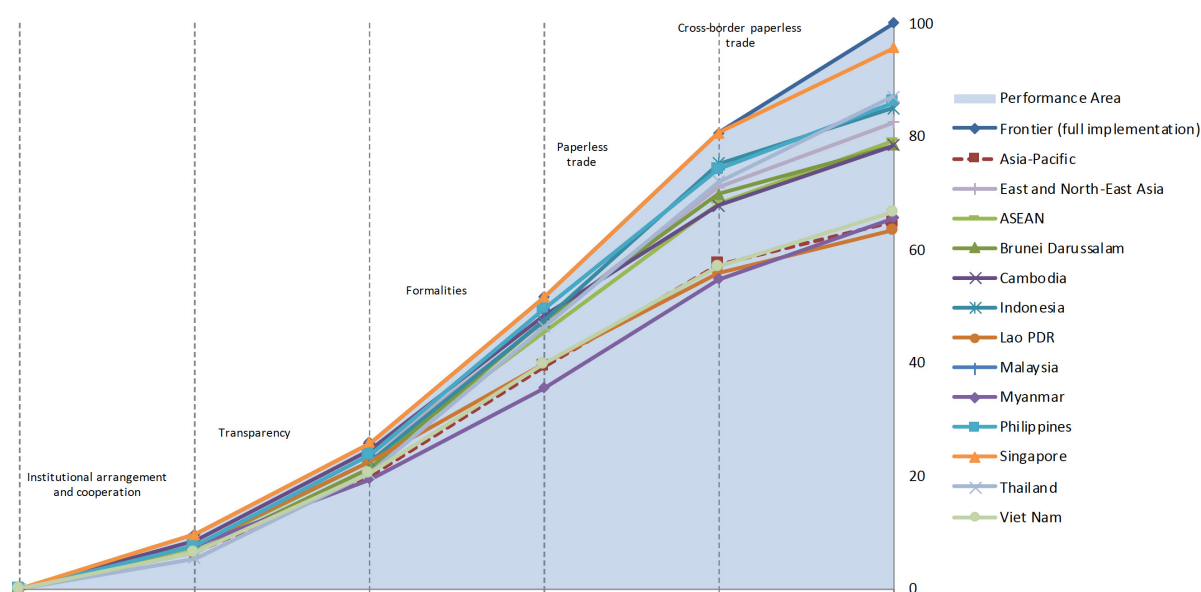
Reducing trade costs is essential in enabling economies to participate in regional and global value chains effectively, and to continue using trade as an important engine of growth and sustainable development. The recent surge in shipping costs and the subsequent disruption of the international supply chain has put additional pressure on already high trade costs in Asia and the Pacific. Trade facilitation plays a significant role in avoiding unnecessary costs and enhancing efficiency through streamlined and digitalized trade. The World Trade Organization (WTO) Trade Facilitation Agreement (TFA) and regional trade digitalization initiatives such as the Framework Agreement on Facilitation of Cross-border Paperless Trade in Asia and the Pacific provides guidance on measures that should be considered for implementation.

In this context, this report presents the results of the 2021 United Nations Global Survey on Digital and Sustainable Trade Facilitation for 10 ASEAN countries that reviewed the progress of trade facilitation reforms. It provides a detailed analysis based on 58 trade facilitation measures that are classified into four groups (“General Trade Facilitation”, “Digital Trade Facilitation”, “Sustainable Trade Facilitation” and “Other Trade Facilitation”) and a further 11 sub-groups covering both binding and non-binding WTO TFA measures, as well as measures beyond the scope of WTO TFA. The report reveals that:

- The ASEAN implementation rate of the measures stands at 79%, significantly higher than the Asia-Pacific regional average of 64.9%. Within the region, the implementation level of ASEAN is next only to Australia and New Zealand and East and North-East Asia subregions;
- Implementation varies widely across the ASEAN countries. The implementation rate of Singapore has achieved a world-leading level, standing at more than 90%. The Philippines, Indonesia, Malaysia and Thailand achieved high implementation rates of more than 80%. Cambodia achieved the most significant increase of eight percentage points, standing at approximately 80%. The Lao People’s Democratic Republic has also made significant progress in implementation and is now standing at more than 60%;
- ASEAN countries made the most progress in implementing ‘Cross-border Paperless Trade’ and ‘Institutional Arrangement and Cooperation’ related measures between 2019 and 2021, standing at 57% and 77%, respectively;
- With the continued expansion and improvement of the ASEAN Single Window (ASW), significant progress has been made in implementing cross-border paperless trade systems in ASEAN countries during the past two years. This is evidenced by the implementation rate of ‘Cross-border Paperless Trade’ being higher than the regional average. In addition to the significant role of ASW Live Operation since 2018, ASEAN Member States have also been deepening the discussion with ASEAN Dialogue Partners on the exchange of trade-related documents;
- Measures under the “Sustainable Trade Facilitation” category are least implemented, particularly those targeting women and SMEs. For example, implementing measures to enhance gender balance in national trade facilitation faces considerable challenges with average implementation rates of 32%, suggesting that there is plenty of room for improvement. Implementation of SMEs in the AEO scheme is less than 30%;
- Measures related to trade facilitation in times of crisis are relatively well-implemented (approximately 74%, higher than the regional average level). ASEAN Member States also have a relatively high implementation rate of long-term measures, thanks to the cooperation between the ASEAN Member States, which are strengthening during this pivotal time. ASEAN wide self-certification has been implemented with a platform for traders in all member States to self-declare the origin of their exports to minimize close contact. All ASEAN Member States have enabled the exchange of ATIGA Form D through a Single Window.

The report suggests that most trade cost reductions are associated with paperless trade measures rather than conventional trade facilitation measures. Full Implementation of binding and non-binding WTO TFA measures could decrease trade costs by 2.6%. On the other hand, digital trade facilitation measures enabling the seamless electronic exchange of trade data and documents across borders will help to significantly reduce trade costs by more than 8% for ASEAN in a full implementation scenario. Adding to existing initiatives and collaboration among ASEAN Member States, the Framework Agreement on Facilitation of Cross-Border Paperless Trade in Asia and the Pacific could provide ASEAN countries with opportunities to promote ASEAN initiatives and solutions as well as support further development of the ASEAN Single Window for interoperability with other paperless trade systems being developed in other parts of the region and world.

Figure. Moving up the trade facilitation ladder towards seamless international supply chains



Note: the figure shows cumulative trade facilitation implementation scores of Asia-Pacific sub-regions for 31 common trade facilitation measures included in the survey. Full implementation of all measures =100.

Source: UN Global Survey on Digital and Sustainable Trade Facilitation 2021, untfsurvey.org.

This ASEAN report should be read in conjunction with the upcoming Global and Asia-Pacific report on the results of the UN Global Survey on Digital and Sustainable Trade Facilitation 2021, which will be available at <https://untfsurvey.org/>.

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