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Must Do Better

Trade & Industrial Policy and the SDGs

The 30th Global Trade Alert Report

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Must Do Better: Trade & Industrial Policy and the SDGs

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EXECUTIVE SUMMARY

So much is expected of trade policy in the 21st century. Officials are challenged to explain how their government's commercial policy choices affect the Sustainable Development Goals (SDGs). Some worry there is a tension between pursuit of what they regard as neoliberal trade and investment reforms and making progress on eliminating poverty and hunger and on adopting clean energy, to name just three of the SDGs. Some fret that commercial policy should do more while others doubt the wisdom of linking trade policy to the SDGs in the first place. Well known deficiencies in official tracking of commercial policy intervention by governments hold back global assessments of the fallout from tariff and non-tariff policy changes for the SDGs—an evidence gap that this report fills.

For seven of the 17 SDGs this report sheds light on what commercial policy choice worldwide *has* contributed, *could* contribute further, and *should* contribute to the implementation of the SDGs. Evidence is presented on whether there is a tension between commercial policy reform and making progress on the SDGs; on whether differences in national per-capita incomes make a difference; and on whether the emergency commercial policy interventions witnessed during the pandemic era set back progress towards the SDGs. To address these matters we deployed a textbook framework of trade policy impact to link 37,529 unilateral commercial policy interventions to 61 SDG indicators associated with SDGs 1, 2, 3, 6, 7, 9, and 14. A total of 192 governments were responsible for these policy changes.

Agenda 2030—the United Nations initiative encompassing the SDGs—came into effect on 1 January 2016. Since that date, a total of 19,672 import, export, subsidy or other behind-the-border commercial policy changes have affected the 7 selected SDGs. In terms of impact on the SDGs, 45% likely improved outcomes, 27% worsened matters, and the remaining 28% were neutral (no effect). This track record looks less impressive when compared to pre-2016 policy outcomes:

- 46% of pre-2016 commercial policy changes would also have improved these SDGs as well.
- Although the number of times commercial policy changes affected the SDGs rose on average 10% since 2016, the total number of commercial policy interventions of any type implemented rose 32%.

One area of improvement: before 2016 a third of trade policy changes impaired SDG metrics, after Agenda 2030 came into effect that fell to 27%. Still, whether looking at these aggregate statistics or by individual SDG, since Agenda 2030 came into effect no marked shift in commercial policy choice supportive of sustainable development has occurred.

The World Bank classifies nations into four groups based on per-capita incomes. Since 2016, on 4 of the 7 SDGs studied here more than half of the commercial policy changes taken by the lowest income group of nations improved SDG metrics. For the highest income group of nations 2 SDGs benefited from more SDG-friendly trade policies—but there was also regression on one SDG. Most striking of all was the precious little change witnessed in the contribution of trade policies to the SDGs in the 108 lower- and middle-income nations.

The onset of the COVID-19 pandemic cannot be blamed for any deficiencies in commercial policy's contribution to attaining the SDGs. When comparing intervention taken during 2016-19 and 2020-22, key metrics don't change that much. If anything, the share of interventions likely to improve SDG metrics edges up from 0.44 to 0.46.

Given the way that some SDG indicators were formulated, it is possible that short run supply side performance is improved by imposing trade-distorting practices and trade barriers. In practice, on the basis of evidence presented here, the tension between liberal trade policies and sustainable development is absent in SDGs 1 and 6. For only a quarter of commercial policy steps taken since 2016 did a tension arise in SDGs 2, 3, 6, and 14. The tension is worst in SDG 9: over 90% of commercial policy changes improving metrics in this SDG also distort trade or unwind trade reforms. The onset of the pandemic increases this tension a little in SDGs 1, 2, and 3 but the tension attenuates in the fisheries-related SDG (14).

There is plenty of room for liberalising commercial policy moves to contribute more to the SDGs examined here, except for SDG 9 where the tension mentioned above bites again. Some improvement in SDG metrics would arise from moves to reinstate recently lapsed trade reforms or to phase out early time-limited trade-distorting practices. However, bolder moves would deliver more.

If together governments were persuaded to unwind those market-distorting trade practices implemented since Agenda 2030 came into force then over 55% of remaining commercial policy interventions in SDGs 1, 2, 3, 6, and 7 would improve sustainable development (the remaining 45% measures having no effect). Scrapping these trade-distortive practices would significantly impair performance on SDG 9—but the right response here is to start a discussion about the efficacy of alternative policies that promote private sector development.

PART ONE
GLOBAL ASSESSMENT OF COMMERCIAL POLICY & SEVEN SDGS

CHAPTER 1: DELIVERING THE SDGS: WHAT IS EXPECTED OF COMMERCIAL POLICY?

SDG adoption and the stated nexus to commercial policy

On the 25 September 2015 the United Nations General Assembly adopted the *2030 Agenda for Sustainable Development*. This Agenda is ambitious—it seeks no less than to transform the prospects of the world's population over a fifteen-year time horizon, in particular those people living in developing countries. The Agenda is universal—no nation is exempt and all are expected to contribute positively to this far-reaching initiative.

Central to this Agenda was the adoption of 17 Sustainable Development Goals (SDGs) and 169 associated targets. Those goals range from the elimination of poverty and hunger, to access to education, gender equality, reduction of other inequalities, advancing the clean energy transition and tackling climate change in general, and promoting international partnerships, to name just a few. Since implementation of the SDGs began in 2016 extensive efforts have been taken to track progress towards these goals and targets. For example, UNCTAD together with the International Trade Centre and the World Trade Organization (WTO) collect information on the trade-related indicators in the SDGs (in particular, the 17th SDG). Taken together, the SDGs represent the highest profile, multi-faceted collective endeavour undertaken by humankind so far this century.

Given the extensive cross-border commercial ties between nations, it was natural that a range of policy interventions affecting those ties would feature in the formulation of the SDGs. As Bellmann and Tipping (2015) note, the formal statement of the SDGs contains numerous specific references to potential commercial policy initiatives. Those references include[1]:

1. Implementing duty-free quota-free access for exporters from the Least Developed Countries (LDCs).[2]

2. Phasing out of agricultural export subsidies.[3]

3. Prohibition of certain fishery subsidies.[4]

4. Reform of fossil fuel subsidies.[5]

5. Action against poaching, trafficking, and supply of illegal wildlife products.[6]

6. Financing of Aid for Trade, supporting the integration of developing countries into the world trading system.[7]

Some of these steps were to be taken multilaterally[8] (such as the negotiation this year of a fishery subsidies accord at the WTO), some regionally, and some nationally.[9] The steps that governments take unilaterally in formulating and executing their commercial policies fall within the scope of Agenda 2030.

1 The following list refers to the references to mentions of commercial policy in the SDGs as opposed to statements about the contribution of commercial outcomes such as trade, foreign direct investment, cross-border transfers of technologies, and integration into global value chains to sustainable development. The focus of this report is on the likely impact of commercial policy changes—in fact, unilateral commercial policy changes—on the SDGs, not on the various forms of cross-border commerce on the latter.

2 SDG target 17.2.

3 SDG target 2.b.

4 SDG target 14.6.

5 SDG target 12.c.

6 SDG target 15.7.

7 SDG target 8.a.

8 Agenda 2030 documentation also includes injunctions to implement the principle of Special and Differential Treatment at the World Trade Organization (possibly an odd claim given that this principle has been applied for decades) as well as affirming the flexibilities in WTO rules as they relate to the treatment of intellectual property in medicines.

9 Interestingly, the WTO Secretariat emphasises the role that international trade can play in contributing positively to nine of the 17 SDGs. The Secretariat submits annual reports to the UN High-Level Political Forum. Those reports frequently link commercial policy interventions to selected SDGs.

Yet we do not have a systemic assessment of the contribution of commercial policy to attaining the SDGs. Did that contribution change once the SDGs came into force at the start of 2016? Has the contribution of commercial policies differed across SDGs, across nations with different means, and over time? Did the COVID-19 pandemic and attendant disruption alter commercial policy in ways that diminished its contribution to attaining the SDGs?

For sure there are useful case studies that shed light on some of these questions (see Heble and Shepherd 2017 for a collection). There is also a valuable analysis by experts from UN ESCAP on the resort to non-tariff measures in the Asia-Pacific region and their likely consequences for selected SDGs. More recently, UNCTAD analysts usefully examined whether resort to trade policies affected certain SDGs during the pandemic.

There are certainly references to trade and investment in United Nations reports on progress towards the SDGs but they are often negative—as a review of *The Sustainable Development Goals Report 2022* shows.[10] Ultimately, we don't have answers to the question posed two paragraphs earlier. Even more important, we don't have a sense of what more commercial policy could contribute to attaining the SDGs by 2030.

The role of commercial policy in the SDGs is contested

Matters are worse for, in conducting research for this report, we repeatedly came across four perspectives that implicitly or explicitly challenge whether commercial policy should play a role in attaining the SDGs. First, for those advancing the deglobalisation narrative and longstanding critics of globalisation and the supply side policies said to underpin it, the less neoliberal commercial policy has to do with the SDGs the better—not least because the "lived experiences" of so many people are touched by the many non-economic objectives of the SDGs.

A second negative perspective focuses on the potential contribution of multilateral trade policy initiatives. It contends that the WTO is not a "development organization" and sees no need for a distinct work programme linking commercial policy choice and the SDGs. This perspective is not shared universally among WTO members and did not, for example, prevent the WTO Secretariat from publishing in 2018 a report on the case for "mainstreaming" trade in the implementation of the SDGs.

To another group what seems to matter is whether commercial policy is a silver bullet that can tackle every SDG. Anything short of that promise and their interest appears to wane. To this group, regrettably, the Tinbergen Rule for sensible policy design cuts no ice—namely, that governments seeking to pursue multiple objectives (as they are in the case of the SDGs) will need multiple policy instruments to do so effectively. The notion that some development outcomes are more amenable to commercial policy outcomes than others is lost on this group.

A fourth perspective wills the ends of the SDGs but challenges the means, in particular, as they relate to commercial policy. On this view serious concerns about the formulation of the SDGs, including the choice of associated targets and indicators, make them unsuitable as a guide to design and evaluate commercial policy choice. Implicitly, the challenge posed here is what contribution commercial policy should make given how the SDGs are currently formulated. This viewpoint is worth exploring in more detail.

For over half a century mainstream international trade research emphasised the importance of governments choosing the best policy to tackle societal goals and rankings of policy intervention were devised (Bhagwati, Panagariya, and Srinivasan 1998).[11] Such research goes on to show that—except in very particular circumstances—commercial policies are not the best ways to attain many defined governmental goals, such as increasing value-added of sustainable manufacturing.

On this view, should it be found that classic trade policy interventions made no contribution to attaining SDGs then this should be celebrated if it is the result of governments choosing other policies that deliver the same objective at lower cost. It follows that reflexively encouraging governments to erect import tariffs, local content requirements, export controls and the like in the name of attaining the SDGs is wrong headed. Still, those with this point of view should welcome government initiatives to replace trade restrictions with other, more effective policy interventions seeking to attain this or that SDG indicator.

In addition to the inferiority of trade restrictions, concerns might also be raised that some SDG targets and indicators are national in nature. This could lead to globally sub-optimal outcomes when it comes to trade policy choice. Consider the following example: SDG indicators 2.1 and 2.2 relate to ending hunger and nutrition. A net exporter of foodstuffs may impose an export ban and argue that it contributes to these two SDG indicators by lowering prices

10 Most of the references in that report to imports emphasised the perils of over-dependence on foreign sources of food. References to exports and foreign direct investment were rare, references to trade policy of any type even rarer. This contrasts to references found in the report to domestic regulation or to the need for domestic regulatory initiatives.

11 In the literature these objectives are often referred to as non-economic objectives, which on first glance may confuse lay men and women. Mainstream international trade analysts tend to distinguish between welfare and other objectives of governments, referring to the latter as non-economic objectives.

paid by domestic consumers. Yet, at the same time, that export ban threatens food security in previously supplied food importing nations. Whose hunger and malnutrition matters more? Arguably both matter yet narrow assessments of the contribution of one government's commercial policy choice to attaining it own SDGs would miss the adverse international fallout.

In a similar vein some would emphasise the inherently redistributive consequences of trade policy intervention. On this perspective, even if the imposition of a trade barrier helped improve performance on one SDG indicator, then it would come at the expense of another societal group. This smacks of robbing Peter to pay Paul. Analysts taking this line are essentially challenging whether the choice of metrics in the list of SDG indicators are appropriate for evaluating policy choice.[12]

A tension between sensible commercial policy and the SDGs?

Fundamentally, there could be tension between commercial policy interventions that improve particular SDG indicators and the accepted principles of the world trading system which place a premium on commercial policy measures that facilitate cross-border commerce. Concerns about this tension are accentuated for those who regard liberal commercial policies as delivering other societal benefits that have not found their way on to the list of SDG indicators. This reinforces the concern that making the SDGs central to the scoring of national policy choice through to 2030 may be a recipe for encouraging state intervention that is either damaging or that misses important other opportunities to advance societal progress.

These are important arguments that deserve to be taken seriously. Before concluding that there is a fundamental tension between trade policy and the SDGs, our approach is to check the underlying factual basis. By deploying a database of approximately 50,000 commercial policy interventions taken worldwide before and after Agenda 2030 came into force in 2016, in this report we assess whether such a tension exists, whether it has diminished or worsened over time, and whether evidence of tension is confined to particular SDGs.

We have no illusions that some may contest our chosen methodology, our choice of SDGs to focus upon, and the interpretation of our findings. Yet we proceed on the assumption that deliberation on the nexus between commercial policy and the SDGs will be advanced if more evidence is brought to bear upon this critical matter. After all, there may in fact be less tension than arguments based on first principles imply.

Finally, we know that our work won't be the last word on the contribution of commercial policy to Agenda 2030—indeed, we will regard this analysis as a success if it stimulates others to prepare better methodological approaches and empirical analyses of their own.

Organisation of this report

This report is organised into three parts. The first part describes how we developed a mapping from commercial policy intervention to 61 SDG indicators that were selected to highlight the possible impact (positive or negative) of the former on leading environmental, social, and economic outcomes associated with Agenda 2030. We also summarise our main findings and identify four reform scenarios under which commercial policy could contribute more to attaining the SDGs.

The second part of our report provides detailed evidence on the frequency, form, and impact of commercial policy intervention on SDGs 1, 2, 3, 6, 7, 9, and 14, taking both a global perspective as well as dividing nations into four income groups. We also present results on the contribution of commercial policy before and since the SDGs were implemented and we explore whether the track record varied before and since the onset of the COVID-19 pandemic. The first two parts of the report, therefore, seek to answer the very questions posed towards the end of the first section of this chapter.

Consistent with our longstanding monitoring of the commercial policy choices of the G20 members, the third part of this report contains evidence on the policy choices made by each G20 member since November 2008 and their exposure to the state intervention taken by trading partners. So that there is no misunderstanding the evidence presented in the third part of this report does not relate specifically to the SDGs. Consequently, the first two parts of this report can be read independently of the third part.

12 Further complications arise if a commercial policy intervention affects multiple SDG indicators, potentially in different ways. How best to aggregate gains and losses? In the next chapter evidence is presented on the number of SDG indicators affected by commercial policy intervention. Less than four percent of the commercial policy interventions in our study affect only one SDG indicator.

CHAPTER 2: THE SDGS-COMMERCIAL POLICY NEXUS: A MAPPING

In order to gauge the frequency with which governments have advanced or retarded the SDGs through their commercial policy choices a mapping must be developed between each type of commercial policy intervention and each SDG indicator deemed in-scope. Ideally, this mapping should have the following characteristics:

- the assignment of impact should be grounded in economic logic,
- that logic should be readily communicated and intelligible,
- the mapping should be consistently applied across indicators of a similar type across the SDGs, and
- the mapping should be replicable by others.

The goal of this chapter is to describe the mapping that was developed specifically for this study. We do not claim that this is the only mapping that meets the standards mentioned above. As will become evident, there is room for developing more sophisticated mappings. But it is important to start somewhere—indeed, in this case by using a framework that should be recognisable to anyone who has taken an undergraduate economics course in microeconomics or international trade.

Scope of the mapping

To start we describe what we mean by the phrase "commercial policy intervention." We take a modern understanding of this term, recognising that governments can tilt the commercial playing field in favour of domestic firms (or against them) in many ways. Therefore, we do not confine our analysis to policy interventions taken at customs houses that directly affect the importation or exportation of goods. We include many "behind the border" policy interventions such as localisation rules and incentives, the many different types of corporate subsidy awards to import-competing and exporting firms, policies restricting cross-border payments for traded goods, and measures affecting public sourcing of goods from abroad.[1]

Nor do we confine ourselves to measures affecting goods trade—policy intervention affecting foreign direct investment, the cross-border movement of workers, and services trade are within-scope. As Table 1 makes clear, we include 62 policy intervention types found in the Global Trade Alert database. Those intervention types are grouped into 12 groups and four intervention classes.

Examination of the Agenda 2030 text reveals that there are clearly some SDGs and SDG indicators where it would be very difficult to argue that there is a direct effect of commercial policy choice. SDGs 5 ("Achieve gender equality and empower all women and girls") and 16 ("Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels") come to mind.

For other SDGs where there is a plausible direct effect of commercial policy, this may not be the case for every indicator within a SDG. For example, SDG target 14.5.1 ("Coverage of protected areas in relation to marine areas") is unrelated to commercial policy whereas arguably indicator 14.6.1 (relating to the prohibition of certain fishery subsidies) is. In this manner we whittled down the candidates SDG indicators for further investigation.

We were also keen to include, where credible, SDGs where indicators did not refer only to the supply side performance of economies. For these reasons we identified 61 SDG indicators associated with a diverse set of seven SDGs (1, 2, 3, 6, 7, 9, and 14). The in-scope SDG indicators are listed in Table 2. The number of SDG indicators associated with each SDG varies from three (SDG 14) to 21 (SDG 3).

1 However, the database that we use (the Global Trade Alert) does not cover regulations known in trade policy circles as Technical Barriers to Trade (TBT) or as Sanitary or Phytosanitary Measures (SPS). While there are some arguments for including the latter two, unfortunately so many of the records of so much of these policy interventions in the WTO's ePing database do not include information necessary to identify which products are covered by them. One advantage of not including TBT and SPS measures is that the findings that followed cannot be accused of being skewed by what some regard as the legitimate exercise of the state's regulatory powers.

Table 1

Intervention Type in GTA Database	Intervention Group (G1)	Intervention Class
FDI: Entry and ownership rule	FDI	Behind-the-border measure
FDI: Financial incentive	FDI	Behind-the-border measure
FDI: Treatment and operations, nes	FDI	Behind-the-border measure
Local content requirement	Local Requirements	Behind-the-border measure
Local labour requirement	Local Requirements	Behind-the-border measure
Local operations requirement	Local Requirements	Behind-the-border measure
Local value added requirement	Local Requirements	Behind-the-border measure
Localisation, nes	Local Requirements	Behind-the-border measure
Local supply requirement for exports	Local Requirements	Behind-the-border measure
Local content incentive	Local Incentives	Behind-the-border measure
Local labour incentive	Local Incentives	Behind-the-border measure
Local operations incentive	Local Incentives	Behind-the-border measure
Local value added incentive	Local Incentives	Behind-the-border measure
Labour market access	Migration Measures	Behind-the-border measure
Post-migration treatment	Migration Measures	Behind-the-border measure
Trade payment measure	Obligation Inward	Behind-the-border measure
Trade balancing measure	Obligation Inward	Behind-the-border measure
Controls on commercial transactions and investment instruments	Obligations Outward	Behind-the-border measure
Controls on credit operations	Obligations Outward	Behind-the-border measure
Repatriation & surrender requirements	Obligations Outward	Behind-the-border measure
Public procurement access	Public Procurement	Behind-the-border measure
Public procurement localisation	Public Procurement	Behind-the-border measure
Public procurement preference margin	Public Procurement	Behind-the-border measure
Public procurement, nes	Public Procurement	Behind-the-border measure
Export subsidy	Export Incentives	Export measures
Financial assistance in foreign market	Export Incentives	Export measures
Other export incentive	Export Incentives	Export measures
Tax-based export incentive	Export Incentives	Export measures
Trade finance	Export Incentives	Export measures
Export ban	Export Controls	Export measures
Export quota	Export Controls	Export measures
Export tariff quota	Export Controls	Export measures
Export tax	Export Controls	Export measures
Export-related non-tariff measure, nes	Export Controls	Export measures
Foreign customer limit	Export Controls	Export measures
Export licensing requirement	Export Controls	Export measures
Anti-circumvention	Import Restrictions	Import measures
Anti-dumping	Import Restrictions	Import measures
Anti-subsidy	Import Restrictions	Import measures
Import monitoring	Import Restrictions	Import measures
Safeguard	Import Restrictions	Import measures
Special safeguard	Import Restrictions	Import measures
Import ban	Import Restrictions	Import measures
Import licensing requirement	Import Restrictions	Import measures
Import quota	Import Restrictions	Import measures
Import tariff quota	Import Restrictions	Import measures
Internal taxation of imports	Import Restrictions	Import measures
Import tariff	Import Restrictions	Import measures
Import-related non-tariff measure, nes	Import Restrictions	Import measures
Capital injection and equity stakes (including bailouts)	Subsidies	Subsidies to local firms
Financial grant	Subsidies	Subsidies to local firms
Import incentive	Subsidies	Subsidies to local firms
In-kind grant	Subsidies	Subsidies to local firms
Interest payment subsidy	Subsidies	Subsidies to local firms
Loan guarantee	Subsidies	Subsidies to local firms
Price stabilisation	Subsidies	Subsidies to local firms
Production subsidy	Subsidies	Subsidies to local firms
State aid, nes	Subsidies	Subsidies to local firms
State aid, unspecified	Subsidies	Subsidies to local firms
State loan	Subsidies	Subsidies to local firms
Tax or social insurance relief	Subsidies	Subsidies to local firms
Competitive devaluation	Competitive Devaluation	Equivalent to an import and export measure

Table 2

SDG	SDG Indicator	Mechanism (G2)	Filters used*?
1	1.1.1	Sourcing+	CPC Sector, HS Codes
1	1.2.1	Combo	CPC Sector, HS Codes
1	1.2.2	Combo	CPC Sector, HS Codes
1	1.5.3	Combo	CPC Sector, HS Codes
1	1.b.1	Combo	CPC Sector, HS Codes
2	2.1.1	Sourcing+	CPC Sector
2	2.1.2	Sourcing+	CPC Sector
2	2.2.1	Sourcing+	CPC Sector
2	2.2.2	Sourcing+	CPC Sector
2	2.3.1	Production-	CPC Sector
2	2.3.2	Production+	CPC Sector
2	2.4.1	Production+	CPC Sector
2	2.a.1	Spending+	CPC Sector
2	2.a.2	Sourcing+	CPC Sector
2	2.b.1	Production+	CPC Sector
2	2.b.2	Spending-	CPC Sector
2	2.c.1	Sourcing+	CPC Sector
3	3.1.1	Sourcing+	Keywords, CPC sectors, HS Codes
3	3.1.2	Sourcing+	CPC Sector
3	3.2.1	Sourcing+	Keywords, CPC sectors, HS Codes
3	3.2.2	Sourcing+	Keywords, CPC sectors, HS Codes
3	3.3.1	Sourcing+	Keywords, CPC sectors, HS Codes
3	3.3.2	Sourcing+	Keywords, CPC sectors, HS Codes
3	3.3.3	Sourcing+	Keywords, CPC sectors, HS Codes
3	3.3.4	Sourcing+	Keywords, CPC sectors, HS Codes
3	3.3.5	Sourcing+	Keywords, CPC sectors, HS Codes
3	3.4.1	Sourcing+	Keywords, CPC sectors, HS Codes
3	3.4.2	Sourcing+	CPC Sector
3	3.5.1	Sourcing+	CPC Sector
3	3.5.2	Sourcing-	CPC Sector, HS Codes
3	3.7.1	Sourcing+	HS Codes
3	3.7.2	Sourcing+	Keywords, HS Codes
3	3.8.1	Sourcing+	Keywords, CPC sectors, HS Codes
3	3.9.1	Production+	Keywords, CPC sectors, HS Codes
3	3.9.3	Sourcing-	Keywords, CPC Sector
3	3.a.1	Sourcing-	CPC Sector
3	3.b.1	Sourcing+	HS Codes
3	3.b.2	Sourcing+	Keywords, CPC Sector
3	3.c.1	Sourcing+	CPC Sector
6	6.1.1	Combo	CPC Sector, HS Codes
6	6.2.1	Combo	CPC Sector, HS Codes
6	6.3.1	Combo	CPC Sector, HS Codes
6	6.3.2	Combo	CPC Sector, HS Codes
6	6.5.1	Combo	CPC Sector, HS Codes
6	6.6.1	Sourcing+	Keywords, CPC Sector
6	6.a.1	Sourcing+	CPC Sector, HS Codes
7	7.1.1	Combo	CPC Sector
7	7.1.2	Combo	CPC Sector
7	7.2.1	Production+	CPC Sector, HS Codes
7	7.a.1	Sourcing+	CPC Sector
9	9.1.1	Combo	Keywords, CPC Sector
9	9.1.2	Combo	Keywords, CPC Sector
9	9.2.1	Production+	Keywords, CPC Sector, HS Codes
9	9.2.2	Production+	Keywords, CPC Sector, HS Codes
9	9.3.1	Production+	Keywords, CPC Sector
9	9.3.2	SME	Keywords, CPC Sector
9	9.4.1	FDI+	Keywords, CPC Sector
9	9.5.1	Spending+	Keywords, CPC Sector
9	9.b.1	Production+	Keywords, CPC Sector
9	9.c.1	Combo	Keywords, CPC Sector
14	14.4.1	Sourcing-	CPC Sector, HS Codes
14	14.6.1	Spending-	CPC Sector, HS Codes
14	14.b.1	Spending-	CPC Sector, HS Codes

*Filters are written in the exact order that they were applied.

Economic logic

We examined carefully how each of the 61 in-scope SDG indicators were stated. Taking the perspective of a single competitive market in a small open economy as understood in textbook treatments of international trade (see Box 1), we realised that many SDG indicators shared key common features.

For example, a number of indicators refer to the availability and affordability of goods or services to persons bought on open markets. SDG indicator 2.1.1 ("Prevalence of undernourishment" taken to mean "the proportion of the population whose habitual food consumption is insufficient to provide the dietary energy levels that are required to maintain a normal active and healthy life") refers strictly speaking to consumption outcomes.

In a small open economy commercial policy measures that increase the domestic price paid for food tends to increase the share of a nation's population that do not have enough food. Consequently, this economic logic calls for the imposition of policy-related import restrictions to be classified as detracting from meeting SDG indicator 2.1.1. In contrast, the implementation of an export curb on food would improve performance on this indicator, as implied by the findings in Figure 1.

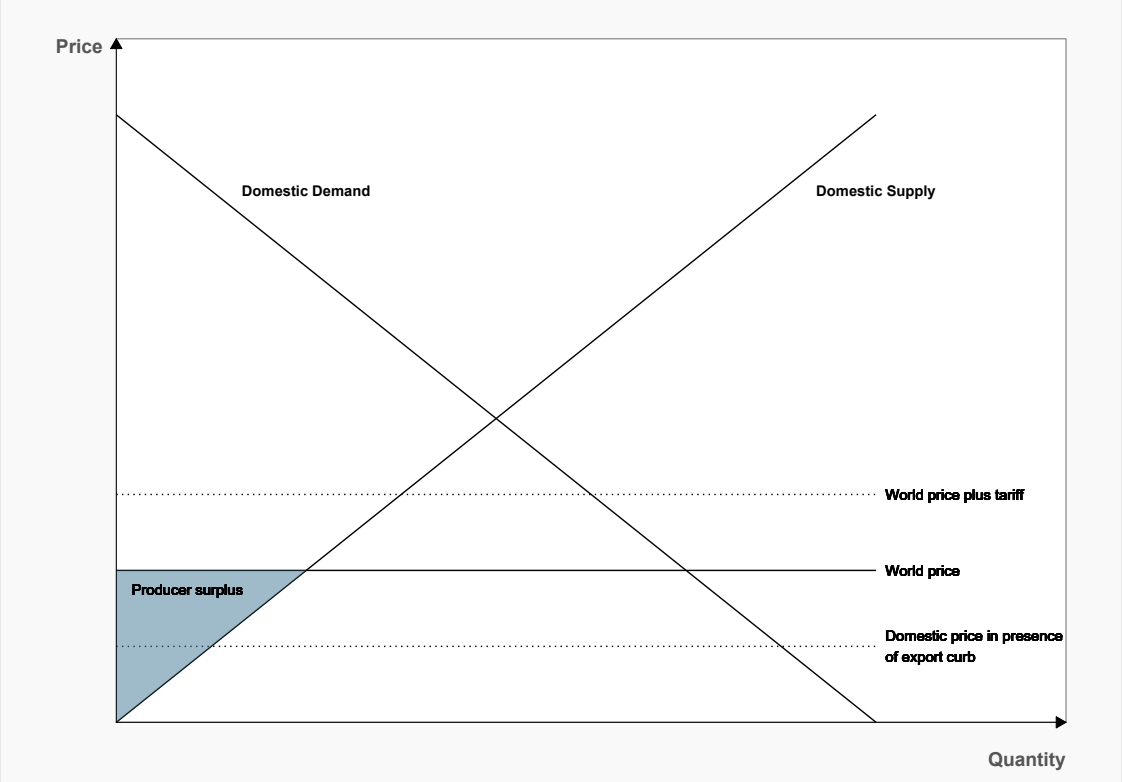
We refer to indicators such as SDG 2.1.1 as ones where the stated goal is to enhancing sourcing by individuals (denoted sourcing+). These indicators are to be differentiated from the few where Agenda 2030 calls for reduced individual consumption (denoted sourcing-).

An important feature of the single market small open economy approach is that not every commercial policy influences domestic prices and therefore is deemed to have a neutral effect on sourcing-related SDG indicators. For example, the payment of subsidies to farmers may increase the domestic supply of food but, given that world prices determine domestic prices, the availability and affordability of food to the population does not change.[2]

As a result, using the textbook small open economy case, changes in corporate subsidies, and in fact any commercial policy interventions affecting the supply side of the market but not world prices, will have no effect on SDG indicator 2.1.1. To sum up, commercial policy intervention implemented in markets where a sourcing-related SDG indicator applies can have a positive, negative, or no effect on the latter.

Another set of SDG indicators relate to various measures of firm performance on the supply side of the market. We refer to SDG indicators that seek to improve some aspect of firm performance as production+ (conversely denoted production- where the stated goal is to discourage supply.) Examples of production+ SDG indicators are 3.9.1 and 9.2.1. In a small open economy with a production+

Figure 1



2 In the absence of an export curb, after all, nothing prevents the extra food production resulting from the subsidy from being exported abroad.

objective applied to a particular market, any commercial policy intervention that increases the total producer surplus of the domestic production sector (a measure of short run profitability used by economists) is classified as contributing towards the SDG indicator.

A third set of indicators refer to government expenditure levels. Again, there is a distinction between SDG indicators where the stated goal is to increase state spending (denoted expenditure+) and those where the goal is to reduce them (expenditure-). In these cases we classify any corporate subsidy or incentive-related commercial policy that changes state spending in the direction sought as contributing towards the SDG indicator in question.

Table 3

Intervention Group (G1)	Mechanism					
	Impact on domestic price	Impact on total domestic producer surplus	Impact of total government spending	Volume of foreign investment in services only	Combination of sourcing+ and FDI+	Access of SME to finance
	Sourcing	**Production**	**Spending**	**FDI**	**Combo**	**SME**
FDI	0	1	0	-1	-1	-1
Import Restrictions	-1	1	0	0	-1	0
Obligations Outward	1	-1	0	-1	-1	-1
Obligation Inward	-1	1	0	0	-1	0
Local Requirements	0	-1	0	-1	-1	0
Local Incentives	0	1	1	1	1	0
Subsidies	0	1	1	0	0	1
Public Procurement	0	1	0	0	0	0
Export incentives	-1	1	1	0	-1	0
Export controls	1	-1	0	0	1	0
Migration	0	1	0	-1	0	0
Competitive devaluation	-1	1	0	0	-1	0

Note: The impact evaluation above displayed for sourcing, production and spending where more of the development outcome is sought. A score of +1 implies that imposing or raises a trade distorting measure contributes positively to the SDG indicator; a score of -1 indicates the same policy change worsens the SDG indicator; and a score of 0 means the policy change has no impact on the SDG indicator. As Table 2 shows, there are SDG indicators where the desired outcome is reversed. In such cases, the assigned impact has the opposite sign than in this table.

For each group of commercial policy interventions where a measure is imposed that favours local interests over foreign rivals, the expected impact on different types of SDG indicator are summarised in Table 3. This table includes as columns the sourcing, production, and spending SDG indicator types mentioned above as well as three others: one FDI-specific, another a combination of FDI and sourcing+, and a final one for various indicators relating to support for small- and medium-sized businesses (SME).

Our mapping: implementation and summary statistics for each in-scope SDG

We are now in a position to link commercial policy intervention types to their likely impact on each in-scope SDG indicator, thereby completing the mapping portrayed in Figure 2. Table 1 associates each commercial policy intervention with one of 12 groups. Table 2 associates each of the 61 in-scope SDG indicators with a "mechanism" or logic based on a literal reading of the statement of the SDG indicator. Deploying the single market, small open economy logic allows us to link each mechanism to each group of commercial policy interventions, see Table 3.

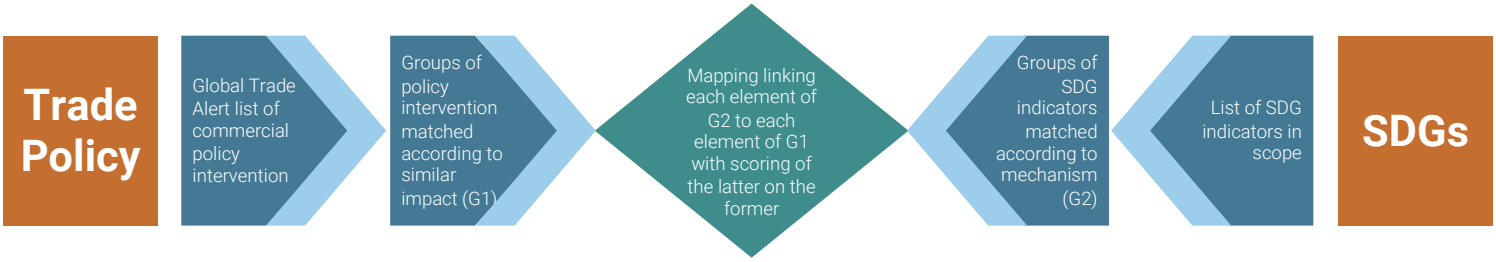


Figure 2

All that remains is ensuring that commercial policy interventions affecting iron (say) in no way influence the assessment of the impact of commercial policy interventions on SDG indicators relating to food (say). When assembling the sample of relevant commercial policy intervention for each in-scope SDG indicator, we applied appropriately chosen filters. Those filters may apply to specific words mentioned in the statement of a SDG indicator, to relevant six-digit product codes in the UN Harmonized System, or to specific three-digit sector codes in version 2.1 of the UN CPC system.

Table 4 provides summary statistics on the number of commercial policy interventions worldwide that can be linked to a SDG indicator using the mapping described above. Of the almost 50,000 commercial policy interventions in the Global Trade Alert's inventory of unilateral policy steps, a total of 37,528 can be related to one or more SDG indicators. A quarter of unilateral policy steps could not be linked to one of the 61 in-scope SDG indicators (but, in principle, they could affect an out-of-scope SDG indicator).

Of the 37,528 policy interventions affecting in-scope SDG indicators, just over half of them (19,672 to be precise) were implemented after Agenda 2030 came into force at the beginning of 2016. This finding will allow us to examine whether the implementation of SDGs affected the propensity of governments to choose commercial policy interventions that better attain the objectives of Agenda 2030.

The number of commercial policy interventions identified as relevant to each SDG varies considerably across the seven SDGs studied in this report. Fewer than 3,000 distinct commercial policy interventions were identified as relevant to SDG 3 whereas over 28,000 were found to potentially affect the indicators in SDG 9. Given that SDG 9 includes several indicators that refer to different aspects of supply side performance in national economies, then maybe this disparity is not that surprising.

In light of a concern mentioned in the last chapter, one interesting finding relates to the number of SDG indicators affected by each commercial policy intervention. Bearing in mind that our analysis considers 61 different SDG indicators, Figure 3 shows the shares of commercial policy interventions implemented since 2016 that affect different numbers of SDG indicators.

Less than 4% of policy interventions affecting cross-border commerce affect a single SDG indicator. The modal policy intervention affects four SDG indicators. In addition, 44% of such policy intervention improved one SDG indicator while worsening another. Arguably, these findings complicate the assessment of the impact of commercial policy intervention on the SDGs. Indicator-by-indicator assessments and even SDG-by-SDG assessment may miss important knock-on effects of commercial policy.

Table 4

SDG	Total number of relevant commercial policy interventions (all years in Global Trade Alert database)	Total number of relevant commercial policy interventions (2016 onwards)	Share of commercial policy interventions contributing positively to this indicator (2016 onwards)	Share of commercial policy interventions that liberalise commerce (2016 onwards)	Number of customs territories implementing commercial policy interventions (2016 onwards)
1	20408	10946	0.25	0.22	183
2	12772	7070	0.71	0.28	176
3	2838	1825	0.33	0.22	117
6	5414	3291	0.2	0.19	123
7	12616	7198	0.53	0.16	157
9	28585	15391	0.76	0.19	178
14	3737	2023	0.25	0.16	146
All SDGs	37528	19672	0.45	0.24	192

Box 1: Features of the economic model employed here

To the extent that commercial policy influences development outcomes it is through its effects on market outcomes. International trade economists have developed economic models of market outcomes so as to better understand the consequences of policy intervention. Those models differ in complexity and in how well known they are. It is worth bearing in mind the maxim "all models are wrong but some are useful." Although the small open economy economic model of a single competitive market almost certainly ignores certain pertinent features, this approach has several virtues:

- It can be readily understood.
- It can be generalised in some respects without undermining the key implications for assessing the impact of commercial policy on SDG indicators.[3]
- It can act as a benchmark against which the development of more sophisticated approaches can subsequently be compared.
- It highlights that there may be some commercial policy interventions have no direct effect on sourcing-based SDG indicators.[4]

Yet we recognise that this economic model will not take account of:

- Any effects of commercial policy intervention in a given market on markets upstream or downstream.
- The economy-wide resource reallocation effects that can arise when a government alters commercial policy towards many goods and services.[5]
- Situations where a nation's commercial policies affect world prices for the good in question.
- Longer term effects in a competitive market that arise from the entry of new firms, the exit of incumbent suppliers, and the incentives of new or existing firms to invest in new plant, new product and service offerings, and to innovate in general.

The single competitive market small open economy model is probably best thought of revealing the short run effects of commercial policy in the market where consumers, domestic suppliers, importers, or foreign suppliers are directly affected by the implementation of such intervention.

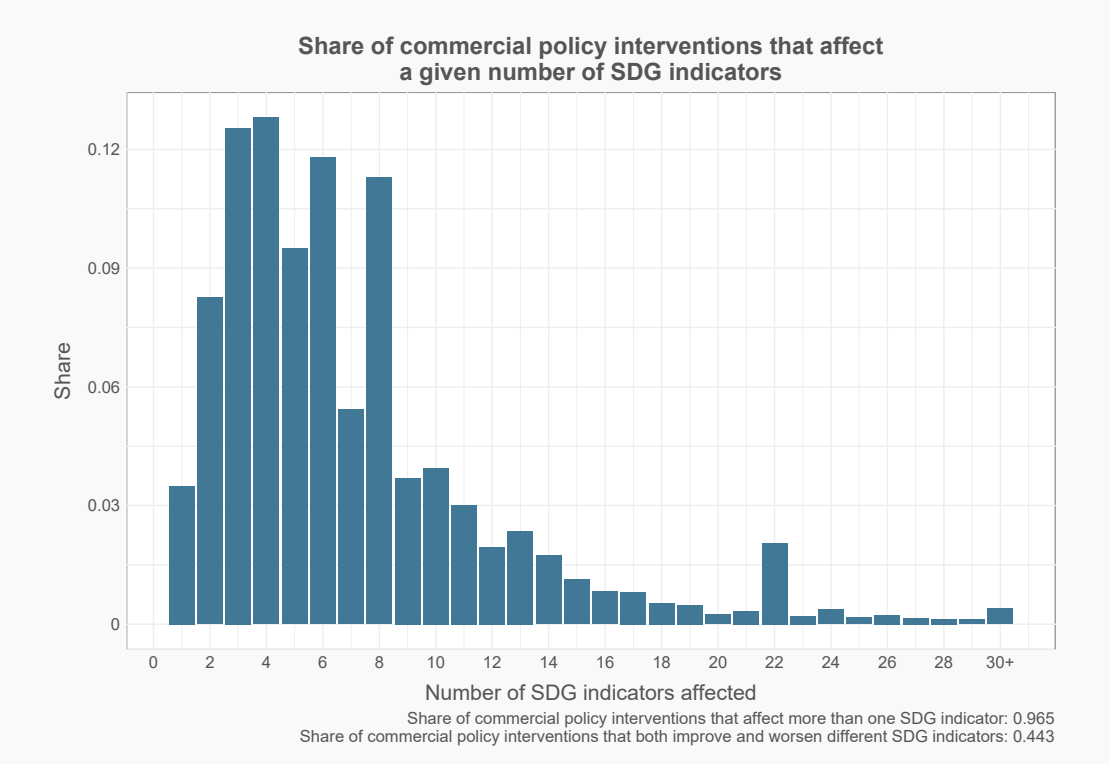


Figure 3

3 For example, the assumption of a competitive market can be replaced with models where firms have market power. As is well known in the international trade literature, under these circumstances reductions in import barriers still deliver lower prices to consumers and have the additional merit of taming some of the market power of incumbent firms. Another generalisation that does not affect the principal findings is the inclusion of international transportation costs, especially of an ad valorem (fixed percentage) variety.

4 Even the economic model applied here then challenges any assumption that the implementation of a commercial policy intervention must improve or worsen a SDG indicator. Thinking in such dichotomies is misleading.

5 So-called general equilibrium effects of commercial policy intervention.

CHAPTER 3: SINCE AGENDA 2030 CAME INTO EFFECT HAS COMMERCIAL POLICY CONTRIBUTED MORE TO SUSTAINABLE DEVELOPMENT?

Making use of the Global Trade Alert's (GTA's) sizeable inventory of commercial policy intervention[6], the primary purpose of this chapter is to examine whether breaks in government behaviour can be observed after Agenda 2030 came into effect on 1 January 2016. Such breaks in behaviour might be observed in aggregate statistics relating to the 61 SDG indicators analysed in this report, at the level of individual SDGs, or in relation to measures that liberalise or distort commerce. Evidence on each is presented in this chapter.

The GTA inventory is well placed to shed light on these matters given that it contains information on nearly 50,000 unilateral commercial policy steps taken by governments since November 2008 (recall the statistics in the final row of Table 1 in Chapter 2).[7] This inventory is viewed by the IMF and others as having the most comprehensive coverage of tariff and non-tariff measures witnessed around the world since the Global Financial Crisis.

Unlike official monitors of commercial policy intervention, the GTA team is not confined to processing information supplied by governments. Instead, tools are used to recover information on relevant commercial policy developments from official websites. The GTA team is aligned with official monitors in requiring, wherever possible, policy intervention to be documented using official sources. The GTA's independence from governments avoids the pressures faced by other monitors. As of December 2022, the GTA database contains information on commercial policy interventions taken by 195 customs territories.

Each implemented commercial policy intervention recorded in the GTA inventory includes amongst other facts information on the identity of the implementing jurisdiction, the date of implementation, the date a measure was terminated (where relevant), and the products and/or sectors affected by the intervention. Each implemented intervention is assessed as to whether it improves the relative treatment of foreign suppliers vis-à-vis domestic rivals; if so, it is deemed a liberalising measure. If not, it is deemed a harmful or (commerce-) distortive measure.

The systemic quantitative evidence presented here complements case studies and other analyses with narrower scope. Indeed, the former may confirm or contradict impressions and conclusions arising from the latter. We contend that, from time to time, it is healthy that the narratives which emerge on major international policy questions (perhaps informed by qualitative evidence, perhaps informed by less) are confronted with quantitative evidence derived from systems-wide analyses. More generally, we see our analysis as contributing to evidence-based policy assessment and making—the fact that this point needs making is telling during times like these.

Amount and form of commercial policy intervention affecting the SDGs since 2016

A total of 19,672 commercial policy interventions have been implemented since 1 January 2016 which affect one or more of the 61 SDG indicators that are within the scope of this study. A total of 192 customs territories were responsible for implementing these policy interventions (see Table 4 in chapter 2). Forty-five percent of them are deemed to have contributed positively towards attaining a SDG indicator. The implementation of another 27% very likely worsened a SDG indicator and the remainder (28%) were deemed to have no effect on a SDG indicator. Twenty-four percent of the commercial policy interventions implemented since 1 January 2016 that affected a SDG indicator studied here liberalised some form of cross-border commerce.

6 For information on the construction of this inventory see Evenett (2019) and the GTA handbook.

7 Formally, the GTA database includes information on implemented and announced commercial policy interventions. Those policy interventions that were announced but not implemented do not play a part in any of the calculations performed in preparing this report. Therefore, all empirical findings refer to commercial policy interventions where there is a known date of implementation and where implementation occurred at some point since 2016.

Information on the broad classes of commercial policy interventions implemented since 2016 is provided in Figure 4. The top panel of this figure refers to the shares of implemented interventions that improved a SDG indicator and the bottom panel to those that worsened an indicator. Information is presented in each panel on each of the seven SDGs studied here. Some findings were expected. For example, the largest category of intervention adversely affecting indicators in SDG 14 (Life under water) were subsidies. In contrast, corporate subsidies play a prominent role in improving indicators in SDG 9.

Import measures accounted for more than half of the implemented measures that improved three SDGs and worsened five SDGs (see both panels in Figure 4). Export measures appear more prominently in the panel associated with worsening the SDGs falling within the scope of this study. Non-subsidy-related behind-the-border measures account for small shares of implemented measures in both panels, with the exception of measures improving indicators in SDG 7. In interpreting these findings and the evidence in Figure 4 it is worth recalling the reported shares are based on counts of policy interventions rather than the impact of that intervention.

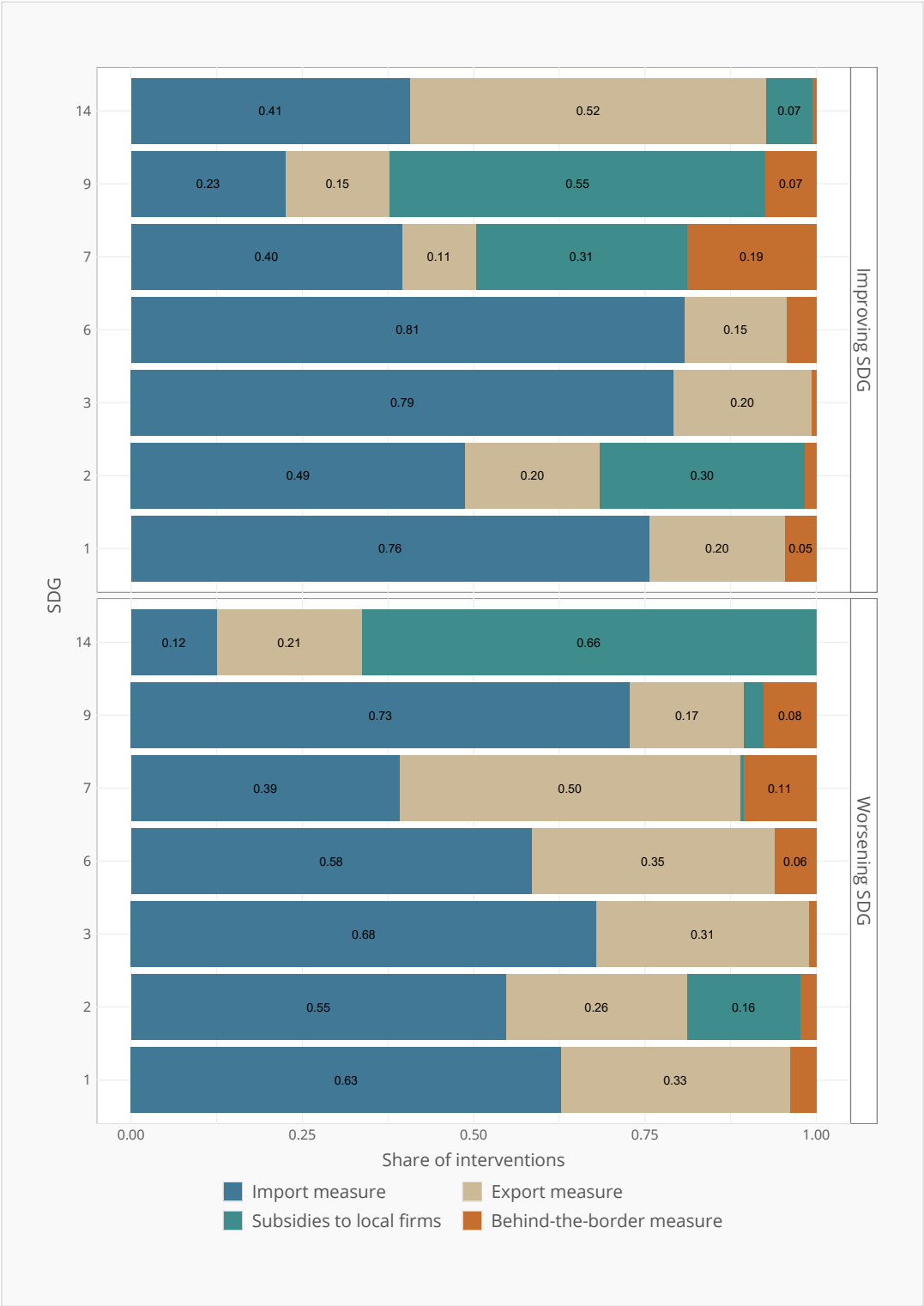


Figure 4

As to the volume of commercial policy intervention affecting the SDGs since 2016, see Figure 5. This figure reports the annual average rates of implementation of new commercial policy measures before and after 1 January 2016. Since Agenda 2030 was implemented the number of new commercial policy interventions ranged on average from 72 per annum (SDG 14) to 1,653 per annum (SDG 9). SDGs 2, 7, and 9 witnessed the most intervention since the start of 2016; SDGs 3, 6 and 14 each saw less than 100 new commercial policy interventions implemented per year.

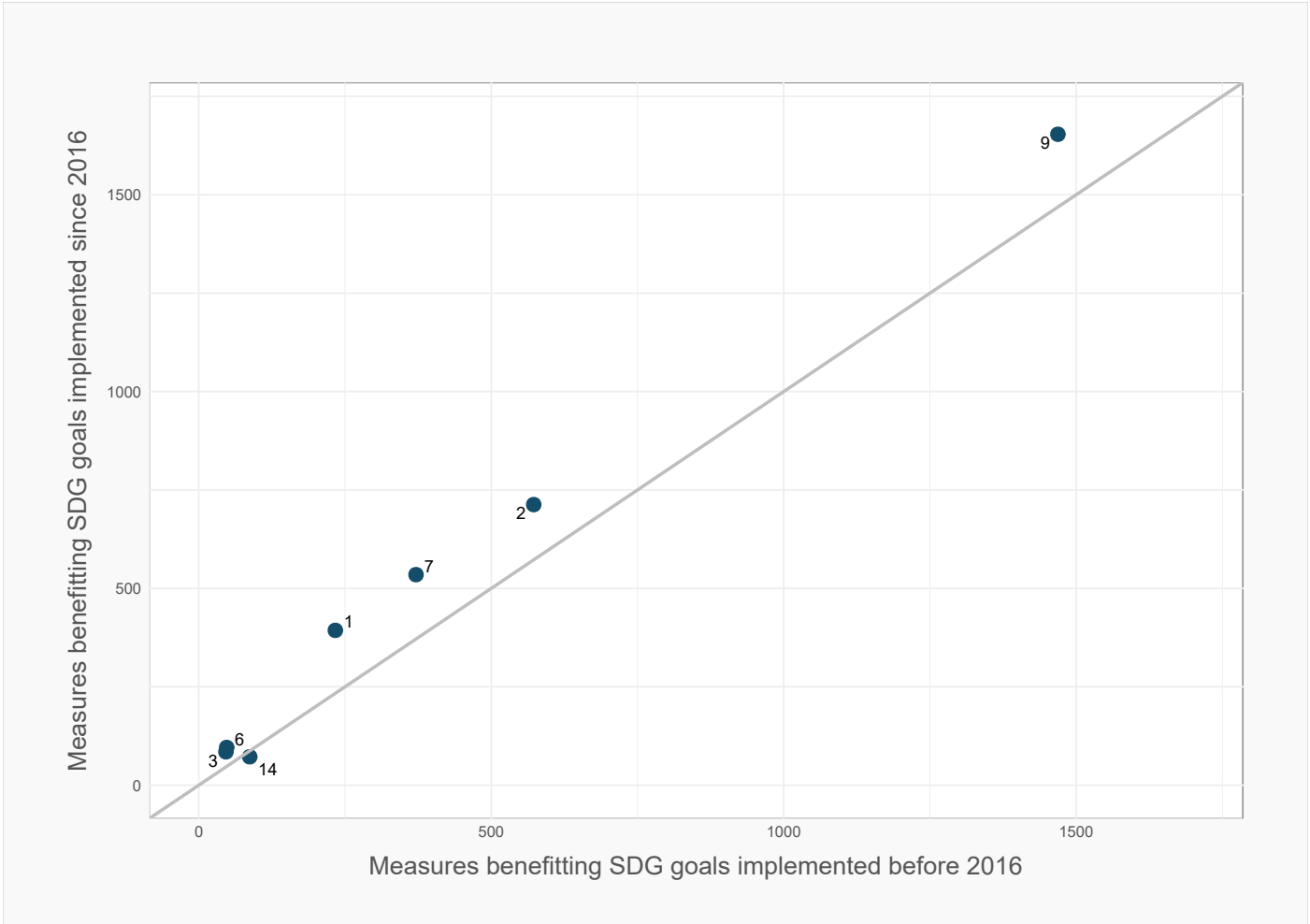
Was there a break in government resort to commercial policy interventions affecting the SDGs?

The short answer is that, while there is some conflicting evidence, the answer is probably not. First, as Figure 5 shows, other than SDG 14, annual resort to commercial policy intervention affecting the SDGs rose. Annual resort to commercial policy interventions that happen to affect SDGs 3 and 6 rose by more than 80% after Agenda 2030 came into effect, although from low bases. In contrast, annual resort to commercial policy intervention affecting SDG 14 fell 17%.

Second, taking together all the commercial policy interventions affecting the SDGs, the percentage that positively contribute to one or more SDG indicators is little changed once Agenda 2030 came into effect (the percentage falls from 46% to 45%). In contrast, the percentage of interventions that worsen SDG indicator performance falls from 33% to 27%. As a result, there is shift towards commercial policy interventions have a neutral (or no) effect on SDG indicators (the percentage rises there from 21% to 28%).

Third, as shown in Figure 6, once Agenda 2030 came into effect the share of commercial policy interventions improving a SDG indicator increased for SDGs 1, 3, 6, and 7; is unchanged for SDG 2; and fell slightly for SDGs 9 and 14.[8] But in each case the differences in the reported shares before and since 2016 are very small.[9]

Figure 5



8 In this figure the shares are calculated based on the number of intervention-tuples found. If the additional requirement is imposed that each indicator within a SDG has the same (equal) weight then the reported shares of commercial policy intervention improving a SDG fall but the pattern of changes over time remain the same.

9 We also plotted the separate charts similar to Figure 6 for liberalising and harmful commercial policy interventions. We confirmed the finding in Figure 6 of very small changes in the shares of commercial policy interventions whose implementation improved SDG indicators.

What conclusions do we draw from these findings? Since the start of 2016 annual resort to commercial policy intervention that affect the SDGs rose (by about 10%). But annual totals of resort to all forms of commercial policy intervention rose over the same time frame by a larger percentage (32%). Therefore, since Agenda 2030 came into effect, while governments worldwide resorted to more commercial policy intervention the share that affected the SDGs studied here actually fell.

Furthermore, the mix of commercial policy intervention improving SDG indicators remained unchanged. There was a shift away from commercial policies worsening SDG indicators to those that were neutral in their effects. On the basis of these findings, it would be difficult to conclude that there has been a marked shift towards commercial policymaking that promotes sustainable development since Agenda 2030 came into force.

