

NAVIGATING NON-TARIFF MEASURES

INSIGHTS FROM A BUSINESS SURVEY
IN THE EUROPEAN UNION



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Navigating Non-Tariff Measures: Insights From A Business Survey in the European Union

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The paper examines how non-tariff measures (NTMs) applied by the European Union's major trading partners impacts EU exporters of goods – results are based on a survey of 8,100 companies from across 26 sectors in the EU's 28 member states – describes the survey methodology; presents the main results obtained in terms of impact on EU companies, by type of NTM, effects on companies of different sizes, particularly micro, small and medium-sized enterprises; draws conclusions on the importance of the role of the EU's negotiating agenda and implementation work to facilitate international trade. It includes survey data statistics and bibliographical references.

Descriptors: **European Union, Non-Tariff Measures, Market Access, Exports, SMEs, Trade Policy.**

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English

The International Trade Centre (ITC) is the joint agency of the World Trade Organization and the United Nations.

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Foreword European Commission



To be successful, EU exporters need to make a substantial effort to understand and comply with all trade formalities and regulations that apply to their products in the European Union (EU) and in third country markets. The EU, and the European Commission in particular, supports these efforts by promoting transparency of rules, coherence of international regulations and standards, and mutual recognition in full respect of the right of governments to pursue their legitimate public policy objectives. The EU has an ambitious agenda cutting across several policy areas. It aims to promote international agreements for better cooperation, and convergence or harmonization of legislation. The Commission's Market Access Database also helps clarify export conditions for EU companies by providing product-specific information on tariffs, import requirements and statistics for over 100 partner countries.

Becoming a successful exporter, however, still requires a lot of effort, particularly for small and medium-sized enterprises (SMEs). The Commission carried out this comprehensive pan-European survey of exporting companies in close cooperation with the International Trade Centre, a United Nations agency well-known for their work in this field. The survey and this report highlight the challenges firms face and bring new evidence on how non-tariff measures the EU's major trading partners apply affect actual EU exporters.

The report offers a wealth of detailed information and confirms the essential role of our negotiating agenda and implementation work to facilitate international trade. It also confirms the Commission's approach to accessing third country markets and the compelling need to further focus the efforts by EU Member States, business and the Commission on the most important barriers that hamper market access for our companies. Our continuous efforts to support EU exporters, in particular SMEs, will achieve maximum impact if they allow businesses to find their way through the variety of trade rules and regulations described in this report.

Our work is further enhanced through initiatives such as the Market Access Strategy and its Trade Database, and the Intellectual Property Rights and Trade Defence Helpdesks for small and medium-sized firms. In particular, where EU exporters face unjustified trade obstacles, the Commission, together with Member States and business, will identify and pursue appropriate strategies to remove them. This report also highlights how important is that trade infrastructure functions well, both at home and in the importing countries. Aside from tackling trade hurdles in partner countries, further streamlining of export formalities could also help EU exports. The report highlights, in particular, opportunities for further improvement in the area of rules of origin and customs procedures, as well as access to information for existing and potential exporting firms. It also points to the critical role EU Member States have to play in managing and implementing the EU's customs regime, in making it easier to get various certificates and supporting documents, and in streamlining their trade and investment promotion activities.

This report also reconfirms how important it is for the EU, its Member States and stakeholders to work together under the 'Enhanced Market Access Partnership'. It is vital they cooperate in implementing existing regulations and agreements, in supporting EU exporters overcome non-tariff barriers, in tackling trade barriers and in streamlining procedures.

This should save EU exporters time and money, thus making their products more competitive on world markets and helping them to participate more successfully in global value chains. Such joint efforts should ultimately help to ensure growth and jobs: on average every billion euros worth of EU exports supports more than 14000 jobs in the EU.

The report demonstrates how lowering barriers to trade can also help developing country partners. It is not only EU exporters who benefit, but also traders in developing and emerging economies. Lower barriers enable more firms to integrate within global and regional value chains, bringing knock-on benefits of inclusive growth and sustainable development. In this way, international trade can deliver in its role as a way to help countries achieve the United Nations' Sustainable Development Goals.

Jean-Luc Demarty
Director-General for Trade, European Commission

Foreword International Trade Centre



Trade in the 21st century faces fewer traditional tariffs, but has seen a proliferation of rules and regulations that affects the movement of goods and services. These non-tariff measures (NTMs) can play an important role in addressing safety and environmental issues. Yet, many small and medium-sized enterprises (SMEs) are unable to recognize or meet many of these standards. By enhancing the transparency of these measures, we can go a long way in helping businesses to navigate this new global trade landscape.

This report provides valuable insights about NTMs, as experienced by European exporters. The report is based on 8,100 company interviews in all 28 European Union (EU) countries, most of them SMEs, and covers their perception of NTMs as they source from and export to non-EU markets. It is a meaningful complement to ITC's NTM Survey work since 2010, which focuses on companies in developing countries exporting to and from the European Union.

This survey shows that EU businesses report regulatory obstacles much as businesses in developing countries do. Their main concerns are technical regulations, conformity assessment procedures and rules of origin. They share the view that the burden is entirely or partially due to procedural obstacles, rather than to the stringency of the regulations themselves.

Many barriers arise due to local capacities and facilities. Market access begins at home, but ends in the destination market. There is scope to work with partner authorities on streamlining processes, harmonizing regulations and providing consistent, transparent and timely information – especially for smaller companies and first-time exporters.

Access to trade and market intelligence is critical to export success. However, many SMEs struggle to find information about requirements in destination markets, particularly in developing economies. ITC has developed programmes to provide critical market intelligence and is at the forefront of advocating transparency in trade.

With EU support, ITC provides intelligence to companies and policymakers on non-tariff regulations imposed by more than 90 countries. ITC ensures that SME concerns about regulatory and procedural trade obstacles are brought to policymakers and other stakeholders for action in countries, regions and multilateral organizations. Recently, ITC, the World Trade Organization (WTO) and the United Nations Department of Economic and Social Affairs (UNDESA) launched an 'e-Ping' alert system for technical barriers to trade and sanitary and phytosanitary measures notified at the WTO.

These initiatives are part of ITC's ongoing dialogue with exporters and importers, in order to monitor the constantly changing trade challenges, and tailor policy responses accordingly. The solutions are sometimes much closer to home than one might expect.

This report shares concerns of European exporters, often in their own words. Unprecedented in scope, we hope that this report will serve as a springboard to integrate the voice of European business in trade negotiations and policymaking. We also hope that this report will serve as a benchmarking tool for trade-related technical assistance, so that developing countries improve their capacity to trade with the EU. I look forward to collaborating with EU partners on this important effort.

A handwritten signature in black ink, appearing to read 'Arancha'.

Arancha González
Executive Director, International Trade Centre

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