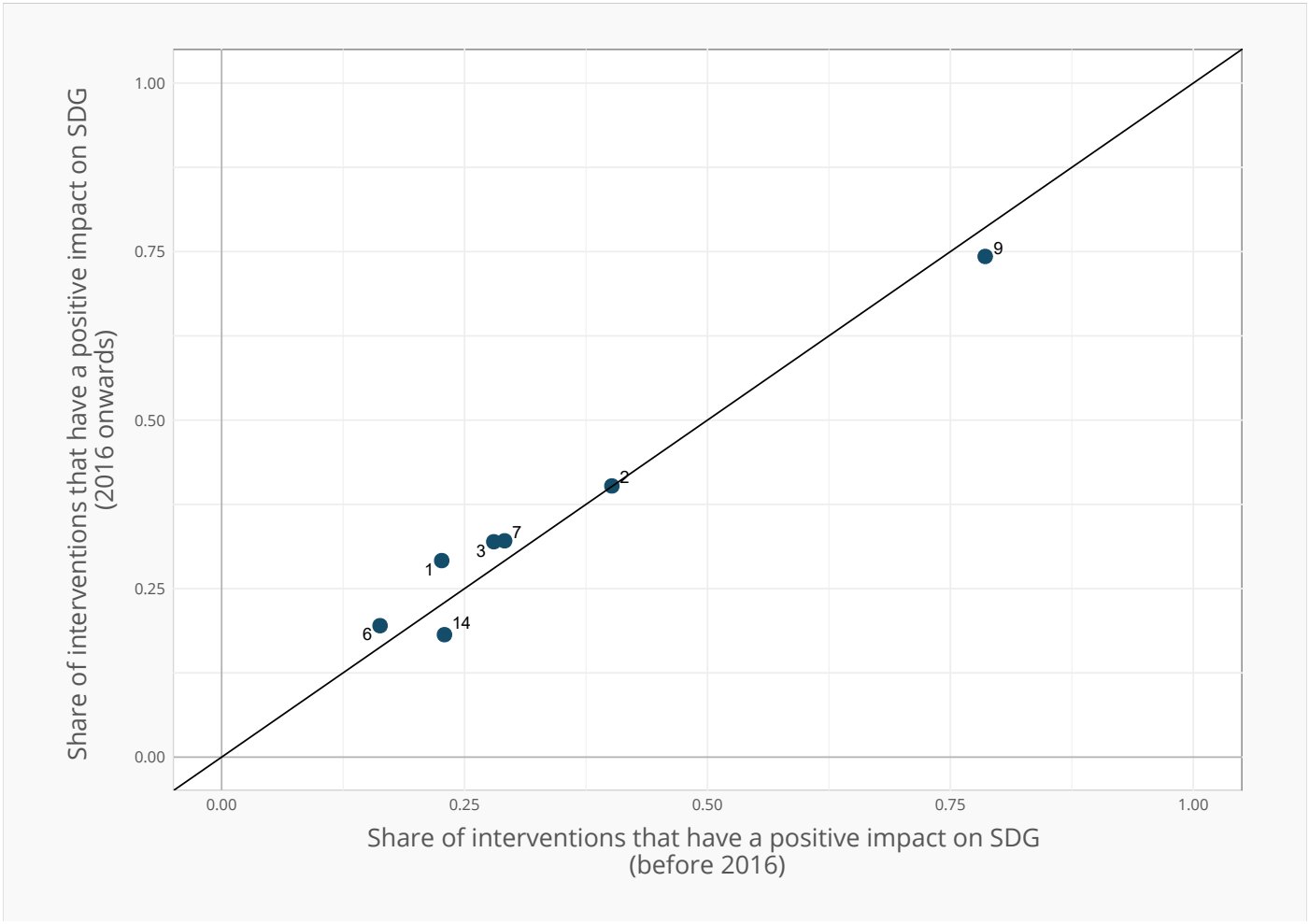


Figure 6

CHAPTER 4: DOES COMMERCIAL POLICY CONTRIBUTE MORE OFTEN TO SUSTAINABLE DEVELOPMENT IN POORER NATIONS?

Although the evidence suggests little shift at the global level toward commercial policies that foster sustainable development, is there any evidence of such a shift among nations with lower per capita incomes? If so, we may take some solace that Agenda 2030 positively influenced government decision-making in respect of trade, investment, and subsidy policies in the jurisdictions where populations are in greatest need.

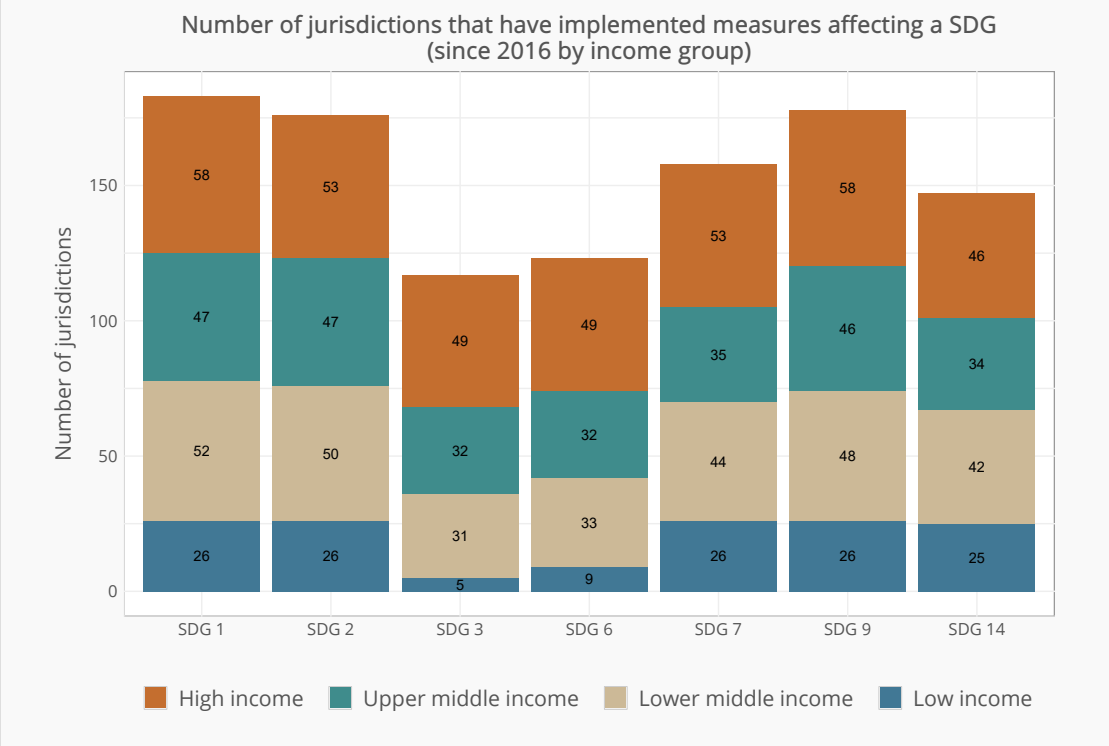


Figure 7

To examine this matter we used the World Bank's distribution of nations into four groups: low income, lower middle income, upper middle income, and high income. The World Bank classifies a nation as low income if its annual per capita income is less than $1,085. Lower middle income nations are those with annual per capita incomes between $1,086 and $4,255. Upper middle income nations have annual per capita incomes between $4,255 and $13,205.

Figure 7 reveals the number of countries in each income group that have taken commercial policy intervention since Agenda 2030 came into effect that impact the seven SDGs studied here. With the exception of SDGs 3 and 6, a total of 25 or 26 low income nations have taken steps that affect the other five SDGs. As this figure shows, our sample of commercial policy intervention also captures large numbers of nations in other income groups.

The commercial policy mix affecting the SDGs since 1 January 2016 varies across income groups, as shown in Figure 8. Interestingly, the upper middle income

countries have an above average resort to corporate subsidies. Lower middle income countries resort more often to import measures. Low income countries resort less often to subsidies and, in the case of some SDGs, disproportionately to export measures[1]. The policy mix adopted by high income nations is distributed more evenly than for the other three income groups and includes larger shares of non-subsidy-related, behind-the-border measures.

Next we explored whether there are marked changes before and since 2016 in the shares of commercial policy intervention contributing positively to the seven SDGs studied here—and whether there are any perceptible differences across income groups. Figure 9 contains four panels, one for each income group.

Looking across the four panels the first striking difference is in the range of the reported shares of positive contributions: the range is greatest for high income nations and smallest for the lower middle income nations.

In terms changes in the shares of commercial policy interventions contributing positively before and since 2016, for low income countries those shares rose for SDG 3 and 6 and fell for SDG 14. The shares for the other SDGs were largely unchanged once Agenda 2030 came into effect. Increased shares of commercial policy intervention by low income nations improving the health-, water-, and sanitation-related SDGs are welcome.

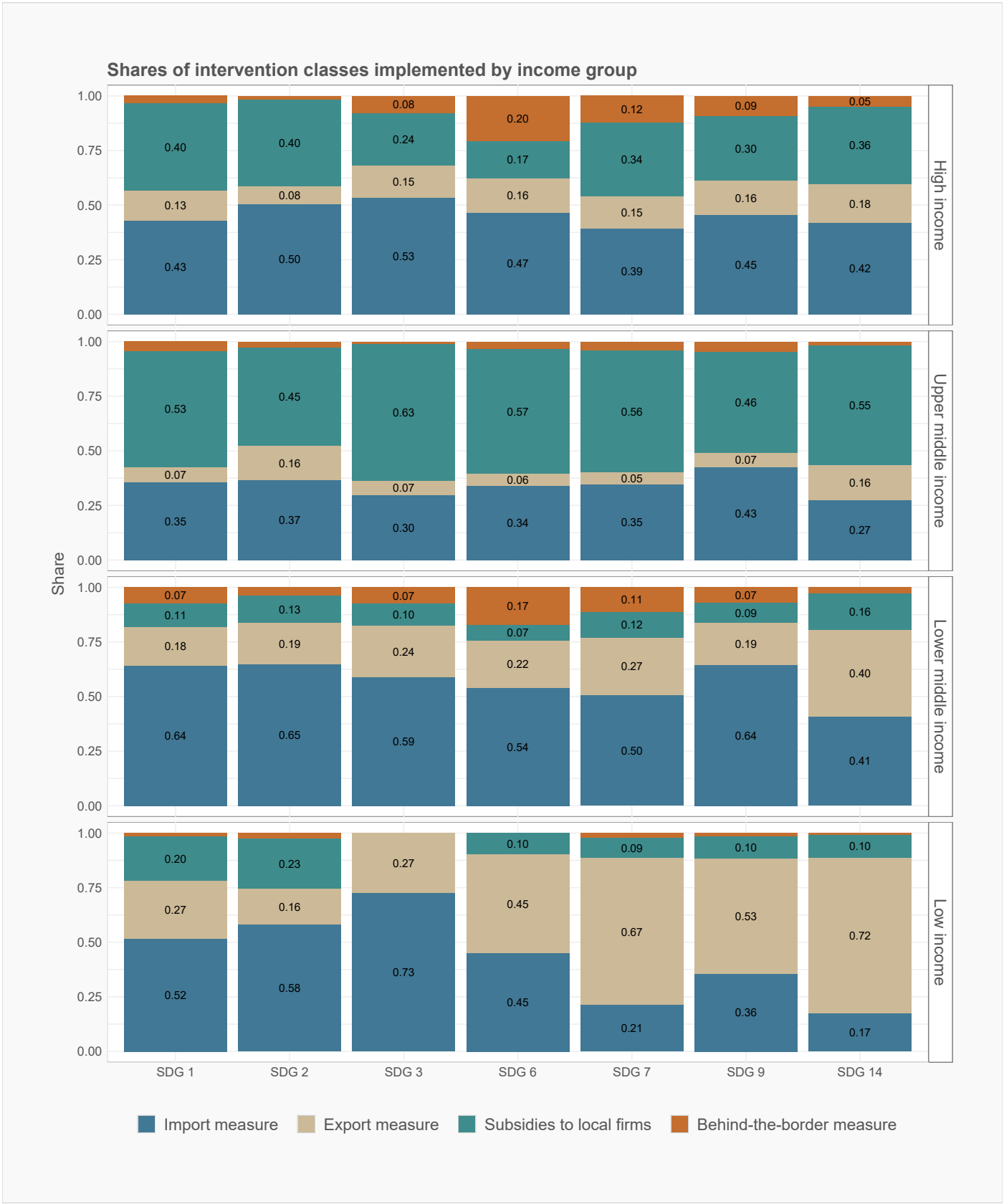
It is also noteworthy that, after Agenda 2030 came into effect, in low income nations the fraction of commercial policies contributing positively has risen above one half for four of the seven SDGs. Nations in no other income group of nations achieved this.

Both lower and upper middle income changes see even smaller changes in shares contributing positively to sustainable development than in the low income countries. For the high income nations the shares of commercial policy contributing positively rise for SDGs 1, 3, and 6 but from very low levels—suggesting a modicum of catch up with other nations.

Overall, there are differences across income groups in resort to commercial policy intervention that fosters sustainable development. The most positive change has been observed in low and high income groups of nations. If anything, the middle income countries—both lower and upper—stand out for how little their commercial policies have changed since Agenda 2030 came into effect, at least on the evidence for the seven SDGs studied here. Together the nations classified by the World Bank as middle income number 108, enough to weigh down any global calculation of change recorded since Agenda 2030 came into effect.

1 Future research may want to investigate whether the differences in adopted commercial policy mix reflect differences in inherited resources (including human capital), extant institutional capacity, development challenges faced, and advice and support received from third parties (including development partners).

Figure 8


Shares of intervention classes implemented by income group
Share
1.00
0.75
0.50
0.25
0.00
High income
0.40
0.13
0.43
0.40
0.08
0.50
0.08
0.24
0.15
0.53
0.20
0.17
0.16
0.47
0.12
0.34
0.15
0.39
0.09
0.30
0.16
0.45
0.05
0.36
0.18
0.42
Upper middle income
0.53
0.07
0.35
0.45
0.16
0.37
0.63
0.07
0.30
0.57
0.06
0.34
0.56
0.05
0.35
0.46
0.07
0.43
0.55
0.16
0.27
Lower middle income
0.07
0.11
0.18
0.64
0.13
0.19
0.65
0.07
0.10
0.24
0.59
0.17
0.07
0.22
0.54
0.11
0.12
0.27
0.50
0.07
0.09
0.19
0.64
0.16
0.40
0.41
Low income
0.20
0.27
0.52
0.23
0.16
0.58
0.27
0.73
0.10
0.45
0.45
0.09
0.67
0.21
0.10
0.53
0.36
0.10
0.72
0.17
SDG 1
SDG 2
SDG 3
SDG 6
SDG 7
SDG 9
SDG 14
Import measure
Export measure
Subsidies to local firms
Behind-the-border measure

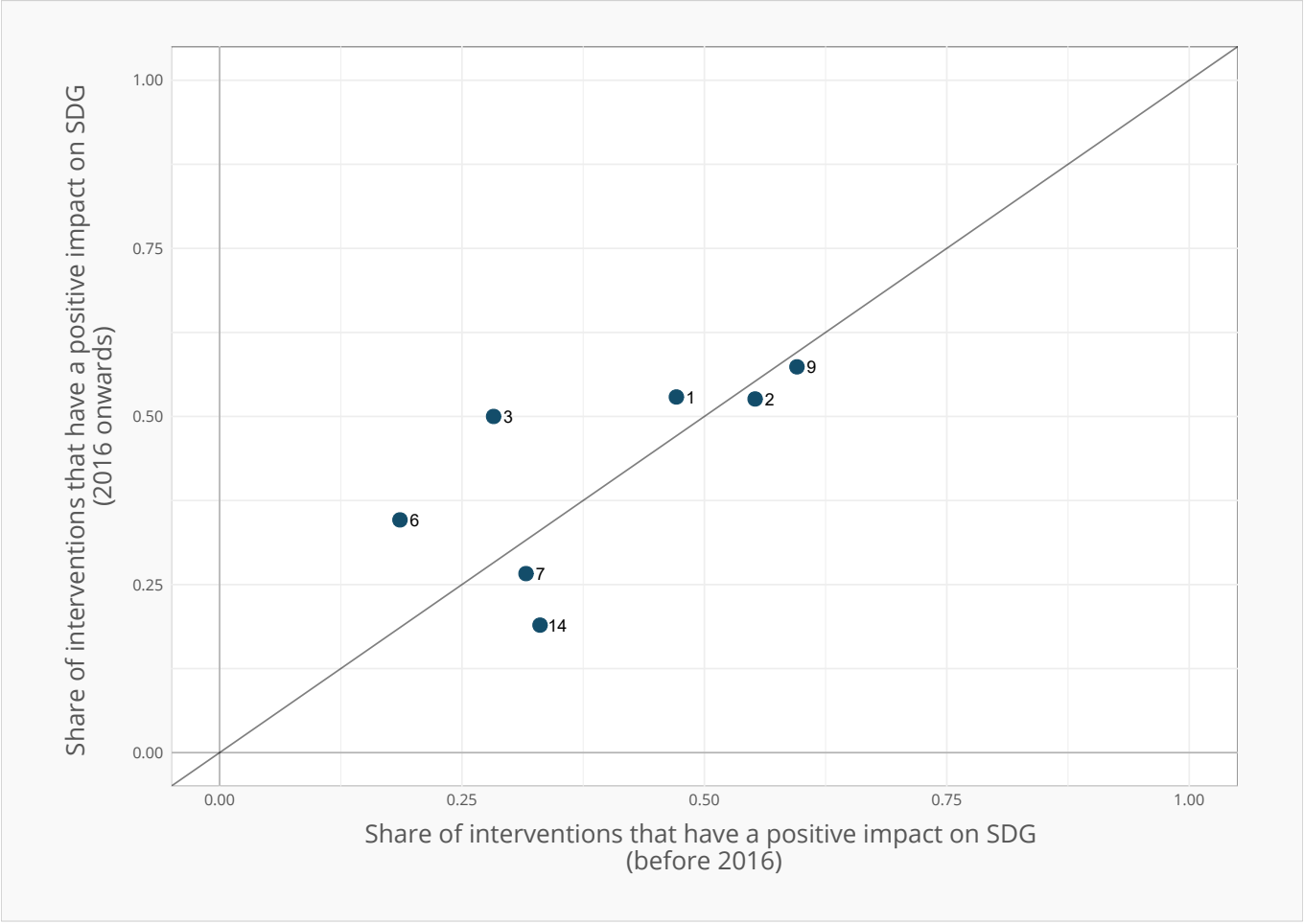


Figure 9 - Low Income

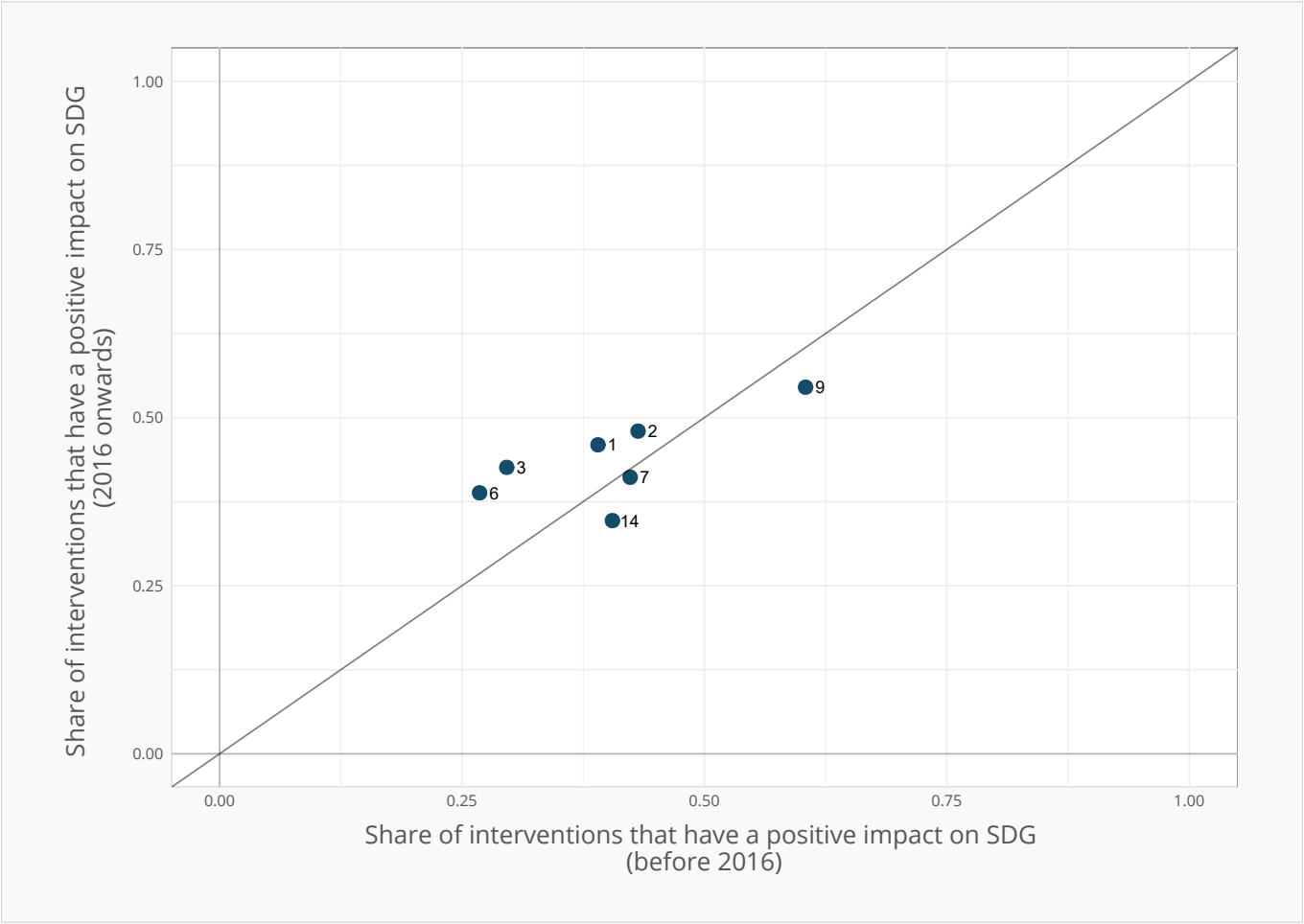


Figure 9 - Lower Middle Income

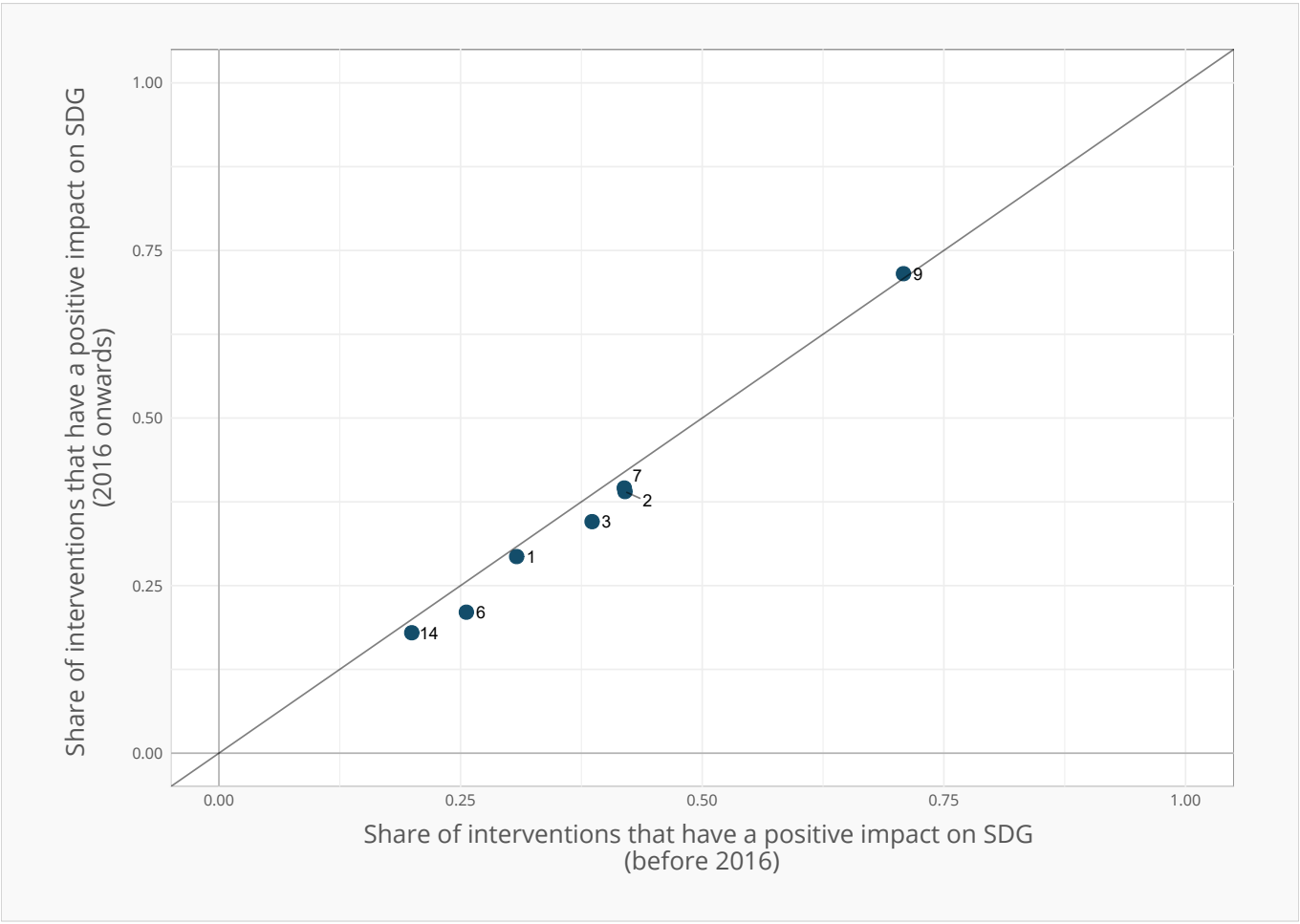


Figure 9 - Upper Middle Income

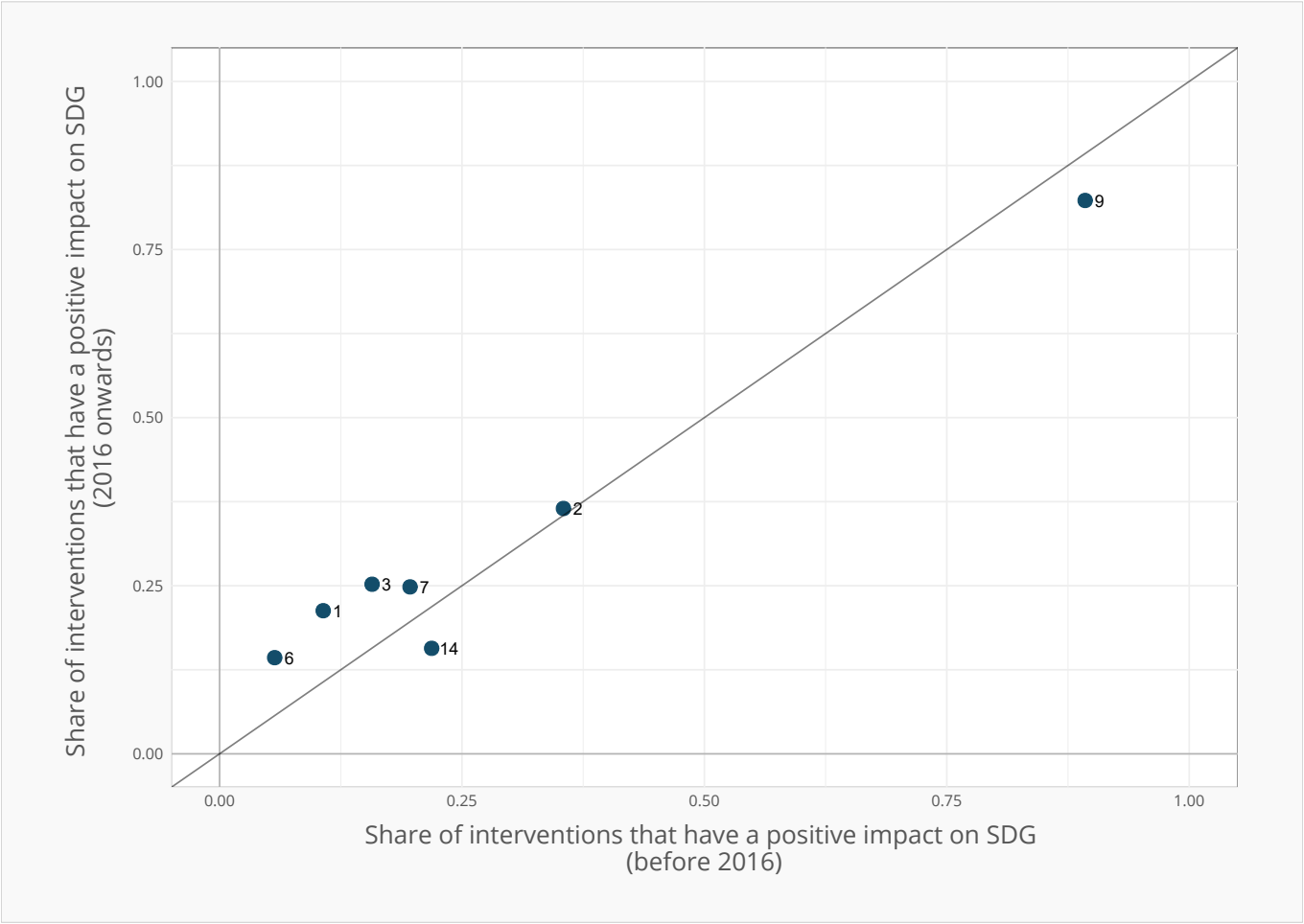


Figure 9 - High Income

CHAPTER 5: DURING THE PANDEMIC HAS COMMERCIAL POLICY THREATENED SUSTAINABLE DEVELOPMENT GAINS?

Governments took many emergency measures—including commercial policy interventions—once the COVID-19 pandemic struck. An oft-voiced concern is that the attendant crisis turned the clock back on progress towards the SDGs. Our interest here, however, is slightly different: whether the commercial policy response to the COVID-19 pandemic has threatened sustainable development gains.

In this chapter we answer the question: to what extent, if at all, did the contribution of commercial policy choice to attaining SDG indicators change from the pre-pandemic years (2016-2019) to the pandemic era (2020-22)? The short answer is, once again, the aggregate statistics suggest "not much" but there is notable variation across the SDGs.

To lay the groundwork for this comparison, we summarise the extent to which the commercial policy mix employed by governments changed once the pandemic hit. For the four classes of policy intervention identified in this study (import measures, export measures, corporate subsidies, and other behind-the-border measures) we computed the changes in the shares of commercial policy intervention attributed to each from 2016-2019 to 2020-22. The difference of the latter minus the former was plotted in Figure 10 for each SDG and for each class of policy intervention.

Interesting similarities in the changing policy mix affecting certain SDGs arise from examining Figure 10. During the pandemic era SDGs 2, 3, and 14 witness fewer import measures, more export measures, and greater resort to corporate subsidies. SDGs 7 and 9 witnessed little change in the commercial policy mix from 2016-19 to the pandemic era, at least as measured by the split between these four classes of policy intervention. SDG 1 (poverty elimination) saw a shift in commercial policy mix away from corporate subsidy awards and towards export measures. Given these disparate results, generalisation is perilous.

Shedding light on the changing policy mix is useful—but the next step is to link those changes to the expected impact on the seven SDGs considered in this study. One indication of the change in the commercial policy contribution to the SDGs is to estimate the change in the shares of measures that improve SDG indicators, worsen them, or have no impact on them (neutral measures). When comparing the shares for 2020-2022 with the comparable shares for 2016-19 for all of the commercial policy interventions found to affect the SDGs, the share of measures facilitating sustainable development rose by 0.02, the share of measures worsening SDG indicators fell 0.02, and the share of neutral measures remained unchanged. From the perspective of SDG implementation, this is good news—and certainly undercuts the narrative that policy overall tends to go in the wrong direction when systemic crises hit.

We also broke down the latter share comparisons by SDG and checked whether they were associated with greater resort to liberalising commercial policy interventions during the pandemic era. The results are plotted for each SDG in Figure 11. The horizontal axis of that figure reveals whether there was an increase during the pandemic era in the share of commercial policy interventions that contributed positively to attaining a SDG—and the points plotted reveal this was the case in four of the SDGs (1, 2, 6, and 7). The vertical axis reveals whether there was an increase in resort to liberalising commercial policy interventions during the pandemic era—and there was not for three SDGs (2, 3, and 14) as is evident from Figure 11.

Furthermore, looking across all four of the quadrants of Figure 11 one can identify five SDGs were the share of positively contributing measures and the share of liberalising measures changed in the same direction during the pandemic era (see the five points plotted in the

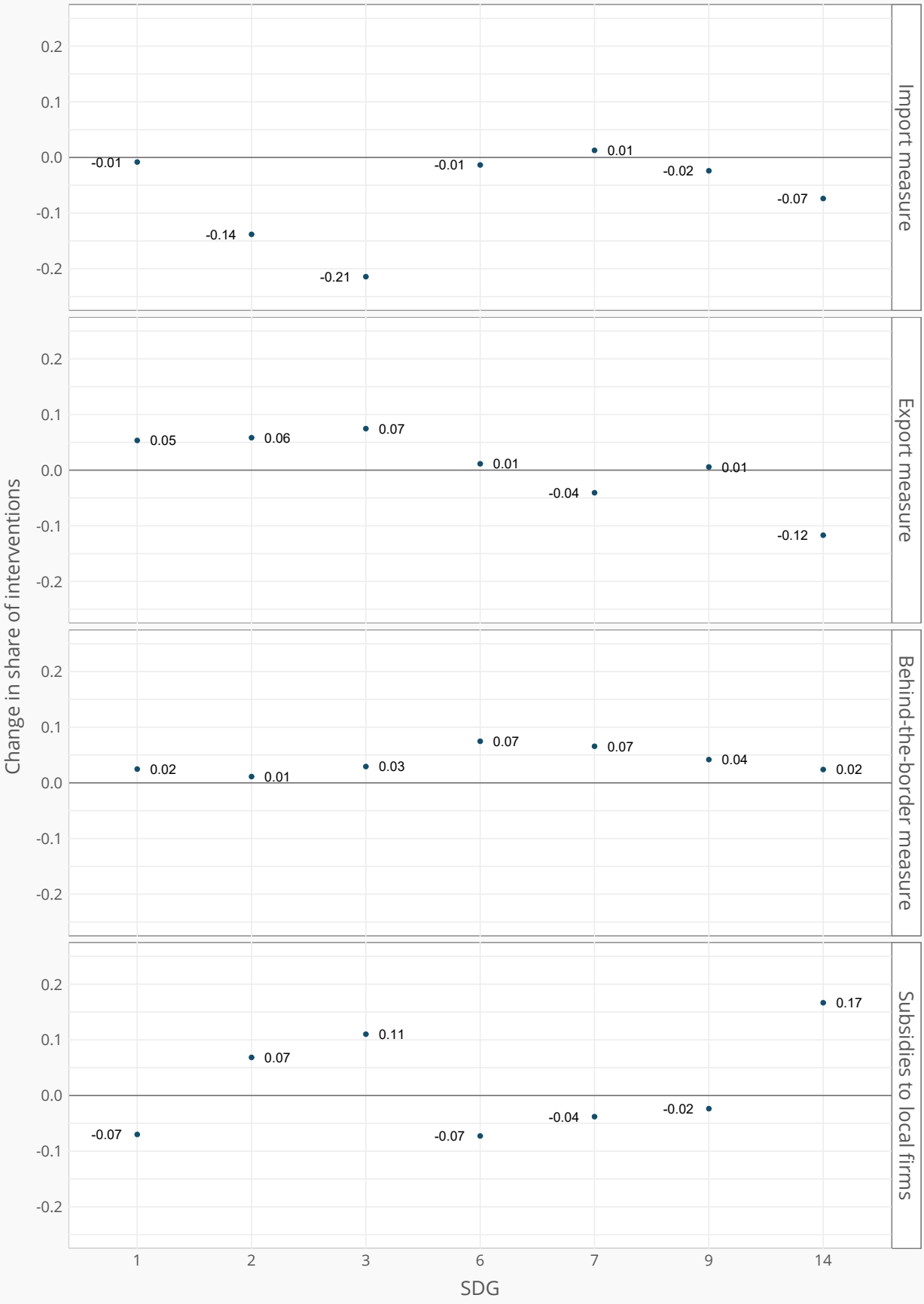
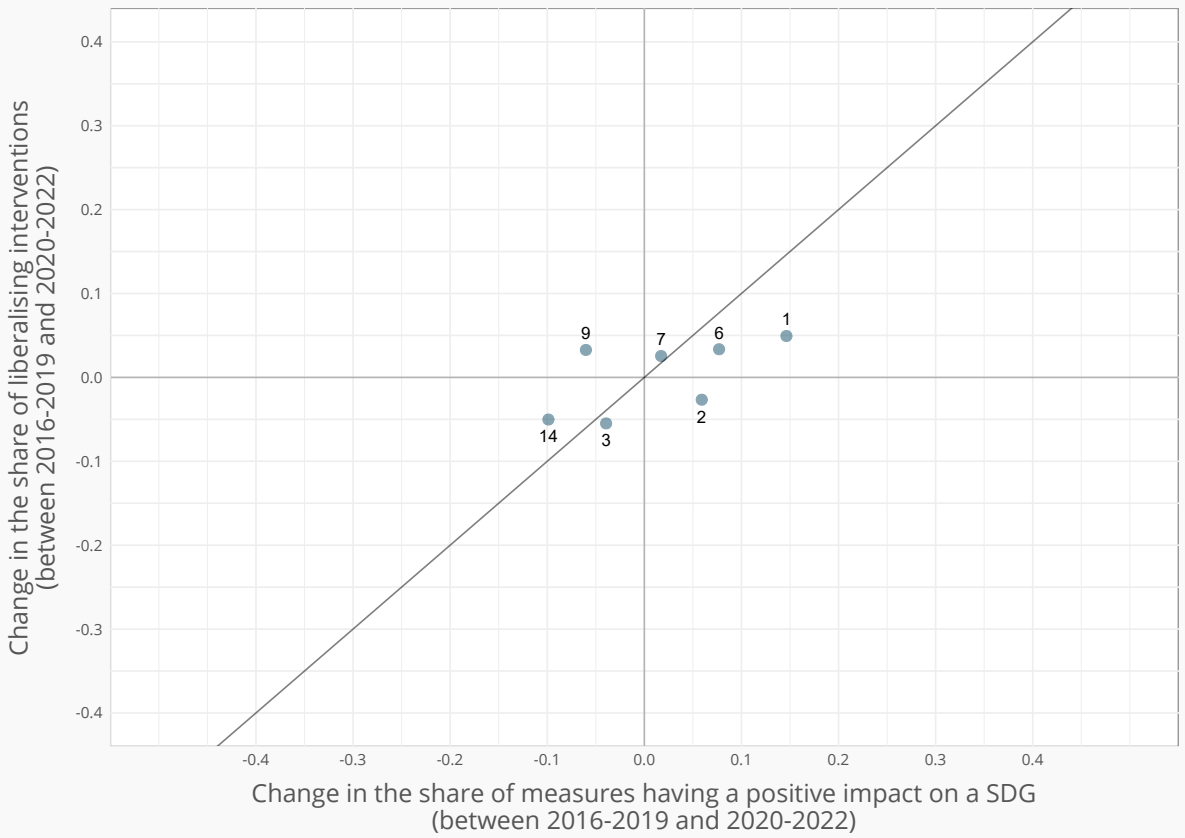

Change in share of interventions
SDG
Import measure
Export measure
Behind-the-border measure
Subsidies to local firms
0.2
0.1
0.0
-0.1
-0.2
1
2
3
6
7
9
14
-0.01
-0.14
-0.21
-0.01
0.01
-0.02
-0.07
0.05
0.06
0.07
0.01
-0.04
0.01
-0.12
0.02
0.01
0.03
0.07
0.07
0.04
0.02
-0.07
0.07
0.11
-0.07
-0.04
-0.02
0.17

Figure 10

Figure 11



top right and bottom left quadrants). However, for two SDGs these shares moved in opposite direction (see the two points plotted in the other two quadrants).

In the case of SDG 2 (Hunger) the share of positively contributing measures was higher during the pandemic while resort to restrictive trade measures (in this case principally export controls on food) increased. In the case of SDG 9, resort to liberalising measures rose during the pandemic era and, given the production-oriented indicators in that SDG, this in turn reduced the share of commercial policy measures that contributed positively to sustainable development.

In sum, during the pandemic a tension arose between commercial openness and promoting sustainable development for two of the SDGs. For three of the other five SDGs studied here, more liberal commercial policies are likely to have contributed to sustainable development. In the latter cases, commercial policy may have offset, in part or in full, other crisis-related factors that tended to reverse prior progress made towards attaining the SDGs.

CHAPTER 6: WHERE ARE THE TENSIONS BETWEEN COMMERCIAL POLICY OPENNESS AND PROMOTING SUSTAINABLE DEVELOPMENT?

It is difficult to escape the conclusion that there can be, in principle, tensions between the successful implementation of the Agenda 2030 and the progressive integration of national markets into the world economy. This logical possibility arises given (a) the way certain SDG indicators have been formulated and (b) the finding in many model-based analyses of trade policy intervention that imposing or raising trade barriers increases the producer surplus of some firms in the implementing jurisdiction (at least in the short run).

However, accepting this logical possibility does not demonstrate that the tension is pervasive. The purpose of this chapter is to use the GTA's inventory of commercial policy intervention to ascertain the extent of this tension.

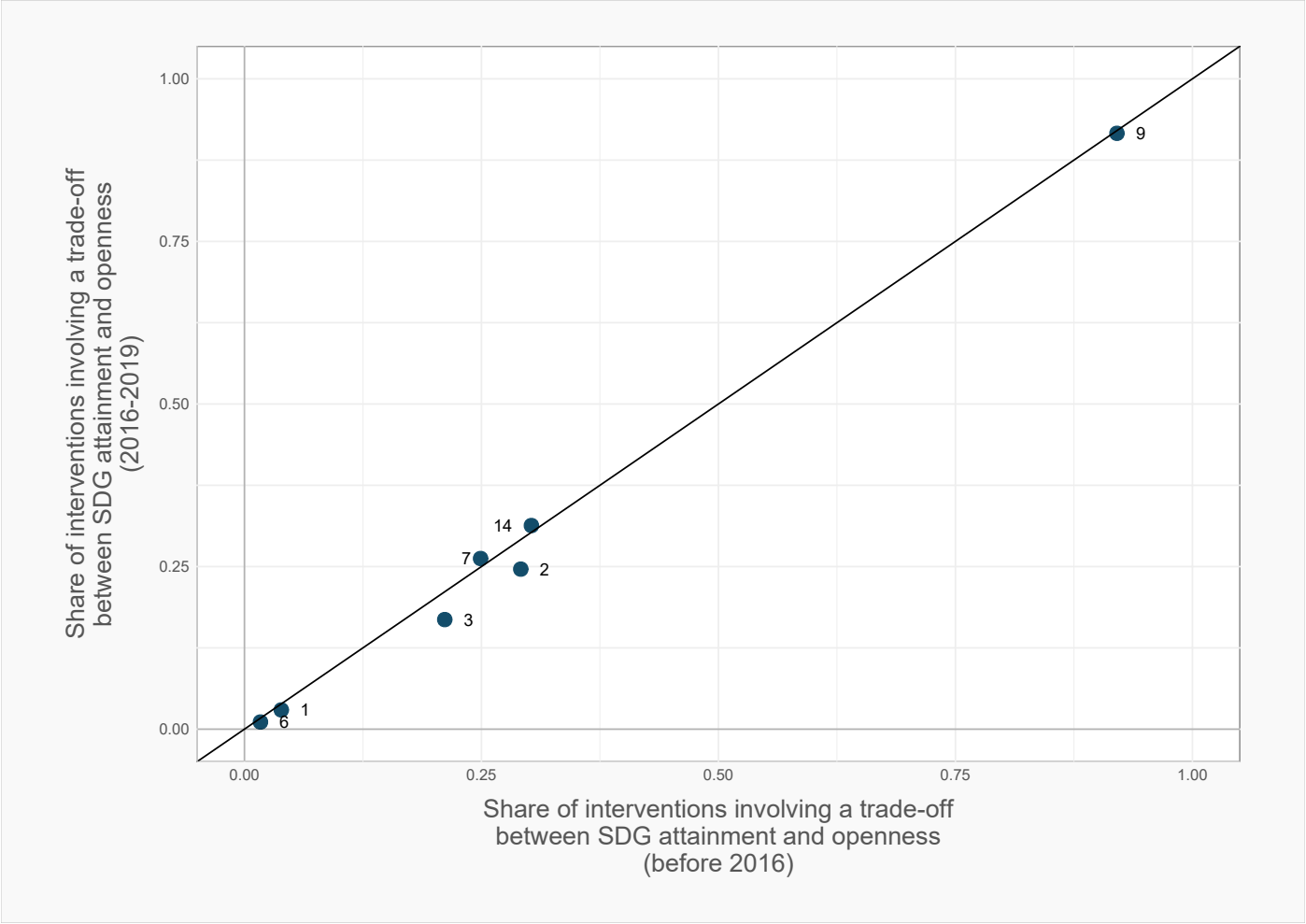


Figure 12

We examine whether this tension has grown over time, comparing the intervention implemented before Agenda 2030 came into effect with the measures taken by governments since 2016. As before, we focus on the seven SDGs associated with the 61 SDG indicators where a mapping between commercial policies and likely impact on sustainable development was prepared for this report.

For the purposes of this chapter and report, a tension is said to exist between commercial openness and the pursuit of sustainable development through commercial policy intervention when the implementation of a state measure:

1. that liberalises some form of cross-border commerce is expected to worsen performance on a SDG indicator, or,
2. that restricts or distorts some form of cross-border commerce is expected to improve performance on a SDG indicator.

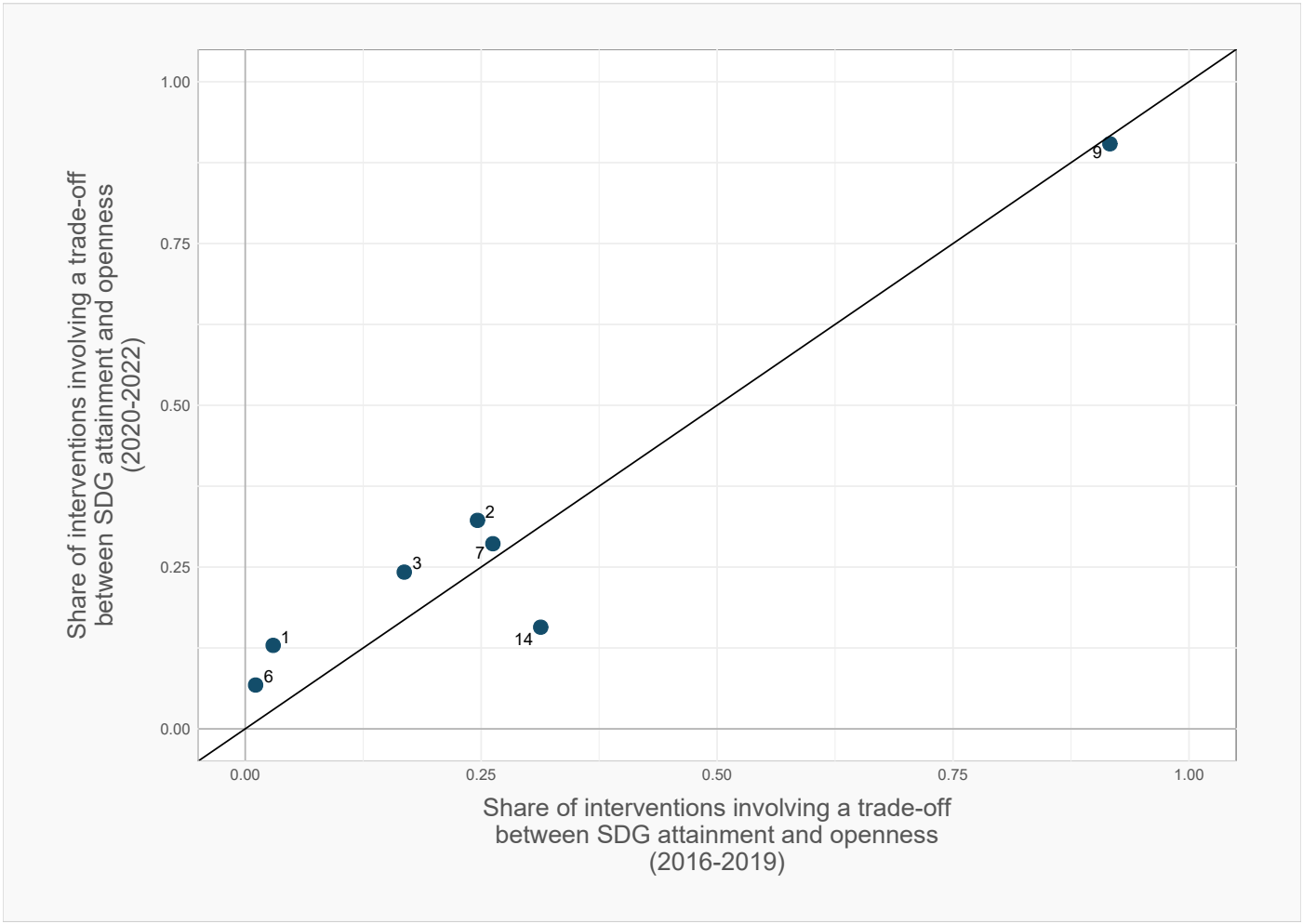
Again, the predicted effect of commercial policy intervention is derived from the analysis of the policy change using the single competitive market, small open economy model described in chapter 2. The tension typically arises when the SDG indicator is classified production+ or production- in the sense described earlier in this report.

An empirical measure of the extent the tension is the share of all commercial policy interventions which satisfy either of the two conditions above. This indicator can be computed for each SDG and for each time frame (before Agenda 2030 came into force, for the years 2016-19, and for the years 2020-22). This indicator is best thought of as a measure of incidence—no claims are made as to magnitude of the effects of such tensions on commercial flows or on the SDG indicators.

For each SDG, the share of commercial policy interventions creating a tension before 2016 and during the years 2016-2019 (the pre-pandemic implementation years for Agenda 2030) were plotted in Figure 12. There are two striking findings. First, the seven SDGs fall into three groups. For SDGs 1 and 6 the tension is practically non-existent in both time periods. For SDGs 2, 3, 7, and 14 the tension is present in approximately a quarter of commercial policy interventions in both time periods. For SDG 9 more than nine commercial policy interventions in ten involve a tension between commercial openness and the (production-based) SDG indicators.

The second striking finding is that this tension neither grew nor diminished significantly once Agenda 2030 came into effect. This is shown by the fact that all of the points plotted in Figure 12 lie on or close to the 45 degree line.

Figure 13



Did commercial policy intervention during the pandemic era break this pattern? By and large, the answer is "no." Figure 13 reproduces Figure 12 but for the time periods 2016-19 (now on the horizontal axis) and 2020-22 (on the vertical axis.) Again, the seven SDGs separate into the same three groups. That the points for five of the SDGs lie a little above the 45 degree line indicates that the tension has worsened slightly with the onset of the COVID-19 pandemic. Having written this, the fact that the point plotted for SDG 14 lies below the line implies that the tension is attenuating in the salient case of fishing.

Figure 14 reveals the extent to which the tension varies across SDG and across groups of nations based on their per-capita income levels. Interestingly, the tension is least apparent in the low income group of nations. In SDGs 1, 6, and 7 the tension is almost non-existent in the lower income group.

Overall, these findings imply that one cannot dismiss out of hand the tension between openness to international commerce and the pursuit of sustainable development through commercial policy measures. Yet, it would be wrong to conclude that this tension is pervasive. Nor does the evidence suggest that this tension has significantly worsened over time.

Given the way certain supply-side SDG indicators were formulated when Agenda 2030 was devised, some degree of tension is almost inevitable. The evidence presented here suggests that for many SDGs measures to open national economies to cross-border commerce do not undermine the pursuit of the Sustainable Development Goals.

Lastly, recall the long-established research finding of the second- or third-best nature of trade policy intervention. The tension evident in SDG 9 calls for consideration of whether non-discriminatory policy interventions could better attain the production-based indicators in that SDG at lower cost to economies than resort to restrictive or distortive commercial policies. If such alternative policies can be found then that will go a long way to reconcile the noble pursuit of Sustainable Development and the precepts of the world trading system.

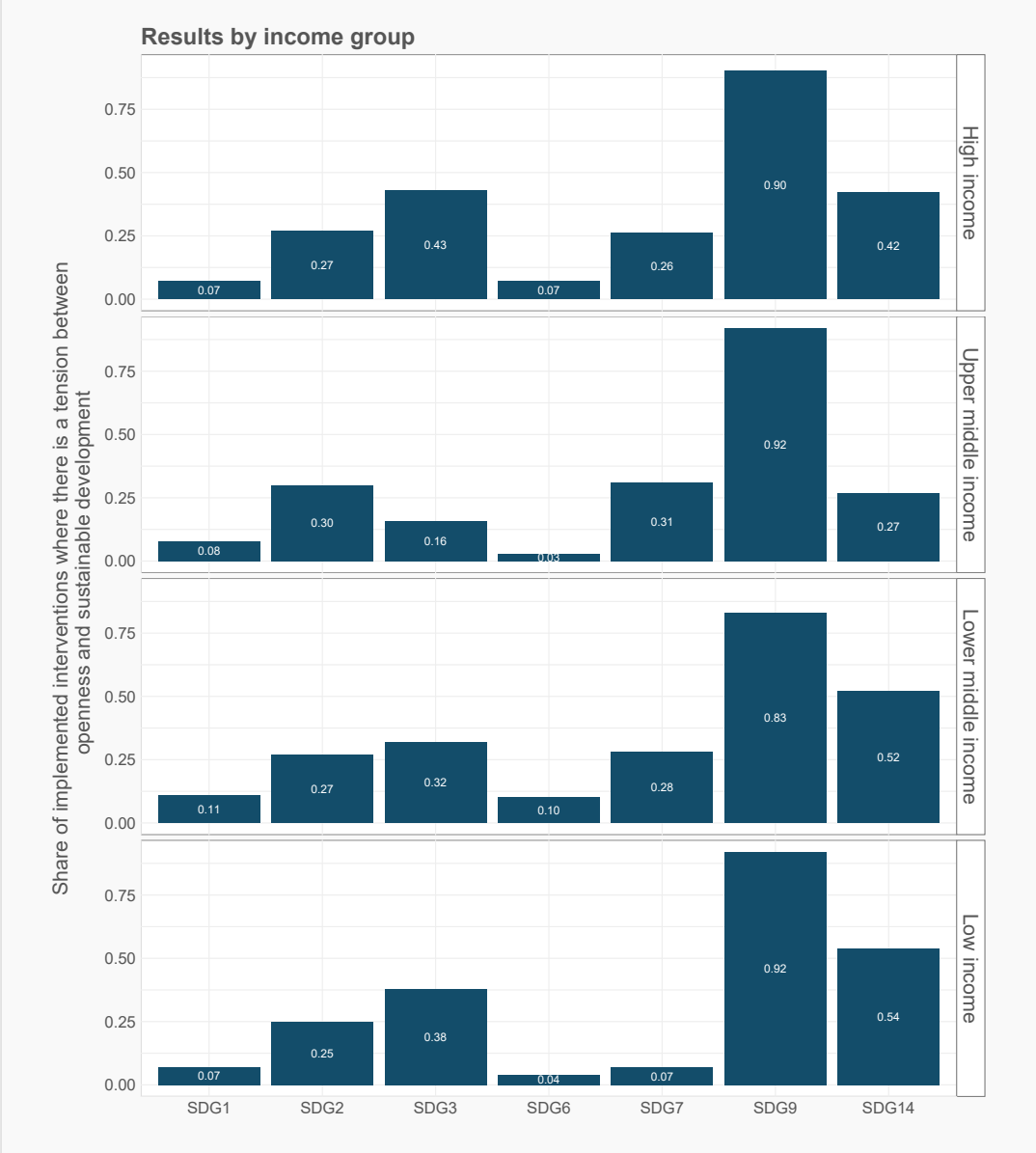


Figure 14

CHAPTER 7: COULD TRADE-FRIENDLY APPROACHES DELIVER MORE? A COMPARISON OF FOUR POLICY OPTIONS

This report started with a discussion of what commercial policy should contribute to sustainable development, conceived these days as attainment of the SDGs. Then the focus shifted to what commercial policy has contributed to SDG indicators before and after Agenda 2030 came into effect. In this chapter the animating question is what more liberalising commercial policy could contribute to improving SDG outcomes. We feel justified asking that question not least because SDG target 14.10 calls on governments to "promote a universal, rules-based, open, non-discriminatory and equitable multilateral trading system under the World Trade Organization."

The empirical record outlined in previous chapters highlighted that, given the way some SDG indicators have been formulated, there can be a tension between further liberalisation of commercial policy and improvements in certain development outcomes. That tension is relevant to the discussion here as, in principle, removing trade barriers could set back "progress" on a SDG, at least as scored by the short run impact predicted by the textbook model of trade policy employed here. Indeed, one goal of this chapter is to examine the degree to which changes in the current pattern of commercial policy intervention support or counter fears that a trade-friendly approach would turn the clock back on sustainable development.

Two "bigger picture" approaches

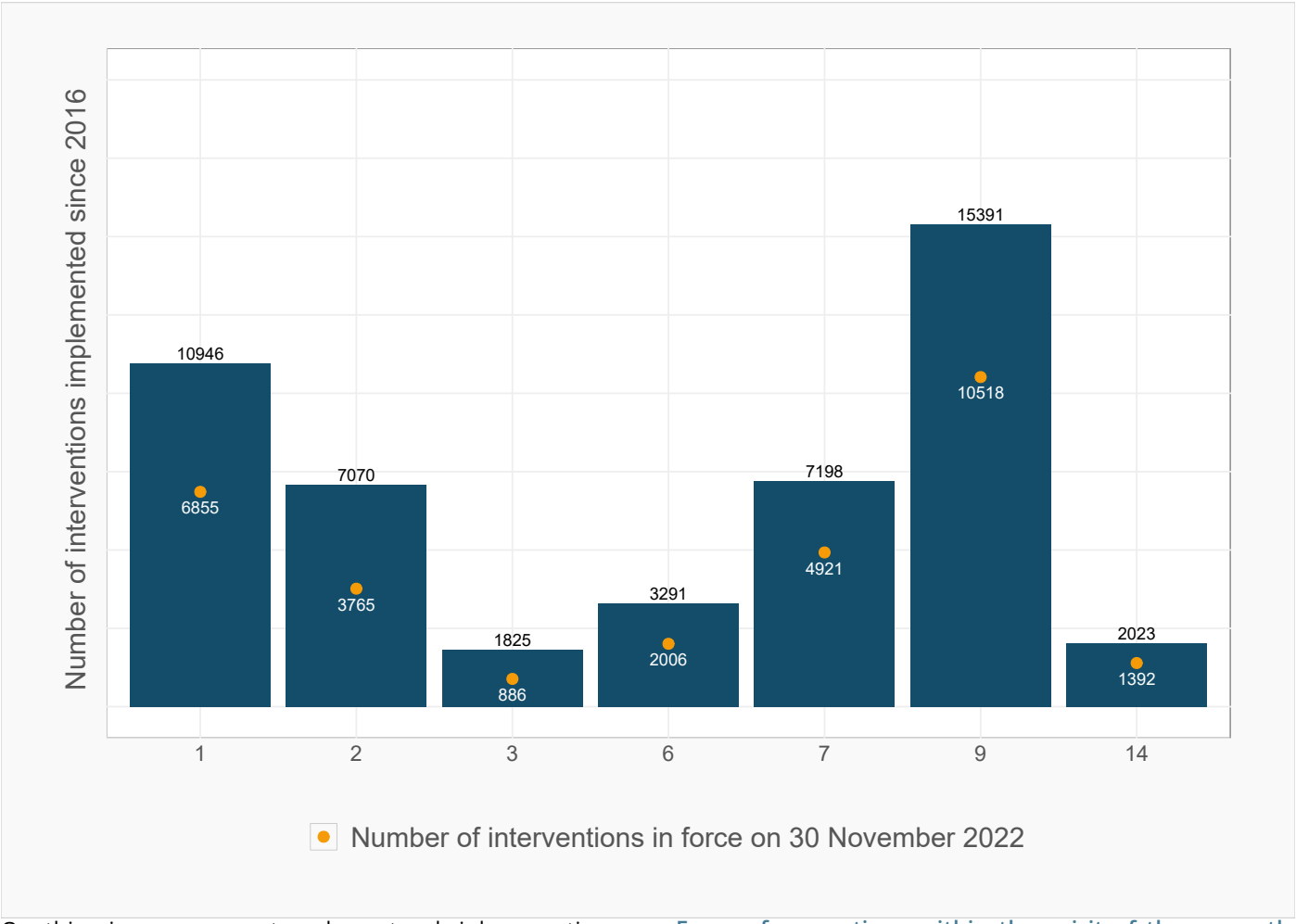
Before examining four specific reform options that take both the current formulation of the SDGs as given and the pattern of commercial policy interventions since 2016 as given, it would be remiss not to mention that there are at least two other approaches to enhancing the contribution of trade-friendly policy approaches to sustainable development.

The first of those two approaches starts by taking the SDGs and associated targets and indicators as currently formulated. It would then recommend disciplining policy choice so that only policy intervention that is least trade restrictive counts towards attainment of a SDG indicator. In practical terms, consider the following example: an import tariff increase would not count positively towards improving a supply-side SDG indicator (such as increasing the value-added created in sustainable manufacturing) if another policy intervention that did not restrict cross-border commerce—or restricted it by less—were available to the government at the time the higher taxes on imports were implemented.

This first approach might go further and encourage the governments of nations at the same level of development to systematically compare the policy interventions employed to attain a given SDG indicator. There are likely to be differences in how trade-restrictive the policy interventions currently deployed are and the recommendation here would be that governments replace their more trade-restrictive policy interventions with less trade-restrictive alternatives. The latter may involve adopting policy interventions that are not traditionally associated with commercial policy. For example, if one goal is to preserve fish stocks then a domestic tax on all fish consumption is preferable alternative to taxing imports of fish.

The second approach would revisit the SDG indicators with an eye to prioritising some of them in light of both our understanding of the broader objectives of the SDGs and our understanding of how cross-border commerce improves economic performance. For example, a centuries-old finding from the analysis when economies open up to international trade, which has been reinforced by more recent cutting-edge analyses of the impact of trade on firms, is that commercial policy reforms reallocate societal resources away from lower productivity commercial activities to higher productivity ones.

Figure 15



On this view, some sectors have to shrink as nations integrate their economies into the world trading system so as to free up resources for other sectors to take advantage of the commercial opportunities on world markets. In which case SDG indicators that relate to employment, productivity, value added or output of specific sectors (or types of sectors) are likely misconceived. For example, if the reason sectors with lots of small- and medium-sized enterprises don't grow much is because firms in those industries have relatively low levels of productivity, then there may be situations where society is better off if resources are reallocated towards more promising sectors.

More generally, the second approach could involve a re-examination of the wisdom of every production-based SDG indicator. The argument could be made that, if the ultimate purpose of economic activity is to support higher levels of consumption of a range of goods and services by the largest number of people, then production-based SDG indicators should be demoted to intermediate aims or abandoned entirely.

Pursuing either of these two approaches would not have implications for every SDG as some important objectives in Agenda 2030 are well beyond the reach of commercial policy. This discussion in no way diminishes the need for legal, social and other societal reforms to meet the latter objectives.

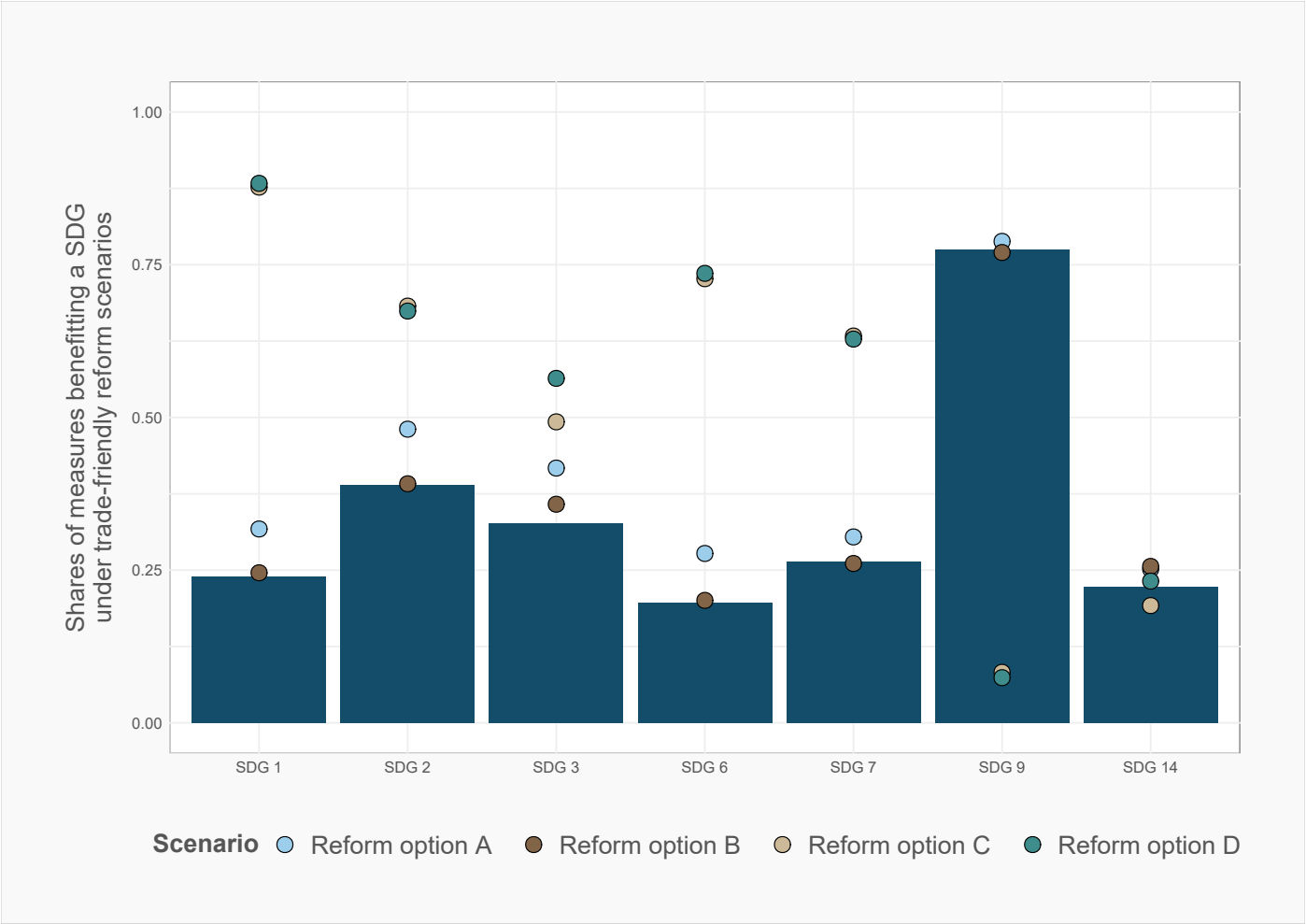
Four reform options within the spirit of the currently formulated SDGs

For those who prefer working with the currently formulated SDGs, there are at least four other trade-friendly reform options to consider. To fix ideas here we consider only those commercial policy interventions in effect on 30 November 2022. Figure 15 reveals the total number of commercial policy interventions in force on that date that affect each of the seven SDGs covered in this study and contrasts those totals with the volume of commercial policy intervention imposed since Agenda 2030 came into effect. Only in the case of SDG 3 have more than half of the commercial policy intervention introduced since 2016 lapsed.

Recall that each commercial policy intervention can improve, worsen, or have no effect on a SDG indicator. Moreover, each intervention will have been classified as liberalising or harmful in the GTA database. Consider then the following metric: the share of commercial policy interventions that improve a SDG indicator. Policy interventions deemed neutral will not add to this metric but liberalising and harmful measures can (depending on the nature of the SDG indicator).

To create a baseline we compute the value of this metric with the commercial policies in place on 30 November 2022. We then recalculate that metric under the following four reform scenarios:

Figure 16



A. Reinstate all liberalising commercial policy intervention implemented since 1 January 2016 that has subsequently lapsed.

B. Remove all harmful commercial policy intervention implemented since 1 January 2016 that has finite duration.

C. Remove all harmful commercial policy intervention implemented since 1 January 2016 that is currently in force.

D. Combine reform scenarios A and C.

These reform scenarios differ in nature. Scenarios A and B relate to finite lived commercial policy intervention. The reform logic underlying scenario B is: if a harmful measure is due to be phased out at a later date, why not consider phasing it out sooner? For scenario A, the reform logic is different: if a government deemed it appropriate to implement a commercial policy reform in the recent past then why not do so again?

Scenario C (and by implication D) addresses permanent harmful commercial policy intervention—or at least such intervention that does not have a published phase-out date. The opposition to removing such permanent discrimination against foreign commercial interests may be greater than in cases when the protection afforded to domestic stakeholders is temporary. Even so it is worth assessing what the impact of scenarios C and D would have on the development metric outlined above.

For each of the SDGs considered in this study, the share of commercial policy interventions that improve a SDG was calculated for each of the four reform scenarios outlined above and the results summarised in Figure 16. It will come as little surprise that, compared to the baseline, the more ambitious reform scenarios (C and D) shift the counterfactual share the most. Put differently, reinstituting previous reforms and early phase-out of finite-length trade restrictions help but only go so far.

For SDGs 1, 2, 3, 6, and 7 the more ambitious trade-friendly reform scenarios would significantly increase the share of policy interventions associated with improve sustainable development outcomes. In all five cases the shares under scenario D would exceed 0.55. In the case of SDG 1 (poverty elimination) the share of commercial policy interventions benefitting that SDG would more than triple and reach 0.88.

The four reform scenarios play out very differently in SDG 9, where the tension discussed in the last chapter plays its part. The counterfactual share calculated for reform scenario C collapses when compared to the baseline

estimate. Put in plain terms, such is the formulation of the production-based indicators in SDG 9 that removal of trade barriers and other harmful commercial policy intervention will reduce short run profitability, employment, and output—which register as regression.

Implementing the reform scenarios would have little impact on the share of commercial policy intervention that improves life below water (SDG 14). At present that share stands at 0.22. Eliminating the time-limited trade distortions (scenario B) raises the share to 0.25, as does the extension of lapsed trade reforms (scenario A). Eliminating all policy interventions that tilt the commercial playing field in favour of domestic interests would reduce one of the SDG indicators and improve two others (relating to subsidy awards)--the former effect dominates and the share under scenario C falls to 0.19.

Can do better, must do better

Evidence presented in earlier chapters of this report revealed how infrequently to date liberalising commercial policy interventions have contributed to attaining the SDGs. This chapter has shown that Past need not be Prologue. Even working within the SDGs as currently specified, there is plenty of scope to foster sustainable development by adopting more trade-friendly commercial policy intervention. More far-reaching conceptions of the positive role that commercial policy reforms at home and the world trading system in general can play are possible too. Cross-border commercial engagement is the handmaiden of sustainable development—if governments want it to be.

PART TWO
THE CONTRIBUTION OF COMMERCIAL POLICIES TO SEVEN SDGS: DETAILED RESULTS

SDG 1: END POVERTY IN ALL ITS FORMS EVERYWHERE

Summary of main findings for SDG 1

	Finding	Comments	Evidence
Number of SDG indicators for which evidence was compiled?	5	Indicators 1.1.1, 1.2.1, 1.2.2, 1.5.3, 1.b.1	See Table 1
Number of times commercial policy interventions since 2016 affect indicators in this SDG	10946	Neutral measures account for largest number of interventions (5193)	See Figure 1
Number of jurisdictions implementing commercial policy measures affecting this SDG since 2016	183		See Table 1
Most common commercial policy intervention types affecting each SDG indicators	1.1.1, 1.5.3: Import measures 1.2.1, 1.2.2, 1.b.1: Subsidies to local firms		See Figure 2
How many SDG indicators does commercial policy intervention harm SDG attainment more than one third of the time (since 2016)?	1 out of 5	Indicator 1.5.3	See Figures 3,4
Since 2016 is there a higher share of commercial policy interventions contributing positively to SDG?	5 out of 5		See Figure 5
Group of nations where commercial policy intervention since 2016 contributed positively most to this SDG?	Lower middle income		See Figure 6
Group of nations where commercial policy intervention since 2016 detracted most to this SDG?	Lower middle income		See Figure 6
Group(s) of nations where share of commercial policy intervention contributing positively to SDG falls since 2016	Low income, Upper Middle Income		See Figure 7
Group of nations that resorted most to time-unlimited policy intervention that contributes positively to this SDG?	Low income		See Figure 8
Group of nations which resorted most to time-unlimited policy intervention that detracts from this SDG?	High income		See Figure 8
Compared to 2016-2019, did the pandemic era see more commercial policy intervention improve this SDG?	Yes	Bigger change from 2016-19 to 2020-22 than pre-2016 to 2016-2019.	See Figure 9
Before SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	No		See Table 2
Since SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	No	Tension grew during Pandemic era due to resort to export curbs.	See Table 3

FIGURE SDG1.1

Breakdown of policy intervention in terms of likely impact on this SDG

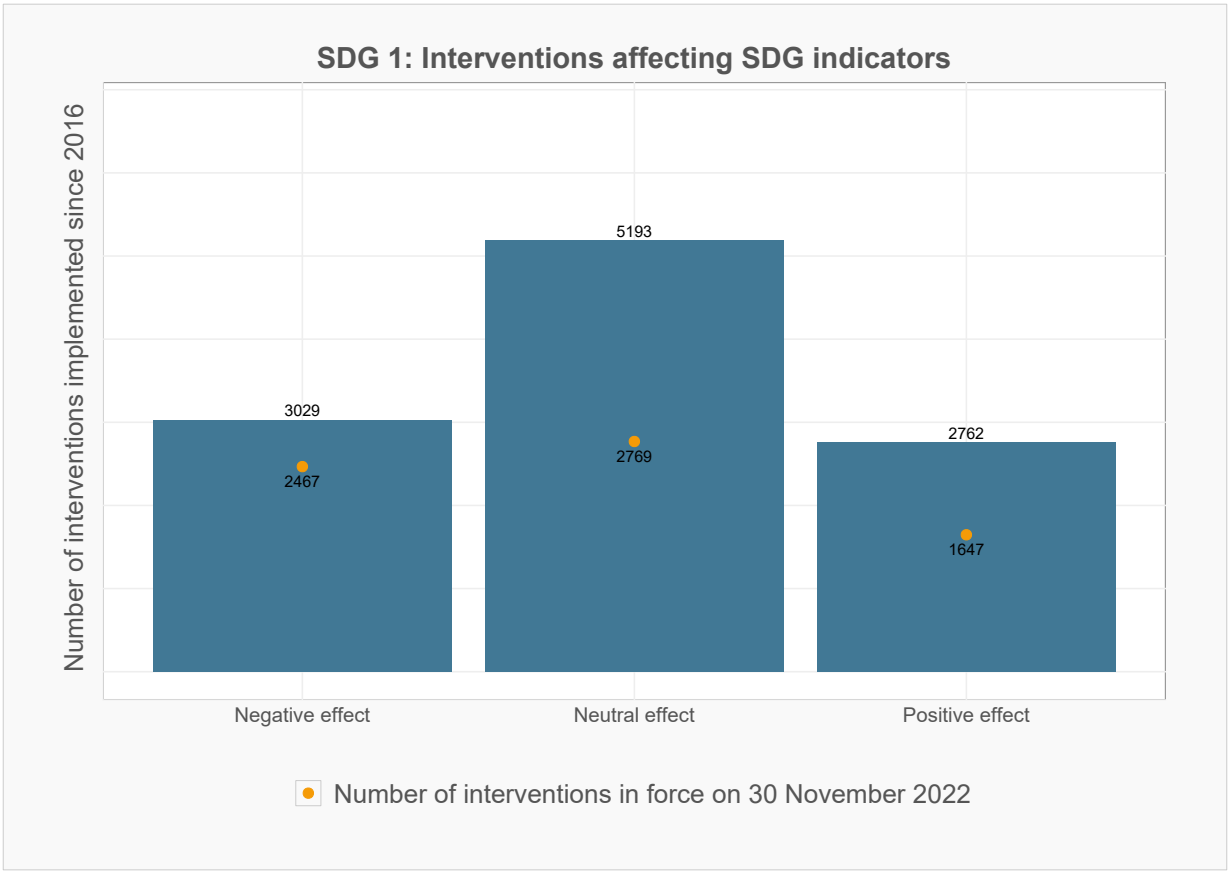


FIGURE SDG1.2

Breakdown of commercial policy intervention type across SDG indicator since 2016

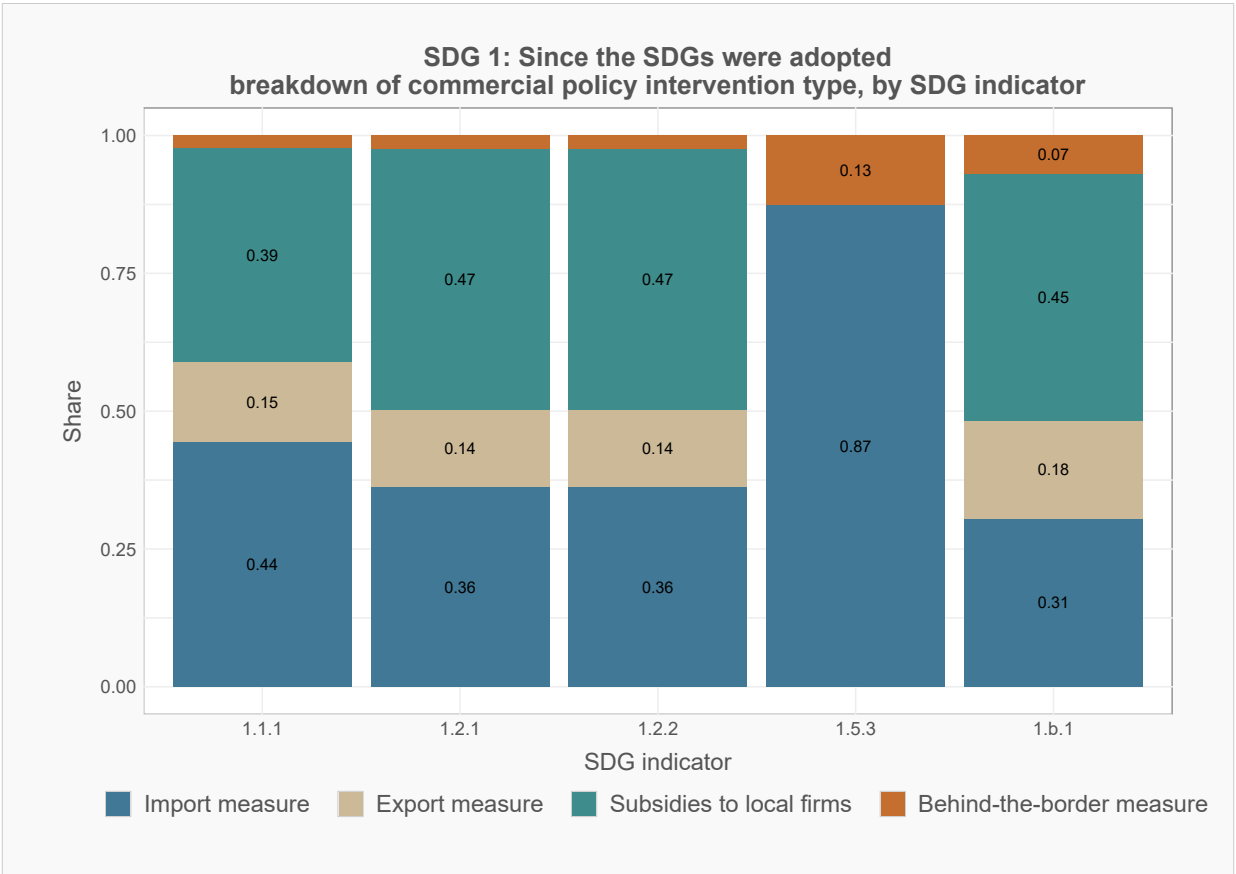


FIGURE SDG1.3

Likely impact of commercial policy intervention, breakdown across SDG indicators since 2016

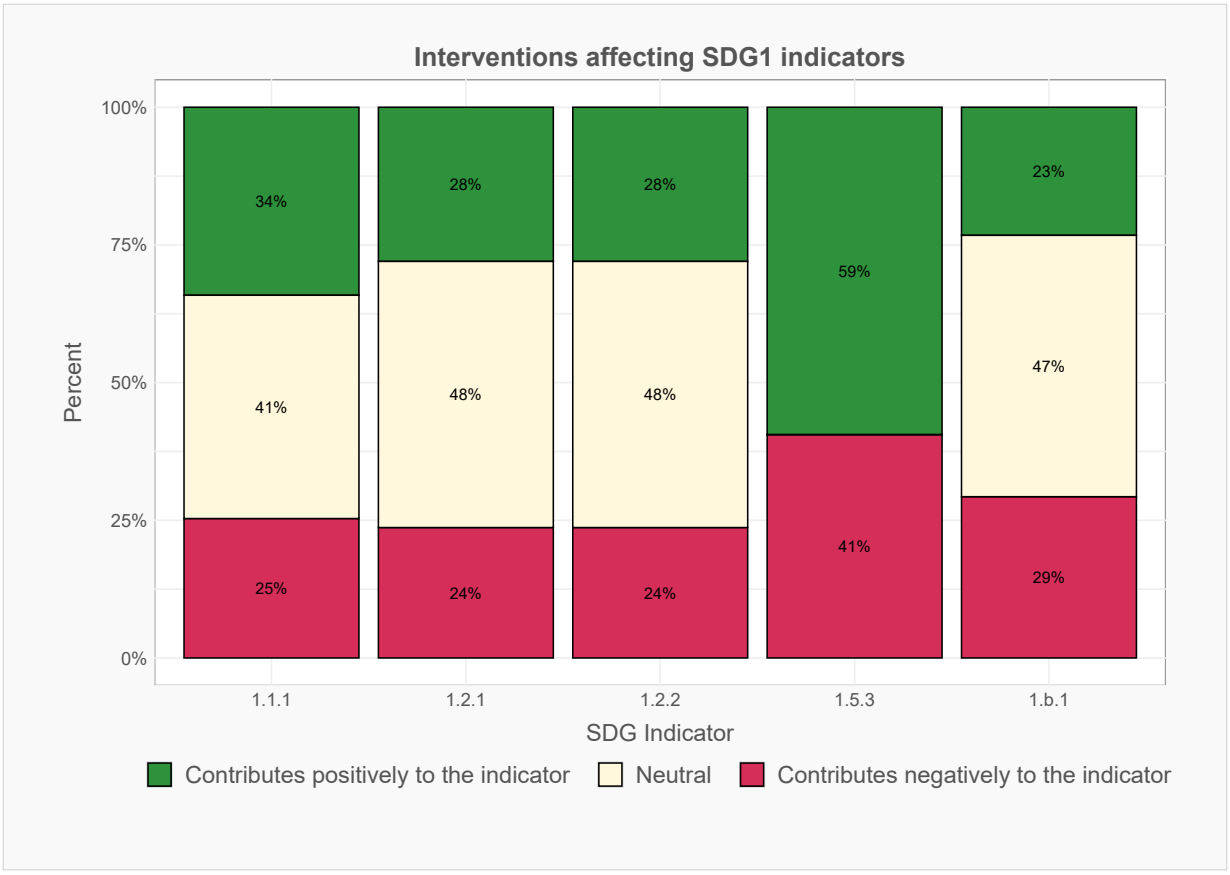


FIGURE SDG1.4

Since 2016, was resort to trade reform and SDG attainment similar?

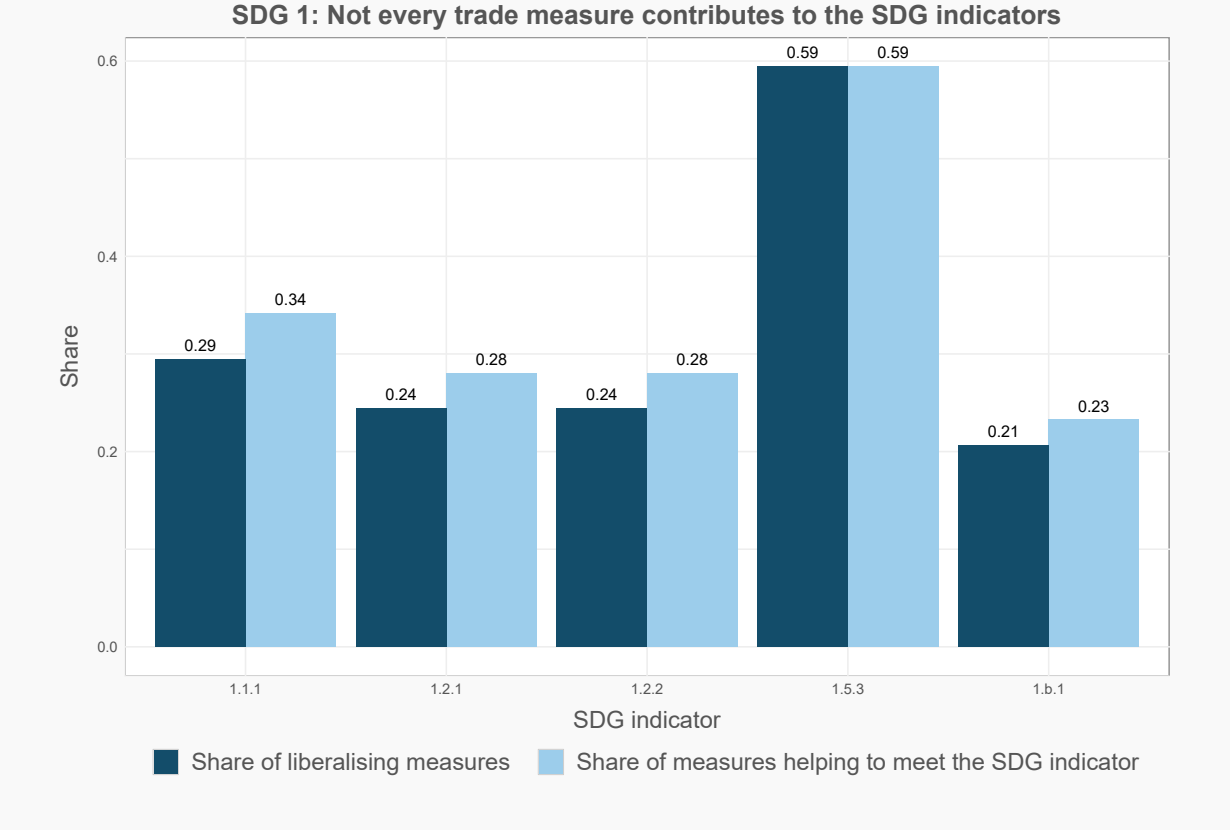
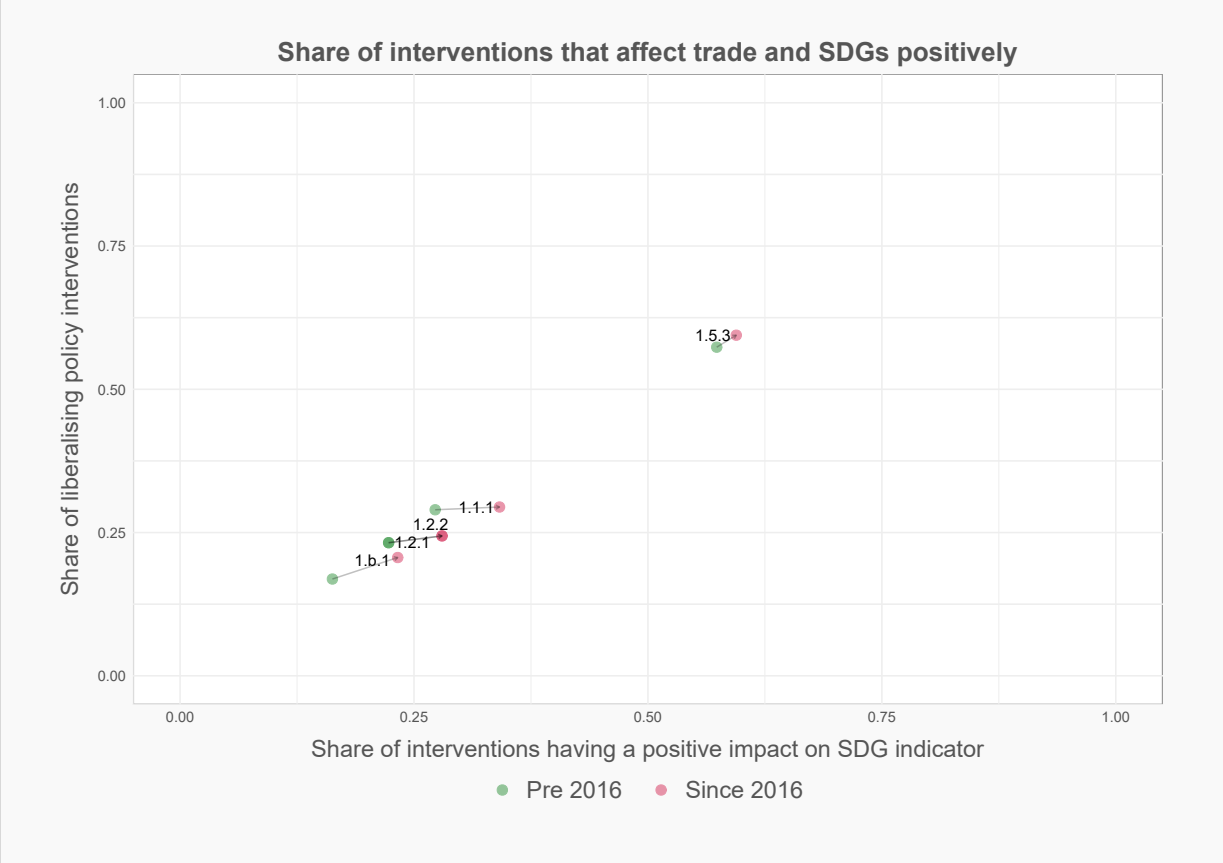


FIGURE SDG1.5

Did SDG implementation improve attainment of the SDG indicators?



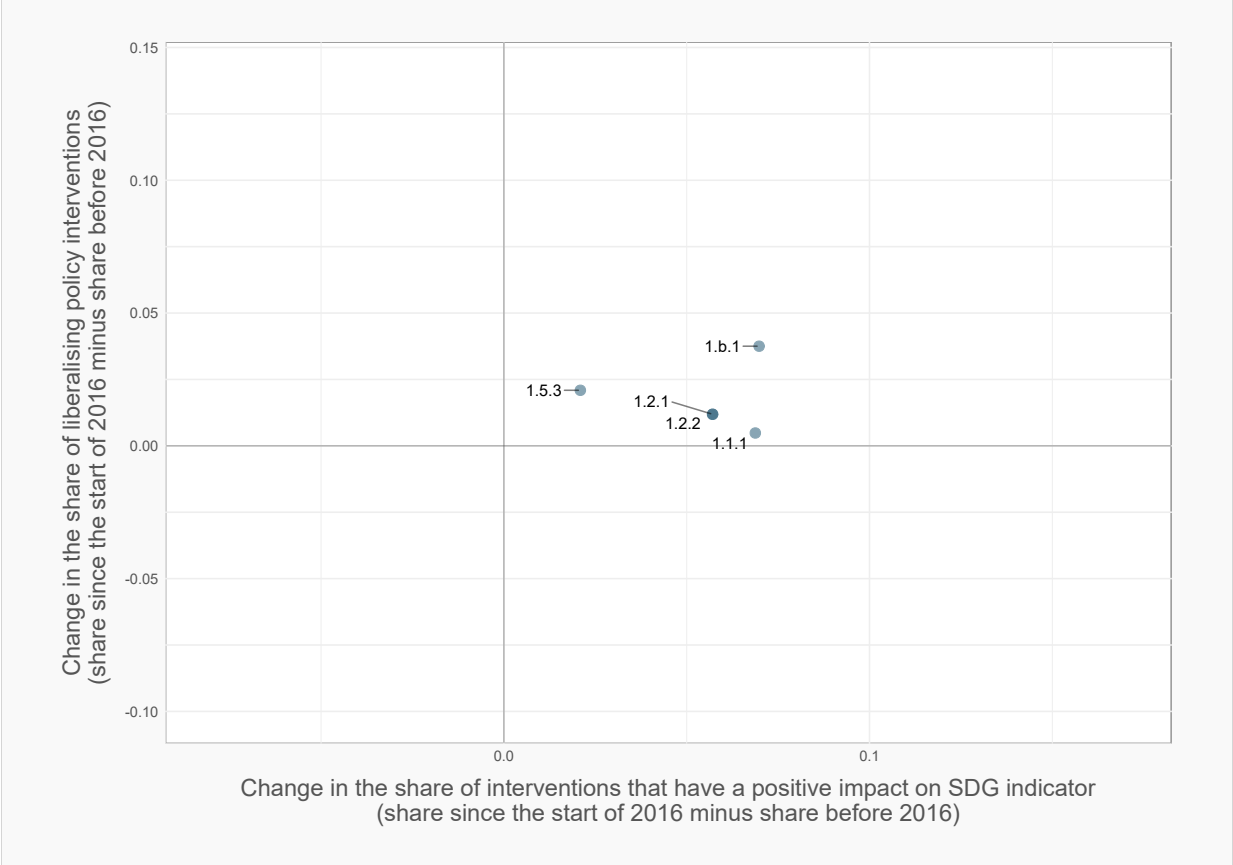


FIGURE SDG1.6

Commercial policies contribution to this SDG varies across income groups since 2016

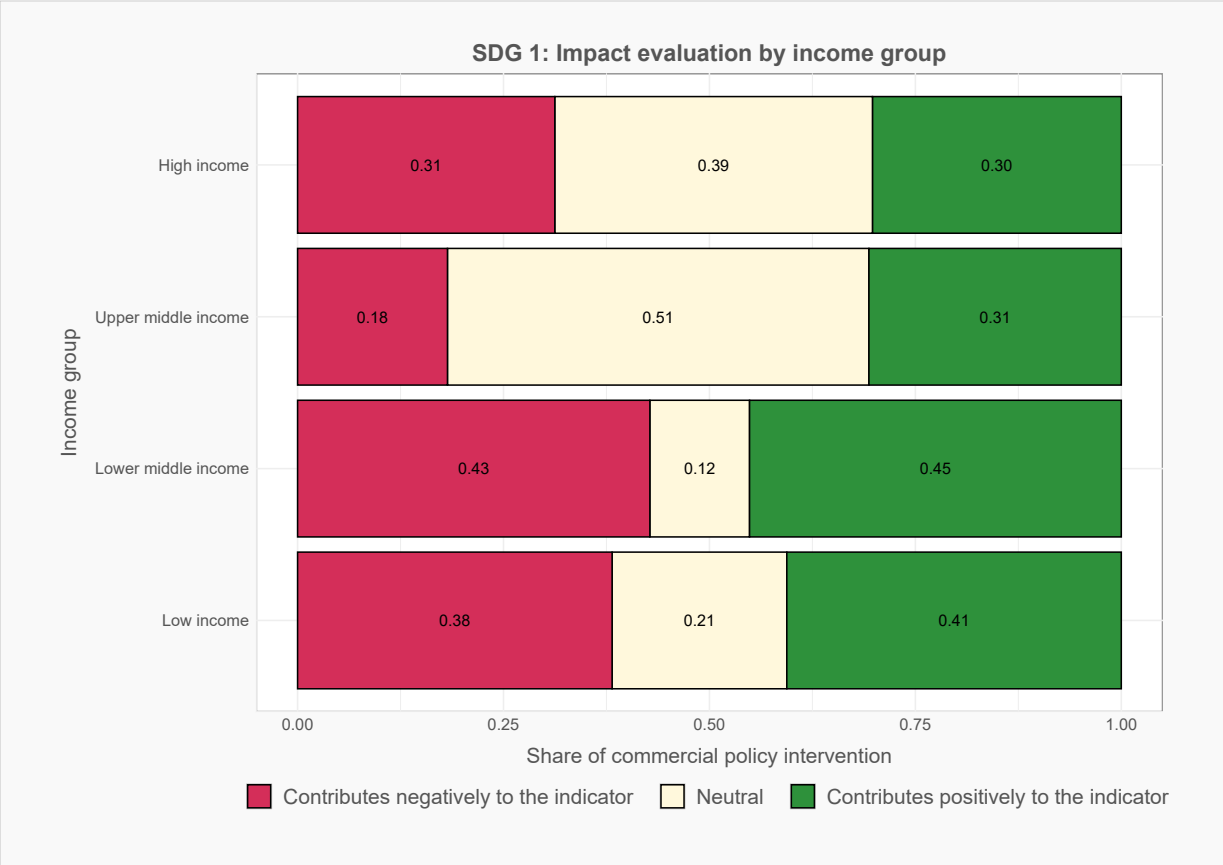
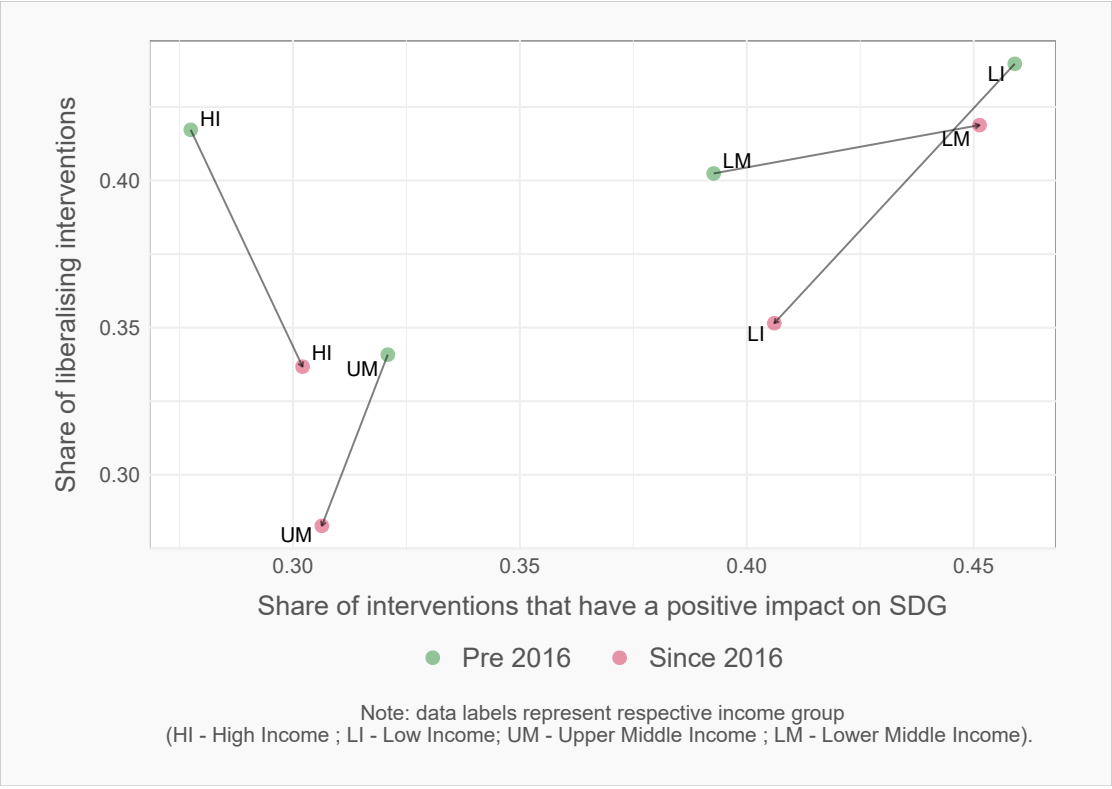


FIGURE SDG1.7

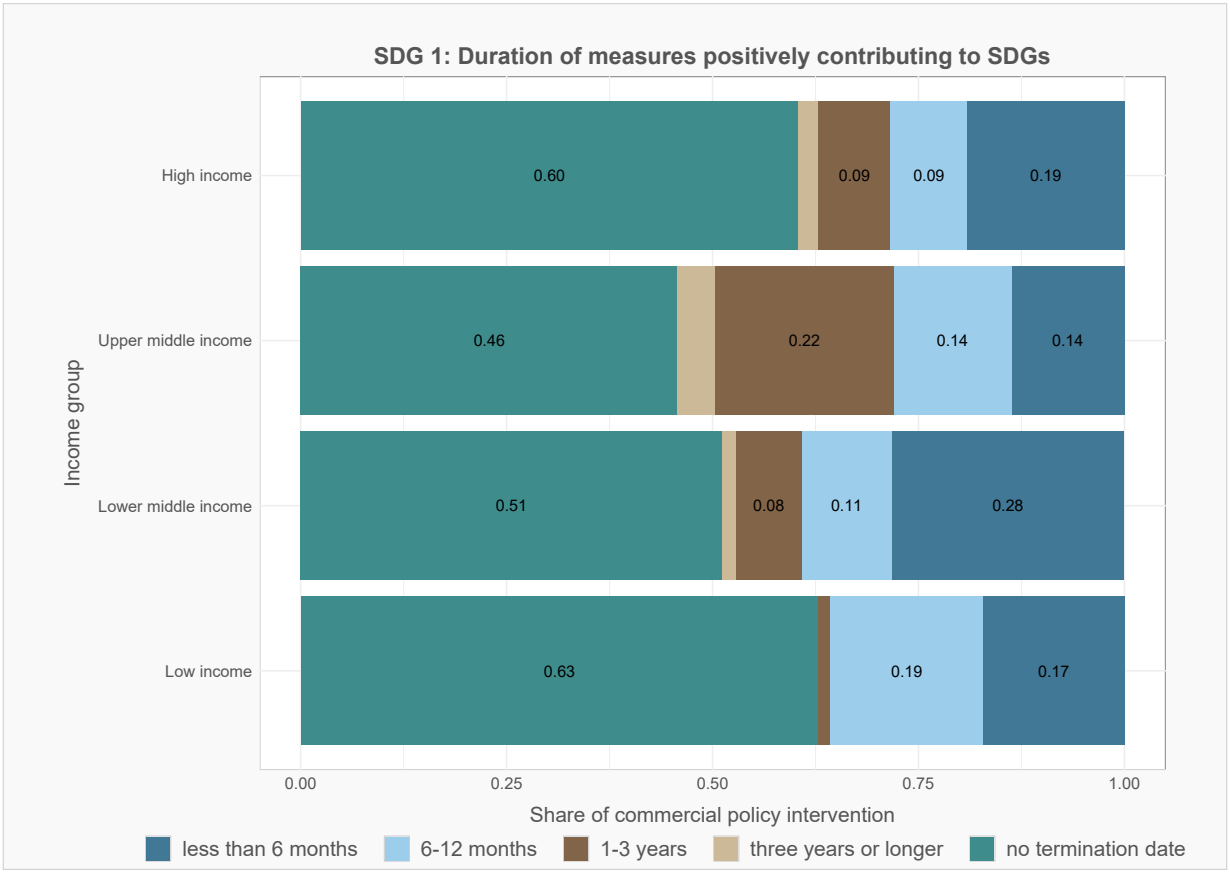
Did SDG implementation affect SDG attainment differently across income groups?



Note: data labels represent respective income group
(HI - High Income ; LI - Low Income; UM - Upper Middle Income ; LM - Lower Middle Income).

FIGURE SDG1.8

Does resort to permanent and temporary measures vary across income groups of nations since 2016?



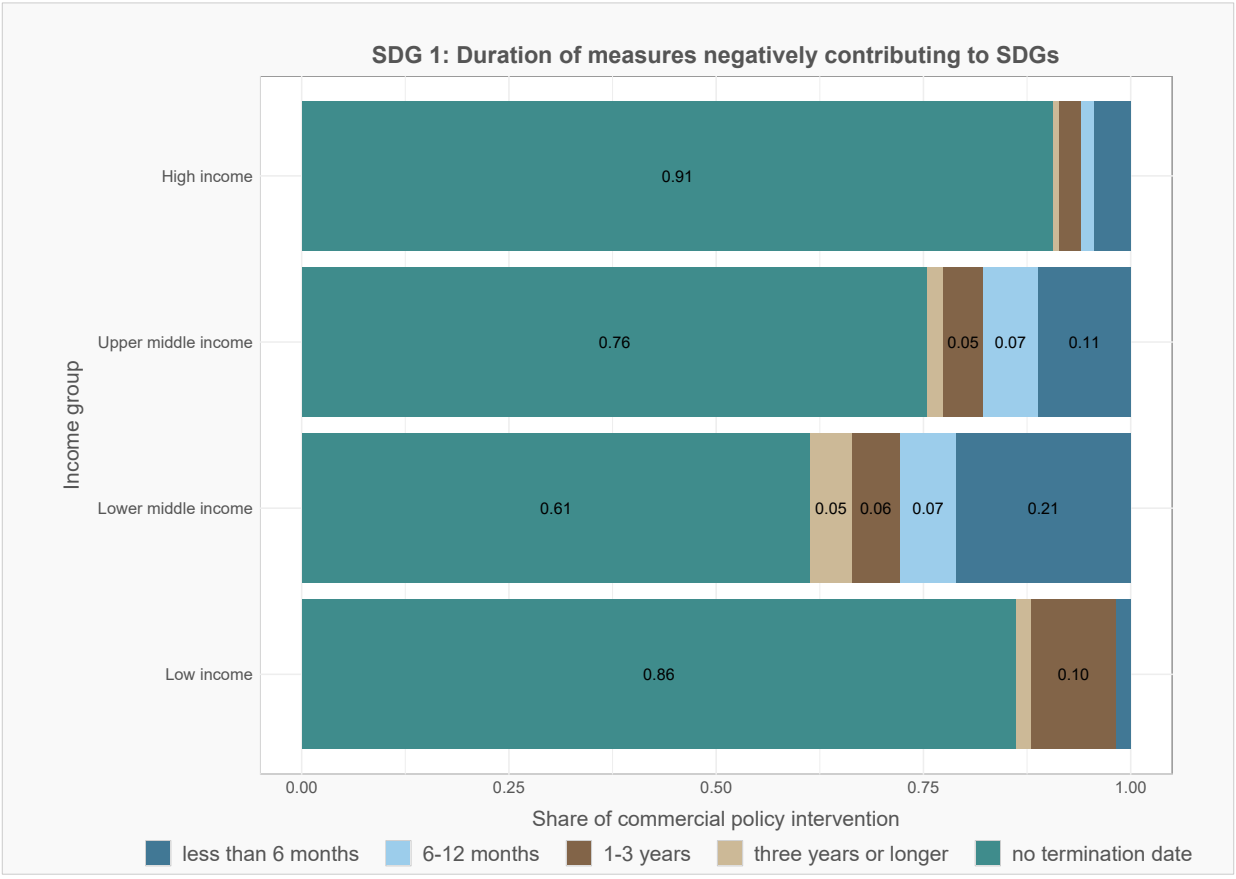


FIGURE SDG1.9

Did SDG attainment and trade openness alter during the COVID-19 pandemic era?

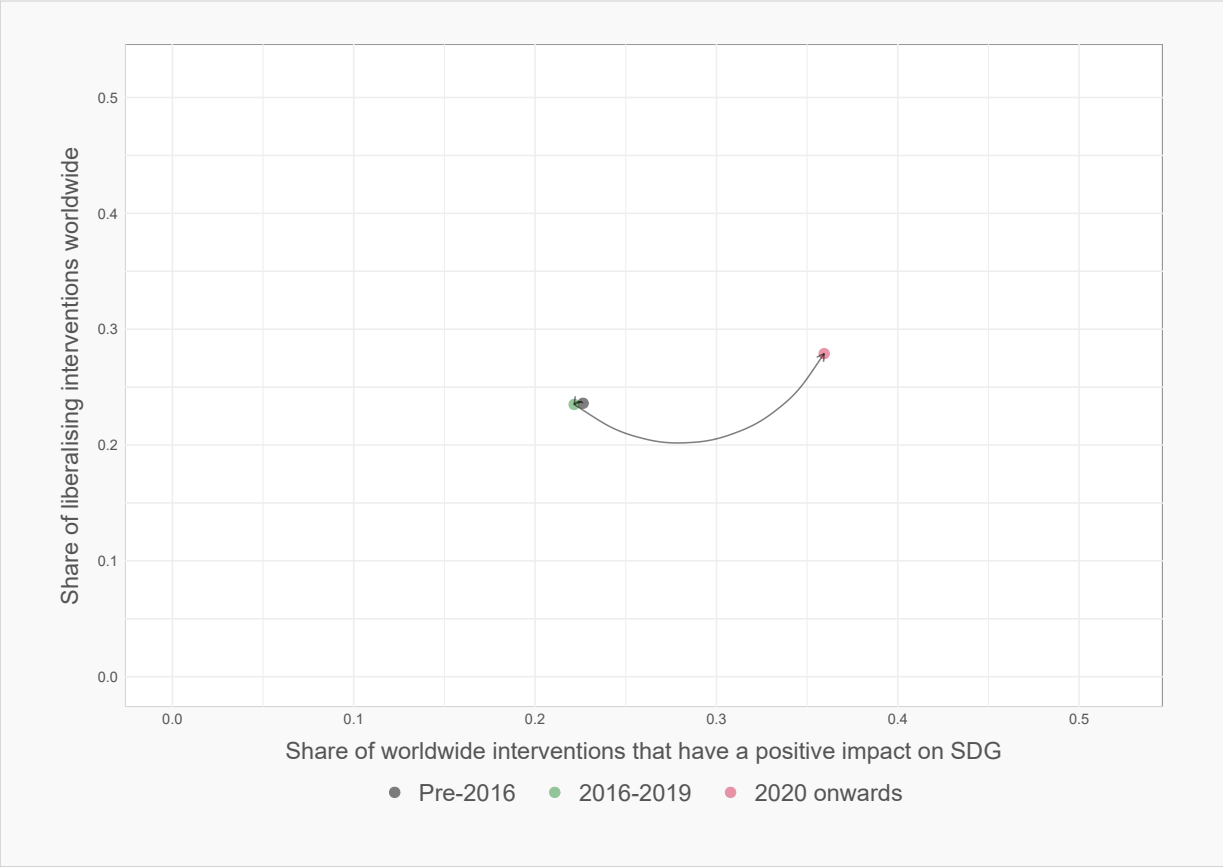


TABLE SDG1.1

Summary statistics on commercial policy intervention in the Global Trade Alert database that is relevant to this SDG

SDG Indicator	Total number of relevant commercial policy interventions (all years in Global Trade Alert database)	Total number of relevant commercial policy interventions (2016 onwards)	Share of commercial policy interventions contributing positively to this indicator (2016 onwards)	Share of commercial policy interventions that liberalise commerce (2016 onwards)	Number of customs territories implementing commercial policy interventions (2016 onwards)
1.1.1	8082	4634	0.34	0.29	173
1.2.1	12492	6955	0.28	0.24	180
1.2.2	12492	6955	0.28	0.24	180
1.5.3	1551	932	0.59	0.59	115
1.b.1	11199	5959	0.23	0.21	147
Any indicator in this SDG	20408	10946	0.25	0.22	183

TABLE SDG1.2

Was there a tension between trade openness and SDG attainment before SDG adoption?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented before 2016)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	20.42%	1.53%	1.66%
No (restrictive/distortive)	2.23%	36.47%	37.7%

TABLE SDG1.3

Was there a tension between trade openness and SDG attainment during 2016-19?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2016-19)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	20.71%	1.27%	1.52%
No (restrictive/distortive)	1.44%	46.58%	28.48%

TABLE SDG1.4

Was there a tension between trade openness and SDG attainment during Pandemic era (2020-2022)?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2020-22)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	24.95%	1.03%	1.91%
No (restrictive/distortive)	10.99%	41.08%	20.04%

SDG 2: ZERO HUNGER

Summary of main findings for SDG 2

	Finding	Comments	Evidence
Number of SDG indicators for which evidence was compiled?	12	Indicators 2.1.1, 2.1.2, 2.2.1, 2.2.2, 2.3.1, 2.3.2, 2.4.1, 2.a.1, 2.a.2, 2.b.1, 2.b.2, 2.c.1	See Table 1
Number of times commercial policy interventions since 2016 affect indicators in this SDG	11832	Positive measures account for largest number of interventions (5045)	See Figure 1
Number of jurisdictions implementing commercial policy measures affecting this SDG since 2016	176		See Table 1
Most common commercial policy intervention types affecting each SDG indicators	2.1.1, 2.1.2, 2.2.1, 2.2.2, 2.4.1, 2.a.1, 2.c.1 : Import measures 2.a.2, 2.b. : Export measures 2.3.1, 2.3.2, 2.b.1 : Subsidies to local firms		See Figure 2
How many SDG indicators does commercial policy intervention harm SDG attainment more than one third of the time (since 2016)?	5 out of 12	Indicator 2.3.1, 2.3.2, 2.4.1, 2.a.2, 2.b.2	See Figures 3,4
Since 2016 is there a higher share of commercial policy interventions contributing positively to SDG?	3 out of 12	Indicator 2.3.1, 2.a.1, 2.b.2	See Figure 5
Group of nations where commercial policy intervention since 2016 contributed positively most to this SDG?	Low income		See Figure 6
Group of nations where commercial policy intervention since 2016 detracted most to this SDG?	Lower middle income		See Figure 6
Group(s) of nations where share of commercial policy intervention contributing positively to SDG falls since 2016	Low income, Upper Middle Income, High income		See Figure 7
Group of nations that resorted most to time-unlimited policy intervention that contributes positively to this SDG?	Low income		See Figure 8
Group of nations which resorted most to time-unlimited policy intervention that detracts from this SDG?	Low income		See Figure 8
Compared to 2016-2019, did the pandemic era see more commercial policy intervention improve this SDG?	Yes	Bigger change from 2016-19 to 2020-22 than pre-2016 to 2016-2019.	See Figure 9
Before SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	Yes		See Table 2
Since SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	Yes	Tension grew during Pandemic era due to resort to export curbs.	See Table 3

FIGURE SDG2.1

Breakdown of policy intervention in terms of likely impact on this SDG

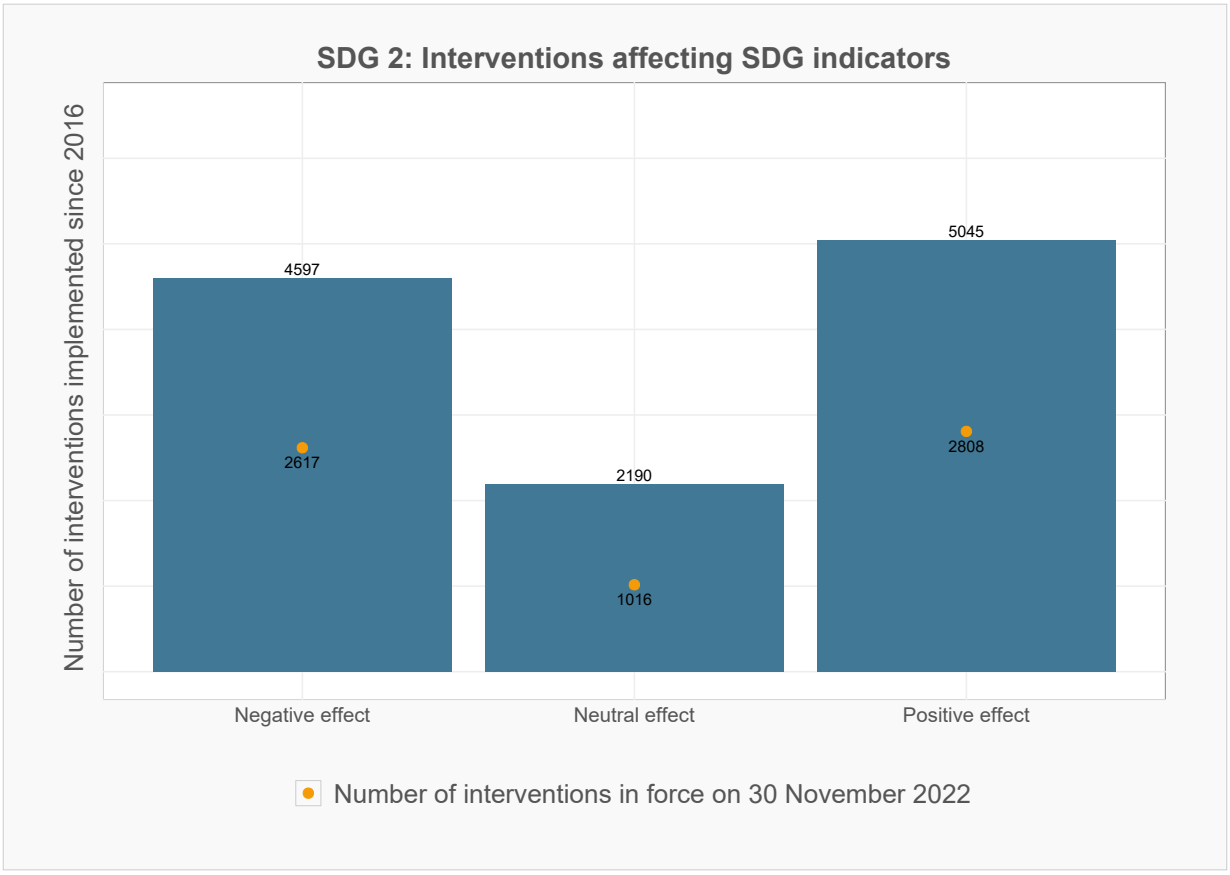


FIGURE SDG2.2

Breakdown of commercial policy intervention type across SDG indicator since 2016

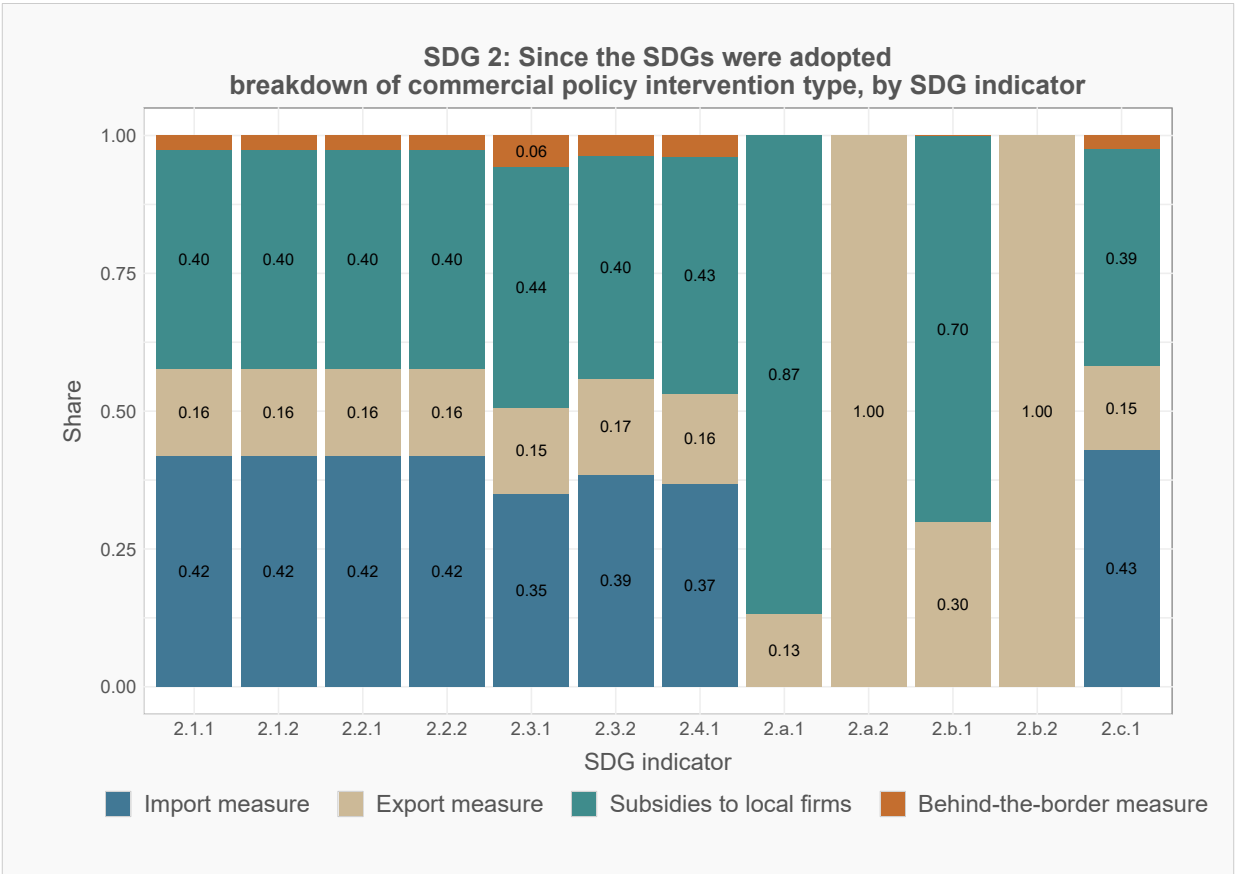


FIGURE SDG2.3

Likely impact of commercial policy intervention, breakdown across SDG indicators since 2016

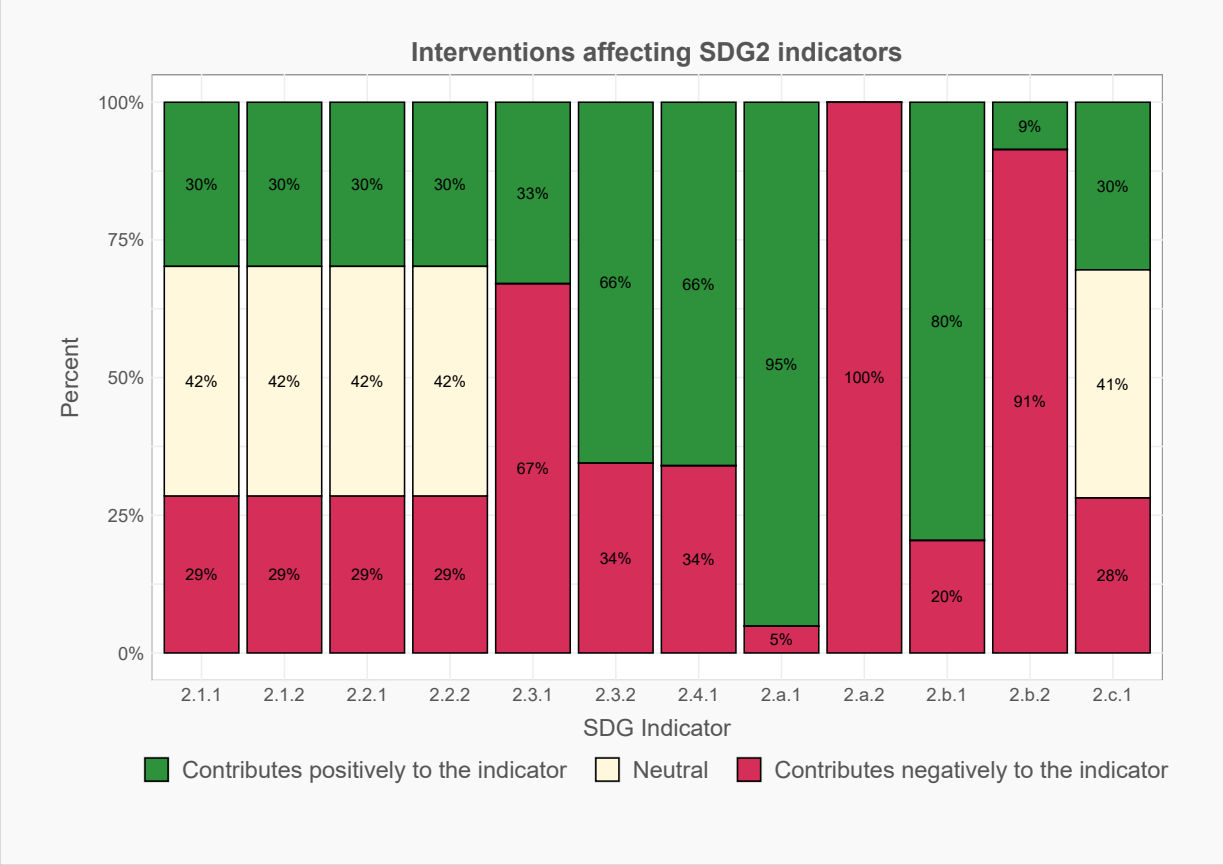


FIGURE SDG2.4

Since 2016, was resort to trade reform and SDG attainment similar?

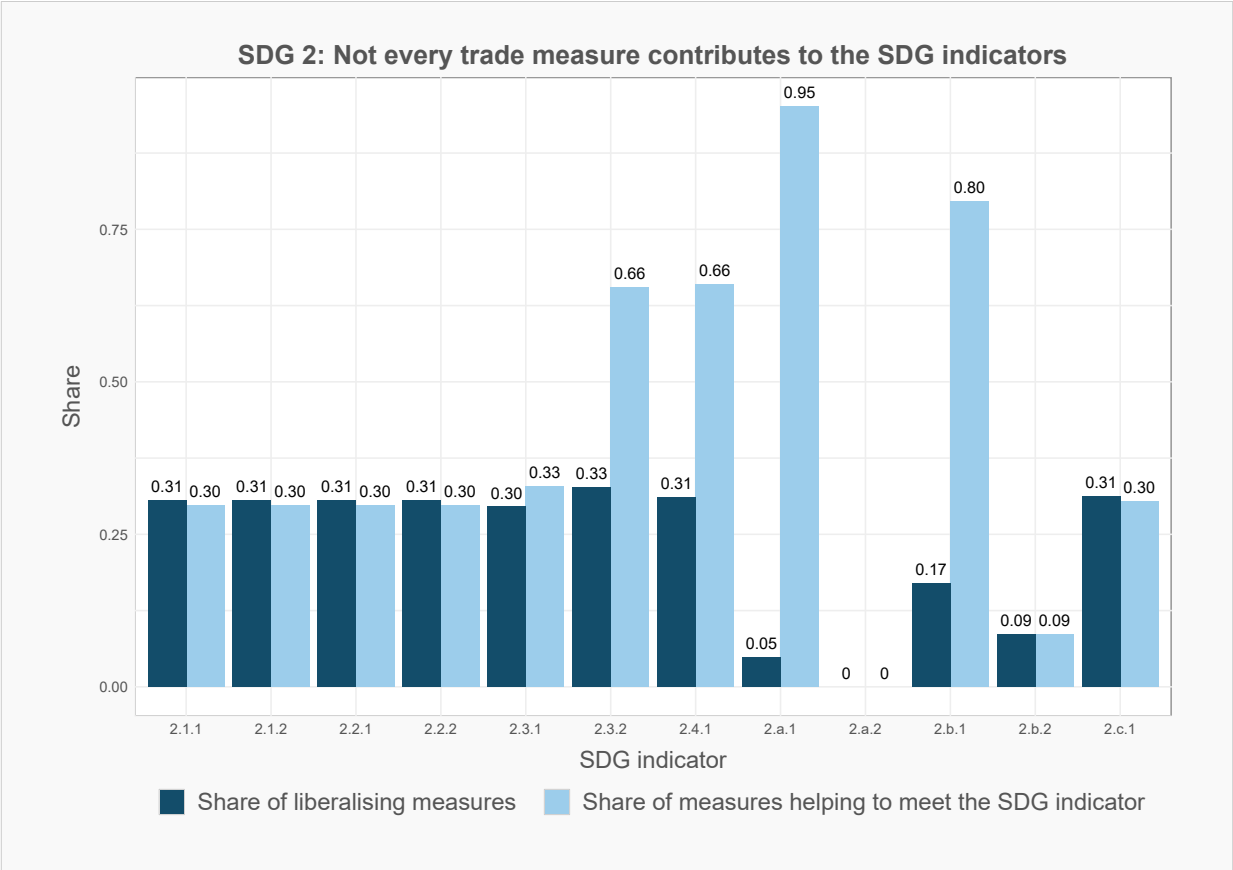
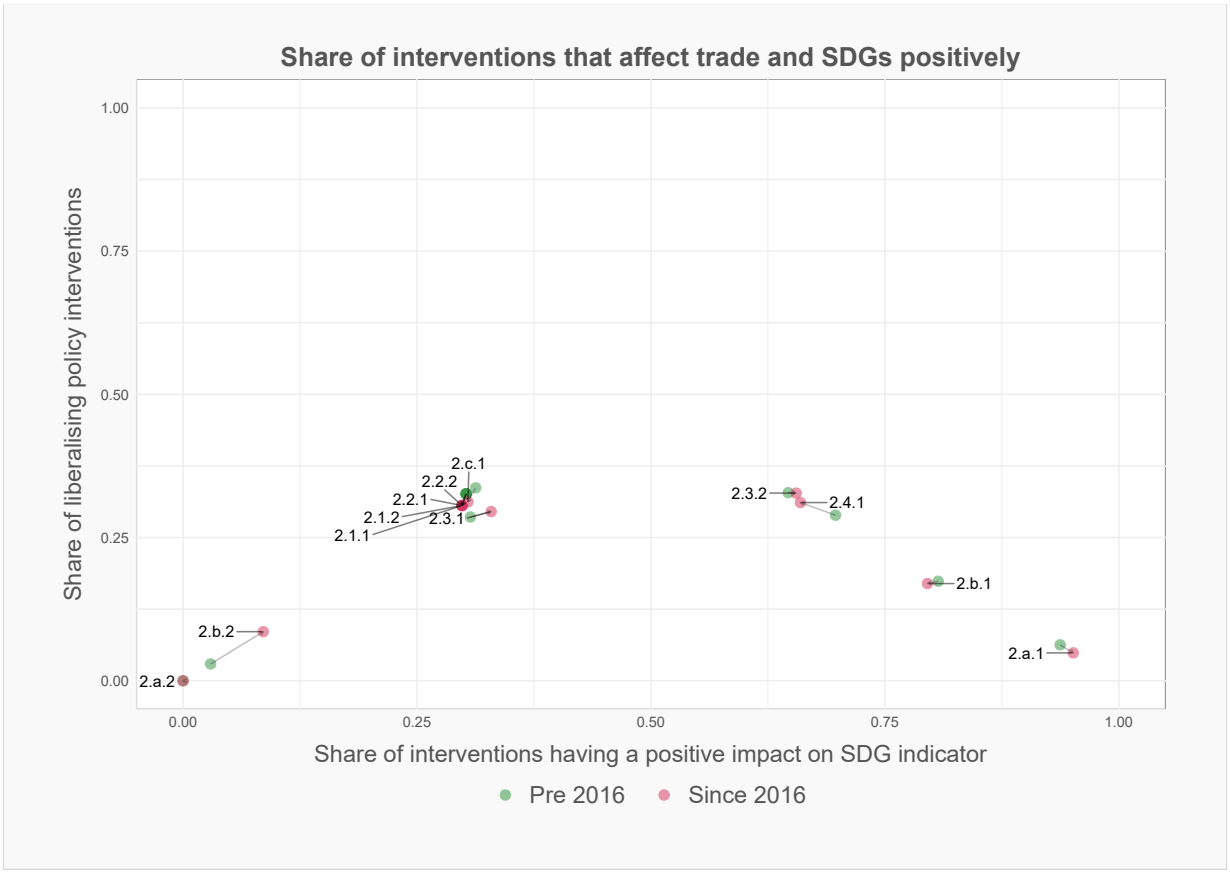


FIGURE SDG2.5

Did SDG implementation improve attainment of the SDG indicators?



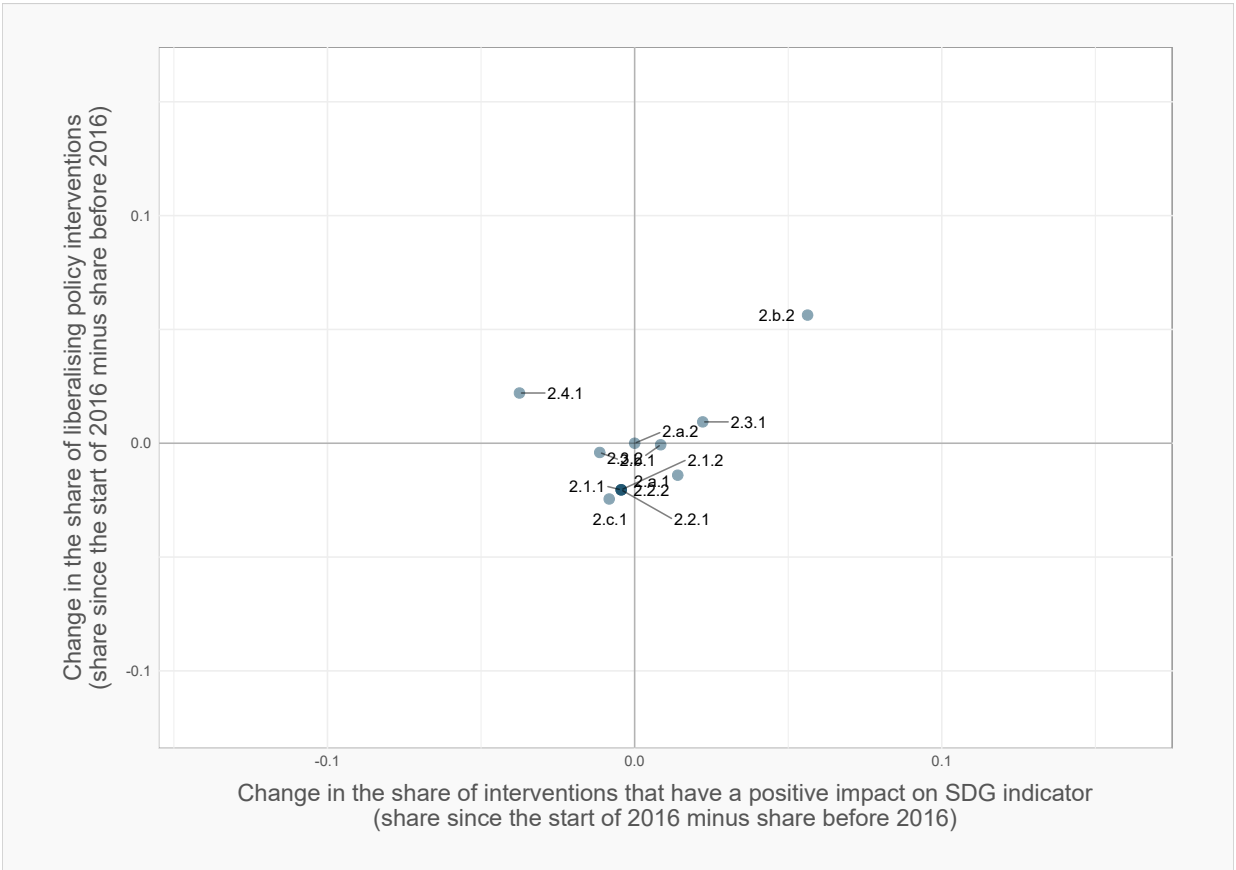


FIGURE SDG2.6

Commercial policies contribution to this SDG varies across income groups since 2016

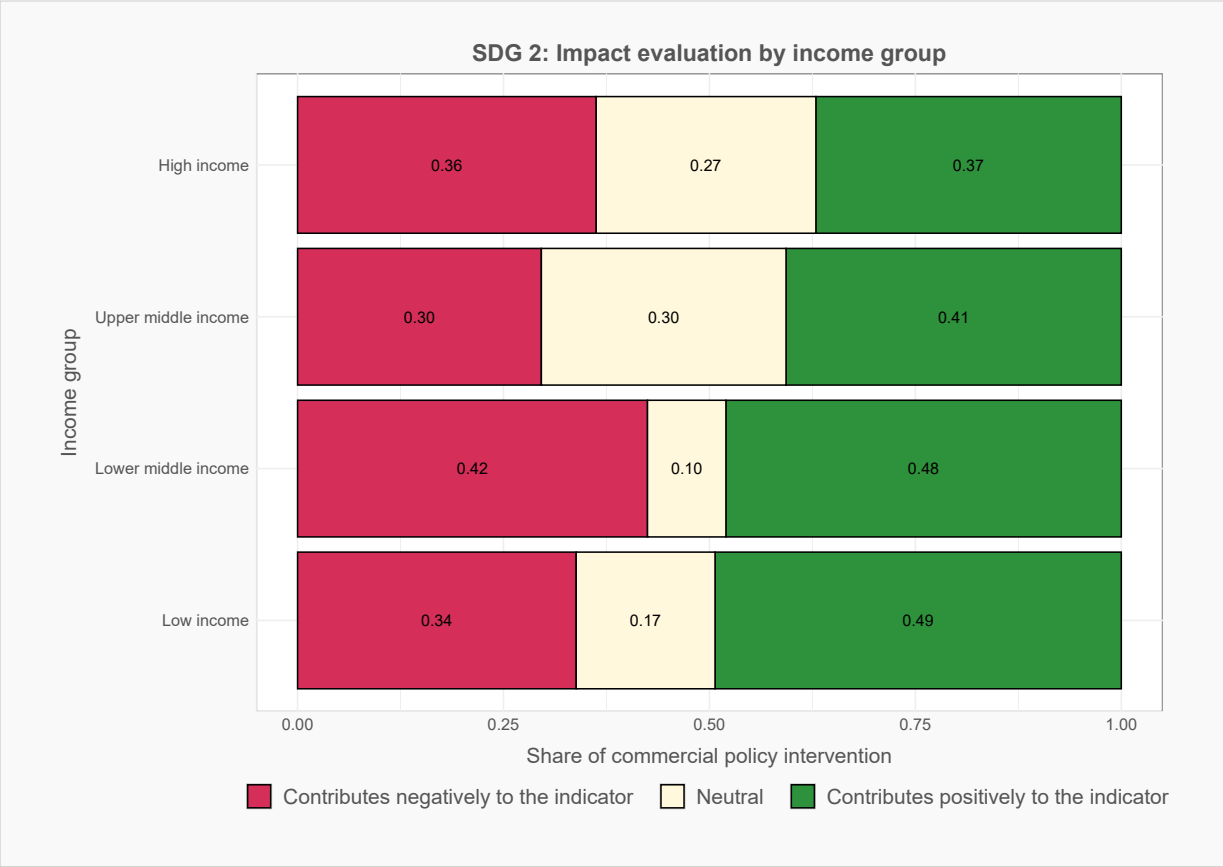
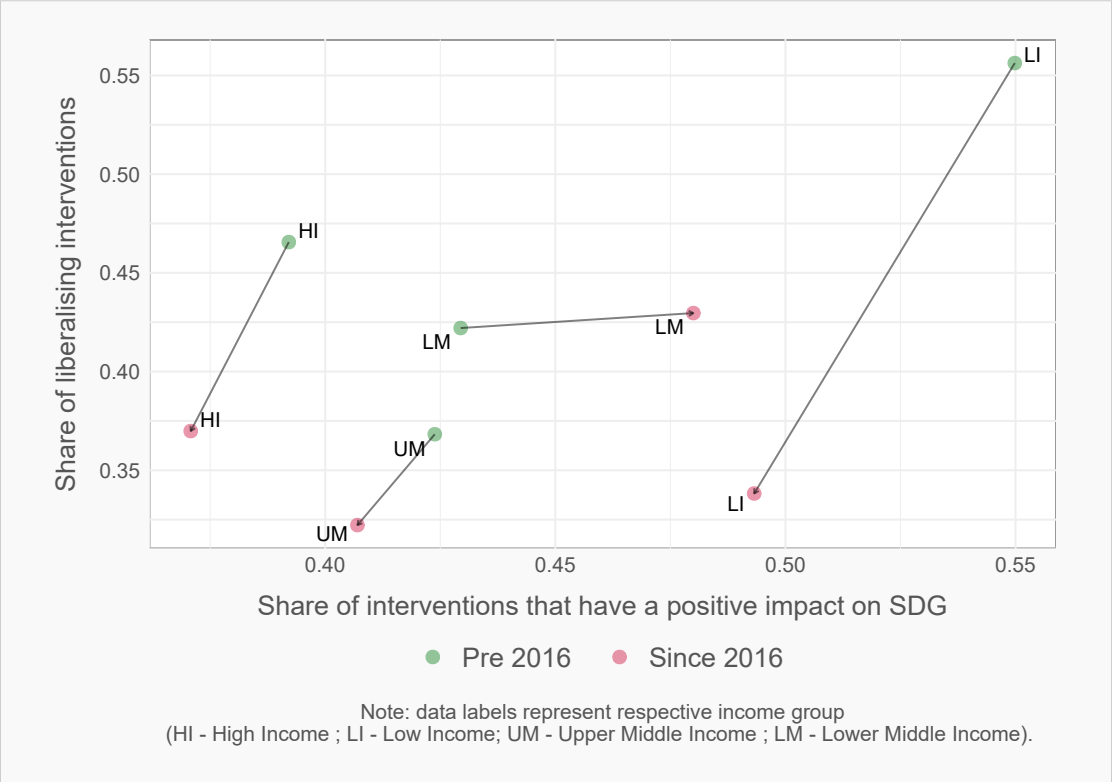


FIGURE SDG2.7

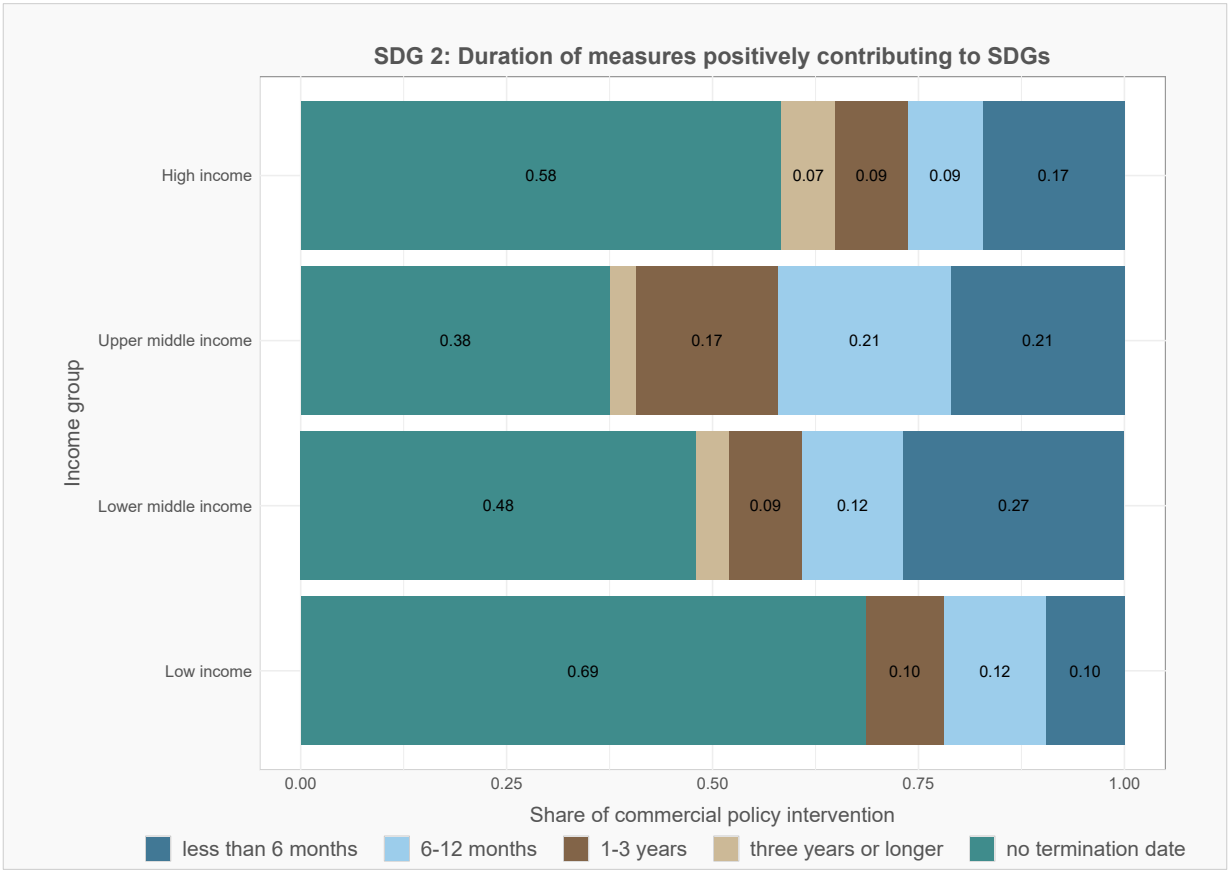
Did SDG implementation affect SDG attainment differently across income groups?



Note: data labels represent respective income group
(HI - High Income ; LI - Low Income; UM - Upper Middle Income ; LM - Lower Middle Income).

FIGURE SDG2.8

Does resort to permanent and temporary measures vary across income groups of nations since 2016?



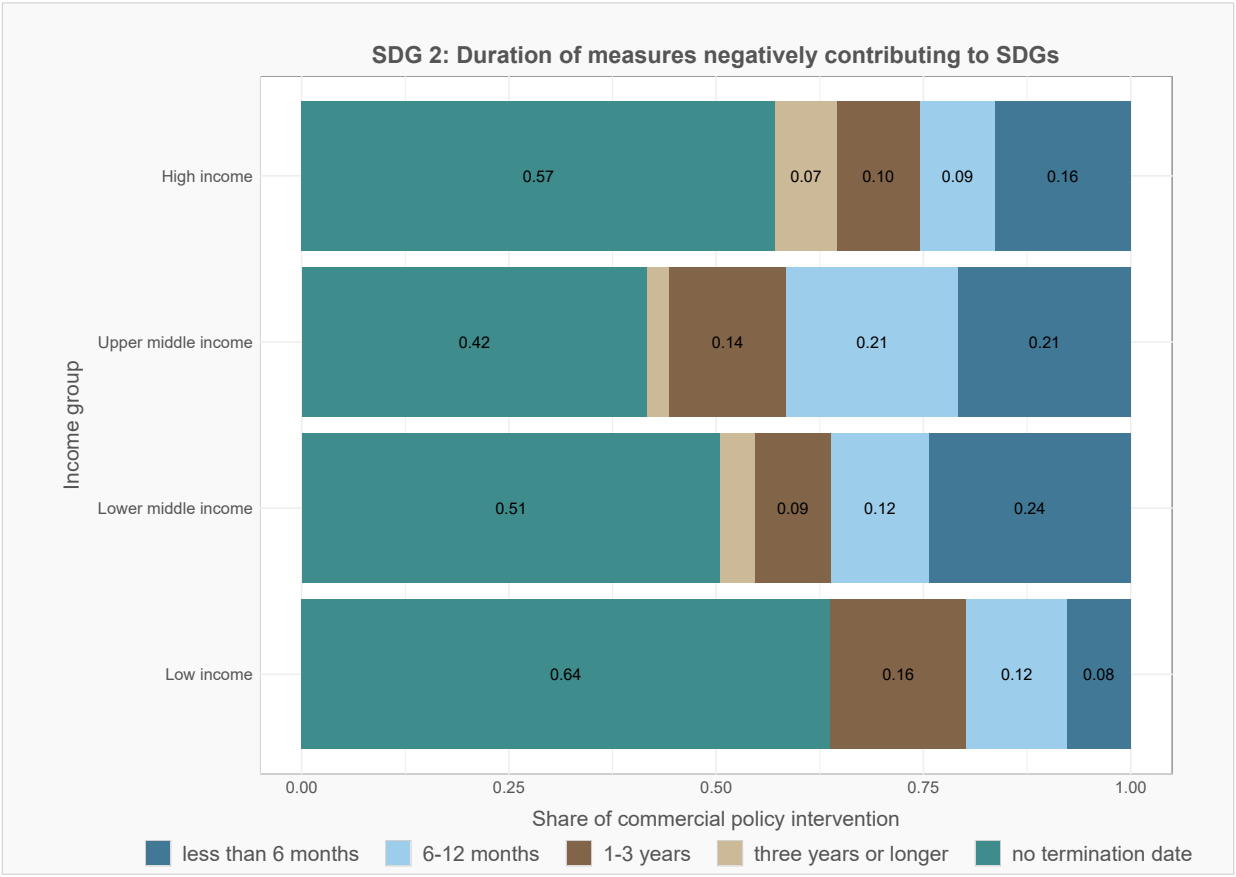


FIGURE SDG2.9

Did SDG attainment and trade openness alter during the COVID-19 pandemic era?

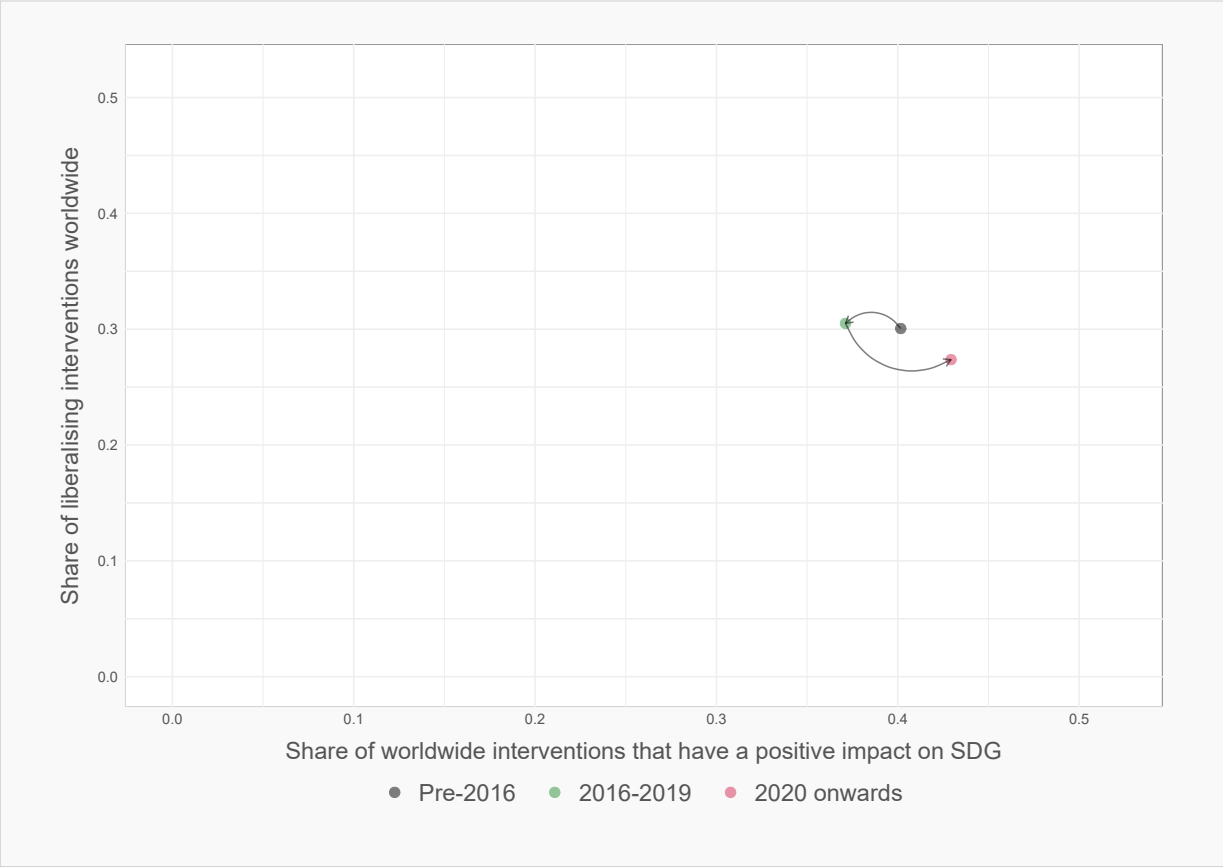


TABLE SDG2.1

Summary statistics on commercial policy intervention in the Global Trade Alert database that is relevant to this SDG

SDG Indicator	Total number of relevant commercial policy interventions (all years in Global Trade Alert database)	Total number of relevant commercial policy interventions (2016 onwards)	Share of commercial policy interventions contributing positively to this indicator (2016 onwards)	Share of commercial policy interventions that liberalise commerce (2016 onwards)	Number of customs territories implementing commercial policy interventions (2016 onwards)
2.1.1	9731	5254	0.3	0.31	174
2.1.2	9731	5254	0.3	0.31	174
2.2.1	9731	5254	0.3	0.31	174
2.2.2	9731	5254	0.3	0.31	174
2.3.1	7519	4067	0.33	0.3	167
2.3.2	4678	2439	0.66	0.33	160
2.4.1	5101	2845	0.66	0.31	155
2.a.1	3874	2136	0.95	0.05	125
2.a.2	28	20	0	0	10
2.b.1	2303	1267	0.8	0.17	131
2.b.2	274	70	0.09	0.09	15
2.c.1	9448	5118	0.3	0.31	174
Any indicator in this SDG	12772	7070	0.71	0.28	176

TABLE SDG2.2

Was there a tension between trade openness and SDG attainment before SDG adoption?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented before 2016)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	19.58%	1.91%	8.57%
No (restrictive/distortive)	20.58%	15.38%	33.98%

TABLE SDG2.3

Was there a tension between trade openness and SDG attainment during 2016-19?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2016-19)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	20.15%	2.71%	7.64%
No (restrictive/distortive)	16.97%	22.45%	30.08%

TABLE SDG2.4

Was there a tension between trade openness and SDG attainment during Pandemic era (2020-2022)?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2020-22)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	18.35%	1.4%	7.63%
No (restrictive/distortive)	24.59%	28.89%	19.15%

SDG 3: ENSURE HEALTHY LIVES AND PROMOTE WELL-BEING FOR ALL AT ALL AGES

Summary of main findings for SDG 3

	Finding	Comments	Evidence
Number of SDG indicators for which evidence was compiled?	21	Indicators 3.1.1, 3.1.2, 3.2.1, 3.2.2, 3.3.1, 3.3.2, 3.3.3, 3.3.4, 3.3.5, 3.4.1, 3.4.2, 3.5.1, 3.5.2, 3.7.1, 3.7.2, 3.8.1, 3.9.1, 3.a.1, 3.b.1, 3.b.2, 3.c.1	See Table 1
Number of times commercial policy interventions since 2016 affect indicators in this SDG	1990	Neutral measures account for largest number of interventions (1003)	See Figure 1
Number of jurisdictions implementing commercial policy measures affecting this SDG since 2016	117		See Table 1
Most common commercial policy intervention types affecting each SDG indicators	3.1.1, 3.2.1, 3.2.2, 3.3.1, 3.3.2, 3.3.3, 3.3.4, 3.3.5, 3.4.1, 3.5.2, 3.8.1, 3.9.1, 3.a.1 : Import measures 3.b.2 : Export measures 3.7.1, 3.7.2, 3.b.1: Subsidies to local firms 3.1.2, 3.4.2, 3.5.1, 3.c.1 : Behind-the-border measure		See Figure 2
How many SDG indicators does commercial policy intervention harm SDG attainment more than one third of the time (since 2016)?	3 out of 21	Indicator 3.5.2, 3.9.1, 3.b.2	See Figures 3,4
Since 2016 is there a higher share of commercial policy interventions contributing positively to SDG?	14 out of 21	Indicator 3.1.1, 3.2.1, 3.2.2, 3.3.1, 3.3.2, 3.3.3, 3.3.4, 3.3.5, 3.4.1, 3.7.1, 3.7.2, 3.8.1, 3.a.1, 3.b.1	See Figure 5
Group of nations where commercial policy intervention since 2016 contributed positively most to this SDG?	Low income		See Figure 6
Group of nations where commercial policy intervention since 2016 detracted most to this SDG?	Low income		See Figure 6
Group(s) of nations where share of commercial policy intervention contributing positively to SDG falls since 2016	Upper middle income		See Figure 7
Group of nations that resorted most to time-unlimited policy intervention that contributes positively to this SDG?	Lower middle income		See Figure 8
Group of nations which resorted most to time-unlimited policy intervention that detracts from this SDG?	High income		See Figure 8
Compared to 2016-2019, did the pandemic era see more commercial policy intervention improve this SDG?	No	Bigger change from before 2016 to 2016-19 than 2016-2019 to 2020 onwards	See Figure 9
Before SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	No		See Table 2
Since SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	Yes	Tension grew during Pandemic era due to resort to export curbs.	See Table 3

FIGURE SDG3.1

Breakdown of policy intervention in terms of likely impact on this SDG

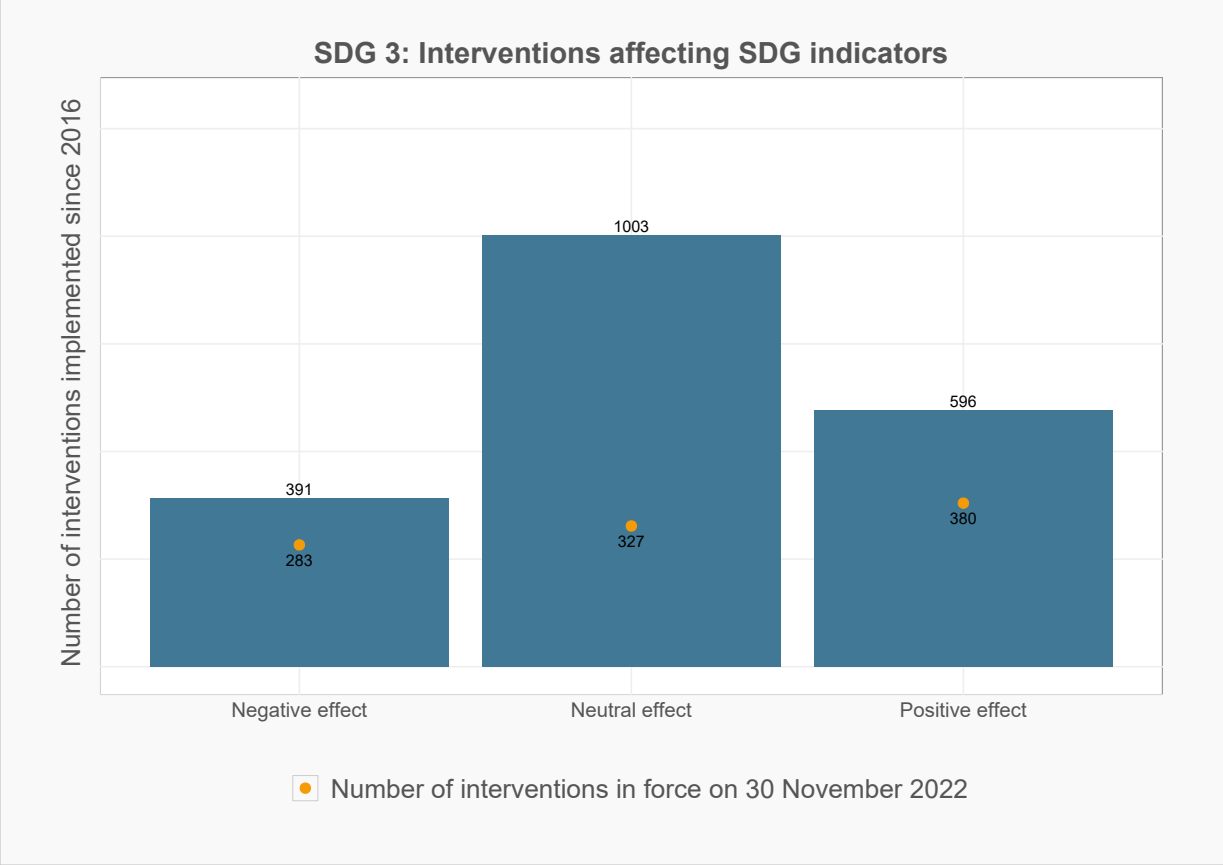


FIGURE SDG3.2

Breakdown of commercial policy intervention type across SDG indicator since 2016

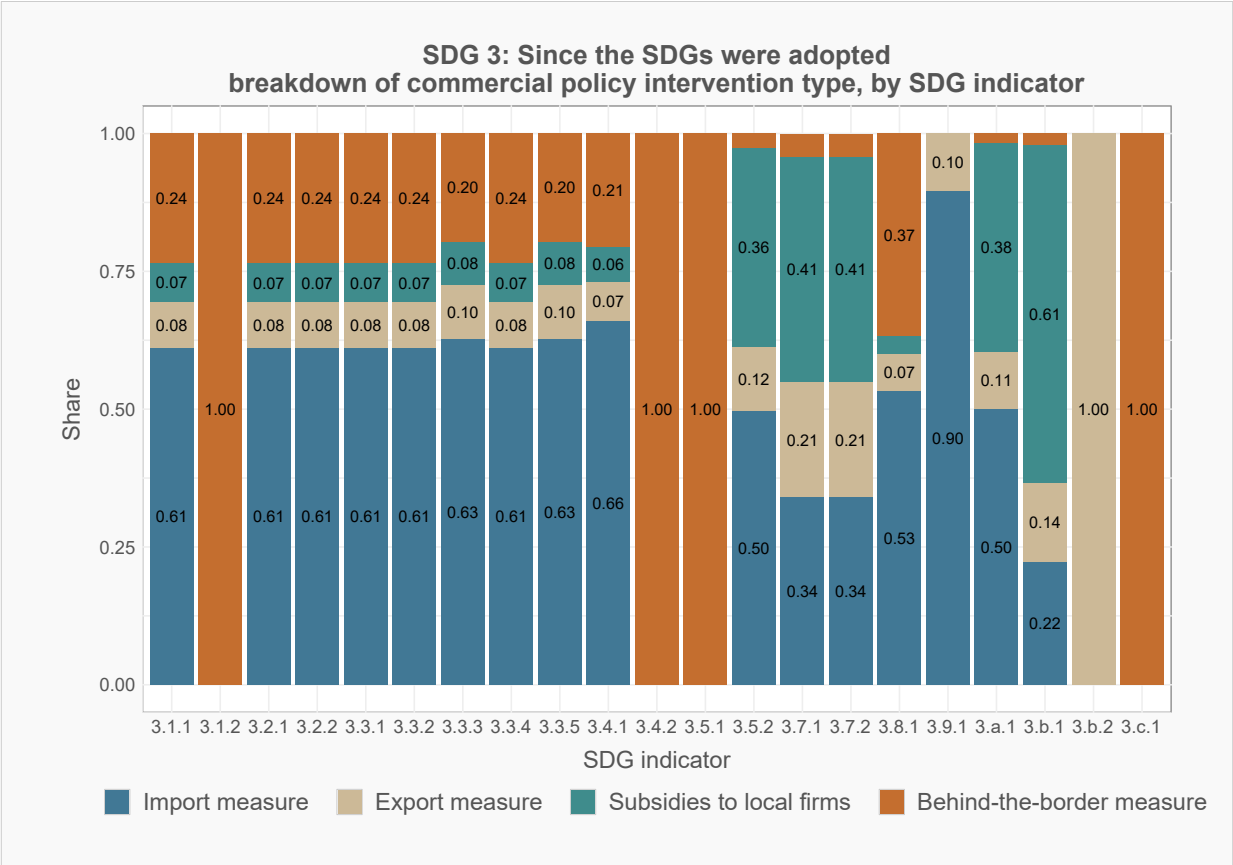


FIGURE SDG3.3

Likely impact of commercial policy intervention, breakdown across SDG indicators since 2016

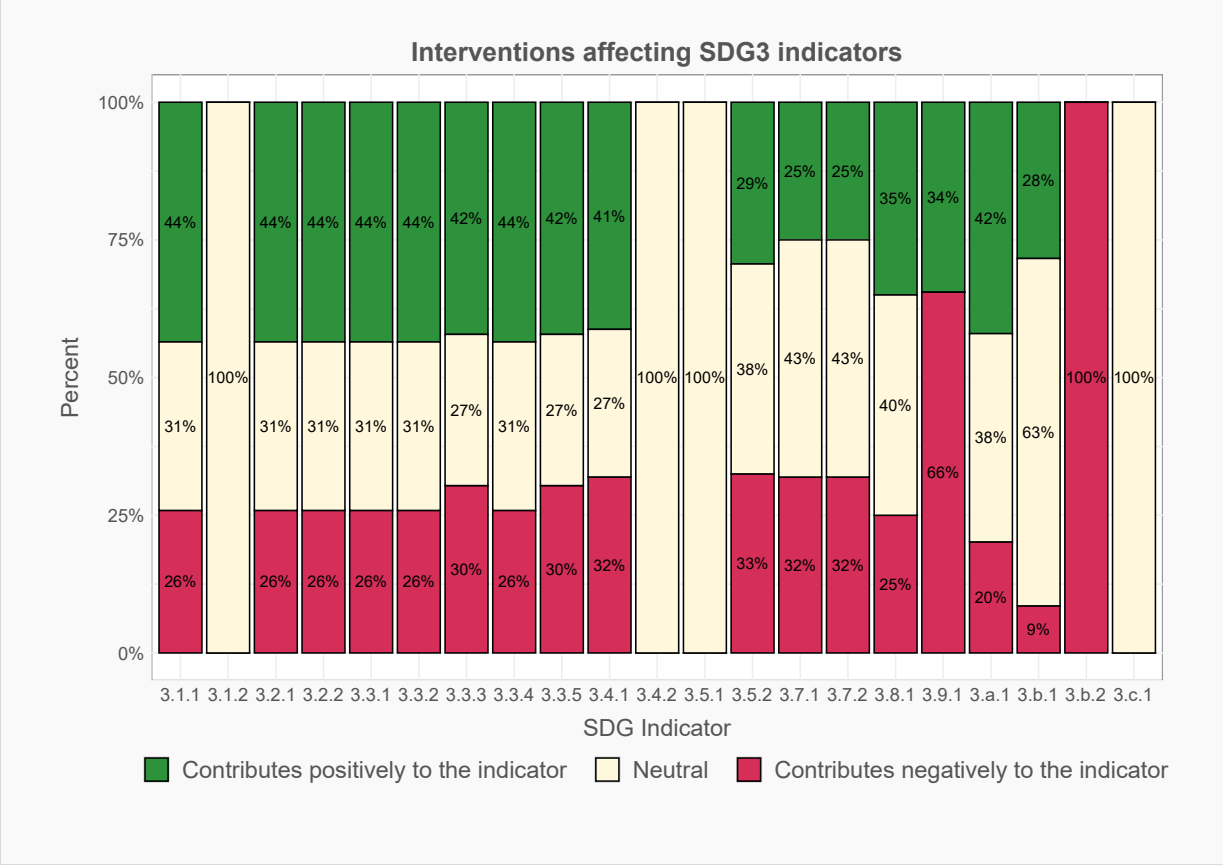


FIGURE SDG3.4

Since 2016, was resort to trade reform and SDG attainment similar?

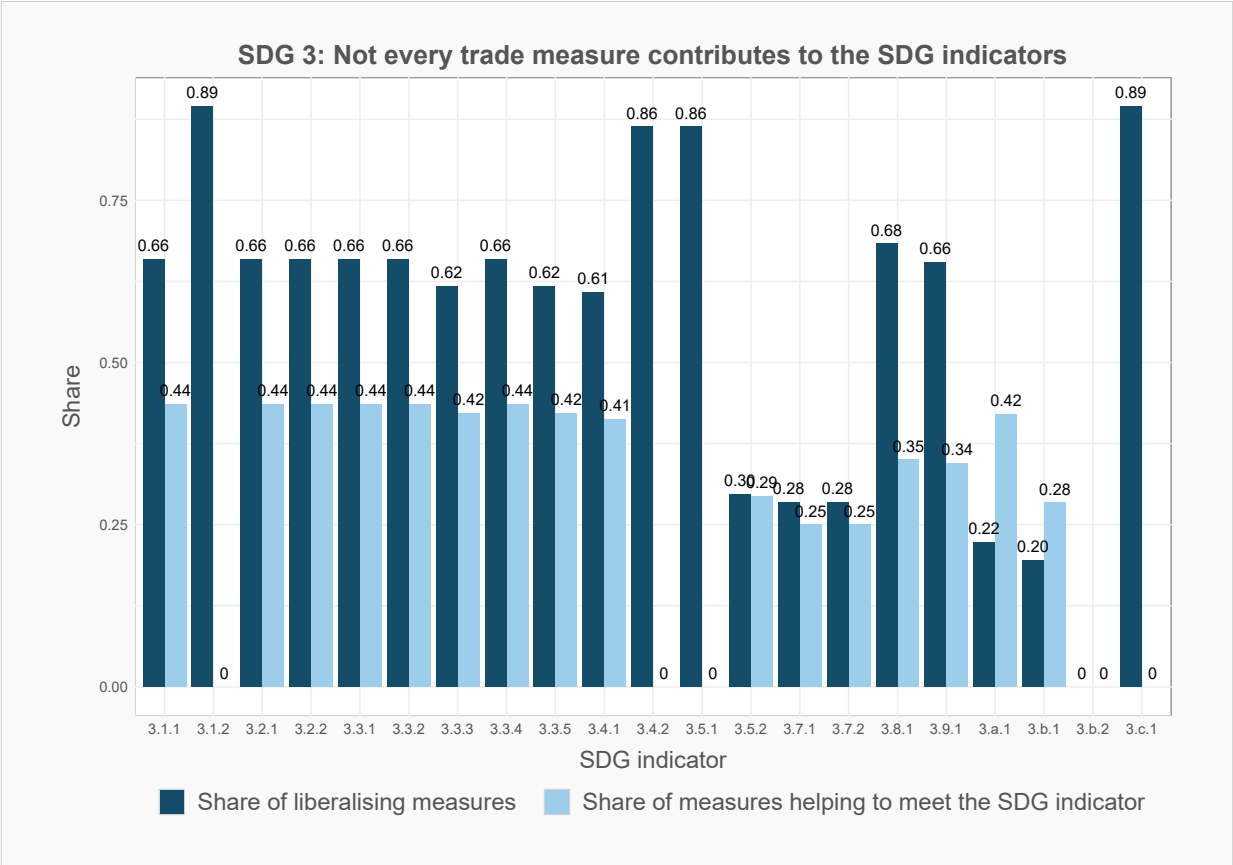
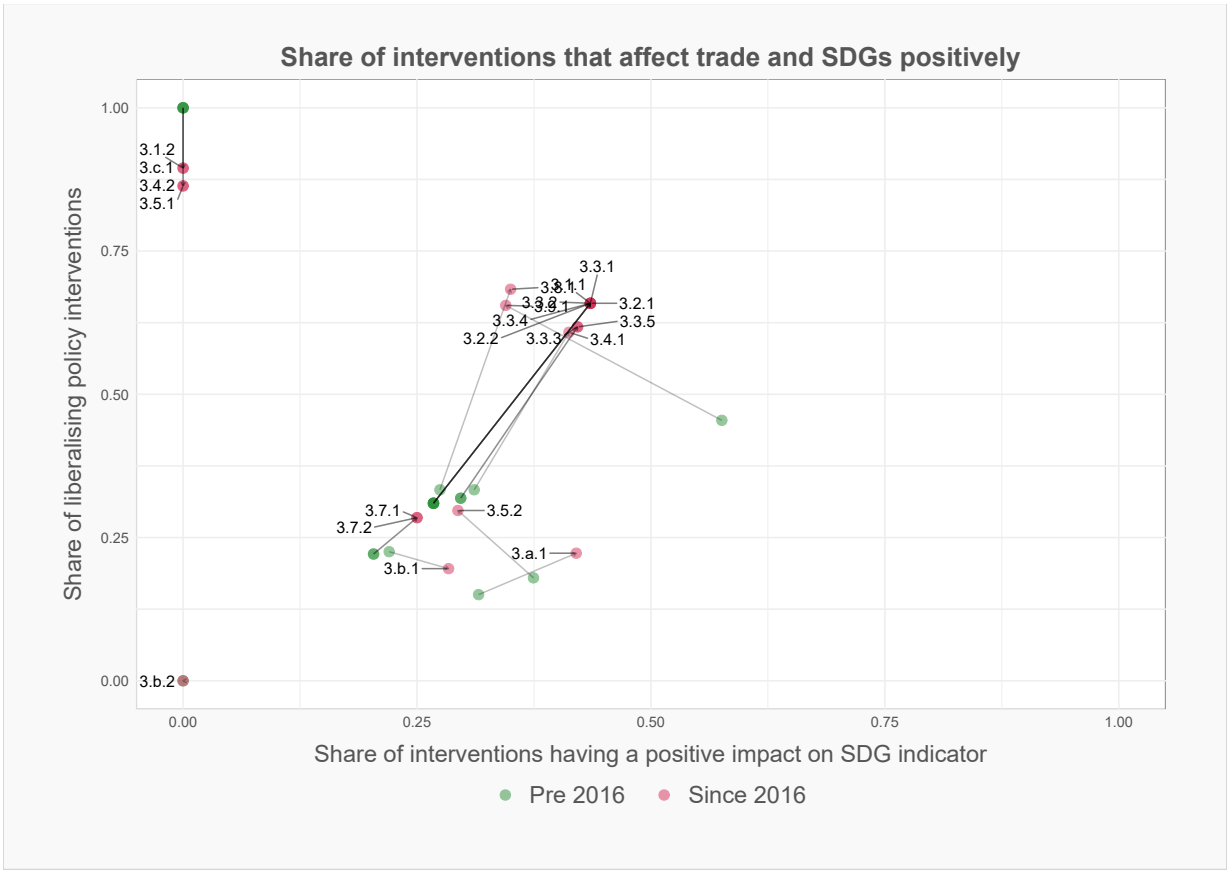


FIGURE SDG3.5

Did SDG implementation improve attainment of the SDG indicators?



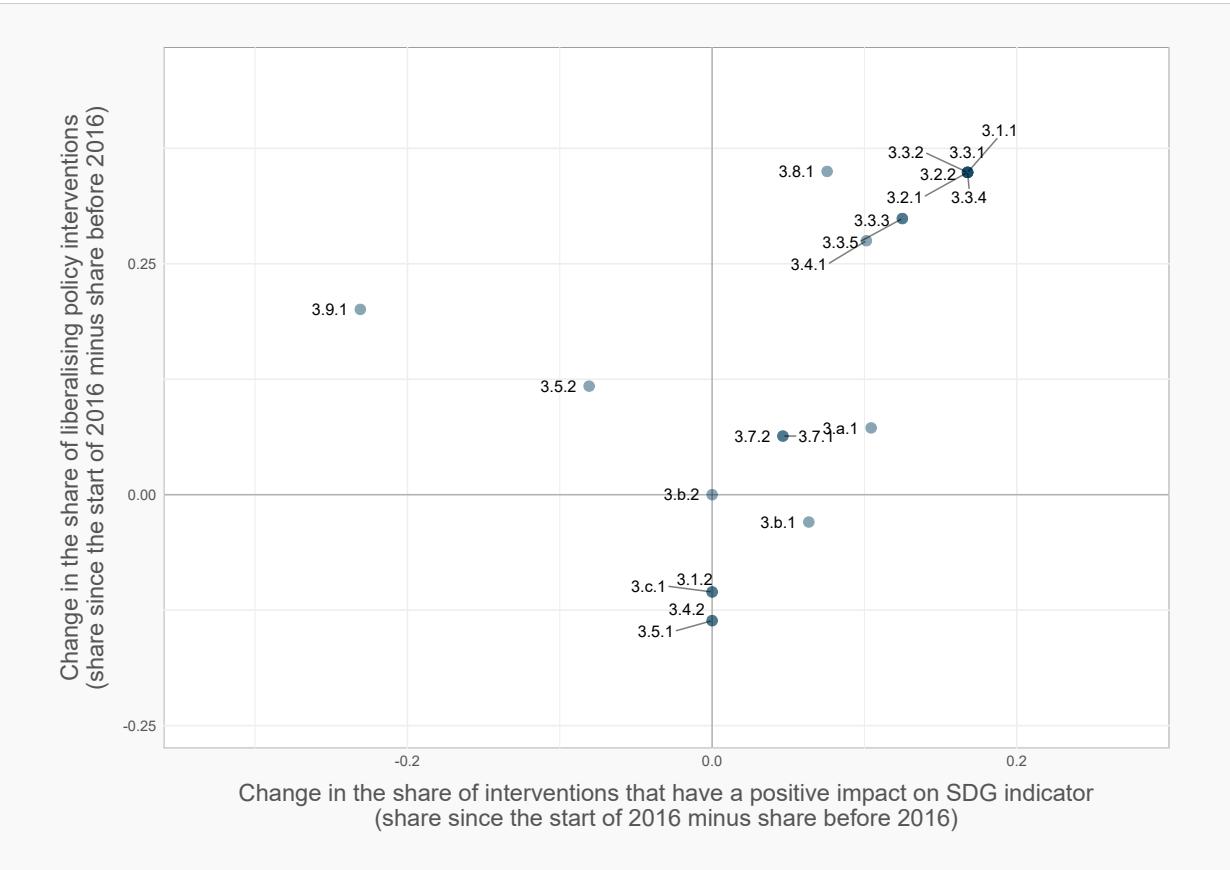


FIGURE SDG3.6

Commercial policies contribution to this SDG varies across income groups since 2016

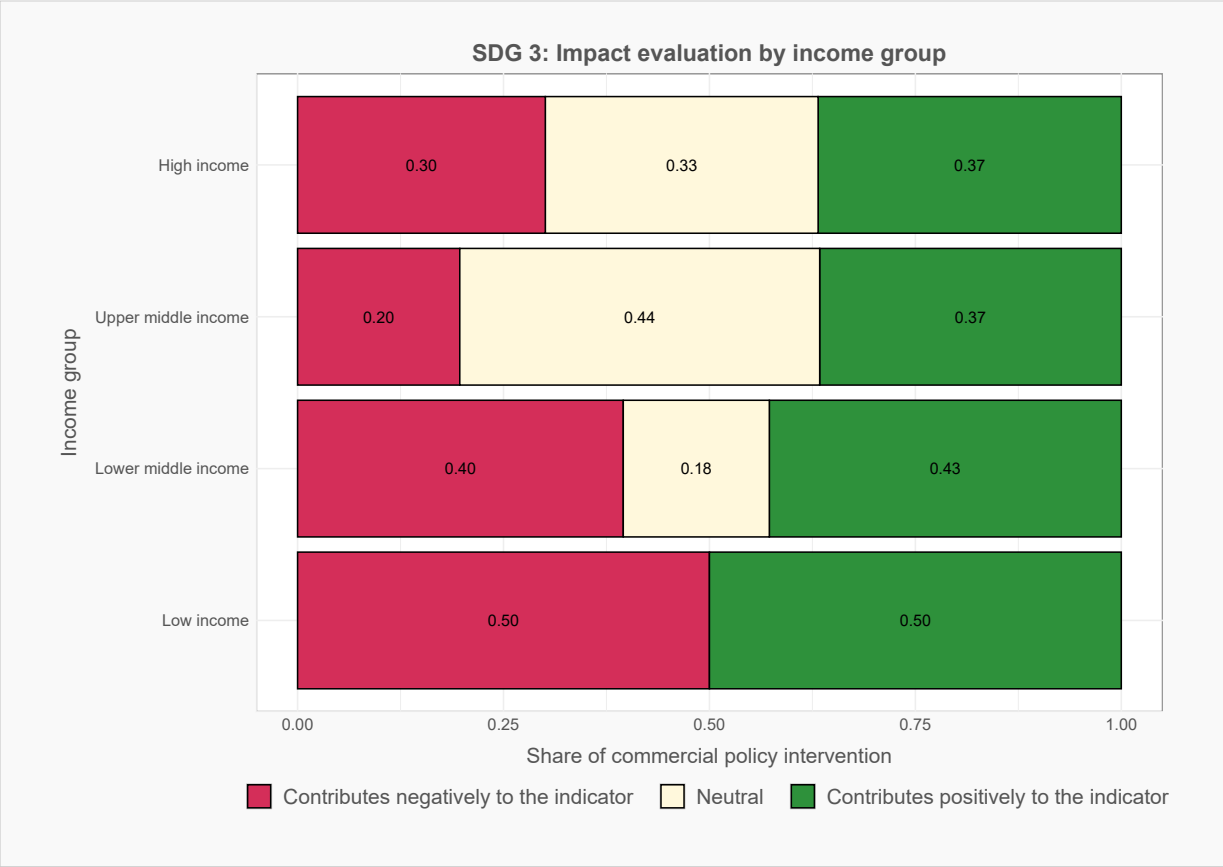
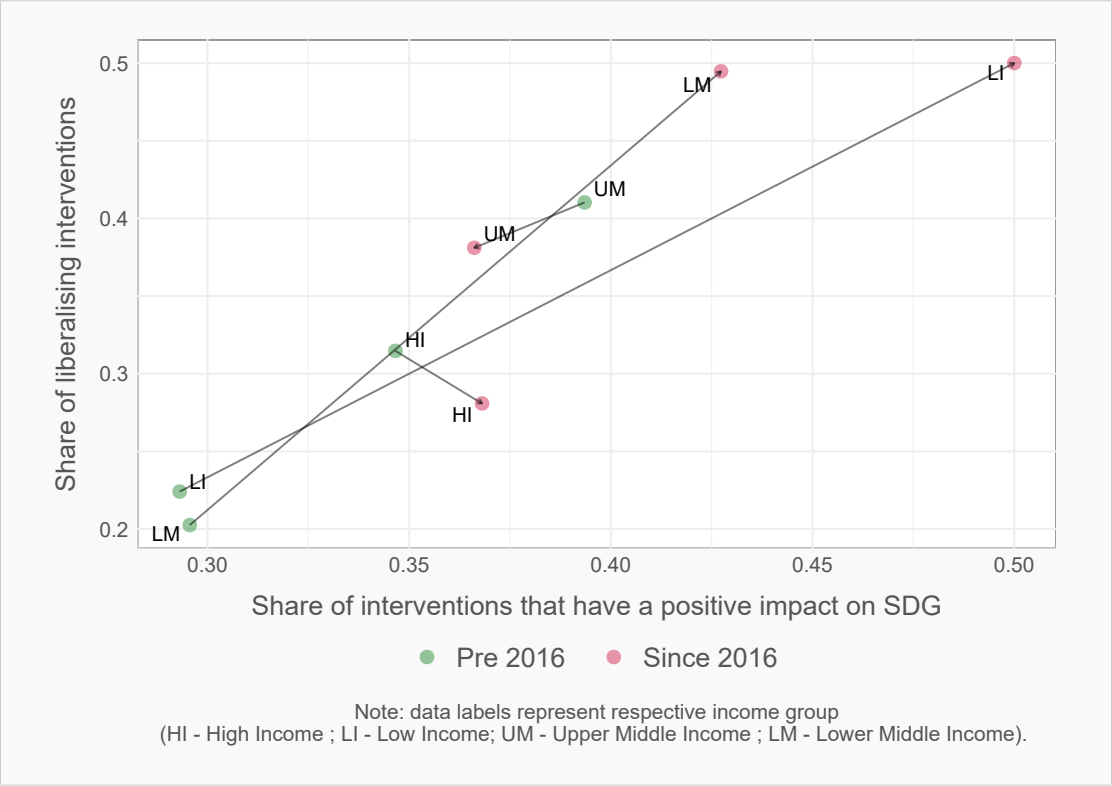


FIGURE SDG3.7

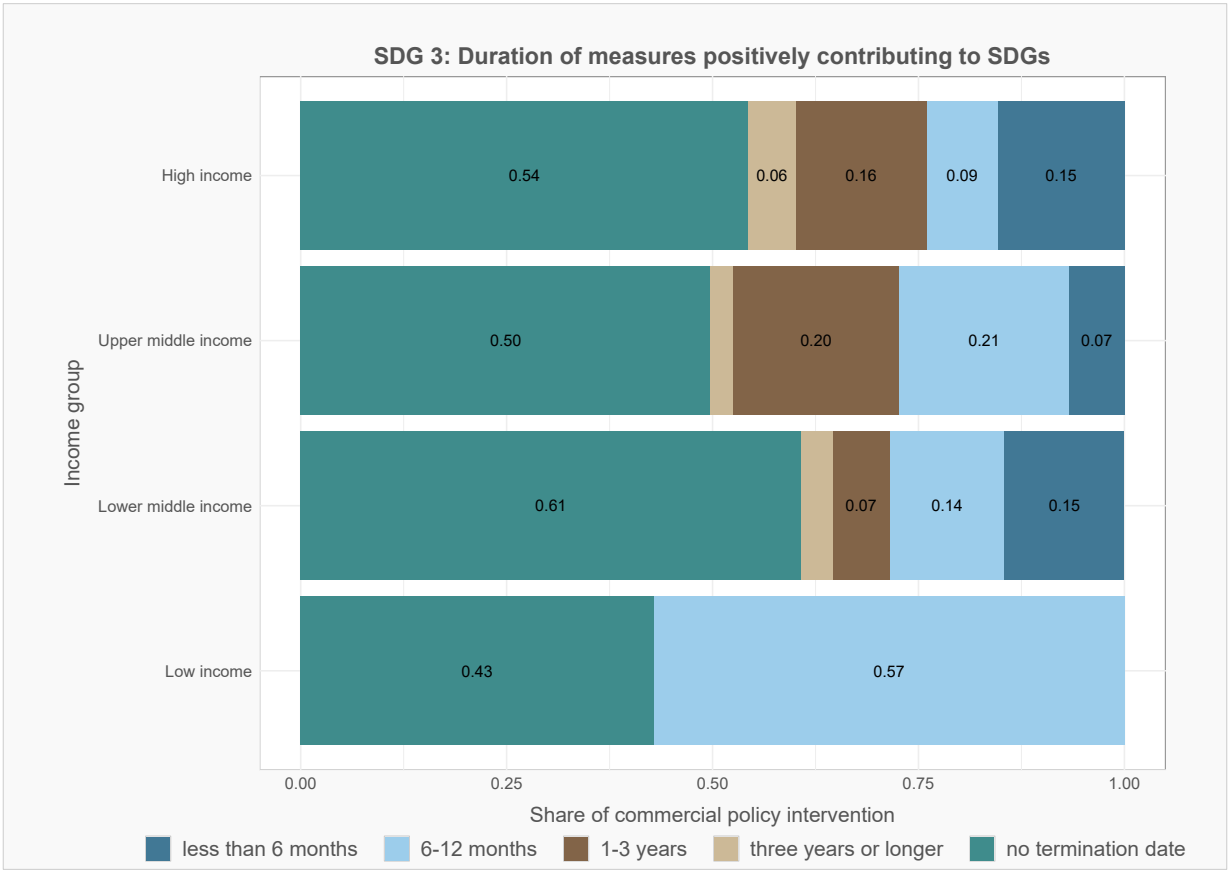
Did SDG implementation affect SDG attainment differently across income groups?



Note: data labels represent respective income group
(HI - High Income ; LI - Low Income; UM - Upper Middle Income ; LM - Lower Middle Income).

FIGURE SDG3.8

Does resort to permanent and temporary measures vary across income groups of nations since 2016?



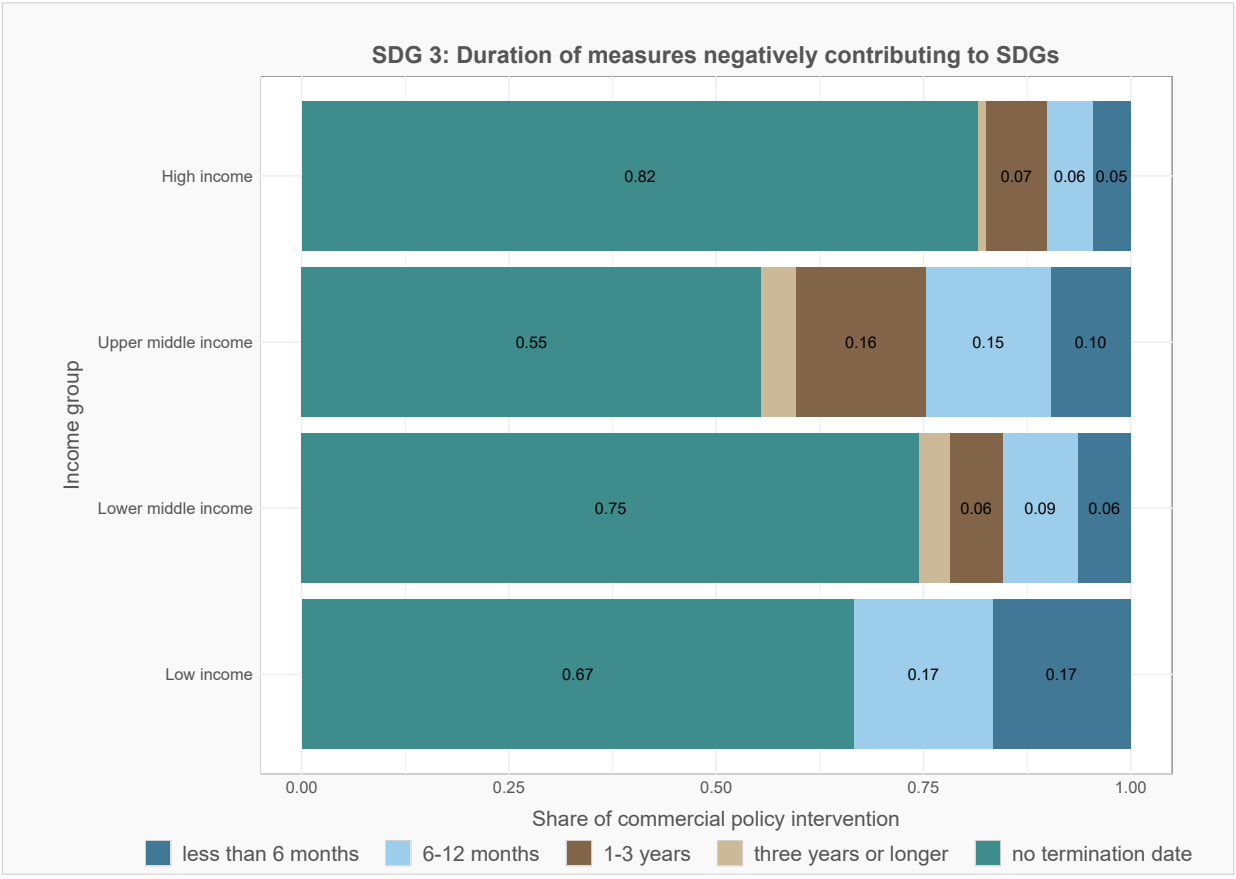


FIGURE SDG3.9

Did SDG attainment and trade openness alter during the COVID-19 pandemic era?

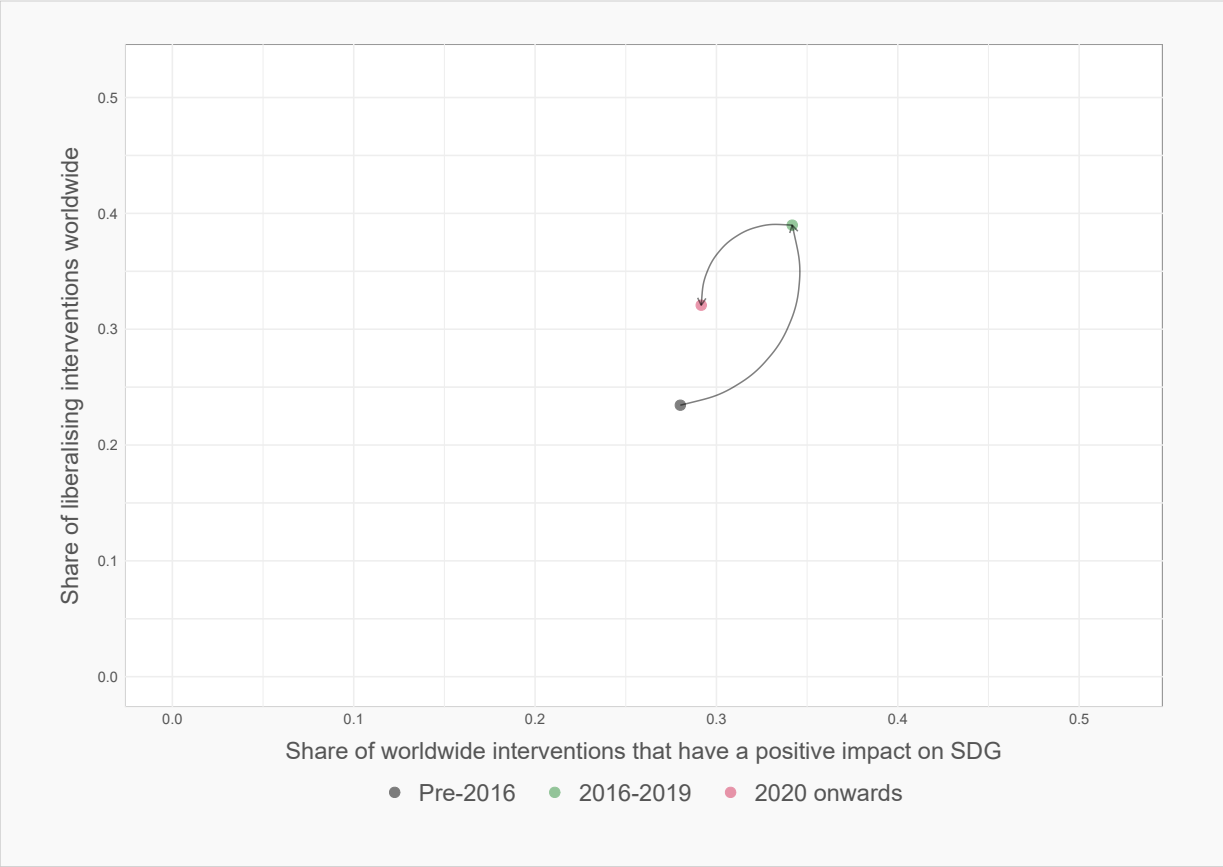


TABLE SDG3.1

Summary statistics on commercial policy intervention in the Global Trade Alert database that is relevant to this SDG

SDG Indicator	Total number of relevant commercial policy interventions (all years in Global Trade Alert database)	Total number of relevant commercial policy interventions (2016 onwards)	Share of commercial policy interventions contributing positively to this indicator (2016 onwards)	Share of commercial policy interventions that liberalise commerce (2016 onwards)	Number of customs territories implementing commercial policy interventions (2016 onwards)
3.1.1	156	85	0.44	0.66	59
3.1.2	20	19	0	0.89	9
3.2.1	156	85	0.44	0.66	59
3.2.2	156	85	0.44	0.66	59
3.3.1	156	85	0.44	0.66	59
3.3.2	156	85	0.44	0.66	59
3.3.3	193	102	0.42	0.62	61
3.3.4	156	85	0.44	0.66	59
3.3.5	193	102	0.42	0.62	61
3.4.1	187	97	0.41	0.61	60
3.4.2	23	22	0	0.86	11
3.5.1	23	22	0	0.86	11
3.5.2	1034	572	0.29	0.3	96
3.7.1	257	144	0.25	0.28	61
3.7.2	257	144	0.25	0.28	61
3.8.1	111	60	0.35	0.68	21
3.9.1	62	29	0.34	0.66	9
3.a.1	504	238	0.42	0.22	70
3.b.1	1611	1216	0.28	0.2	105
3.b.2	109	34	0	0	14
3.c.1	20	19	0	0.89	9
Any indicator in this SDG	2838	1825	0.33	0.22	117

TABLE SDG3.2

Was there a tension between trade openness and SDG attainment before SDG adoption?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented before 2016)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	14.48%	1.36%	7.6%
No (restrictive/distortive)	13.53%	30.14%	32.9%

TABLE SDG3.3

Was there a tension between trade openness and SDG attainment during 2016-19?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2016-19)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	24.73%	6.86%	7.4%
No (restrictive/distortive)	9.45%	32.99%	18.57%

TABLE SDG3.4

Was there a tension between trade openness and SDG attainment during Pandemic era (2020-2022)?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2020-22)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	13.8%	9.4%	8.86%
No (restrictive/distortive)	15.36%	45.06%	7.51%

SDG 6: CLEAN WATER AND SANITATION

Summary of main findings for SDG 6

	Finding	Comments	Evidence
Number of SDG indicators for which evidence was compiled?	6	Indicators 6.1.1, 6.2.1, 6.3.1, 6.3.2, 6.5.1, 6.a.1	See Table 1
Number of times commercial policy interventions since 2016 affect indicators in this SDG	4332	Neutral measures account for largest number of interventions (2943)	See Figure 1
Number of jurisdictions implementing commercial policy measures affecting this SDG since 2016	123		See Table 1
Most common commercial policy intervention types affecting each SDG indicators	6.2.1, 6.3.1, 6.3.2: Import measures 6.1.1, 6.3.1, 6.3.2, 6.5.1: Subsidies to local firms 6.a.1 : Export measure		See Figure 2
How many SDG indicators does commercial policy intervention harm SDG attainment more than one third of the time (since 2016)?	1 out of 6	Indicator 6.a.1	See Figures 3,4
Since 2016 is there a higher share of commercial policy interventions contributing positively to SDG?	5 out of 6	All except 6.a.1	See Figure 5
Group of nations where commercial policy intervention since 2016 contributed positively most to this SDG?	Lower middle income		See Figure 6
Group of nations where commercial policy intervention since 2016 detracted most to this SDG?	Low income		See Figure 6
Group(s) of nations where share of commercial policy intervention contributing positively to SDG falls since 2016	Upper Middle Income		See Figure 7
Group of nations that resorted most to time-unlimited policy intervention that contributes positively to this SDG?	Low income and High in-come		See Figure 8
Group of nations which resorted most to time-unlimited policy intervention that detracts from this SDG?	Low income		See Figure 8
Compared to 2016-2019, did the pandemic era see more commercial policy intervention improve this SDG?	Yes	Bigger change from 2016-19 to 2020-22 than pre-2016 to 2016-2019.	See Figure 9
Before SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	No		See Table 2
Since SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	No		See Table 3

FIGURE SDG6.1

Breakdown of policy intervention in terms of likely impact on this SDG

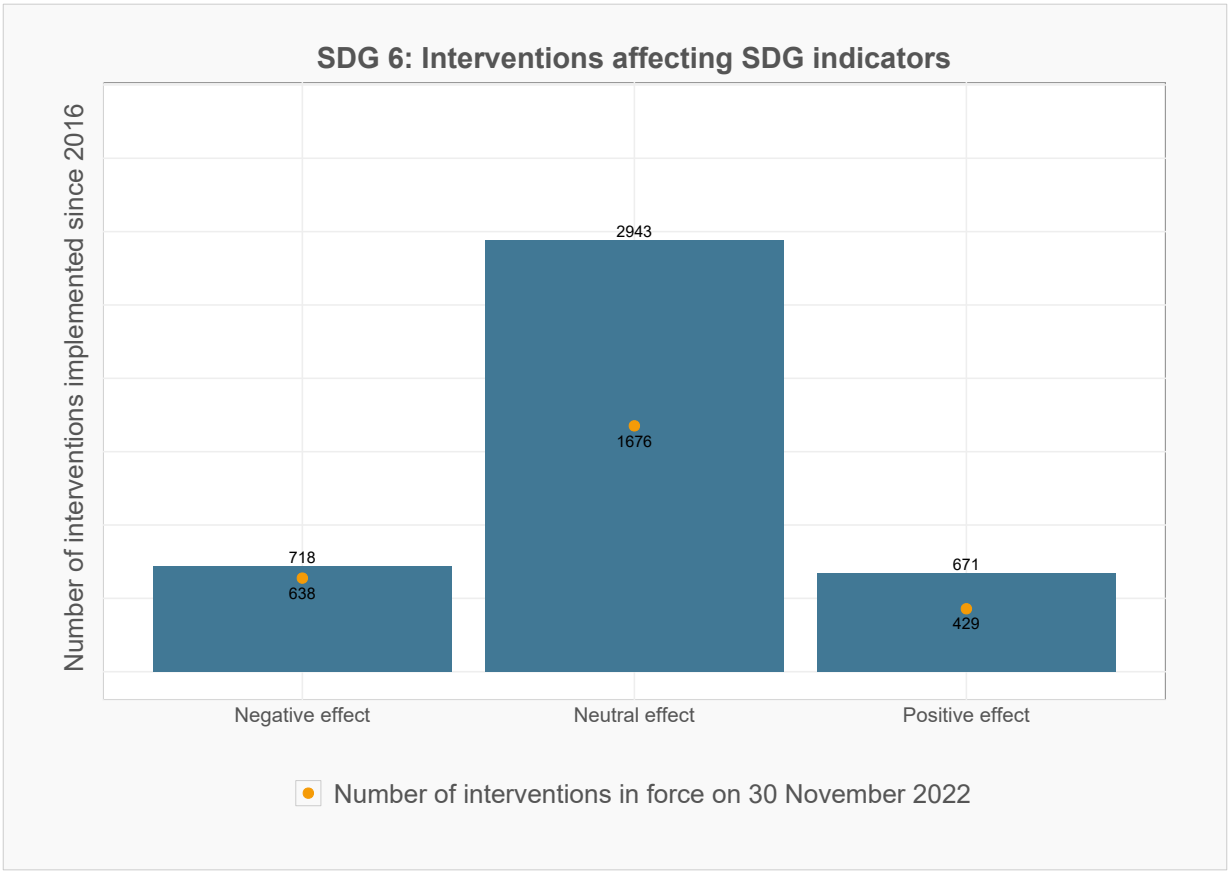


FIGURE SDG6.2

Breakdown of commercial policy intervention type across SDG indicator since 2016

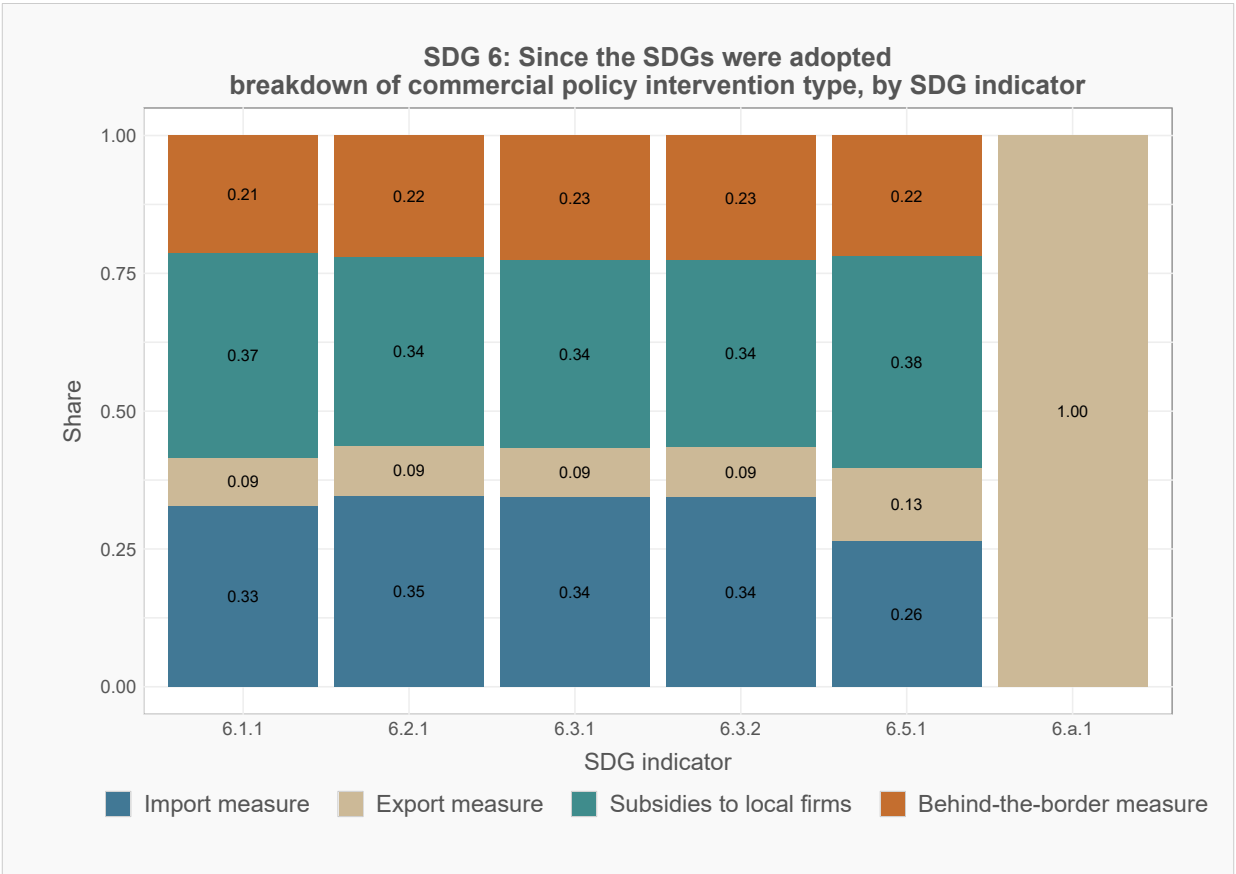


FIGURE SDG6.3

Likely impact of commercial policy intervention, breakdown across SDG indicators since 2016

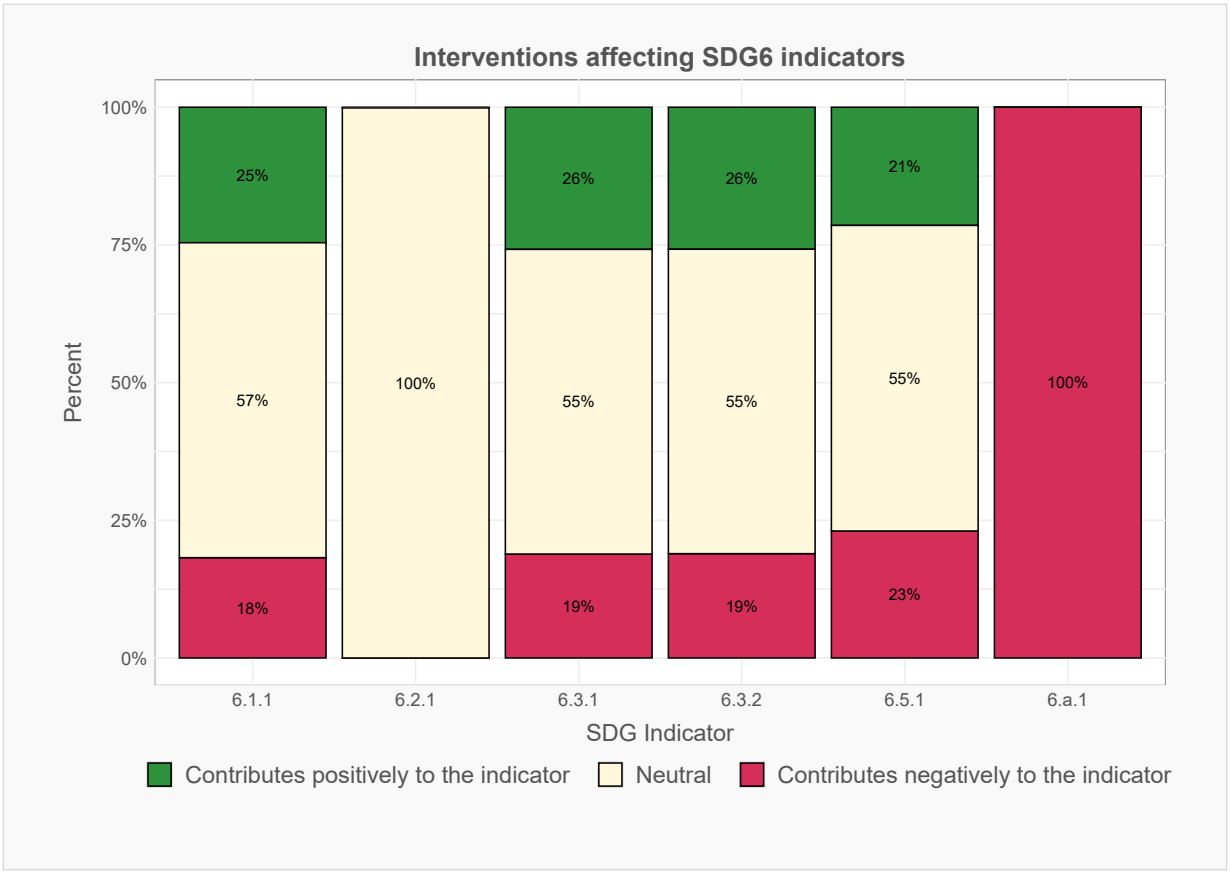


FIGURE SDG6.4

Since 2016, was resort to trade reform and SDG attainment similar?

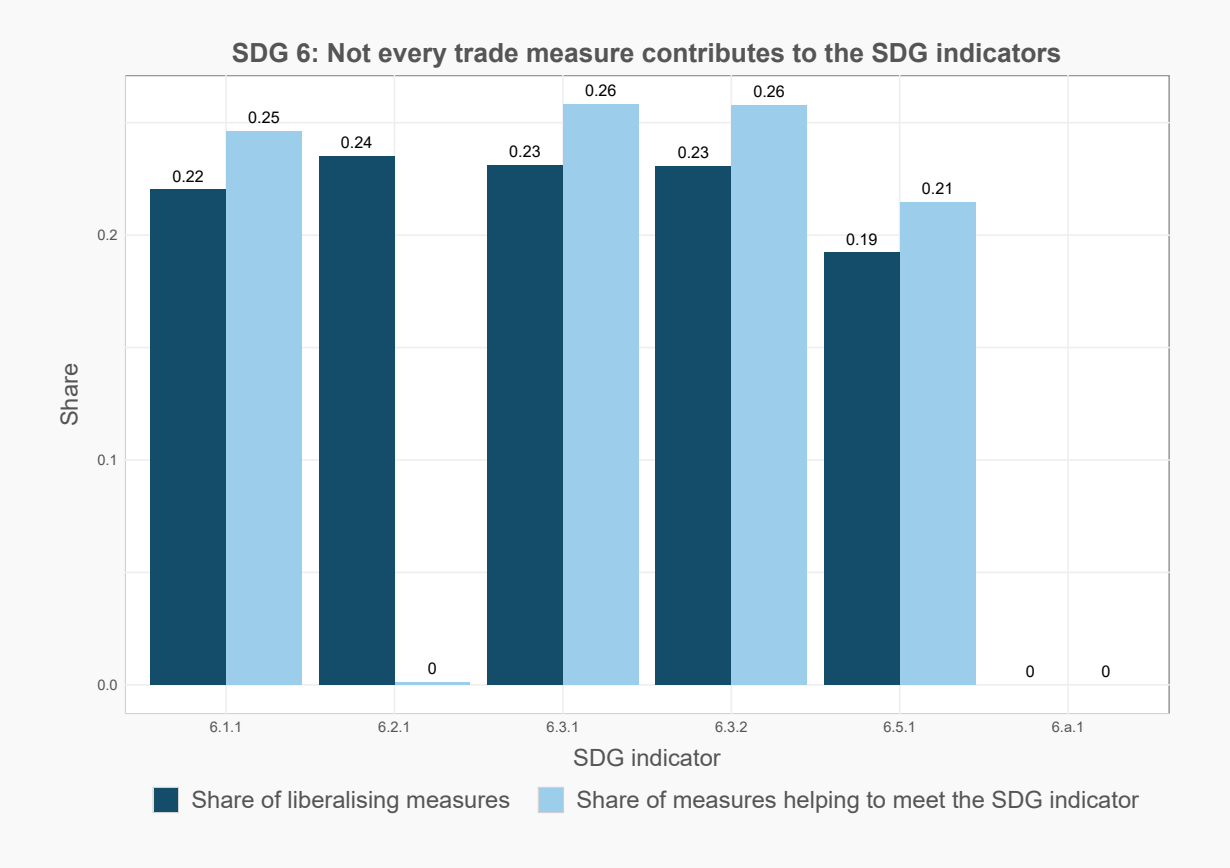
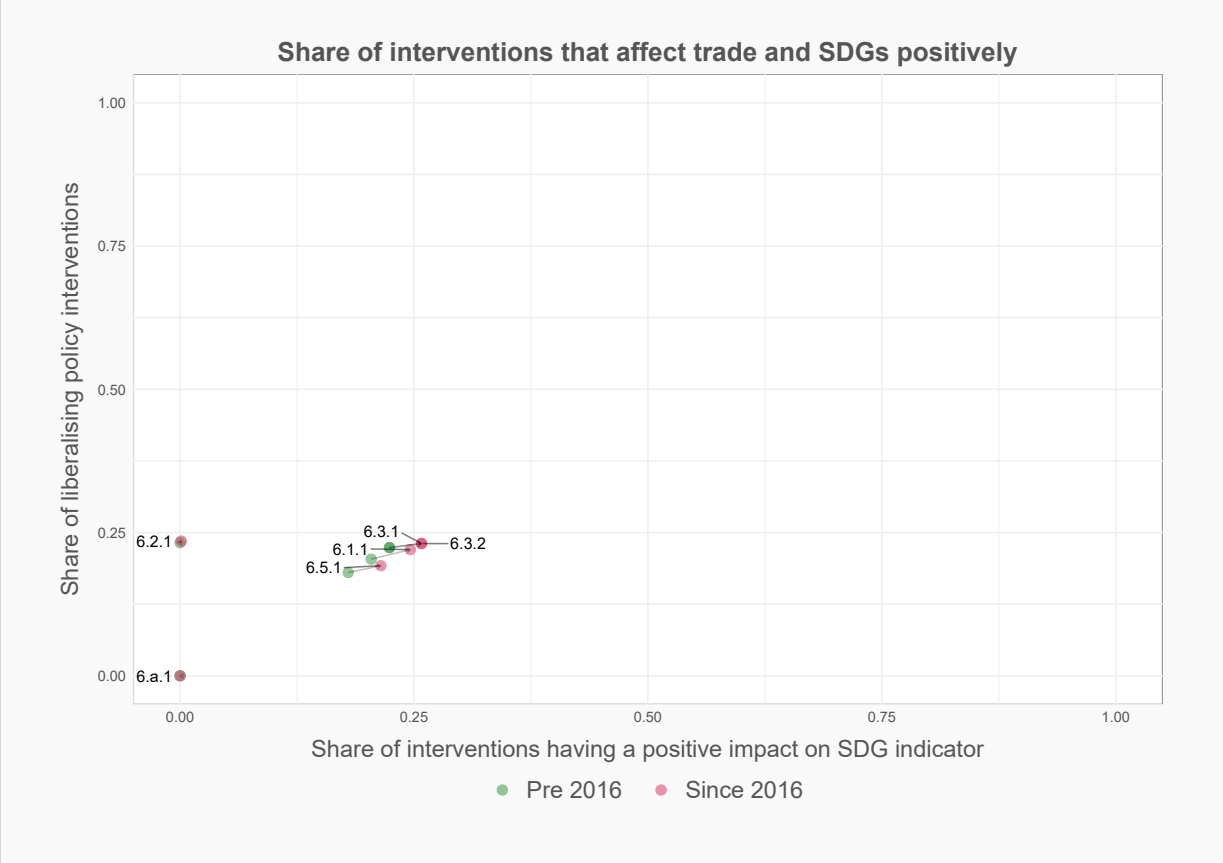


FIGURE SDG6.5

Did SDG implementation improve attainment of the SDG indicators?



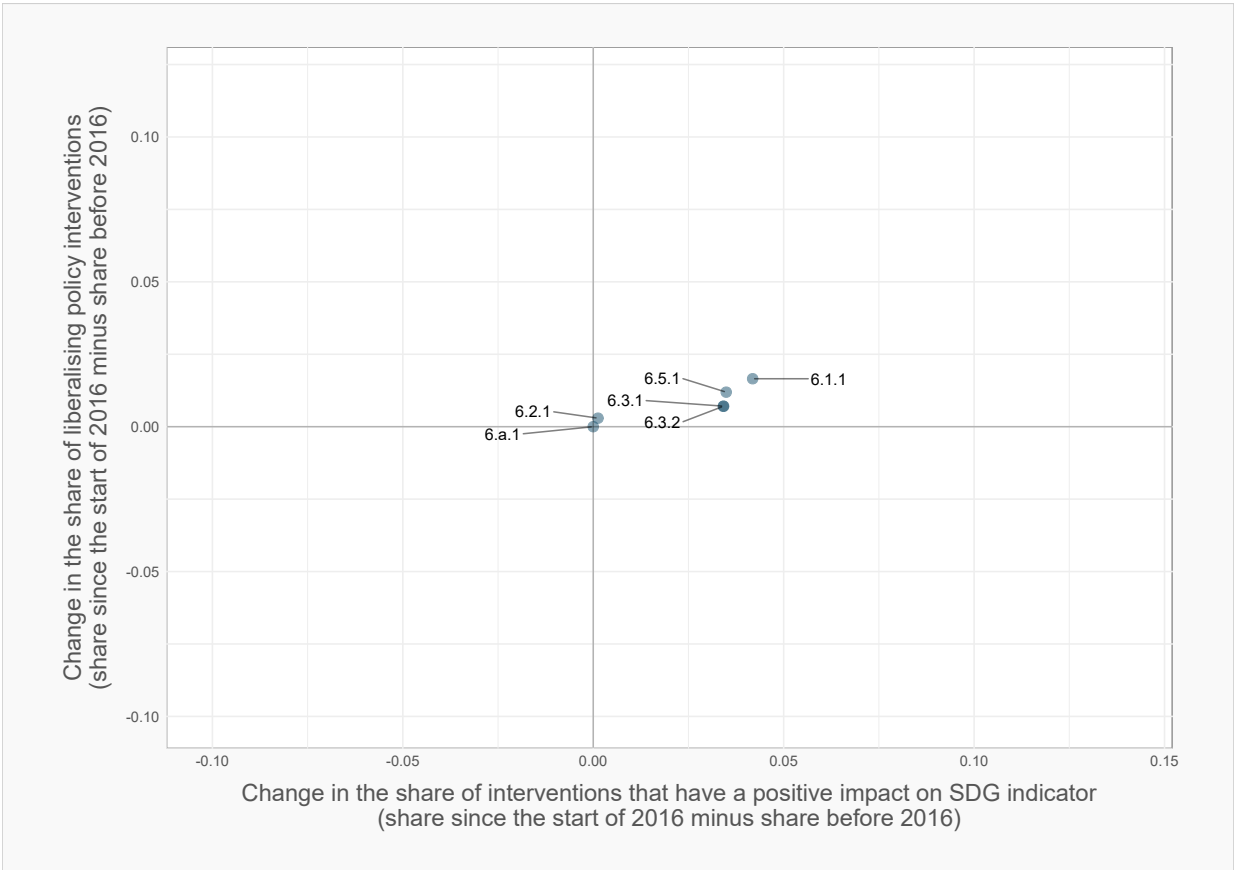


FIGURE SDG6.6

Commercial policies contribution to this SDG varies across income groups since 2016

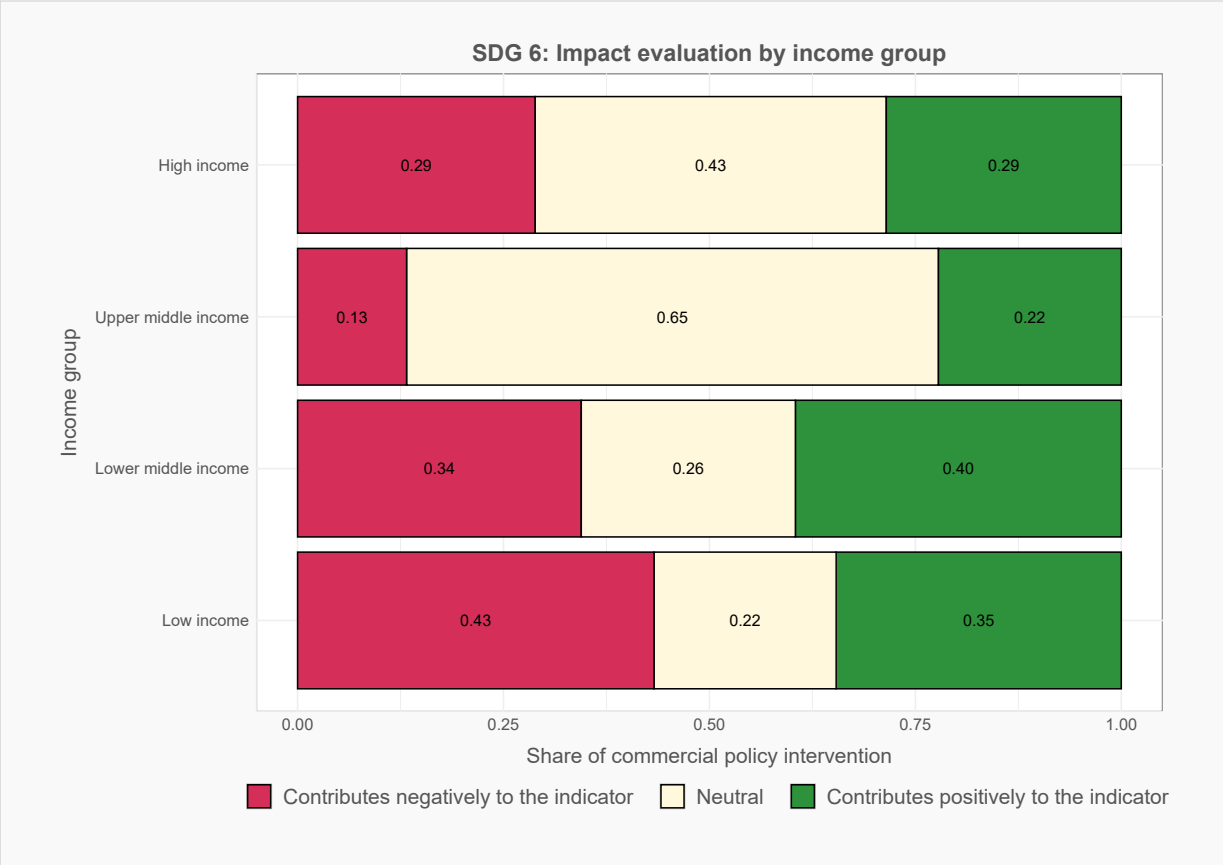
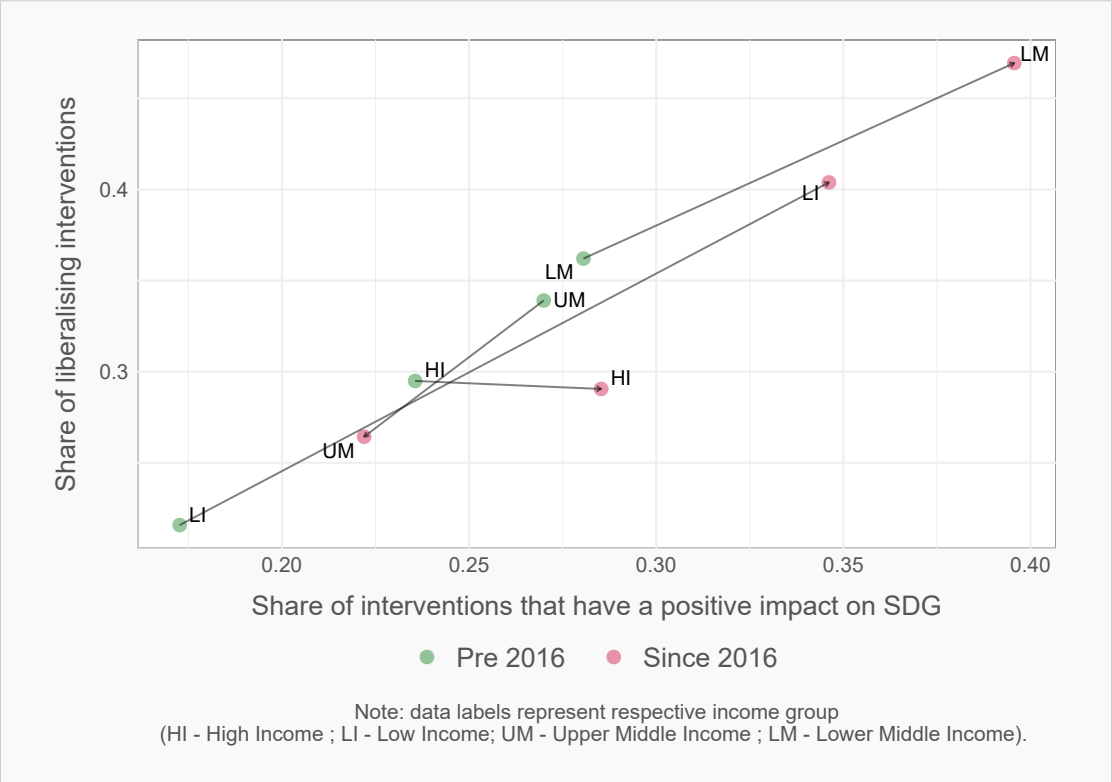


FIGURE SDG6.7

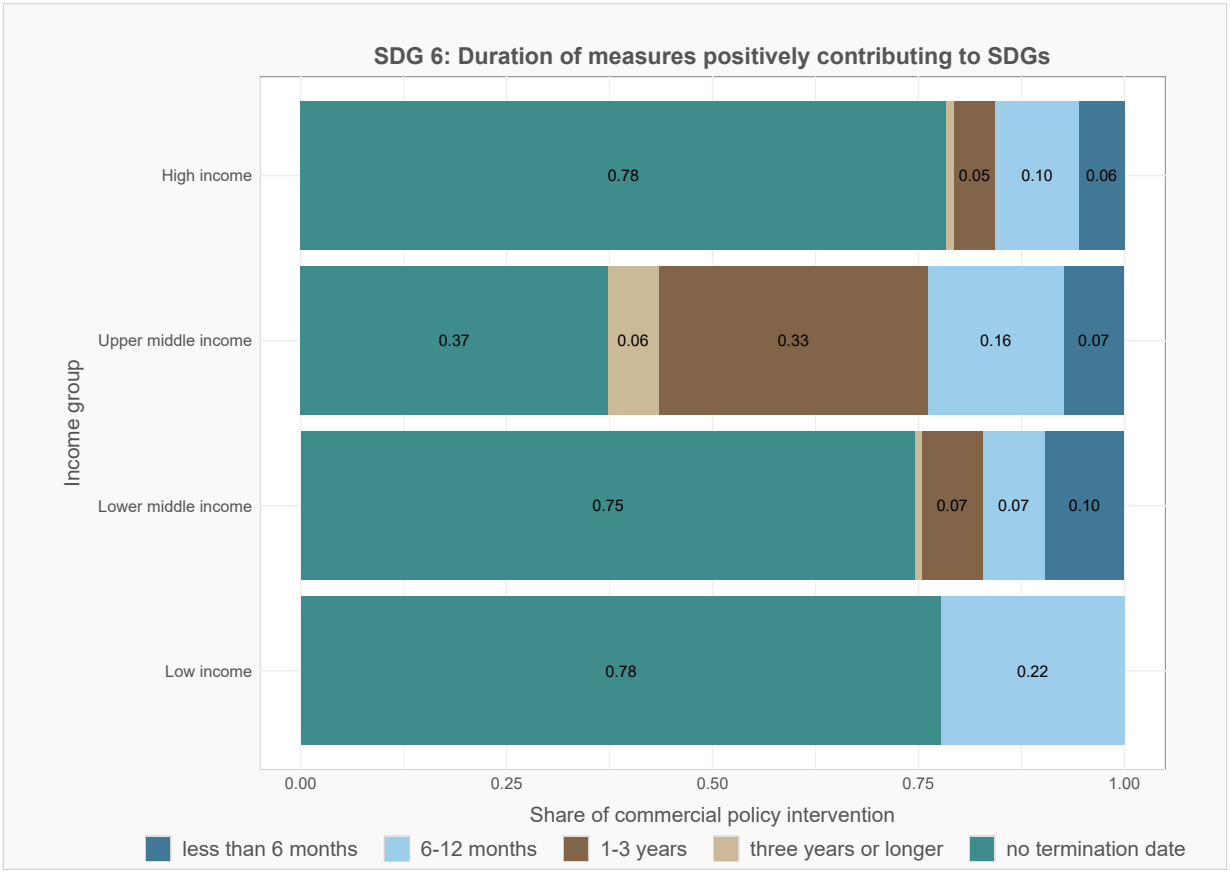
Did SDG implementation affect SDG attainment differently across income groups?



Note: data labels represent respective income group
(HI - High Income ; LI - Low Income; UM - Upper Middle Income ; LM - Lower Middle Income).

FIGURE SDG6.8

Does resort to permanent and temporary measures vary across income groups of nations since 2016?



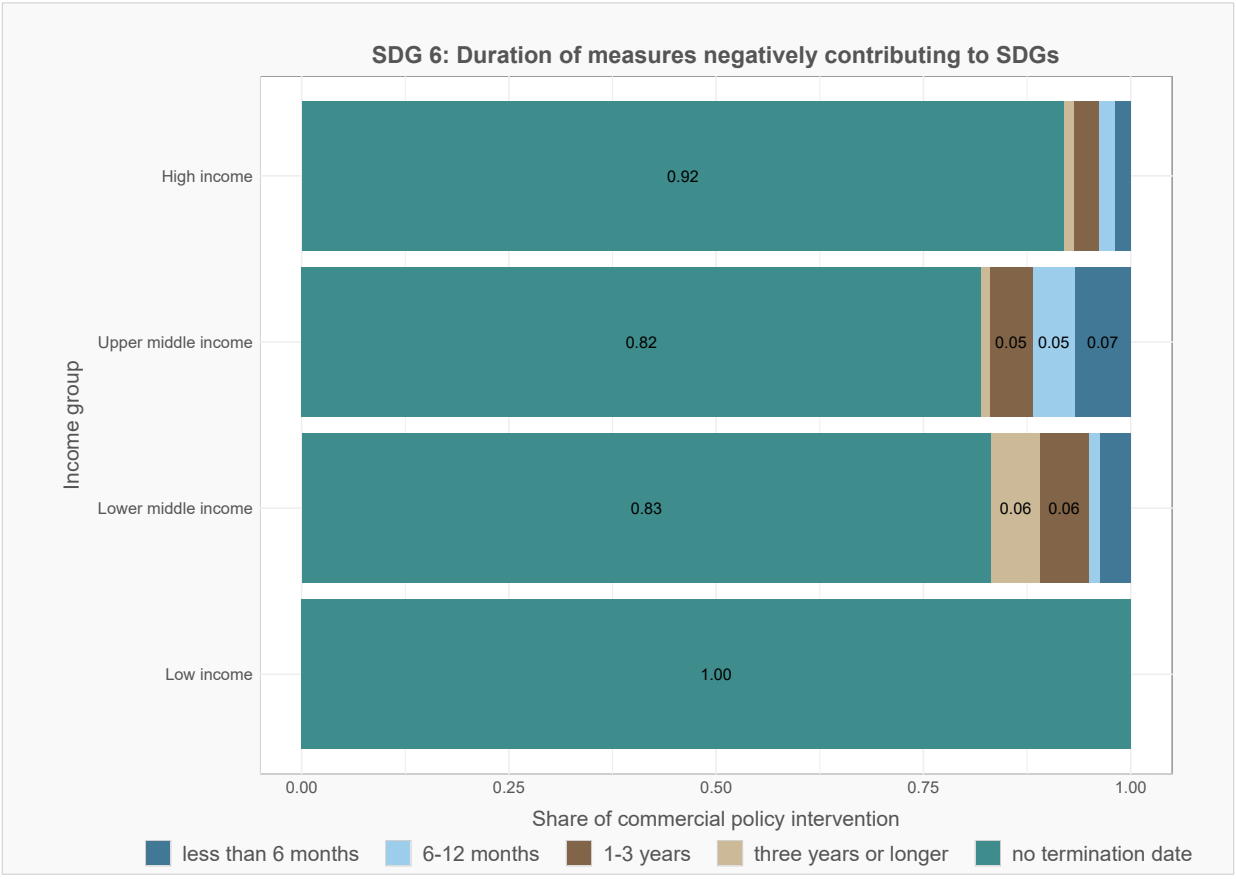


FIGURE SDG6.9

Did SDG attainment and trade openness alter during the COVID-19 pandemic era?

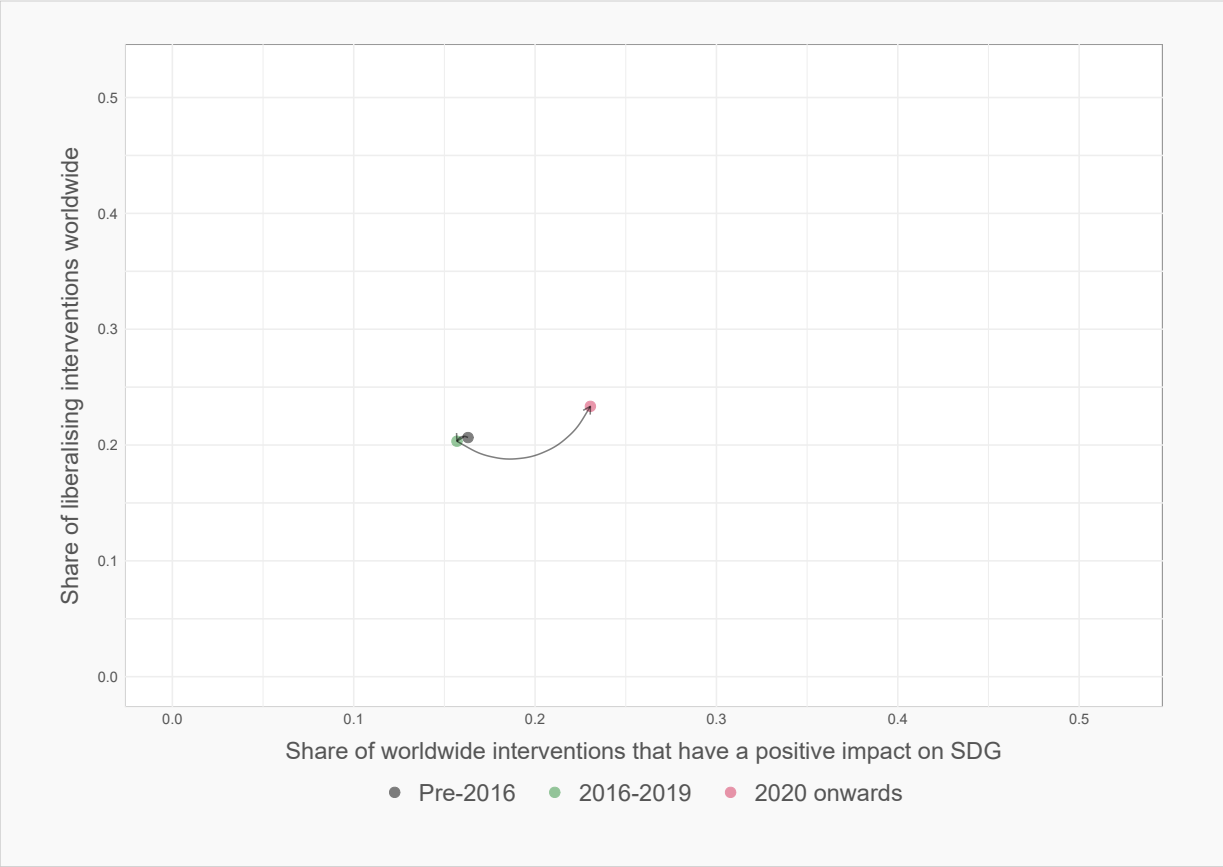


TABLE SDG6.1

Summary statistics on commercial policy intervention in the Global Trade Alert database that is relevant to this SDG

SDG Indicator	Total number of relevant commercial policy interventions (all years in Global Trade Alert database)	Total number of relevant commercial policy interventions (2016 onwards)	Share of commercial policy interventions contributing positively to this indicator (2016 onwards)	Share of commercial policy interventions that liberalise commerce (2016 onwards)	Number of customs territories implementing commercial policy interventions (2016 onwards)
6.1.1	4136	2471	0.25	0.22	113
6.2.1	3954	2399	0	0.24	121
6.3.1	3822	2321	0.26	0.23	112
6.3.2	3825	2323	0.26	0.23	112
6.5.1	4980	3071	0.21	0.19	113
6.a.1	251	71	0	0	14
Any indicator in this SDG	5414	3291	0.2	0.19	123

TABLE SDG6.2

Was there a tension between trade openness and SDG attainment before SDG adoption?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented before 2016)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	15.04%	5.17%	0.43%
No (restrictive/distortive)	1.26%	47.21%	30.88%

TABLE SDG6.3

Was there a tension between trade openness and SDG attainment during 2016-19?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2016-19)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	15.27%	4.39%	0.67%
No (restrictive/distortive)	0.43%	59.92%	19.33%

TABLE SDG6.4

Was there a tension between trade openness and SDG attainment during Pandemic era (2020-2022)?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2020-22)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	17.17%	5.28%	0.89%
No (restrictive/distortive)	5.88%	58.14%	12.64%

SDG 7: AFFORDABLE AND CLEAN ENERGY

Summary of main findings for SDG 7

	Finding	Comments	Evidence
Number of SDG indicators for which evidence was compiled?	4	Indicators 7.1.1, 7.1.2, 7.2.1, 7.a.1	See Table 1
Number of times commercial policy interventions since 2016 affect indicators in this SDG	9338		See Figure 1
Number of jurisdictions implementing commercial policy measures affecting this SDG since 2016	157		See Table 1
Most common commercial policy intervention types affecting each SDG indicators.	All except 7.a.1: Subsidies to local firms 7.a.1: Export measures		See Figure 2
How many SDG indicators does commercial policy intervention harm SDG attainment more than one third of the time (since 2016)?	1 out of 4	Indicator 7.a.1	See Figures 3,4
Since 2016 is there a higher share of commercial policy interventions contributing positively to SDG?	3 out of 4	7.1.1, 7.1.2, 7.a.1	See Figure 5
Group of nations where commercial policy intervention contributed positively most to this SDG?	Upper middle income		See Figure 6
Group of nations where commercial policy intervention detracted most to this SDG?	Low income		See Figure 6
Group(s) of nations where share of commercial policy intervention contributing positively to SDG falls since 2016	All, but high income	High income made considerable gains.	See Figure 7
Group of nations that resorted most to time-unlimited policy intervention that contributes positively to this SDG?	Low income		See Figure 8
Group of nations which resorted most to time-unlimited policy intervention that detracts from this SDG?	High income		See Figure 8
Compared to 2016-2019, did the pandemic era see more commercial policy intervention improve this SDG?	Yes	Slight increase.	See Figure 9
Before SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	Yes	Around 25% of the interventions have inverted signs in terms of GTA evaluation or SDG impact evaluation.	See Table 2
Since SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	Yes	Around 26% of the interventions have inverted signs in terms of GTA evaluation or SDG impact evaluation.	See Table 3

FIGURE SDG7.1

Breakdown of policy intervention in terms of likely impact on this SDG

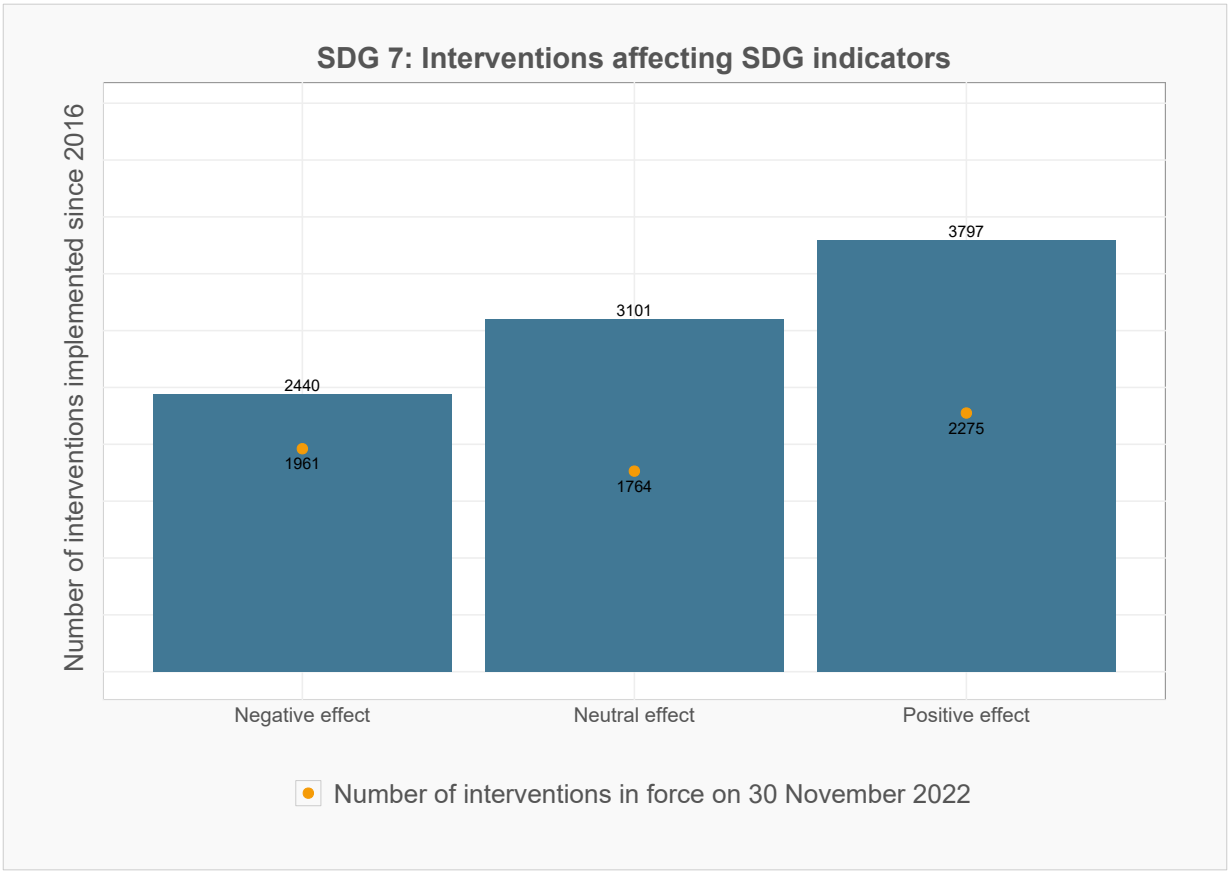


FIGURE SDG7.2

Breakdown of commercial policy intervention type across SDG indicator since 2016

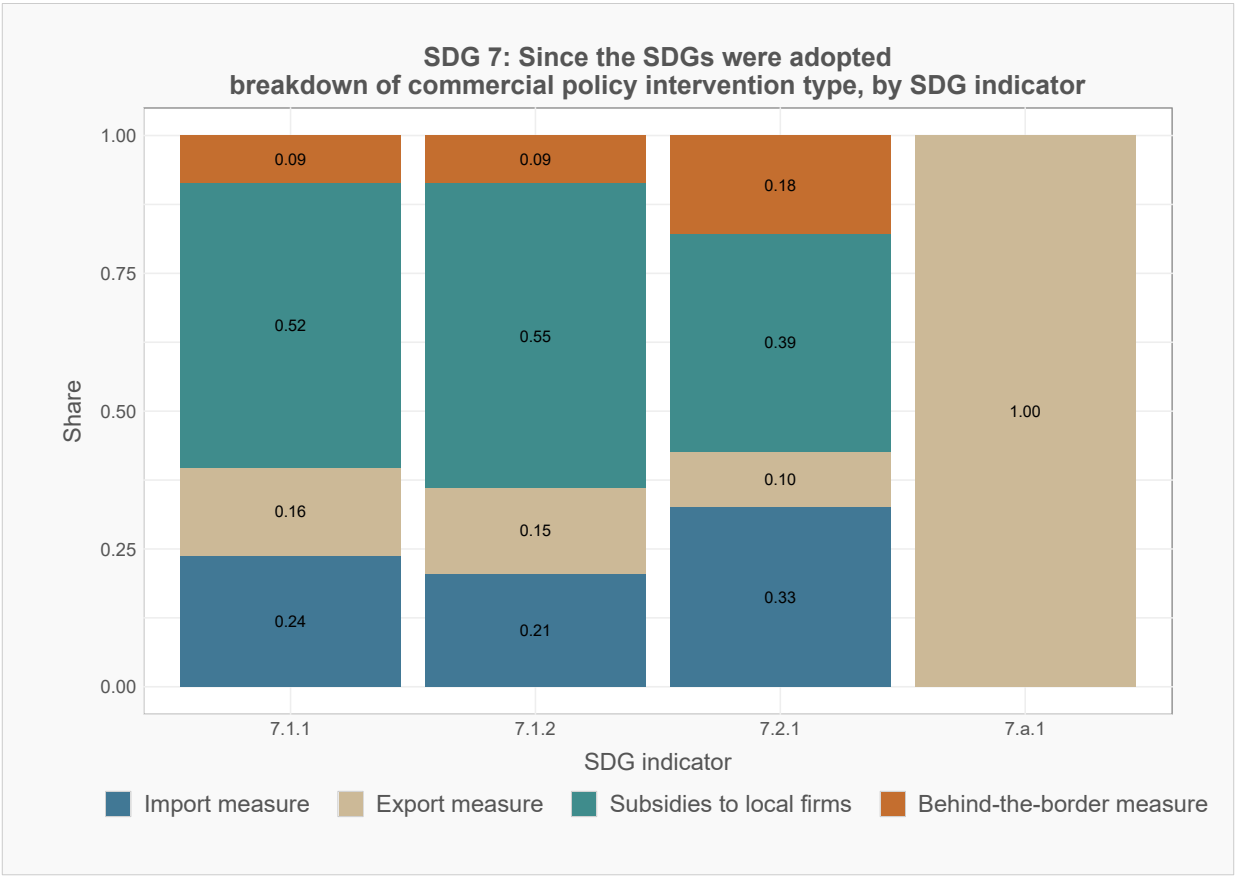


FIGURE SDG7.3

Likely impact of commercial policy intervention, breakdown across SDG indicators since 2016

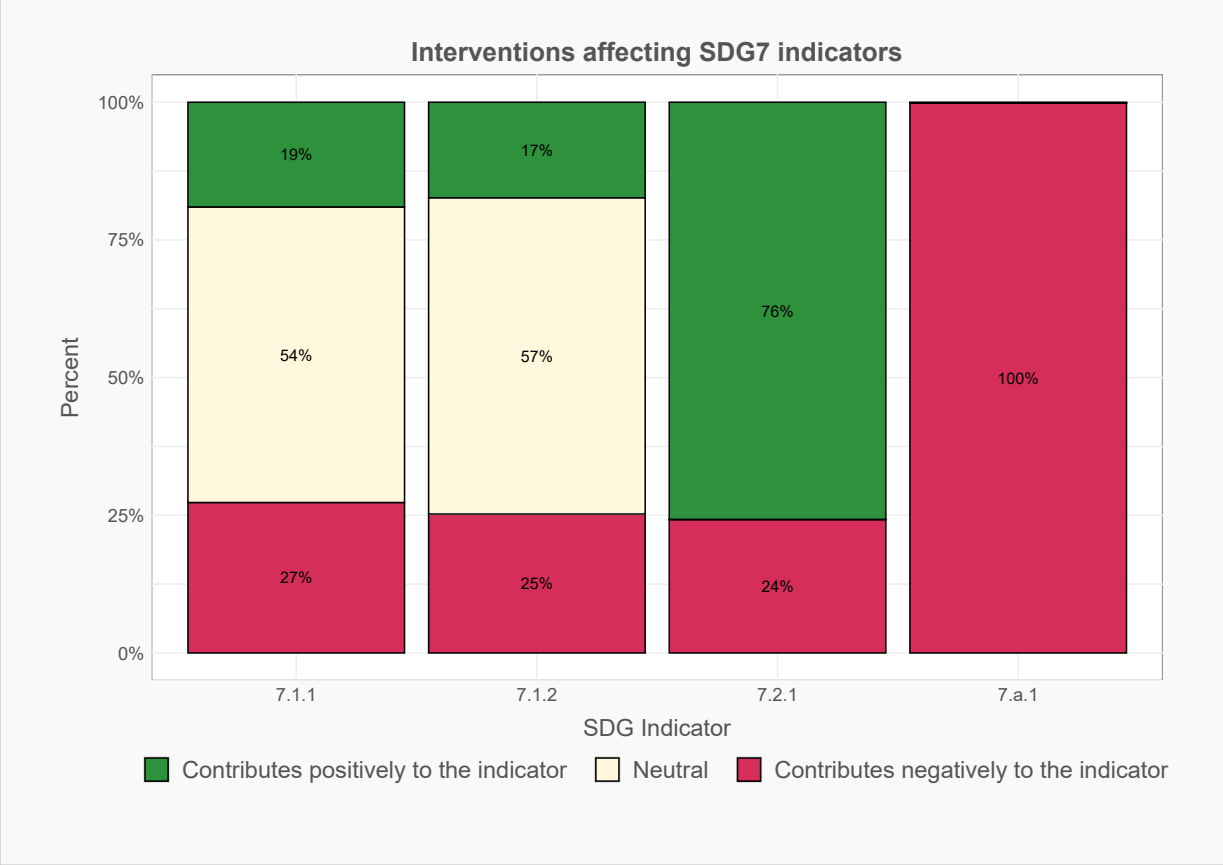


FIGURE SDG7.4

Since 2016, was resort to trade reform and SDG attainment similar?

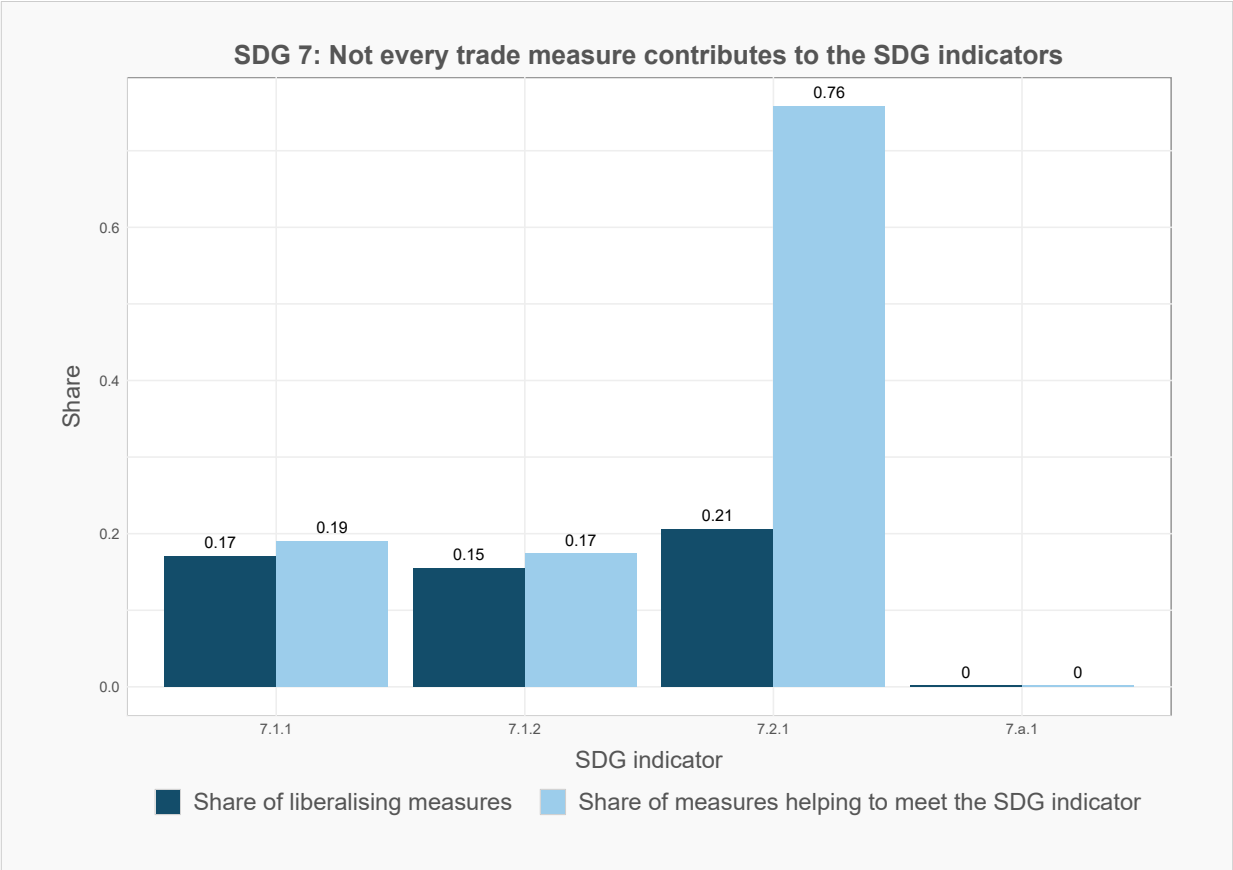
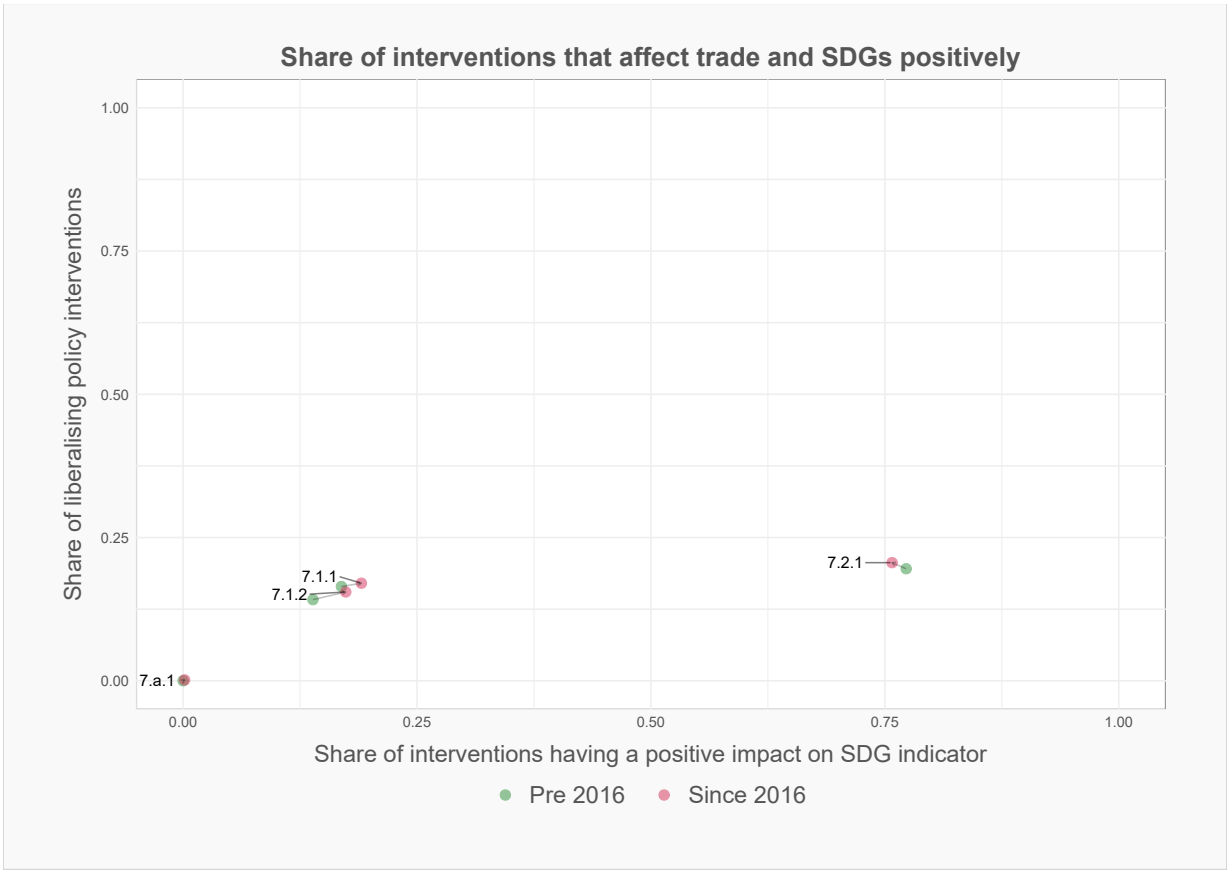


FIGURE SDG7.5

Did SDG implementation improve attainment of the SDG indicators?



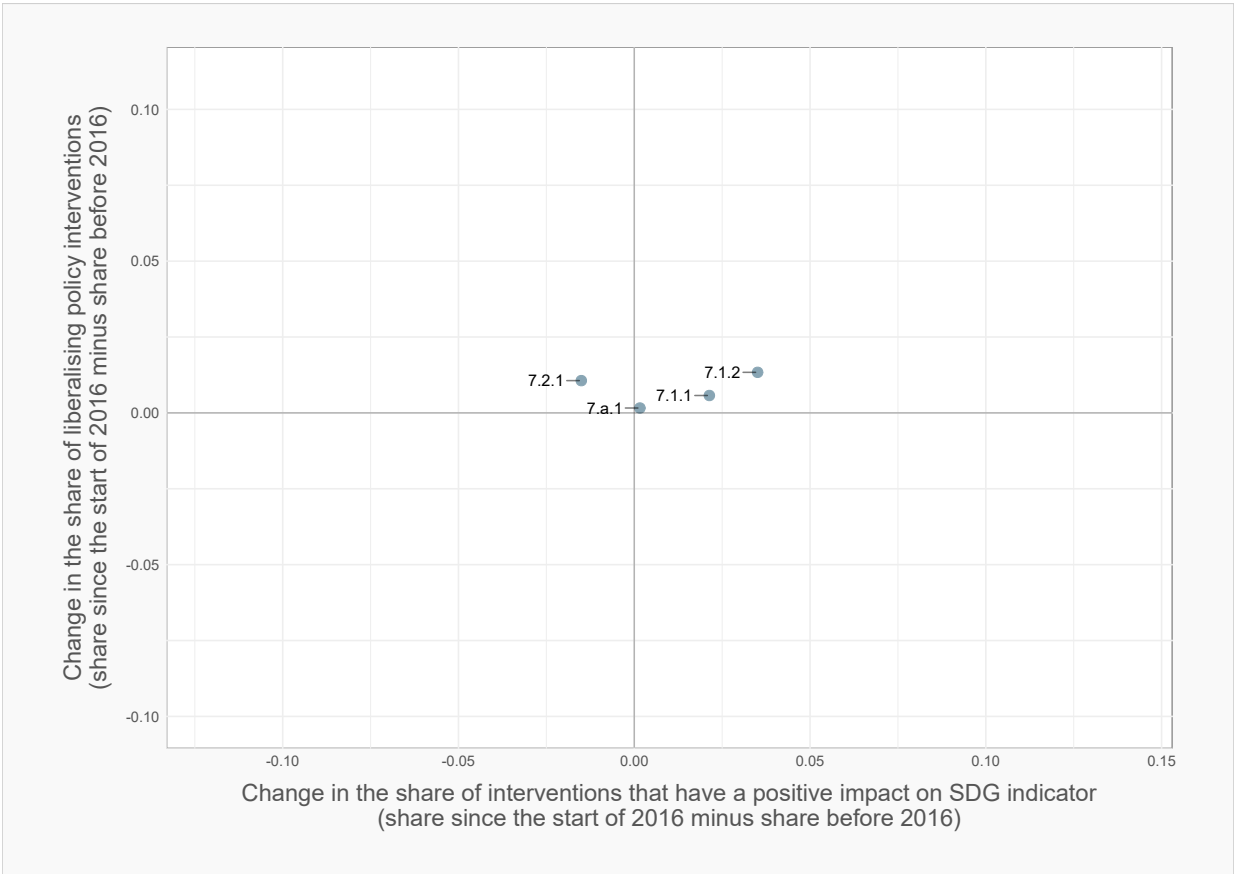
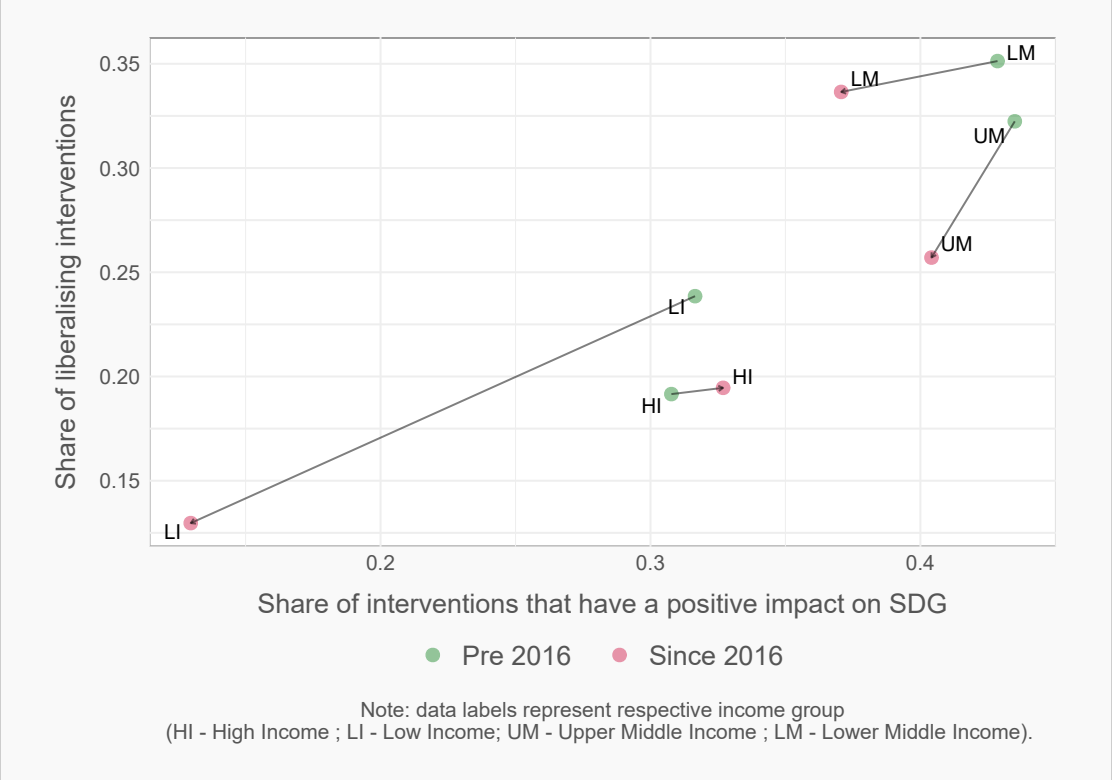


FIGURE SDG7.6

Commercial policies contribution to this SDG varies across income groups since 2016

FIGURE SDG7.7

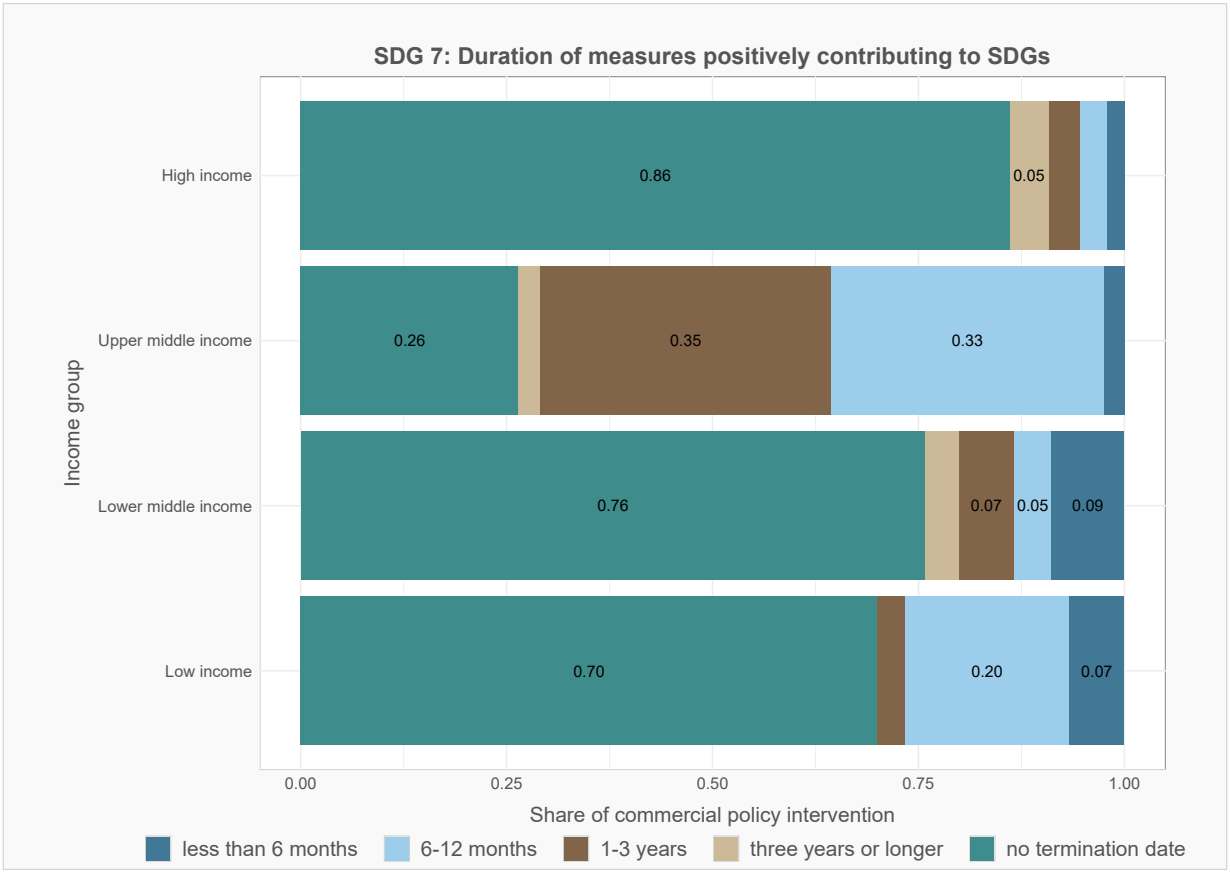
Did SDG implementation affect SDG attainment differently across income groups?



Note: data labels represent respective income group
(HI - High Income ; LI - Low Income; UM - Upper Middle Income ; LM - Lower Middle Income).

FIGURE SDG7.8

Does resort to permanent and temporary measures vary across income groups of nations since 2016?



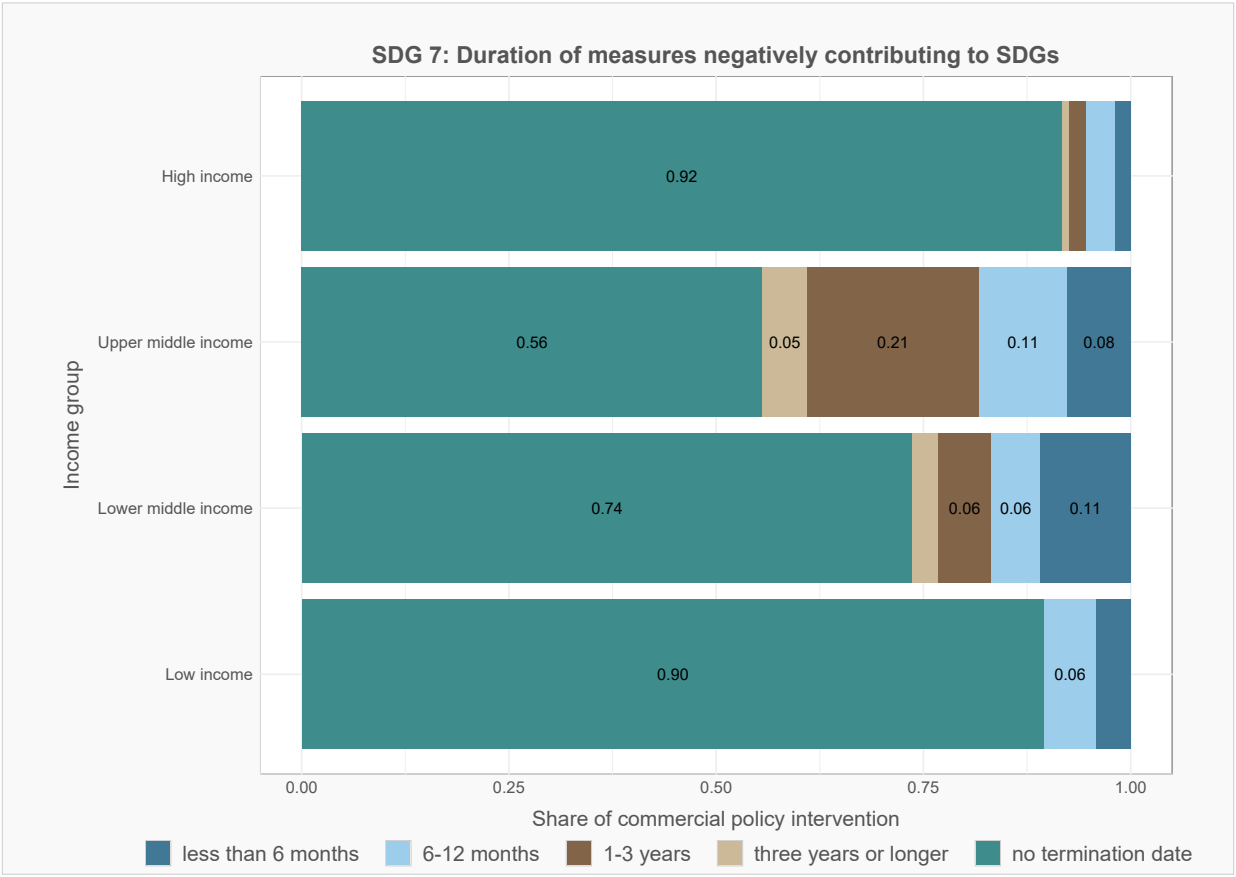


FIGURE SDG7.9

Did SDG attainment and trade openness alter during the COVID-19 pandemic era?

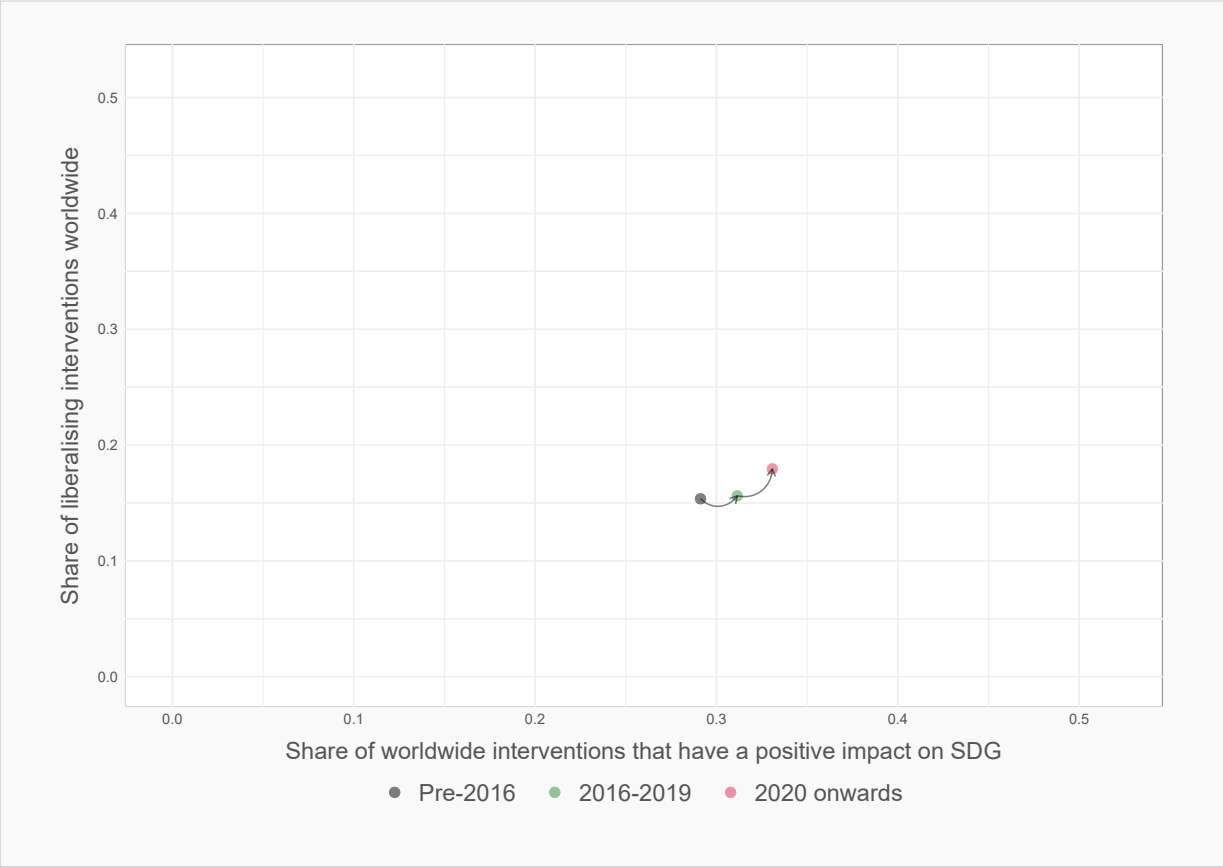


TABLE SDG7.1

Summary statistics on commercial policy intervention in the Global Trade Alert database that is relevant to this SDG

SDG Indicator	Total number of relevant commercial policy interventions (all years in Global Trade Alert database)	Total number of relevant commercial policy interventions (2016 onwards)	Share of commercial policy interventions contributing positively to this indicator (2016 onwards)	Share of commercial policy interventions that liberalise commerce (2016 onwards)	Number of customs territories implementing commercial policy interventions (2016 onwards)
7.1.1	10133	5783	0.19	0.17	151
7.1.2	7432	4297	0.17	0.15	143
7.2.1	6185	3628	0.76	0.21	120
7.a.1	1386	622	0	0	25
Any indicator in this SDG	12616	7198	0.53	0.16	157

TABLE SDG7.2

Was there a tension between trade openness and SDG attainment before SDG adoption?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented before 2016)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	9.56%	0.45%	5.35%
No (restrictive/distortive)	19.56%	33.93%	31.14%

TABLE SDG7.3

Was there a tension between trade openness and SDG attainment during 2016-19?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2016-19)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	9.96%	0.59%	5.06%
No (restrictive/distortive)	21.18%	39.02%	24.19%

TABLE SDG7.4

Was there a tension between trade openness and SDG attainment during Pandemic era (2020-2022)?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2020-22)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	10.94%	0.53%	6.47%
No (restrictive/distortive)	22.14%	37.53%	22.39%

SDG 9: INDUSTRY, INNOVATION AND INFRASTRUCTURE

Summary of main findings for SDG 9

	Finding	Comments	Evidence
Number of SDG indicators for which evidence was compiled?	10	Indicators 9.1.1, 9.1.2, 9.2.1, 9.2.2, 9.3.1, 9.3.2, 9.5.1, 9.b.1, 9.c.1, 9.4.1	See Table 1
Number of times commercial policy interventions since 2016 affect indicators in this SDG	16335	11716 interventions improved SDG indicators, the largest category	See Figure 1
Number of jurisdictions implementing commercial policy measures affecting this SDG since 2016	178		See Table 1
Most common commercial policy intervention types affecting each SDG indicators	Import measure: 9.1.1, 9.1.2, 9.3.2 and 9.4.1 Subsidies to local firms:9.2.1, 9.2.2, 9.3.1, 9.5.1, 9.b.1, 9.c.1		See Figure 2
How many SDG indicators does commercial policy intervention harm SDG attainment more than one third of the time (since 2016)?	3 out of 10	Indicators 9.1.1, 9.1.2 and 9.c.1	See Figures 3,4
Since 2016 is there a higher share of commercial policy interventions contributing positively to SDG?	2 out of 10.	Indicators 9.3.2, 9.4.1	See Figure 5
Group of nations where commercial policy intervention contributed positively most to this SDG?	Low income		See Figure 6
Group of nations where commercial policy intervention detracted most to this SDG?	Lower middle income		See Figure 6
Group(s) of nations where share of commercial policy intervention contributing positively to SDG falls since 2016	Low income and Upper Middle Income		See Figure 7
Group of nations that resorted most to time-unlimited policy intervention that contributes positively to this SDG?	Low income		See Figure 8
Group of nations which resorted most to time-unlimited policy intervention that detracts from this SDG?	High income		See Figure 8
Compared to 2016-2019, did the pandemic era see more commercial policy intervention improve this SDG?	No	Levels have been falling since Pre-2016	See Figure 9
Before SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	Yes	Approximately 70% of the interventions exhibit this tension.	See Table 2
Since SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	Yes	Approximately 65% of the interventions exhibit this tension	See Table 3

FIGURE SDG9.1

Breakdown of policy intervention in terms of likely impact on this SDG

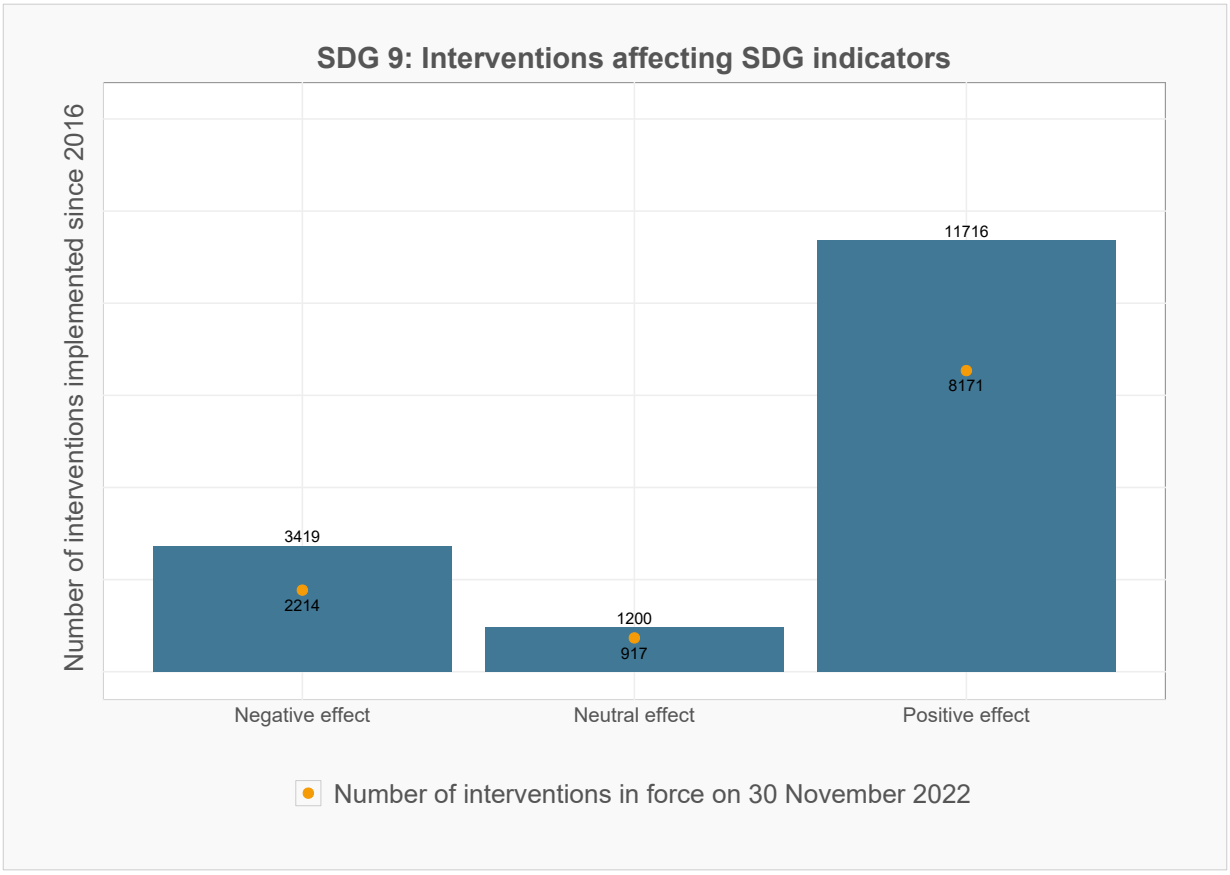


FIGURE SDG9.2

Breakdown of commercial policy intervention type across SDG indicator since 2016

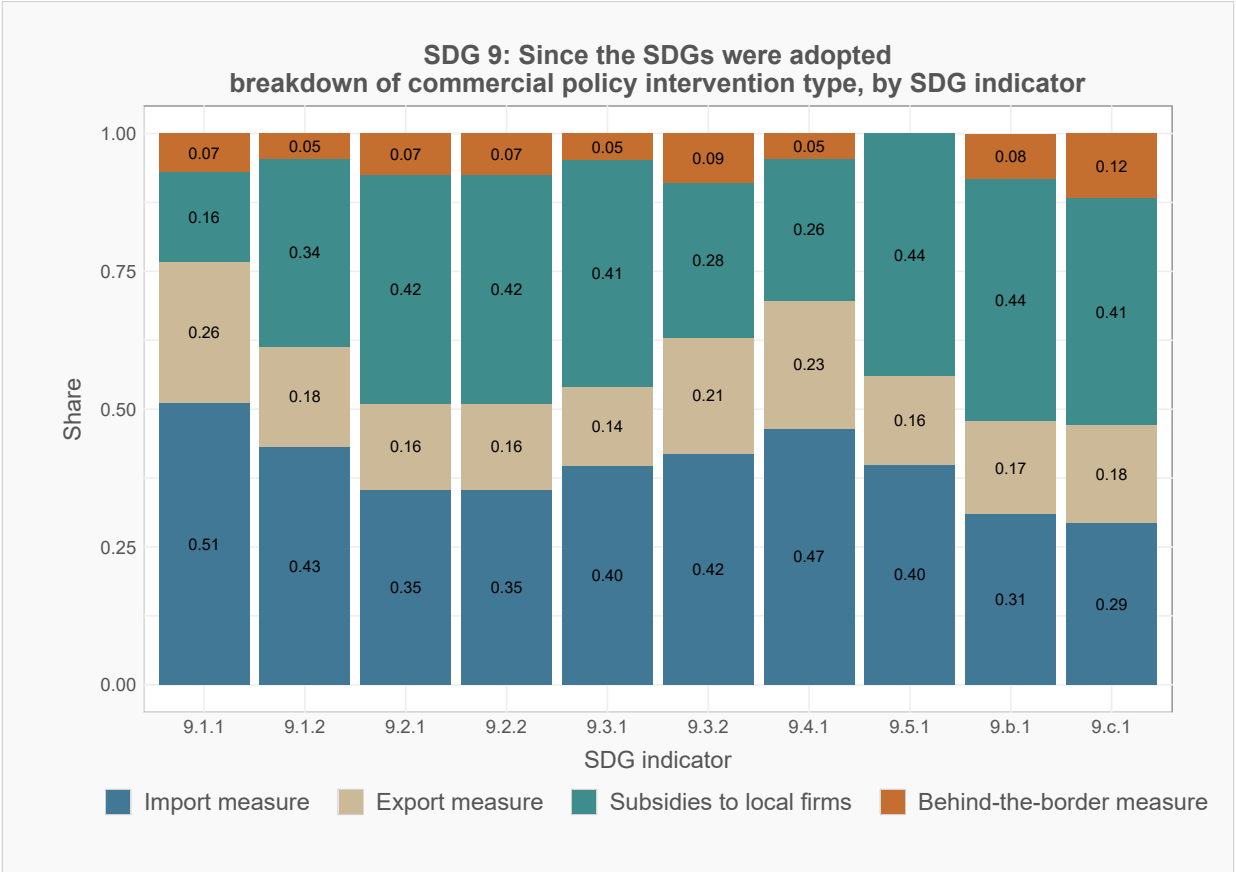


FIGURE SDG9.3

Likely impact of commercial policy intervention, breakdown across SDG indicators since 2016

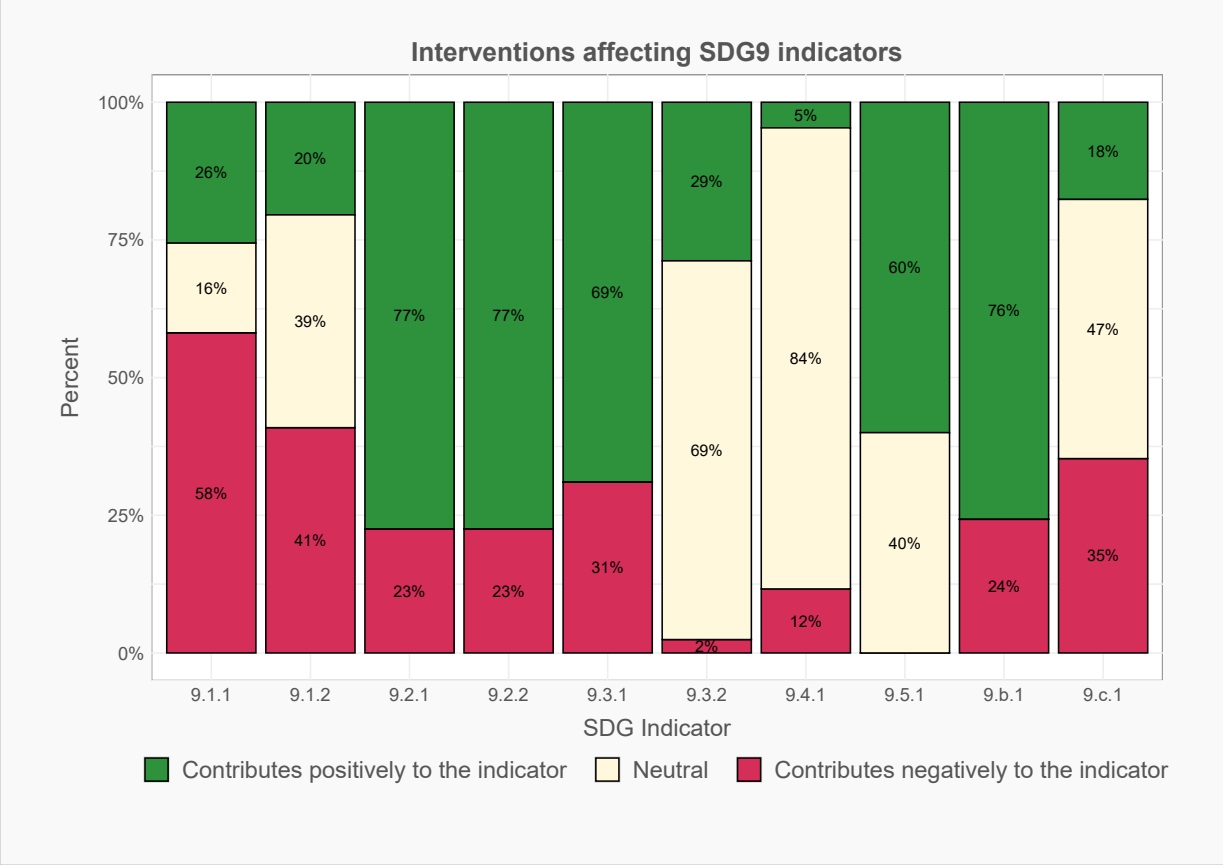


FIGURE SDG9.4

Since 2016, was resort to trade reform and SDG attainment similar?

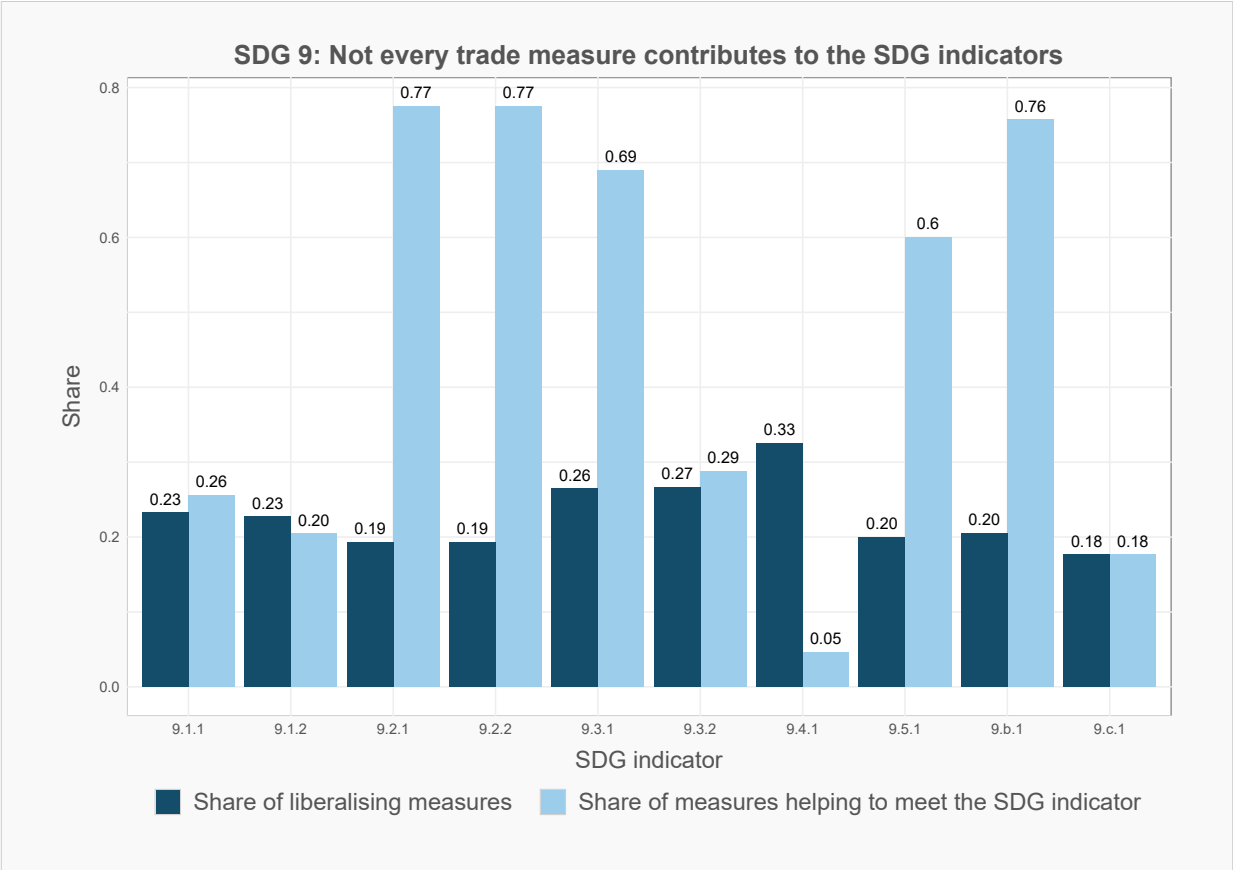
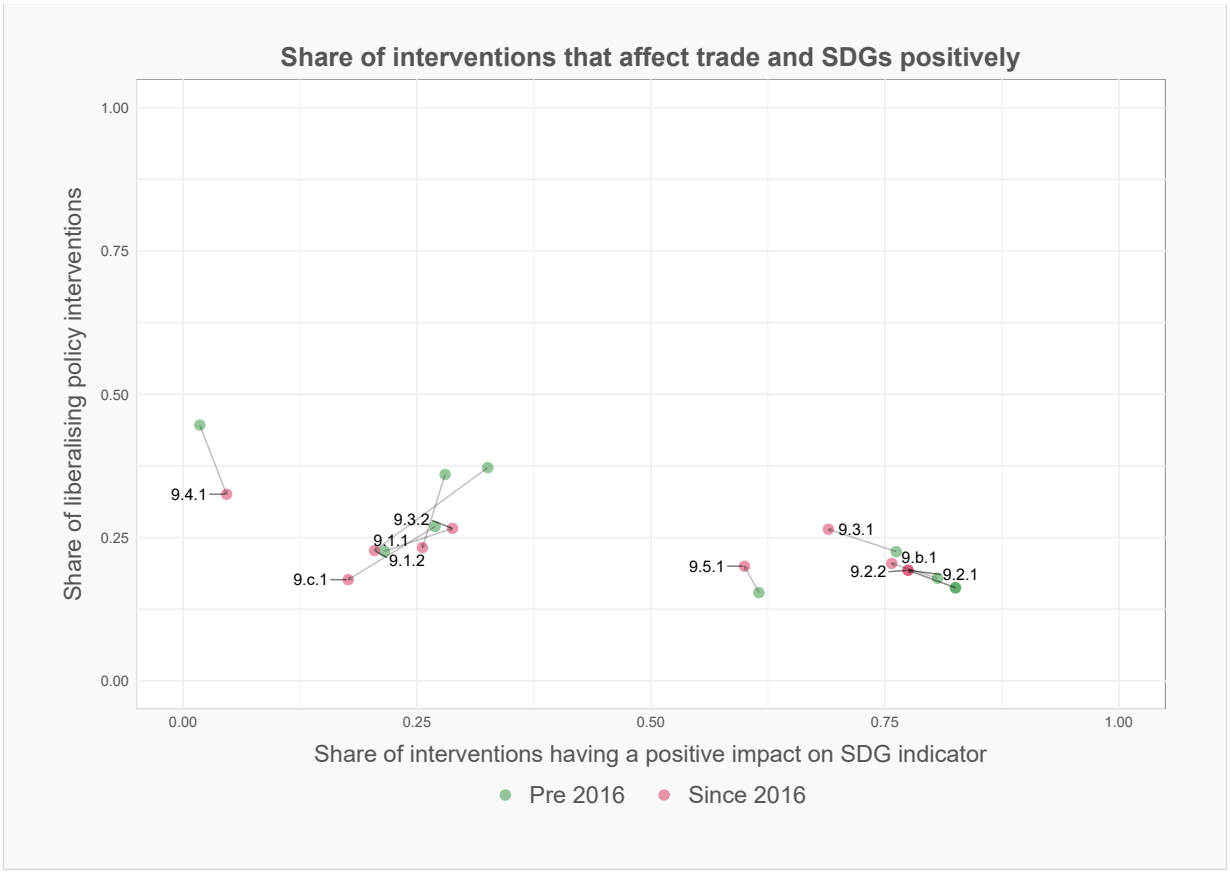


FIGURE SDG9.5

Did SDG implementation improve attainment of the SDG indicators?



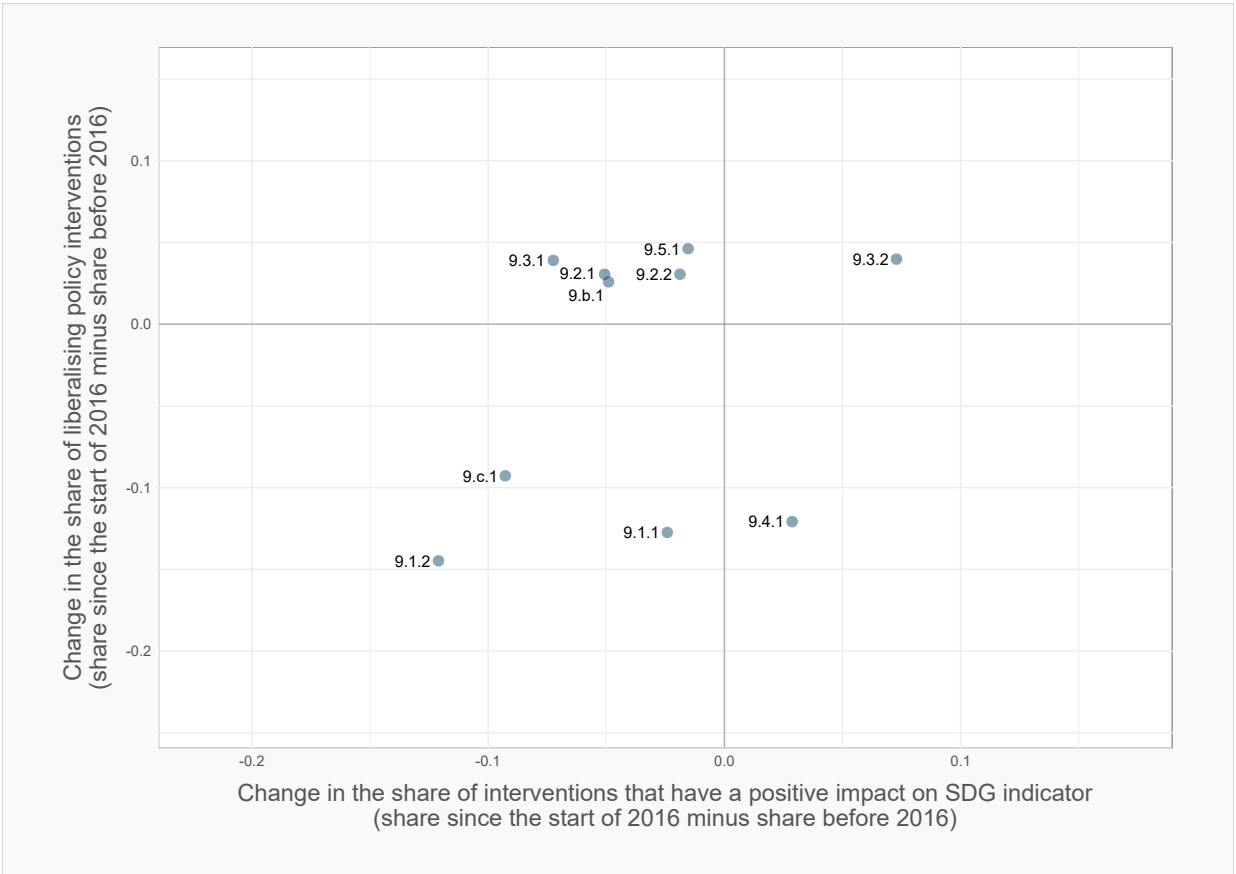


FIGURE SDG9.6

Commercial policies contribution to this SDG varies across income groups since 2016

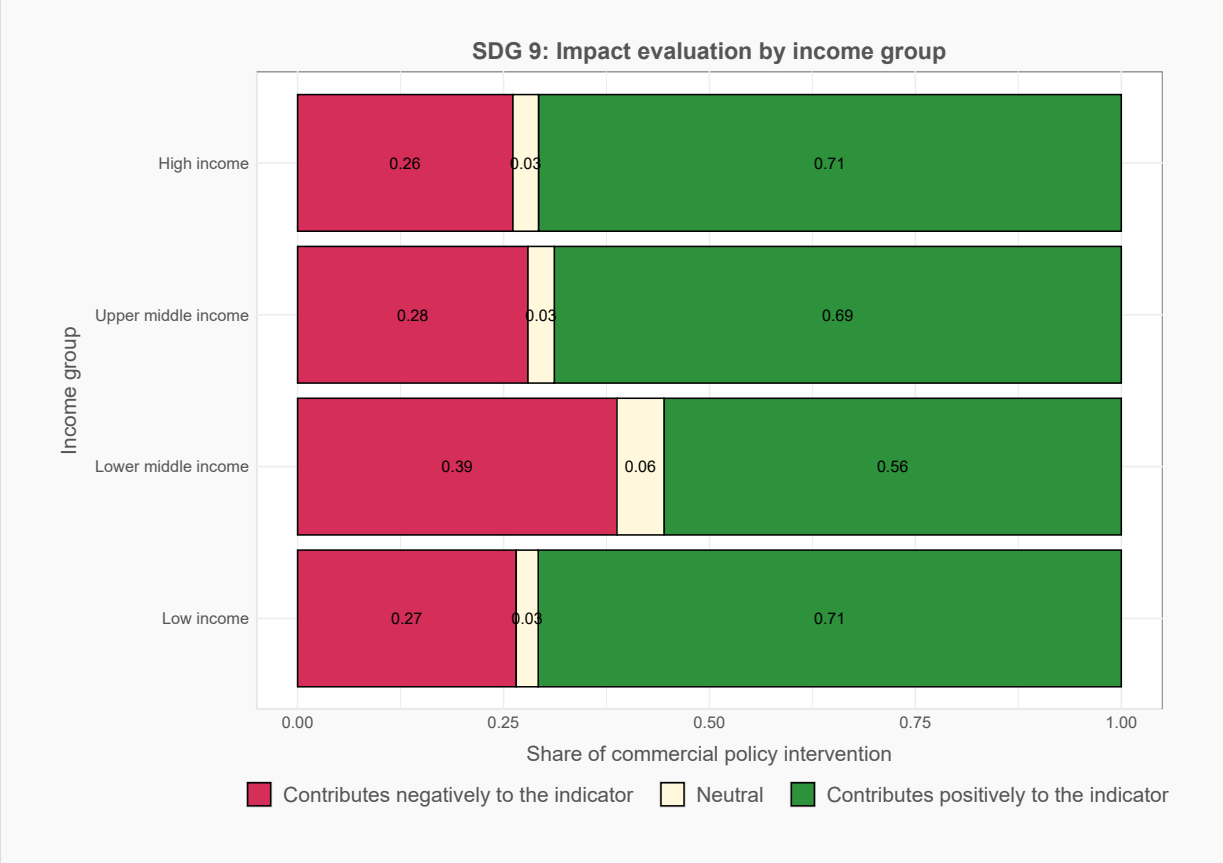
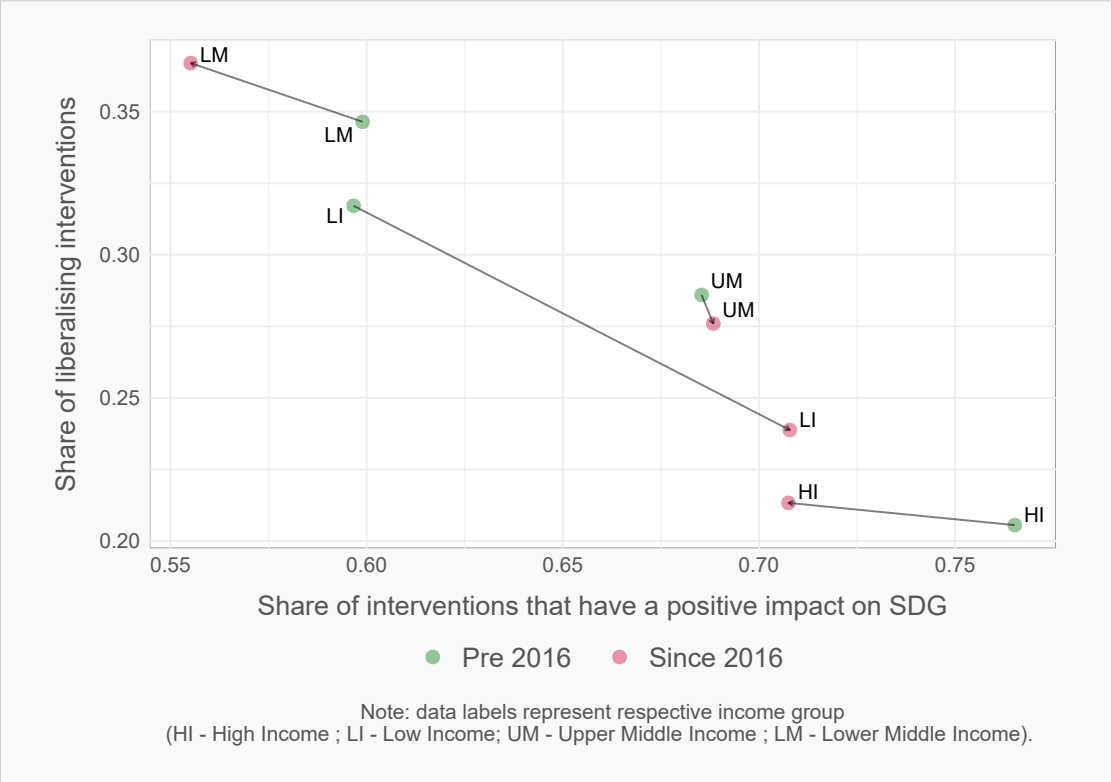


FIGURE SDG9.7

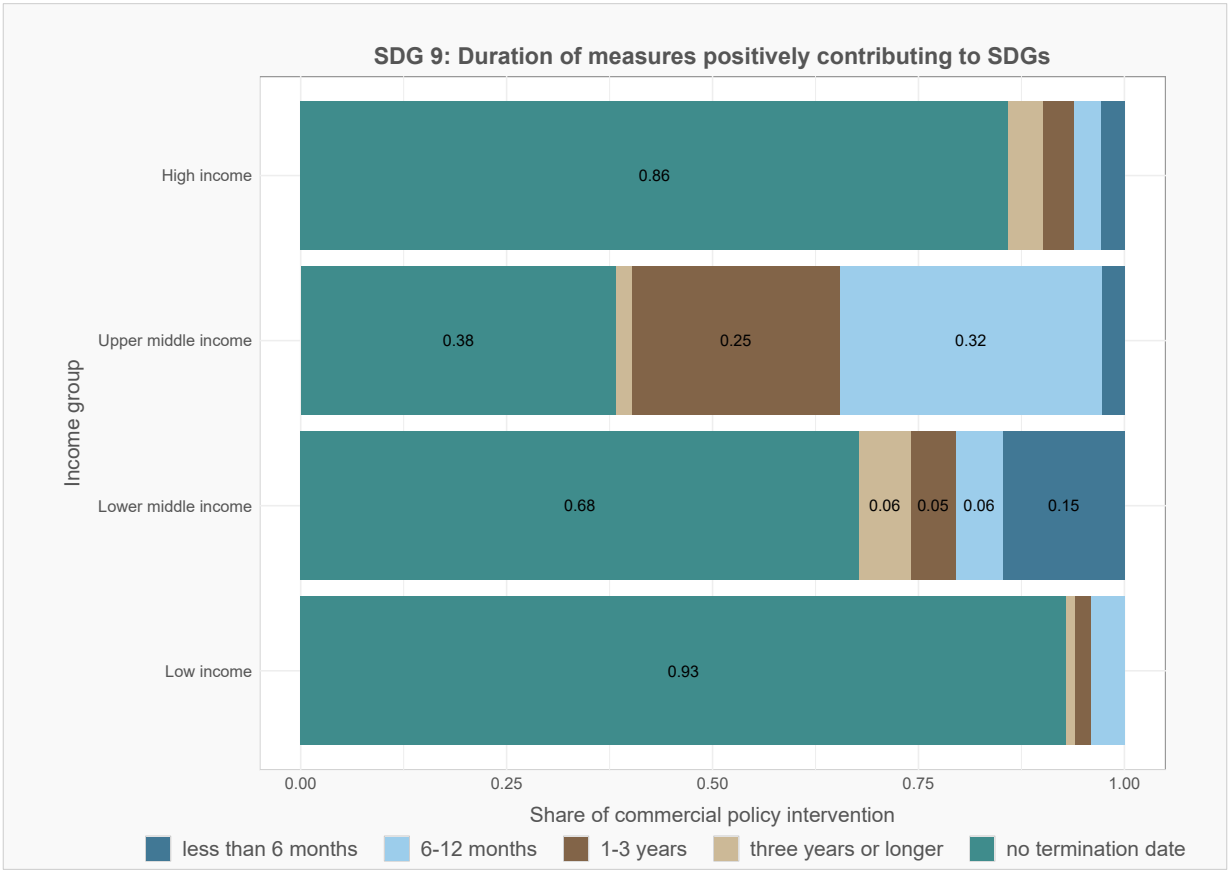
Did SDG implementation affect SDG attainment differently across income groups?



Note: data labels represent respective income group
(HI - High Income ; LI - Low Income; UM - Upper Middle Income ; LM - Lower Middle Income).

FIGURE SDG9.8

Does resort to permanent and temporary measures vary across income groups of nations since 2016?



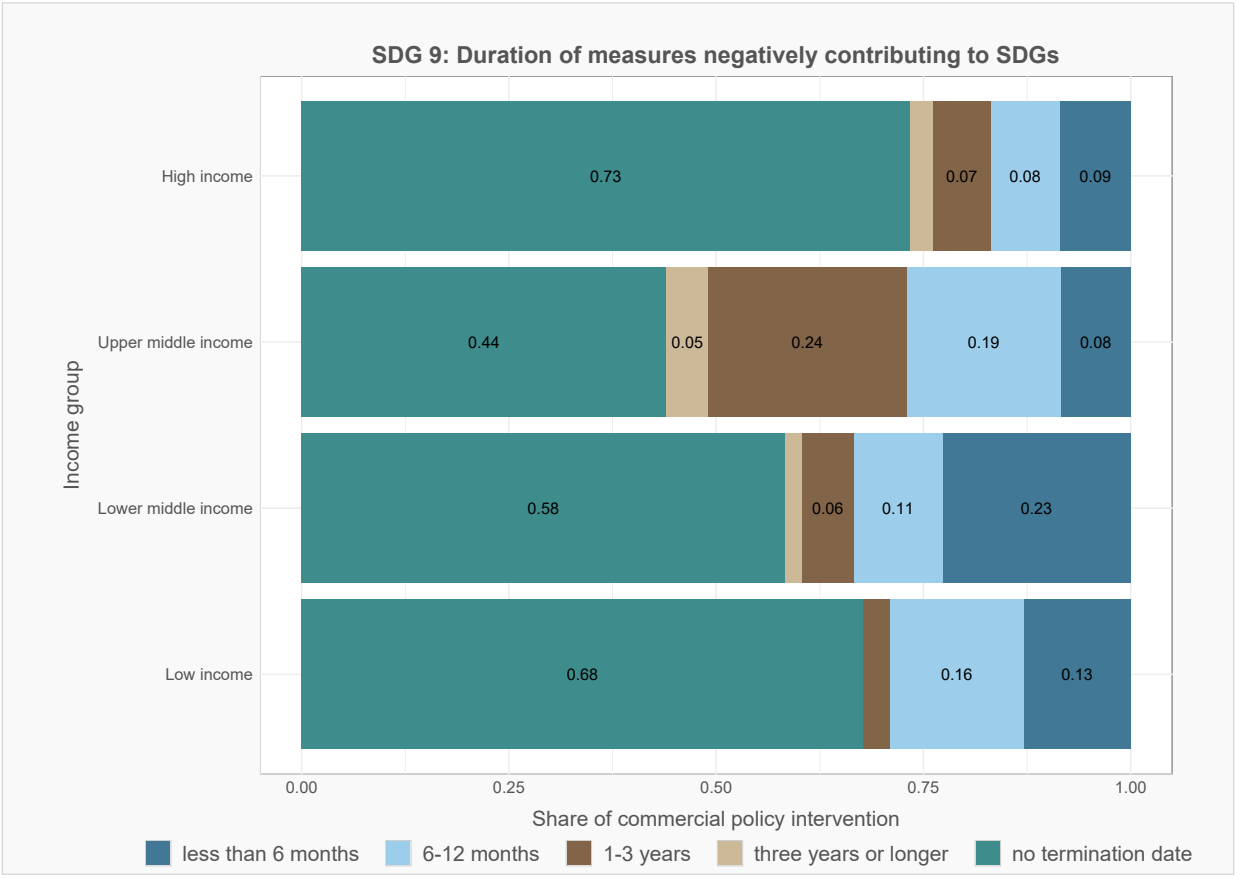


FIGURE SDG9.9

Did SDG attainment and trade openness alter during the COVID-19 pandemic era?

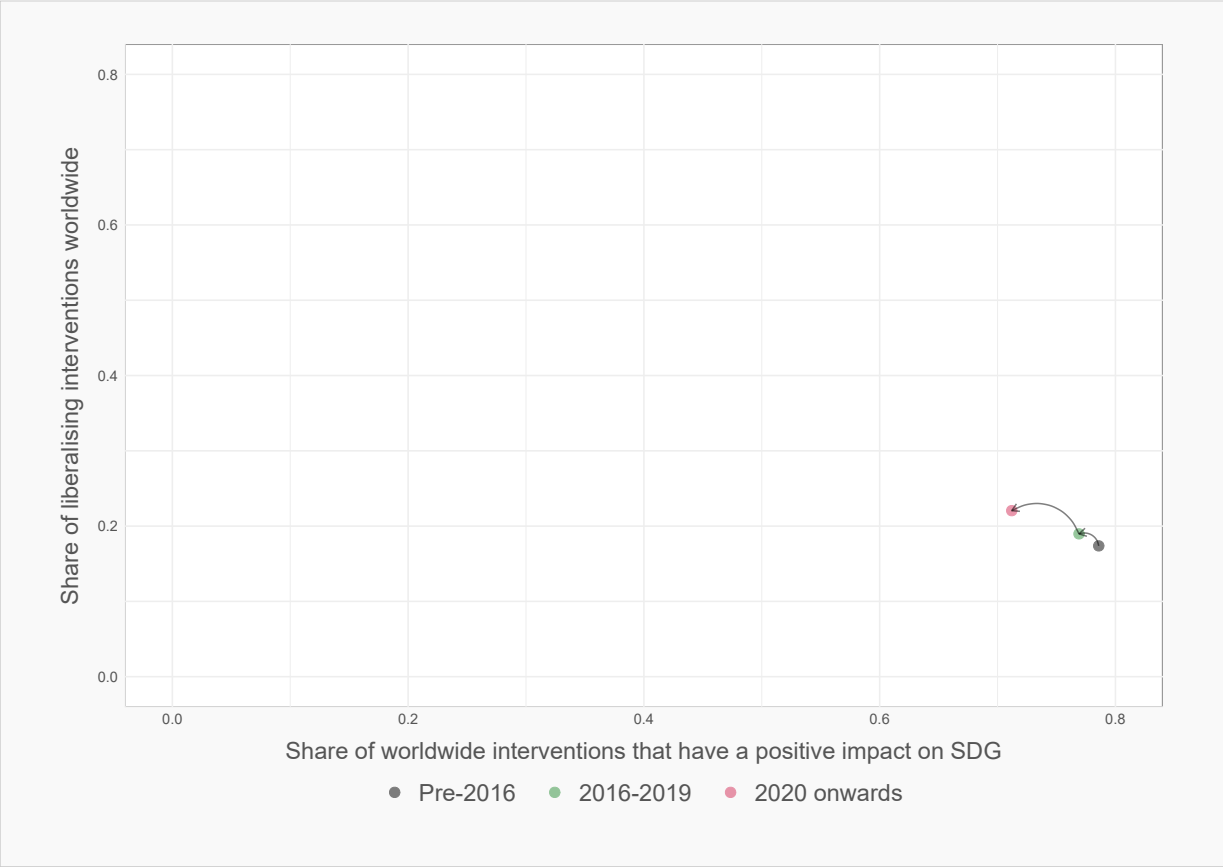


TABLE SDG9.1

Summary statistics on commercial policy intervention in the Global Trade Alert database that is relevant to this SDG

SDG Indicator	Total number of relevant commercial policy interventions (all years in Global Trade Alert database)	Total number of relevant commercial policy interventions (2016 onwards)	Share of commercial policy interventions contributing positively to this indicator (2016 onwards)	Share of commercial policy interventions that liberalise commerce (2016 onwards)	Number of customs territories implementing commercial policy interventions (2016 onwards)
9.1.1	68	43	0.26	0.23	19
9.1.2	87	44	0.2	0.23	44
9.2.1	25964	13782	0.77	0.19	174
9.2.2	25964	13782	0.77	0.19	174
9.3.1	5259	3010	0.69	0.26	161
9.3.2	3399	1684	0.29	0.27	119
9.5.1	38	25	0.6	0.2	38
9.b.1	16850	9183	0.76	0.2	165
9.c.1	43	17	0.18	0.18	11
9.4.1	99	43	0.05	0.33	20
Any indicator in this SDG	28585	15391	0.76	0.19	178

TABLE SDG9.2

Was there a tension between trade openness and SDG attainment before SDG adoption?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented before 2016)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	1.47%	0.99%	14.92%
No (restrictive/distortive)	77.12%	2.77%	2.74%

TABLE SDG9.3

Was there a tension between trade openness and SDG attainment during 2016-19?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2016-19)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	1.21%	1.84%	15.92%
No (restrictive/distortive)	75.7%	3.64%	1.69%

TABLE SDG9.4

Was there a tension between trade openness and SDG attainment during Pandemic era (2020-2022)?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2020-22)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	1.42%	0%	20.63%
No (restrictive/distortive)	69.78%	0.03%	8.14%

SDG 14: LIFE BELOW WATER

Summary of main findings for SDG 14

	Finding	Comments	Evidence
Number of SDG indicators for which evidence was compiled?	3	Indicators 14.4.1, 14.6.1, 14.b.1	See Table 1
Number of times commercial policy interventions since 2016 affect indicators in this SDG	2613	Negative measures account for largest number of interventions (1614)	See Figure 1
Number of jurisdictions implementing commercial policy measures affecting this SDG since 2016	146		See Table 1
Most common commercial policy intervention types affecting each SDG indicators	14.4.1: Import measures 14.4.1, 14.6.1: Subsidies to local firms		See Figure 2
How many SDG indicators does commercial policy intervention harm SDG attainment more than one third of the time (since 2016)?	2 out of 3	Indicators 14.6.1 and 14.b.1	See Figures 3,4
Since 2016 is there a higher share of commercial policy interventions contributing positively to SDG?	1 out of 3	14.6.1 showed a slight increase.	See Figure 5
Group of nations where commercial policy intervention contributed positively most to this SDG?	Low income		See Figure 6
Group of nations where commercial policy intervention detracted most to this SDG?	Upper middle income		See Figure 6
Group(s) of nations where share of commercial policy intervention contributing positively to SDG falls since 2016	High income, Upper middle income and Lower middle income	Low income group made gains.	See Figure 7
Group of nations that resorted most to time-unlimited policy intervention that contributes positively to this SDG?	High income		See Figure 8
Group of nations which resorted most to time-unlimited policy intervention that detracts from this SDG?	Low income		See Figure 8
Compared to 2016-2019, did the pandemic era see more commercial policy intervention improve this SDG?	No	Increase from pre-2016 to 2016-2019 but decrease during the pandemic era.	See Figure 9
Before SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	Yes	30% of interventions before SDG adoption exhibited this tension	See Table 2
Since SDGs adopted was there a pronounced tension between trade openness and attaining this SDG?	Yes	31% of interventions during 2016-19 exhibit this tension; tension significantly reduced from 2020 on.	See Table 3

FIGURE SDG14.1

Breakdown of policy intervention in terms of likely impact on this SDG

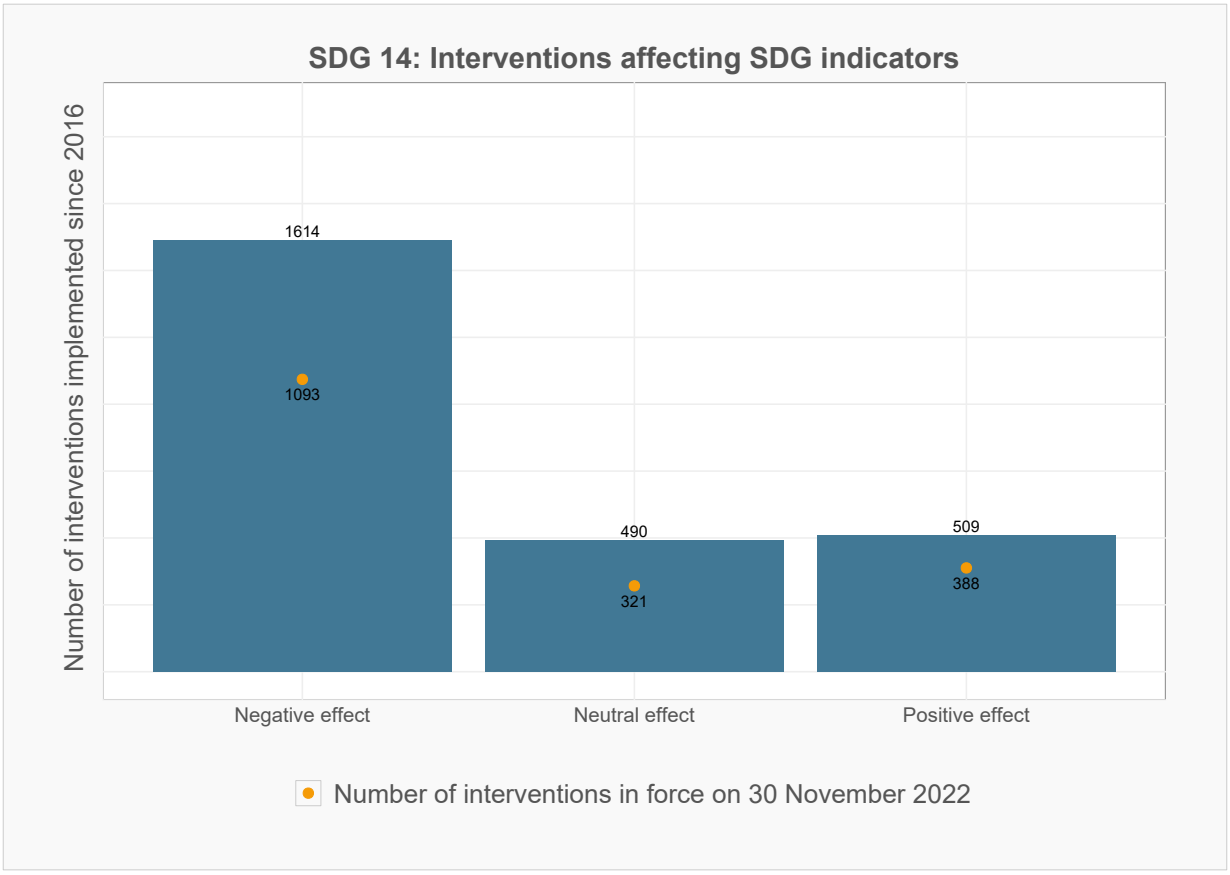


FIGURE SDG14.2

Breakdown of commercial policy intervention type across SDG indicator since 2016

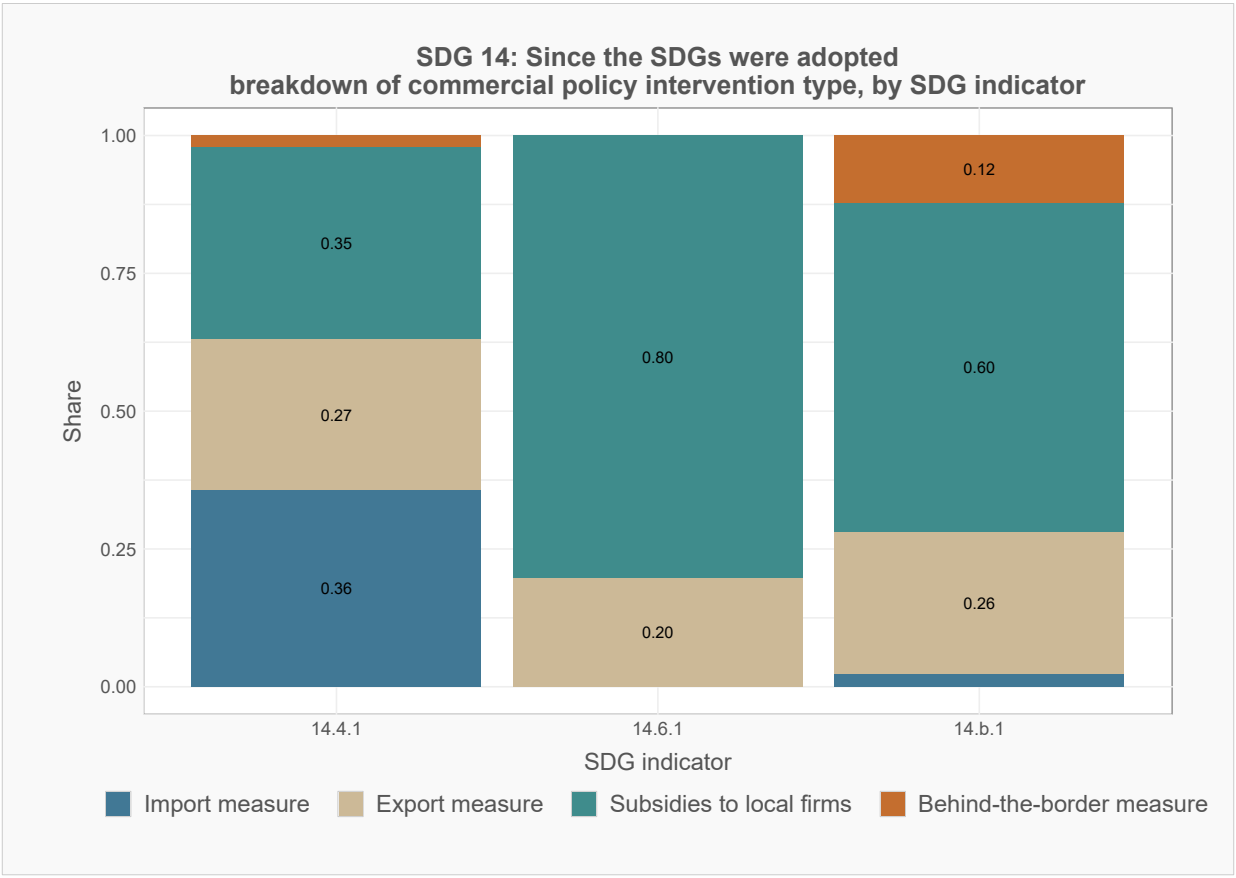


FIGURE SDG14.3

Likely impact of commercial policy intervention, breakdown across SDG indicators since 2016

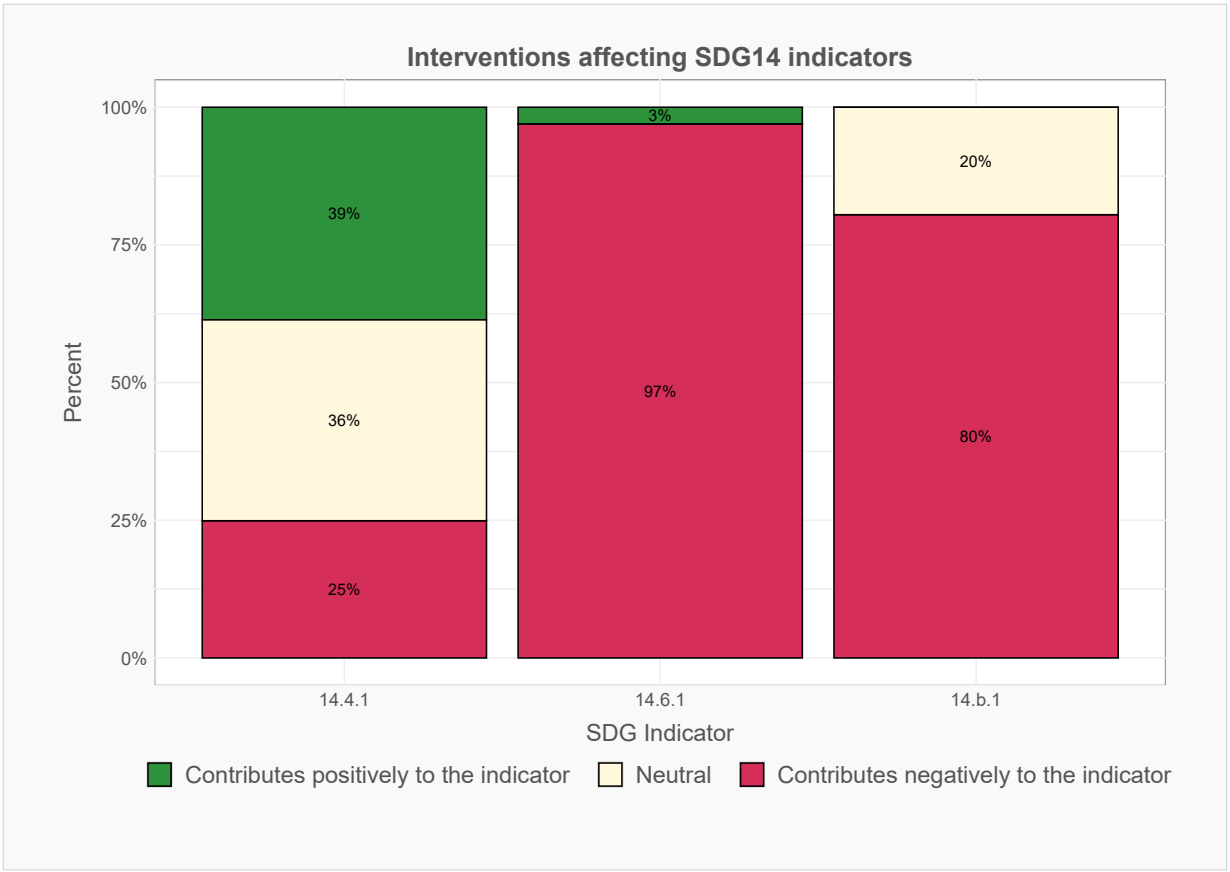


FIGURE SDG14.4

Since 2016, was resort to trade reform and SDG attainment similar?

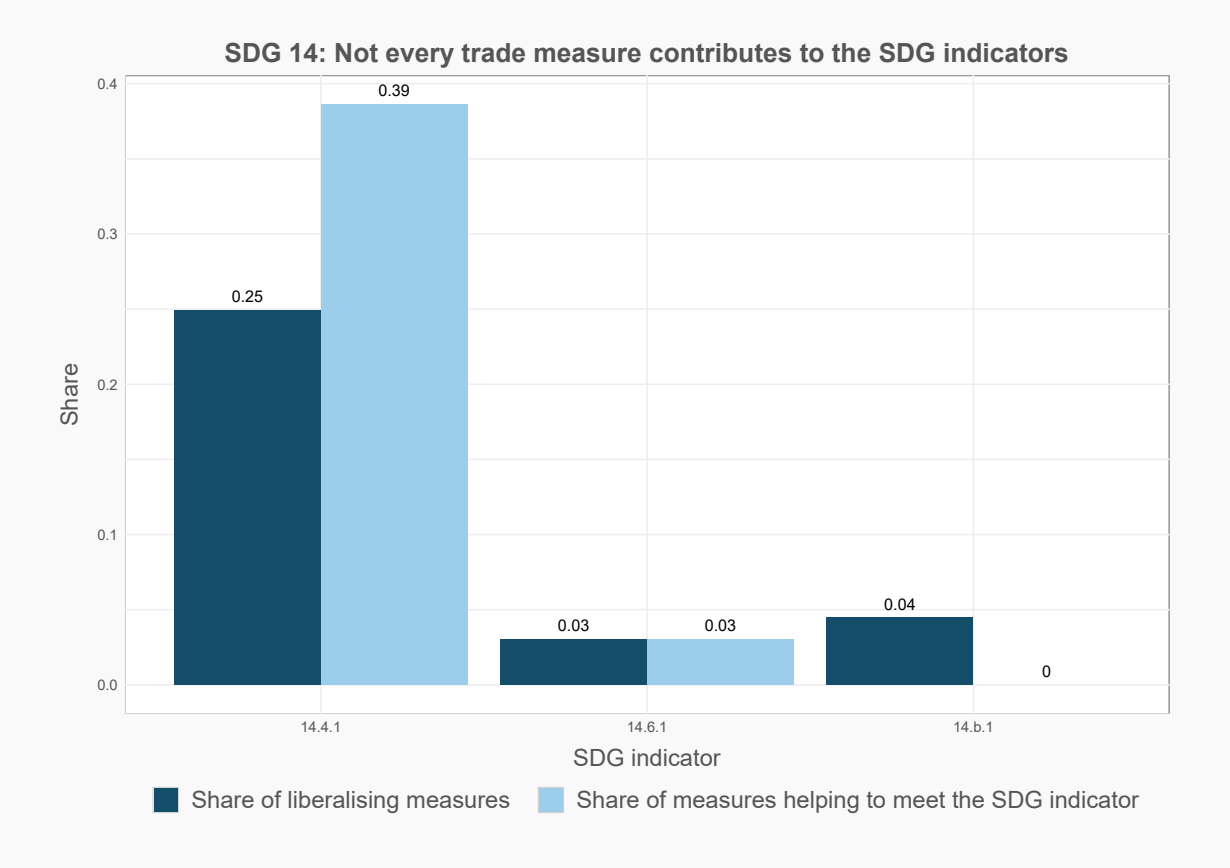
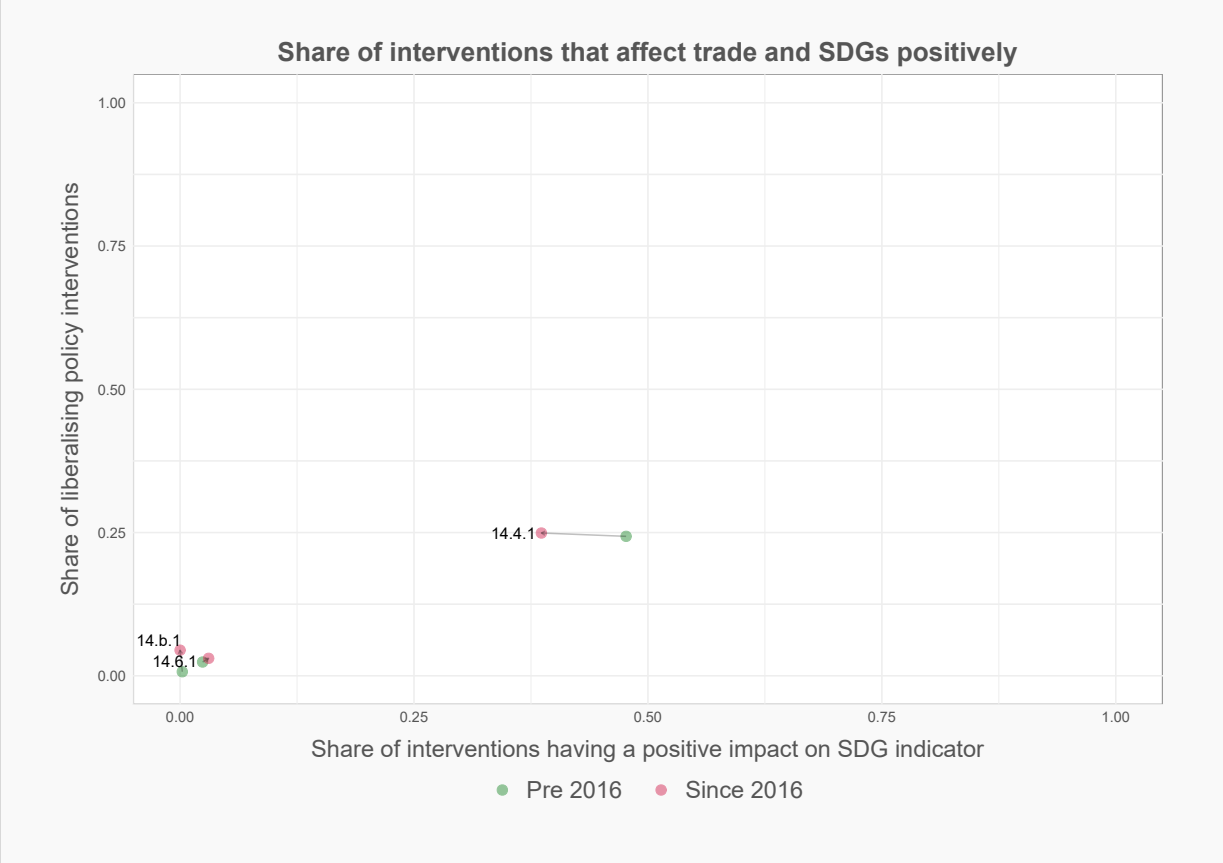


FIGURE SDG14.5

Did SDG implementation improve attainment of the SDG indicators?



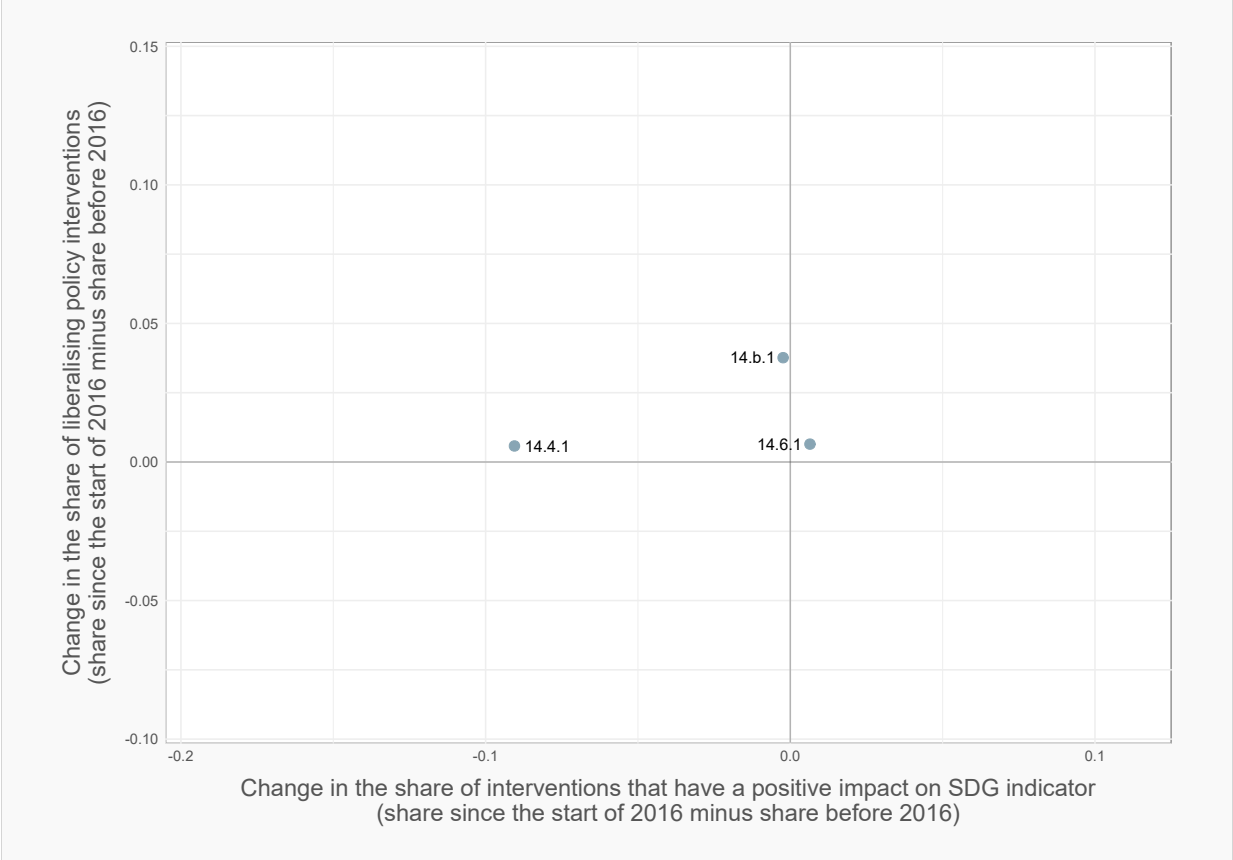


FIGURE SDG14.6

Commercial policies contribution to this SDG varies across income groups since 2016

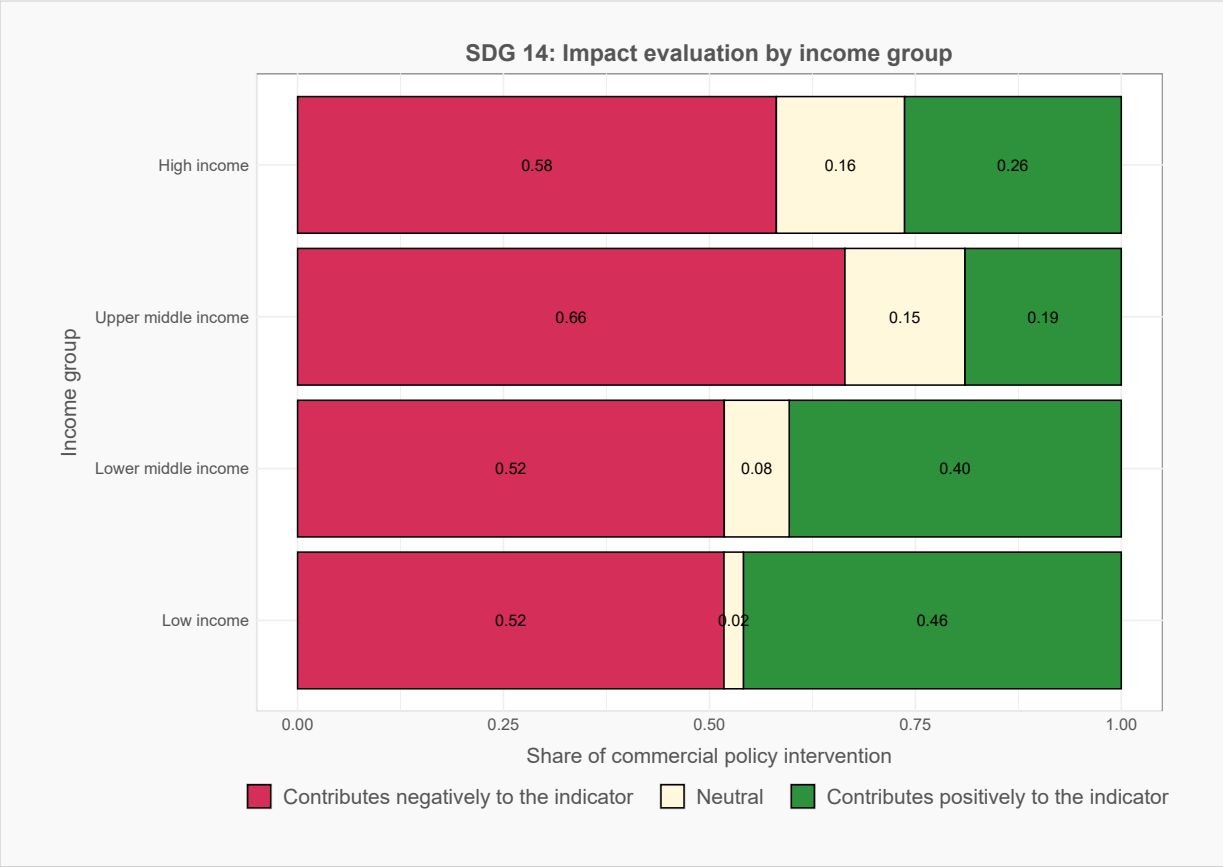
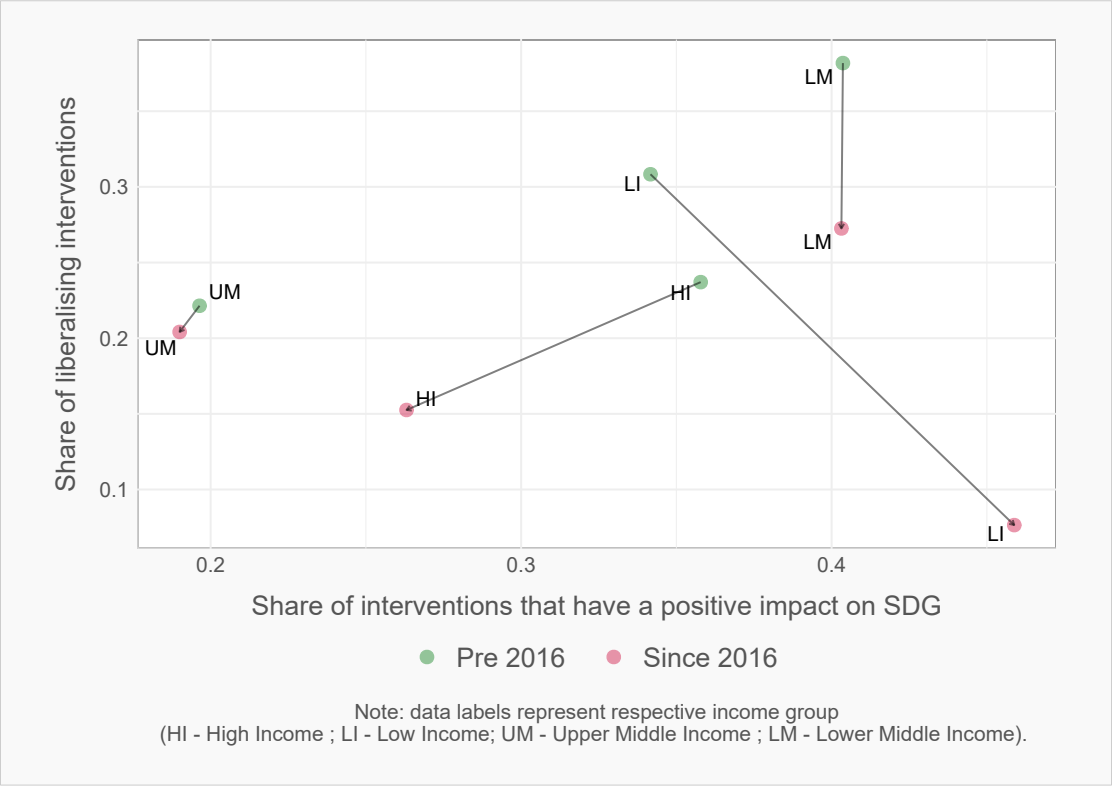


FIGURE SDG14.7

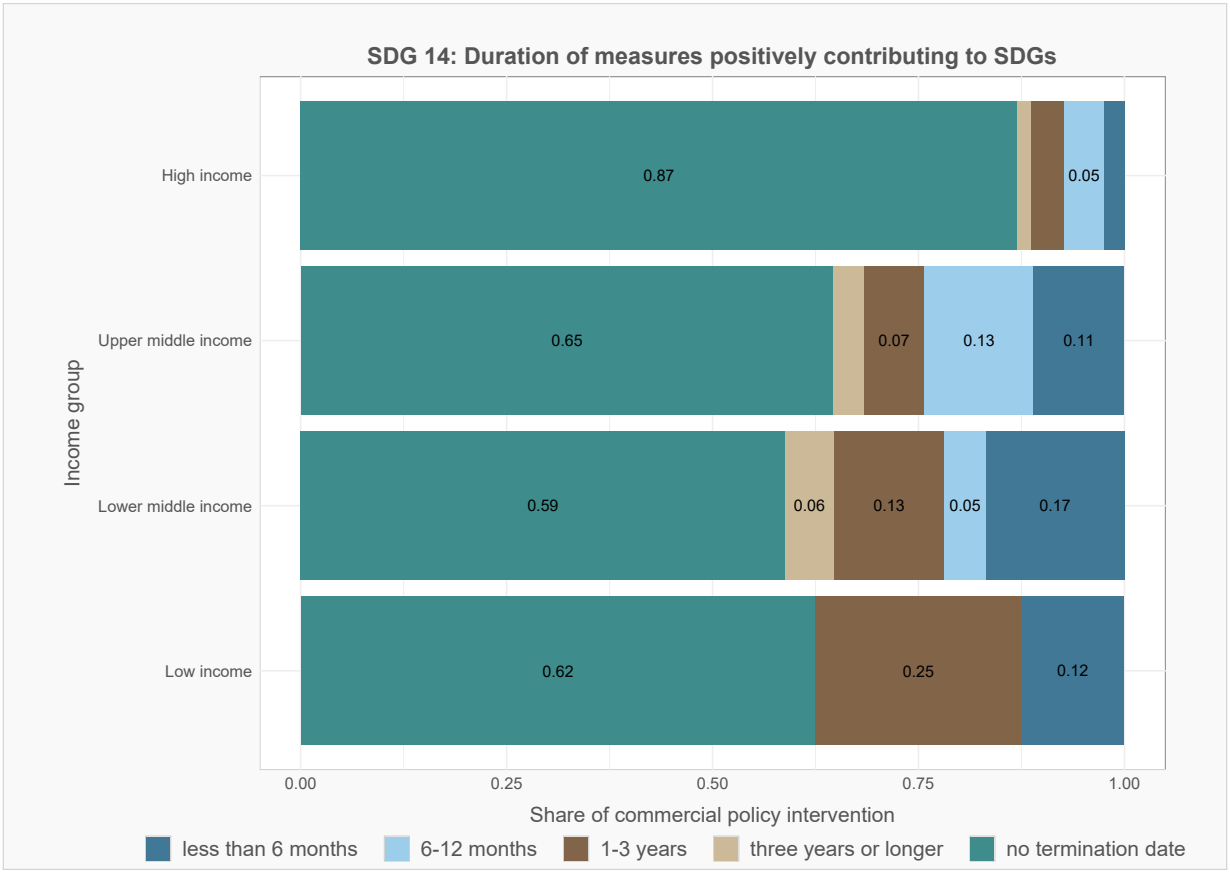
Did SDG implementation affect SDG attainment differently across income groups?



Note: data labels represent respective income group
(HI - High Income ; LI - Low Income; UM - Upper Middle Income ; LM - Lower Middle Income).

FIGURE SDG14.8

Does resort to permanent and temporary measures vary across income groups of nations since 2016?



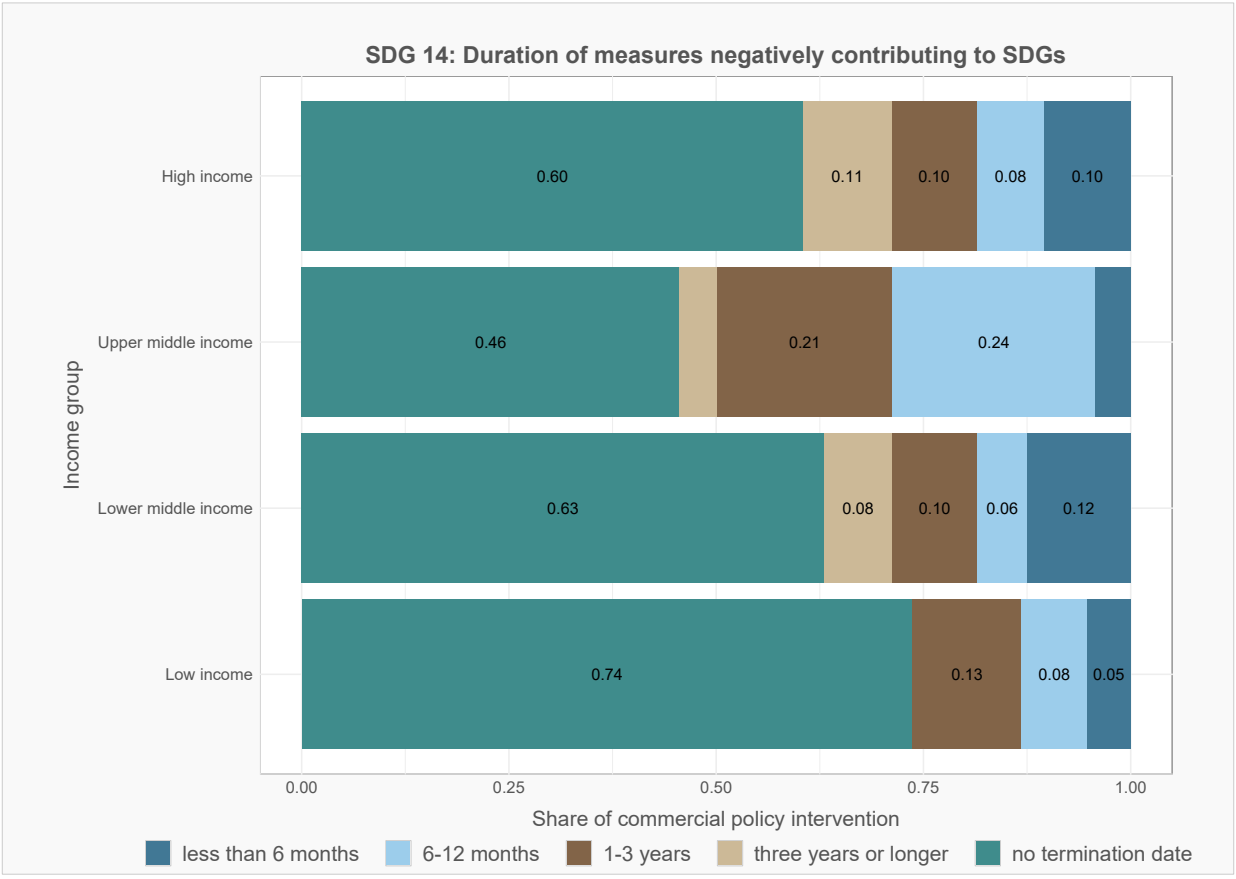


FIGURE SDG14.9

Did SDG attainment and trade openness alter during the COVID-19 pandemic era?

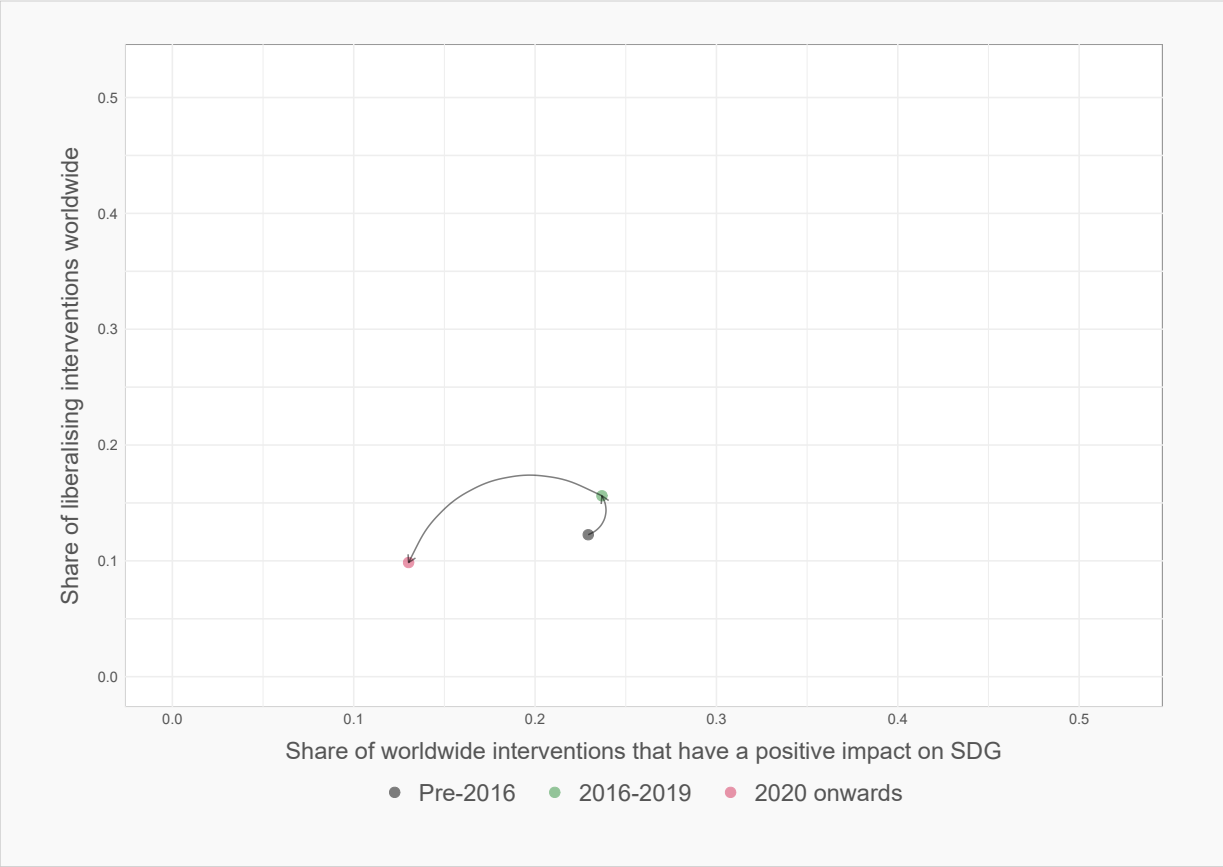


TABLE SDG14.1

Summary statistics on commercial policy intervention in the Global Trade Alert database that is relevant to this SDG

SDG Indicator	Total number of relevant commercial policy interventions (all years in Global Trade Alert database)	Total number of relevant commercial policy interventions (2016 onwards)	Share of commercial policy interventions contributing positively to this indicator (2016 onwards)	Share of commercial policy interventions that liberalise commerce (2016 onwards)	Number of customs territories implementing commercial policy interventions (2016 onwards)
14.4.1	2498	1212	0.39	0.25	144
14.6.1	2425	1344	0.03	0.03	119
14.b.1	670	246	0	0.04	50
Any indicator in this SDG	3737	2023	0.25	0.16	146

TABLE SDG14.2

Was there a tension between trade openness and SDG attainment before SDG adoption?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented before 2016)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	2.33%	0.25%	9.67%
No (restrictive/distortive)	20.6%	12.61%	54.53%

TABLE SDG14.3

Was there a tension between trade openness and SDG attainment during 2016-19?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2016-19)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	3.55%	0.89%	11.18%
No (restrictive/distortive)	20.13%	13.25%	51%

TABLE SDG14.4

Was there a tension between trade openness and SDG attainment during Pandemic era (2020-2022)?

Did policy intervention improve treatment of foreign firms vis-à-vis domestic rivals?	Contribution to this SDG (each cell shows % of all measures implemented during 2020-22)		
	Positive	Neutral (no contribution)	Negative
Yes (liberalising)	3.03%	1.1%	5.72%
No (restrictive/distortive)	9.99%	19.5%	60.65%

WHAT'S NEW IN THE GLOBAL TRADE ALERT DATABASE?

Perhaps it is appropriate to start by highlighting what has not changed in our reporting of commercial policy intervention during 2022. The focus of the Global Trade Alert's monitoring remains on unilateral commercial policy acts—not the signing of reciprocal trade deals or the implementation of those deals. The seven conditions required for a report on a commercial intervention to be recorded in our database have not changed. Nor have the approaches to classification and evaluation of reports on interventions submitted by the monitoring team.

Each policy intervention is still assessed according to the likely impact of its implementation on the relative treatment of the affected domestic commercial interests vis-à-vis relevant foreign rivals. Measures that disadvantage or worsen the competitive position of foreign commercial interests are referred to as harmful, discriminatory, and, occasionally, to as protectionist. The range of policy intervention types covered by the Global Trade Alert initiative has not changed either.

So far this year (2022) we have published information on a total of 6,918 commercial policy interventions. Although most do not, please note that a single state act may involve multiple distinct policy interventions. For example, an export promotion agency may combine trade financing for an exporting firm with a requirement to source a minimum amount of content locally. In this case, both the financing and the requirement would be reported as separate interventions.

The reports on the 6,452 commercial policy interventions published this year refer were taken by 153 customs territories. The commercial interests of 227 different customs territories have been affected by the policy interventions recorded this year. Taking account of the fact that each policy intervention can affect multiple trading partners, a total of 108,536 instances of impact have been recorded, implying that each intervention has affected on average 16 customs territories.

Thirty-nine customs territories have witnessed over 1000 instances of impact—some may be beneficial, others harmful—from the records published this year. Another 36 customs territories have seen their commercial interests affected between 500 and 1000 times from the records of published this year. These statistics provide a sense of the number and reach of the commercial policy intervention published this year.

Subsidies to local firms—not just import-competing manufacturers and farmers but also service sector firms—constitute the largest type of commercial policy intervention recorded this year. Import tariff increases are the second largest category. Export-related measures are the third most recorded category.

It is important to recall that the Global Trade Alert team publishes information on commercial policy intervention that took place in previous years. Consequently, the 6,452 total mentioned above does not refer to the total number of commercial policy interventions implemented in 2022. In fact, so far this year, reports on a total of 3,577 policy interventions that were implemented during 2022 have been published.

A total of 767 of those 3,577 interventions eased cross-border commerce, the remainder worsened the treatment of foreign commercial interests. When compared to prior years, no year before 2022 witnessed as much commercial policy intervention as this year. The jump in recorded totals of policy intervention witnessed in 2020 has not only been sustained but has been increased further.

ACKNOWLEDGEMENTS

The Global Trade Alert team at the St. Gallen Endowment for Prosperity Through Trade contributed to the production of this report. This report was written by Simon J. Evenett and Johannes Fritz, who take final responsibility for its contents.

The Global Trade Alert's Monitoring team is led by Ana Elena Sancho, who is supported by Josse Jakobsen. The team comprises of the following trade policy analysts: Fandi Achmad, Anttoni Asikainen, Fiama Angeles Bonelli, Callum Campbell, Andrey Eydlin, Halit Harput, Chintan Jadwani, Sangwani Mkandawire, Lucas Miaihles, Marius Risse, Anna Szamely, and Maria del Carmen Vergaray. The addition of semi-structured lists of relevant unilateral policy intervention to our database was undertaken by Álvaro Rodríguez Pardo, Aurel Rochell, Robin Scherrer, and Varinia González Zúniga.

The Research team of the Global Trade Alert is marshalled by Fernando Martin Espejo and comprises André Brotto Reigado, Silvan Hofer, and Noé Romeo Kuhn. Working with me, the Research team was responsible for devising and executing the mapping between policy intervention types and SDG indicators that is at core of this report. The process of refining that mapping took time and we now have a greater appreciation of the challenges faced by other analysts that have worked on these matters.

Both teams were supported by the Endowment's Technology Team, which is overseen by Patrick Buess and included contributions from Andrey Bernatsky, Liubomyr Gavryliv and Saad Mahmood.

Anil Shamdasani and Lawrence Reddy seamlessly integrated the elements of this report into the professional document that is before you. Lawrence Reddy and Anttoni Asikainen prepared and executed the outreach campaign for this report under the supervision of Josse Jakobsen. At this time it is appropriate to record our gratitude to the organisations that have agreed to schedule seminars and webinars to discuss the findings of this report.

In addition to his responsibilities as Chief Executive Officer of the St. Gallen Endowment, Dr. Johannes Fritz provided colleagues with strategic guidance throughout the preparation of this report.

The entire team at the St. Gallen Endowment wishes to express their gratitude to the many individuals and organisations that have provided guidance and support for our work throughout this year. Particular thanks go the Dr. Thomas Schmidheiny and Mr. Andreas Kirchschläger of the Max Schmidheiny Foundation of the University of St. Gallen.

Simon J. Evenett

Founder, St. Gallen Endowment for Prosperity Through Trade

HOLDING THEIR FEET TO THE FIRE: THE TRACK RECORD OF EACH G20 MEMBER

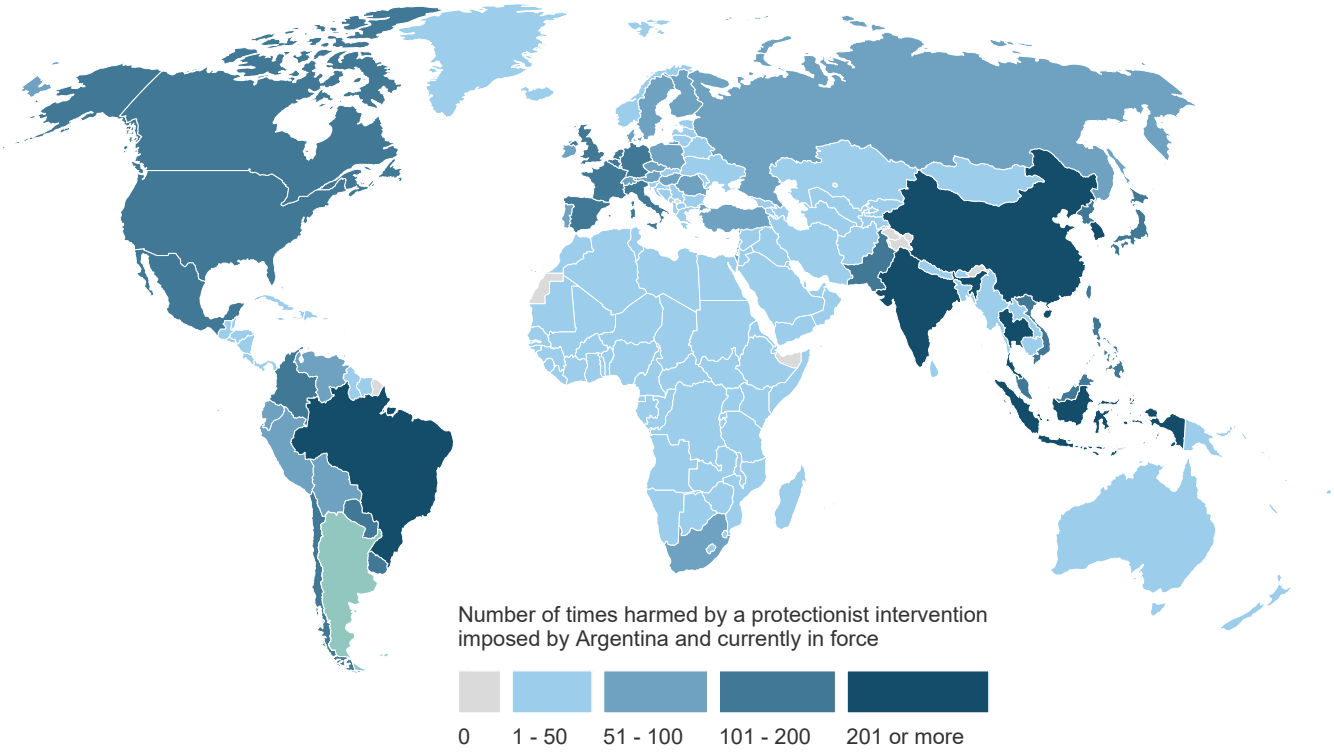
ARGENTINA

What is at stake for Argentina's goods exporters?

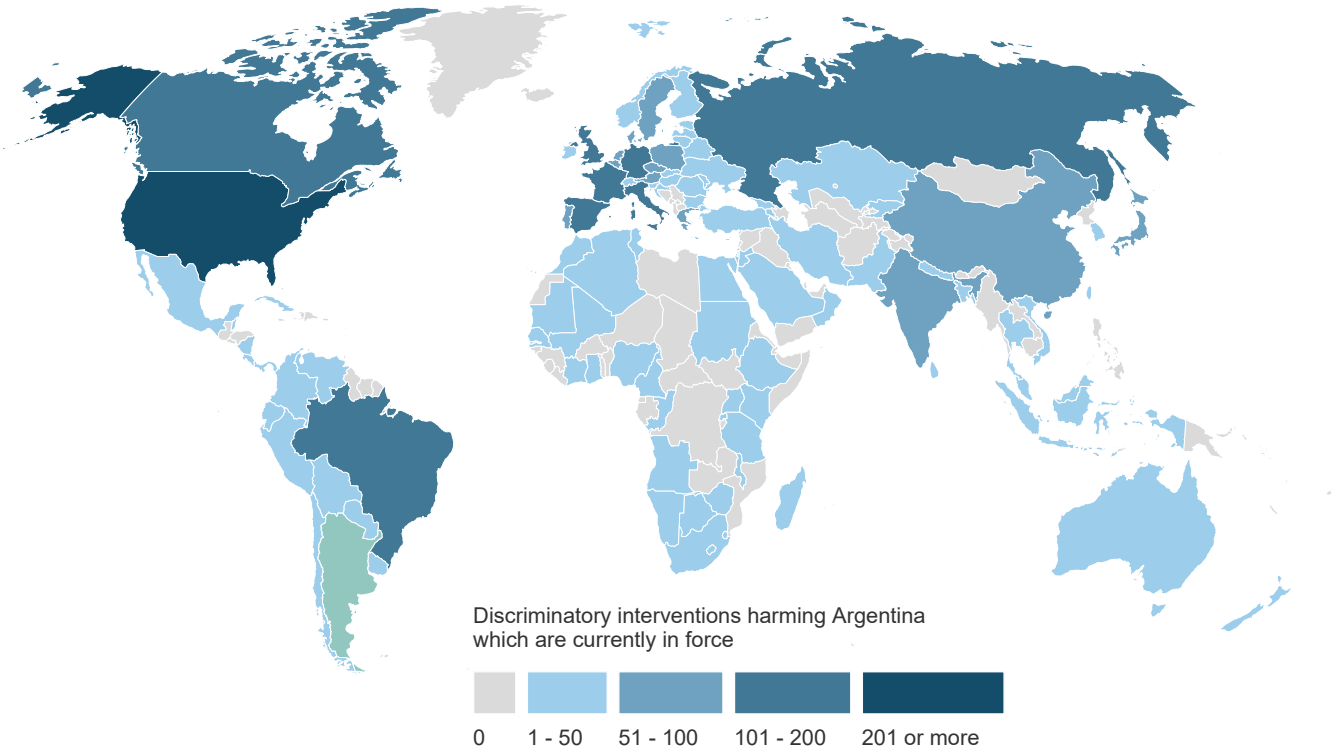
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	21.60	42.22	52.41	61.23	67.12	72.51	72.97	75.99	78.97	77.64	78.47	78.61	76.02	76.79
D	Contingent trade-protective measures	0.32	0.35	0.36	0.07	0.30	0.44	0.44	0.56	0.60	0.82	0.84	0.86	0.87	1.57
E	Non-automatic licensing, quotas etc.	4.51	4.93	7.34	12.60	12.42	13.10	13.21	13.62	14.36	14.59	14.47	14.53	14.53	15.32
F	Price-control measures, including additional taxes and charges	0.17	0.17	1.21	3.57	0.41	3.46	4.62	5.19	5.19	6.60	6.73	6.73	6.73	6.73
G	Finance measures	0.32	1.38	1.72	1.72	1.72	1.72	1.73	1.74	1.74	1.74	1.74	1.74	1.74	1.74
I	Trade-related investment measures	0.27	0.77	1.24	3.34	2.65	4.13	5.04	5.72	5.21	2.77	2.68	2.66	2.69	2.72
L	Subsidies (excl. export subsidies)	8.84	13.35	13.82	14.07	21.83	31.61	39.02	34.61	41.46	41.67	42.37	42.34	39.53	40.35
M	Government procurement restrictions	0.27	0.32	0.27	0.78	1.85	2.58	2.82	1.39	1.50	1.64	1.89	1.75	1.87	1.95
P	Export-related measures (incl. subsidies)	9.20	29.74	43.97	51.31	56.62	62.43	62.79	66.45	67.85	66.02	68.75	68.87	65.86	66.26
	Tariff measures	1.27	1.47	2.33	5.73	10.55	9.80	10.65	10.73	12.65	12.18	13.14	15.25	16.22	16.25
	Instrument unclear	0.05	0.10	0.10	0.39	0.39	0.57	1.23	1.41	1.47	1.51	1.54	1.54	1.54	1.55

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY ARGENTINA'S DISCRIMINATORY INTERVENTIONS

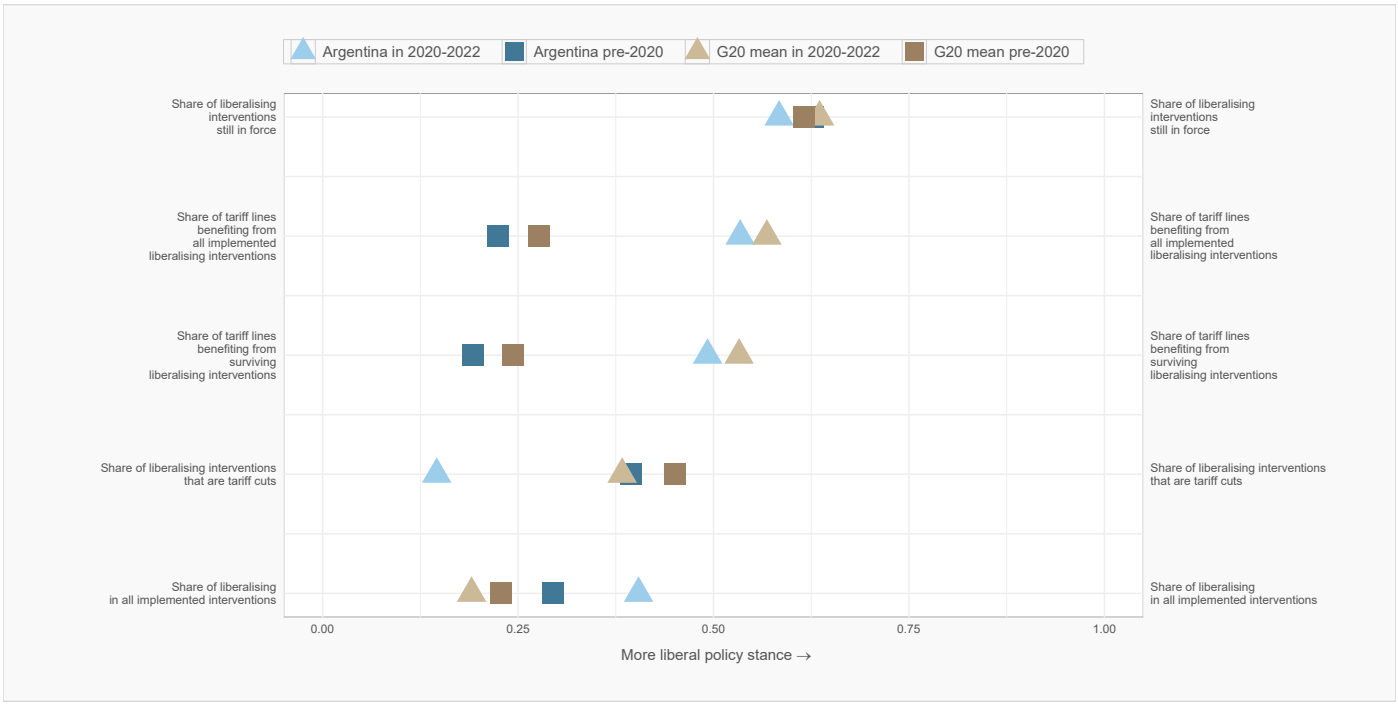


DISCRIMINATORY INTERVENTIONS HARMING ARGENTINA'S INTERESTS



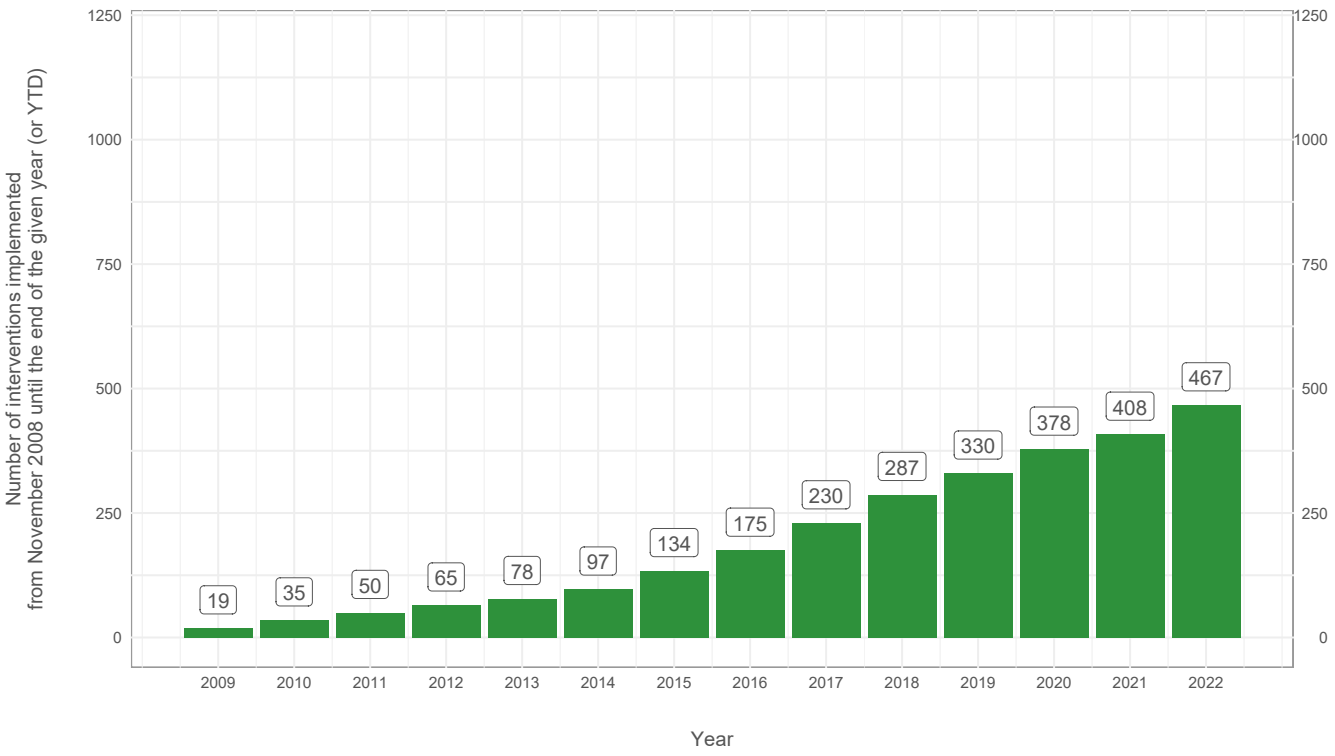
ARGENTINA

Track record of liberalisation



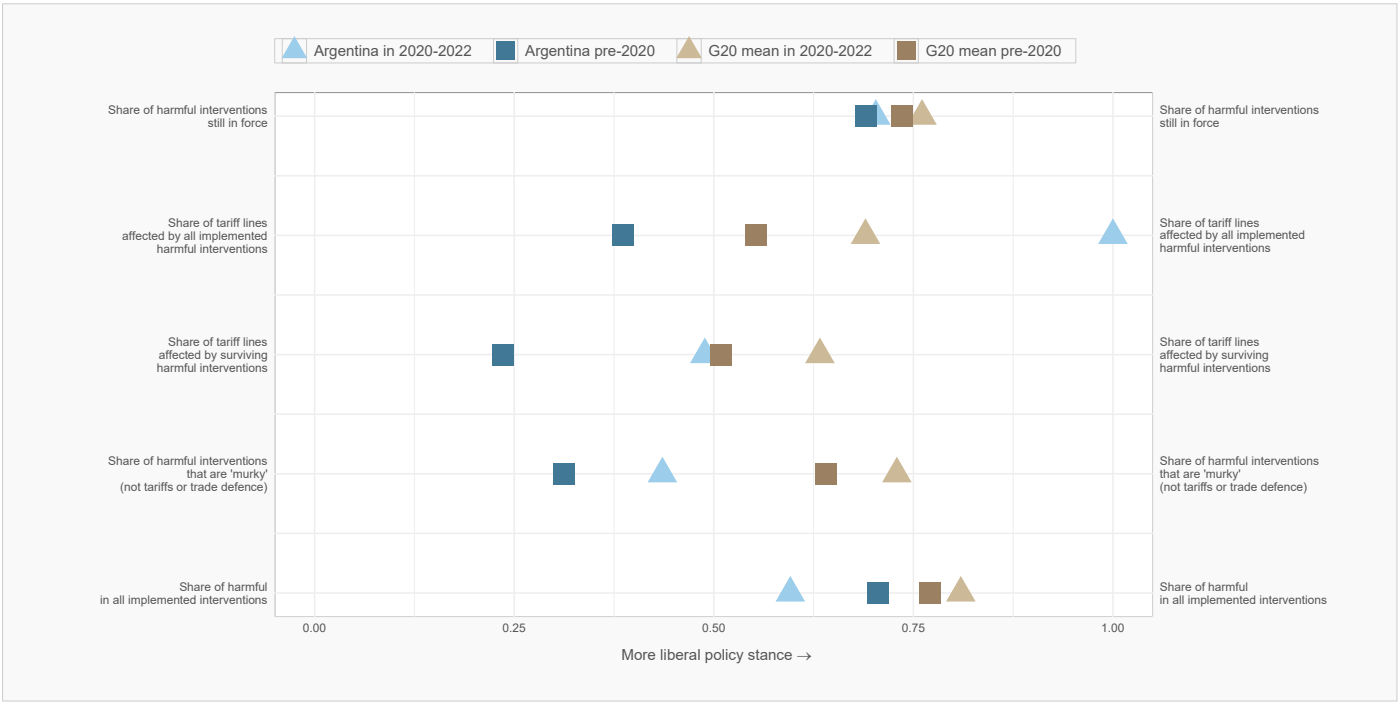
ARGENTINA

Number of liberalising interventions imposed since November 2008



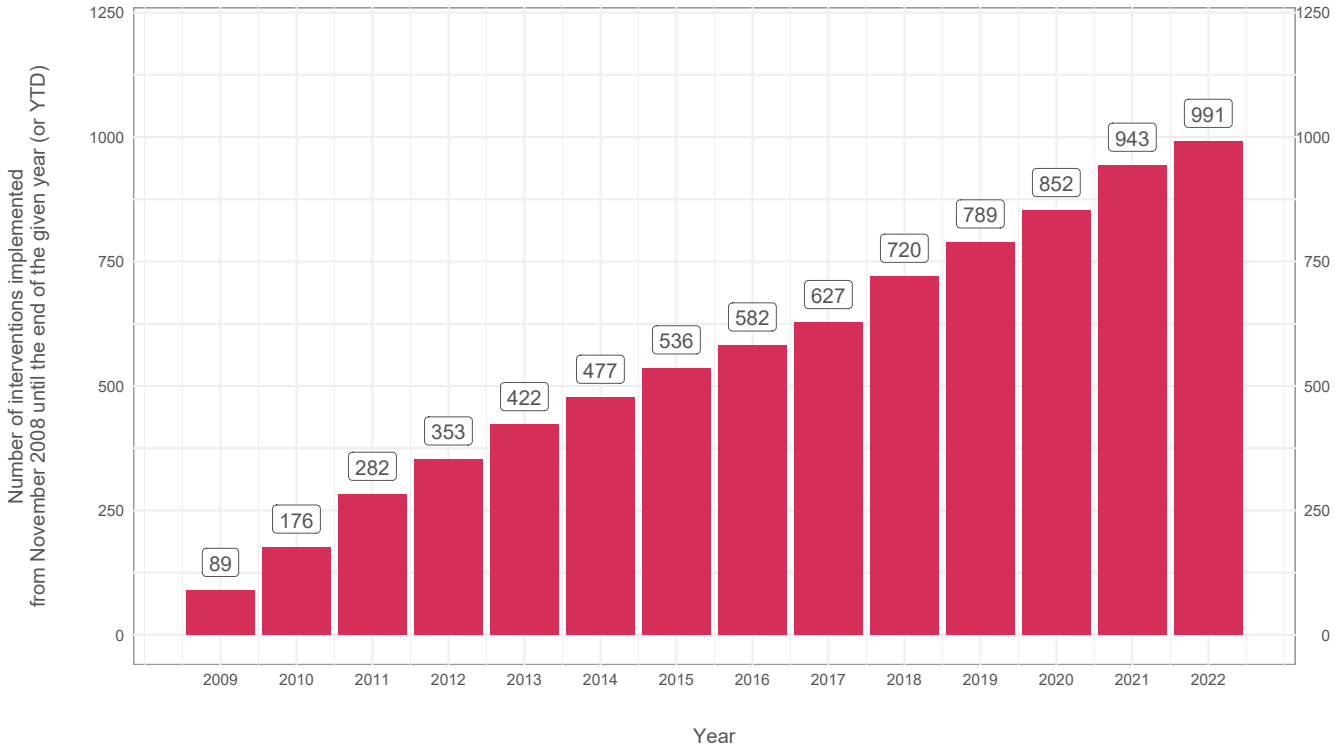
ARGENTINA

Track record of protectionism



ARGENTINA

Number of discriminatory interventions imposed since November 2008



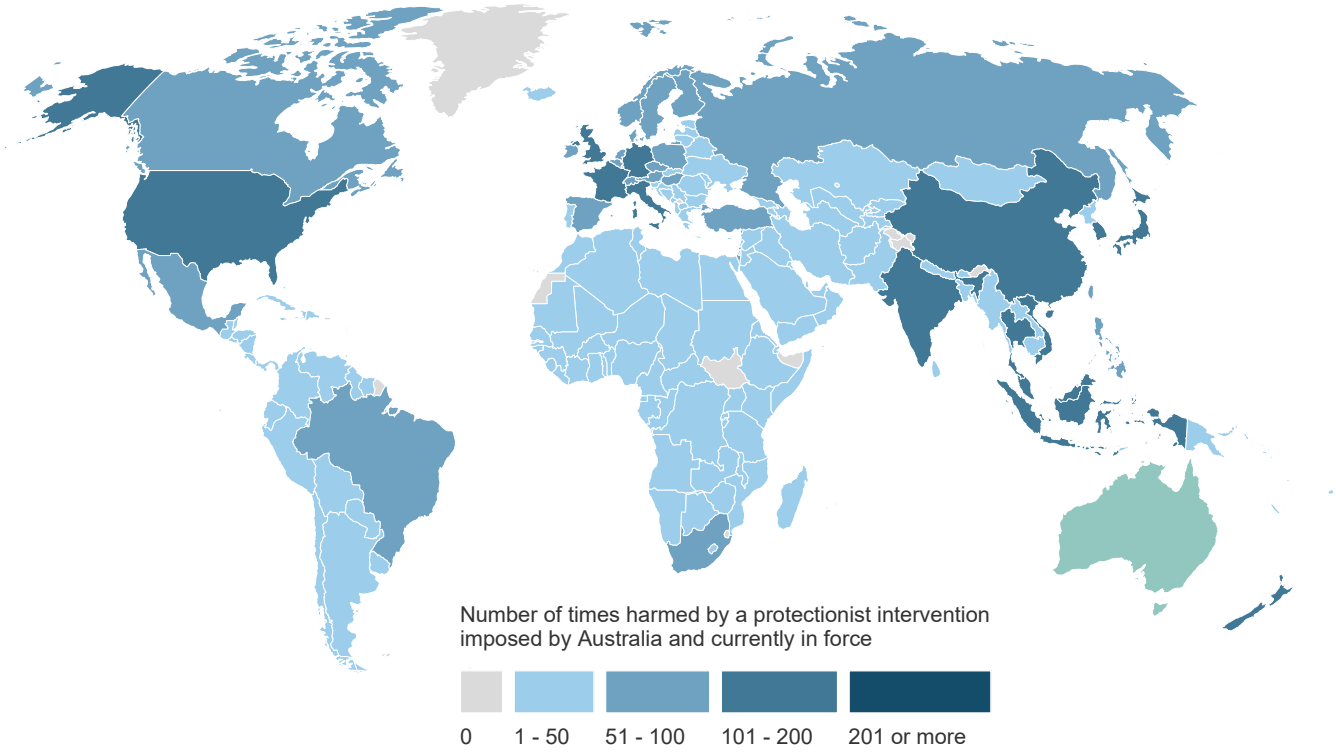
AUSTRALIA

What is at stake for Australia's goods exporters?

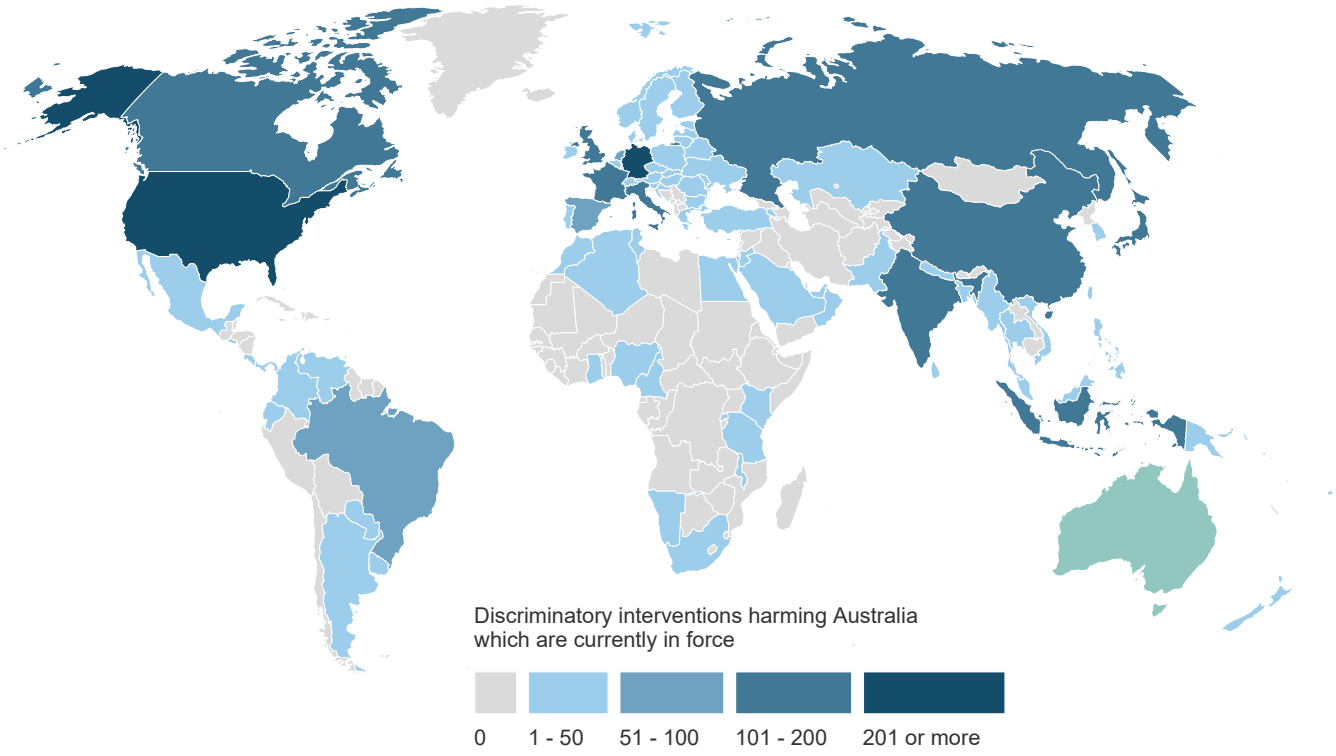
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	23.97	32.50	43.38	47.98	56.85	61.82	62.50	63.98	65.67	68.19	71.93	72.32	68.70	70.30
D	Contingent trade-protective measures	0.06	0.04	0.04	0.05	0.07	0.10	0.14	0.33	0.43	0.46	0.48	0.55	0.60	0.61
E	Non-automatic licensing, quotas etc.	12.10	12.83	13.62	14.72	15.65	15.74	16.09	16.17	16.37	16.51	16.56	17.53	17.56	18.26
F	Price-control measures, including additional taxes and charges	9.06	9.06	9.10	9.13	9.12	10.09	11.05	11.05	11.06	14.60	14.97	15.08	15.21	15.22
G	Finance measures	0.06	0.30	0.69	0.69	0.69	0.69	1.07	1.19	1.19	1.20	1.20	1.20	1.20	1.21
I	Trade-related investment measures	0.04	0.40	0.42	0.44	0.43	0.61	0.66	0.67	0.68	0.68	0.57	0.46	0.48	0.52
L	Subsidies (excl. export subsidies)	3.61	5.08	14.39	15.42	22.42	25.30	25.61	26.08	26.59	26.44	27.04	27.30	18.61	19.35
M	Government procurement restrictions	0.58	0.90	0.70	0.82	0.92	1.03	1.10	1.12	1.26	1.83	2.76	2.39	2.57	2.90
P	Export-related measures (incl. subsidies)	12.74	24.29	34.90	38.74	40.75	40.63	41.02	43.65	45.76	47.69	52.09	52.45	50.20	53.18
	Tariff measures	0.31	1.39	1.49	2.11	4.69	6.44	7.37	7.69	8.52	9.50	9.45	10.50	10.98	11.02
	Instrument unclear	0.20	0.39	0.40	0.96	2.42	3.16	1.26	1.21	1.59	2.36	2.51	2.53	2.76	2.97

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY AUSTRALIA'S DISCRIMINATORY INTERVENTIONS

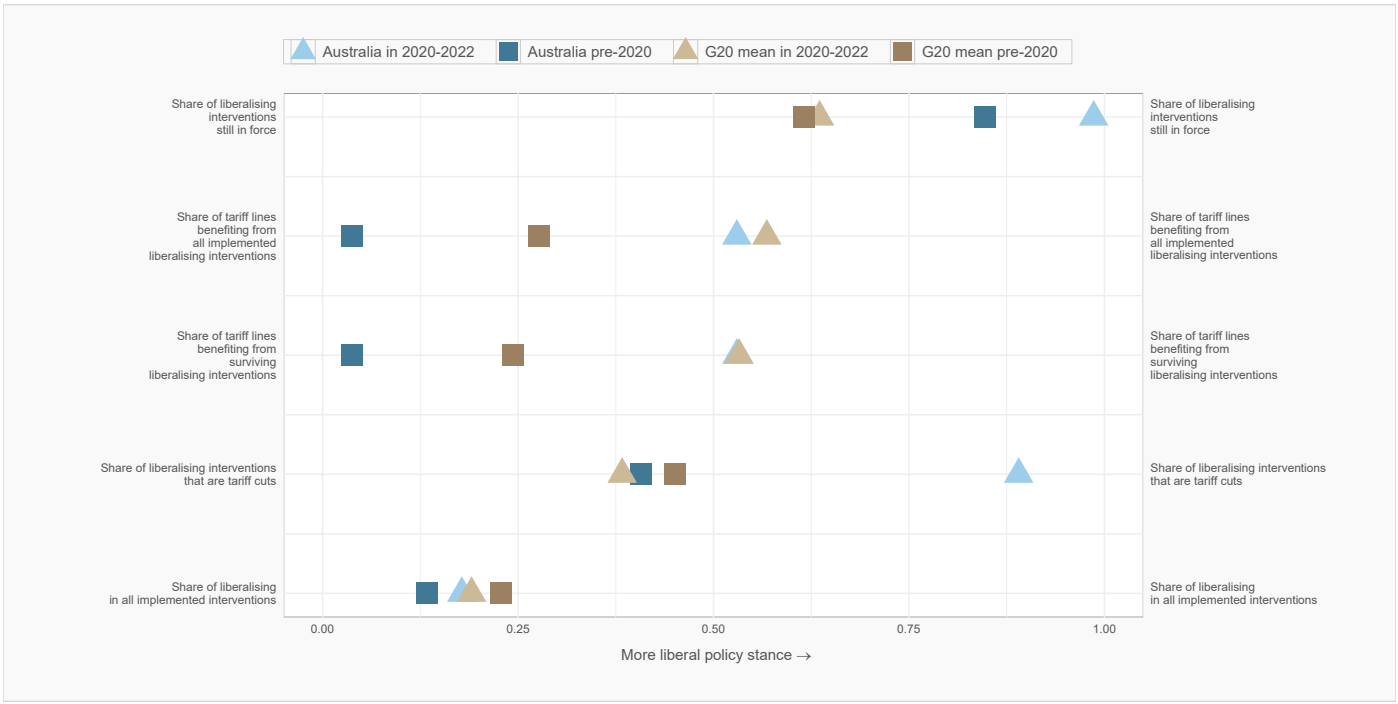


DISCRIMINATORY INTERVENTIONS HARMING AUSTRALIA'S INTERESTS



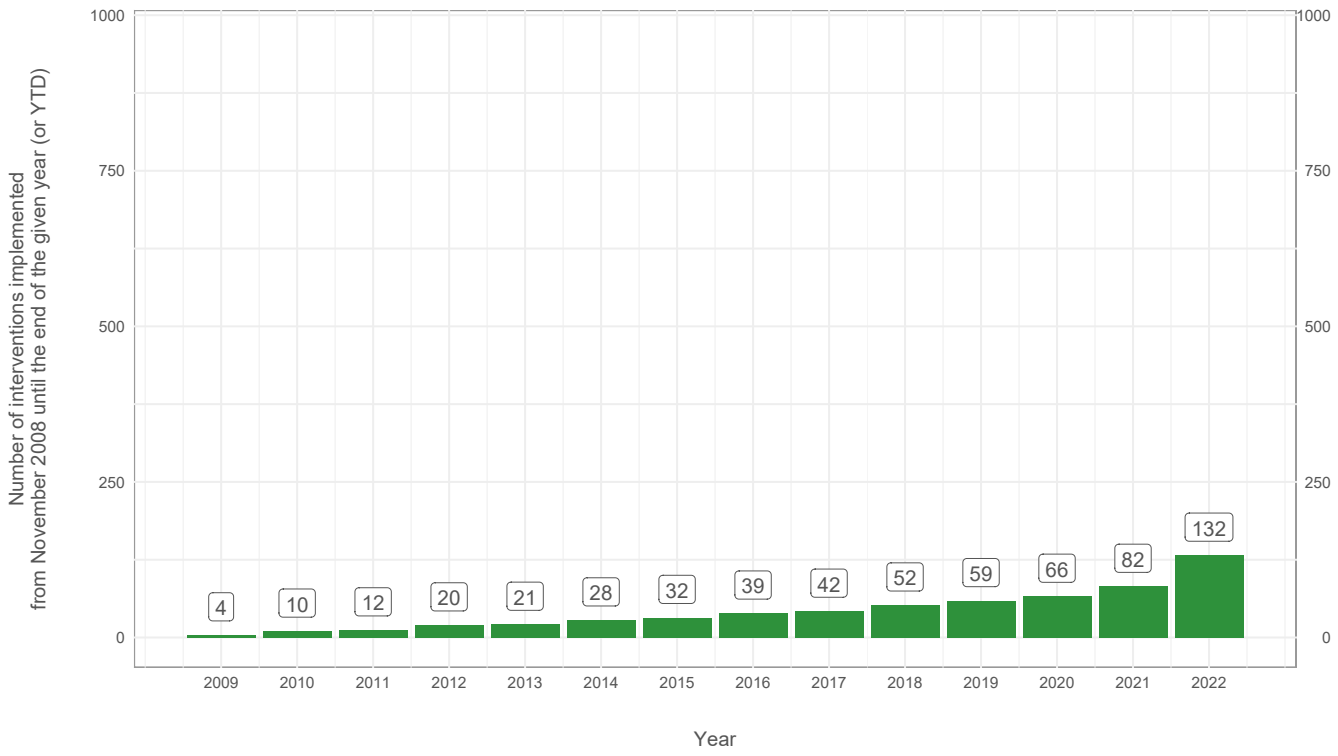
AUSTRALIA

Track record of liberalisation



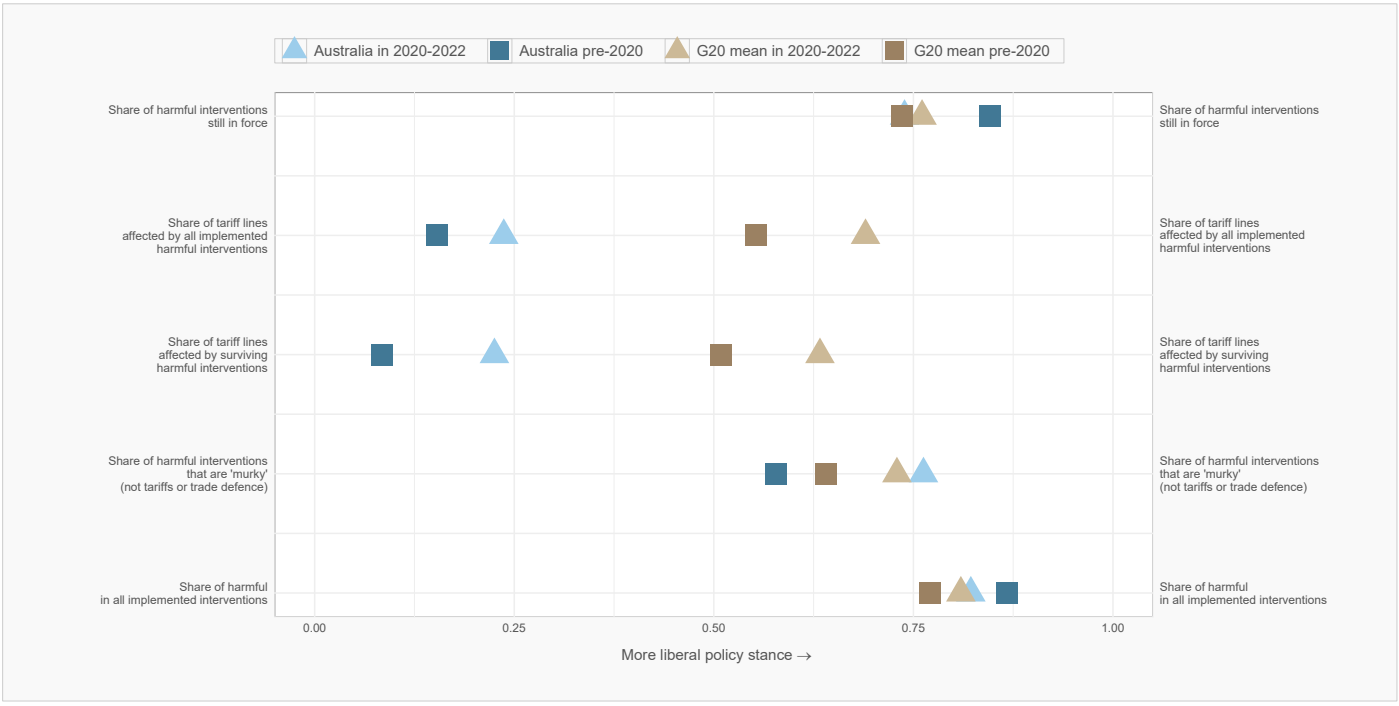
AUSTRALIA

Number of liberalising interventions imposed since November 2008



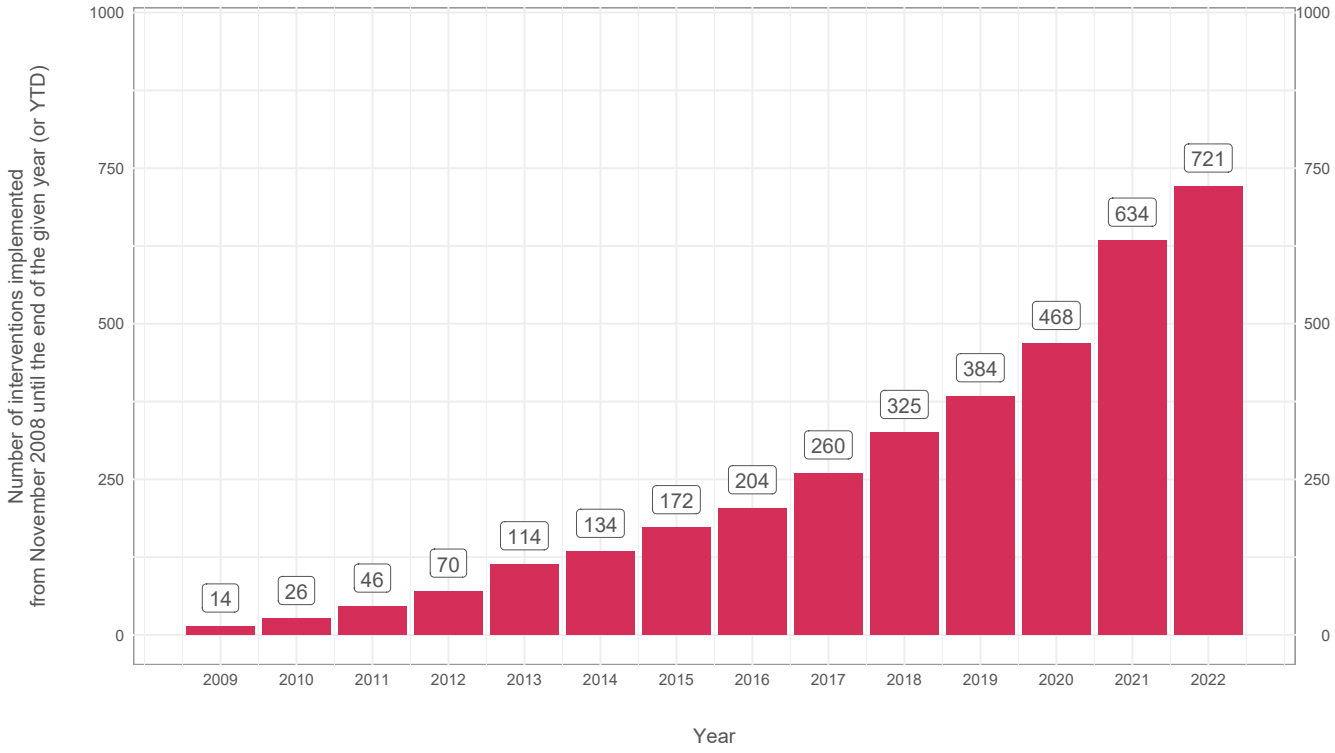
AUSTRALIA

Track record of protectionism



AUSTRALIA

Number of discriminatory interventions imposed since November 2008



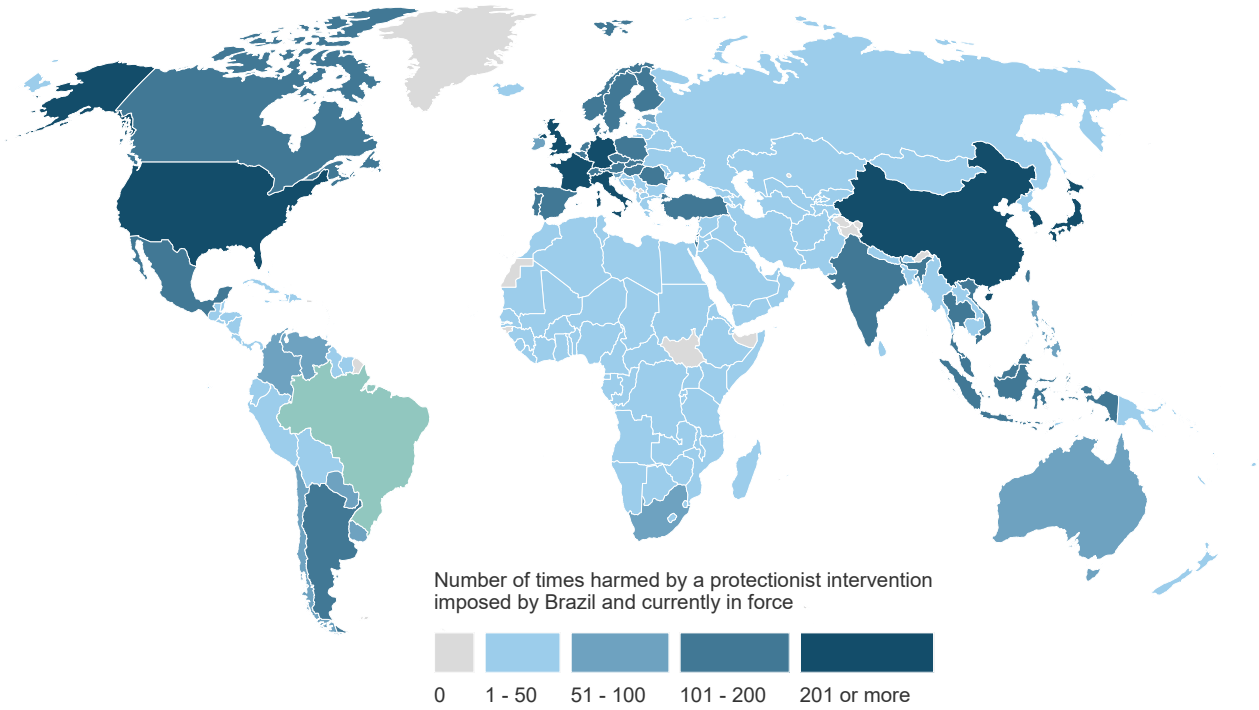
BRAZIL

What is at stake for Brazil's goods exporters?

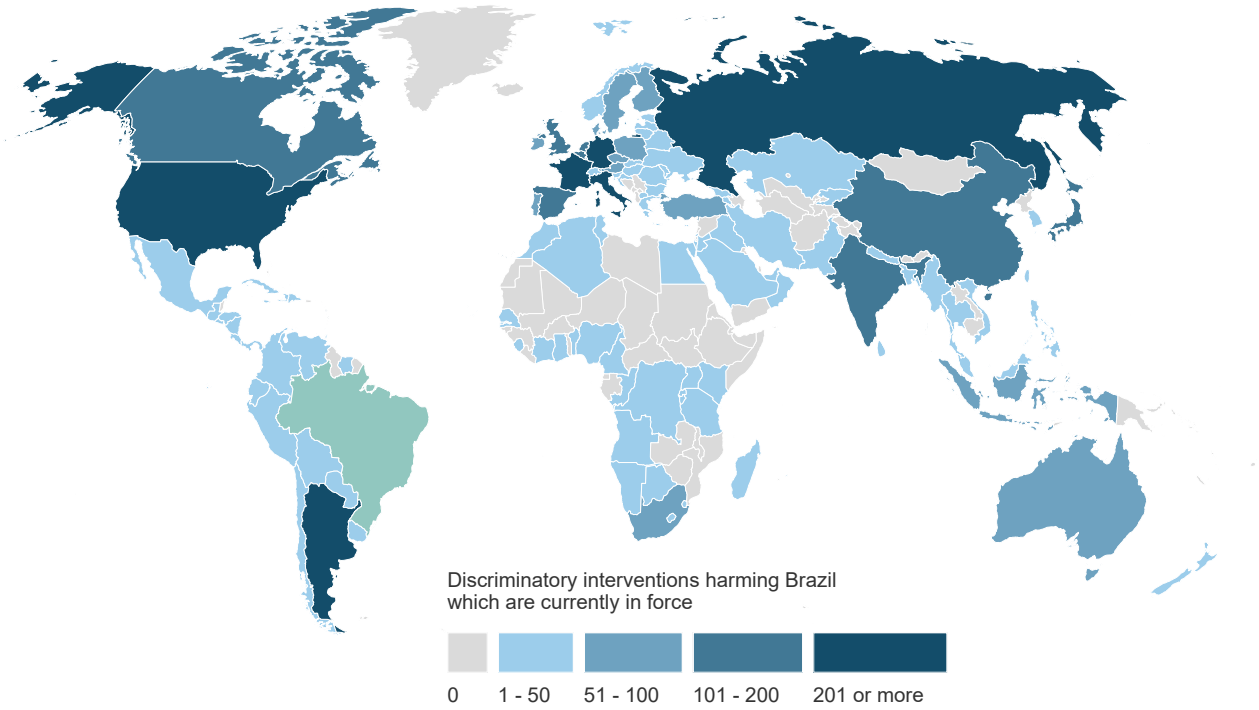
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	37.74	51.73	54.01	61.88	72.48	75.26	75.57	75.62	76.62	78.16	80.90	82.54	80.18	81.05
D	Contingent trade-protective measures	0.04	0.09	0.17	0.26	0.29	0.32	0.47	0.82	1.00	1.82	2.20	1.99	2.05	2.33
E	Non-automatic licensing, quotas etc.	7.90	8.94	12.82	18.16	19.66	19.84	19.11	16.14	17.18	16.99	17.04	19.10	19.30	19.96
F	Price-control measures, including additional taxes and charges	4.70	4.72	4.74	4.75	4.75	4.76	4.76	4.76	4.76	5.16	5.36	12.48	12.48	12.42
G	Finance measures	0.39	1.48	1.56	1.56	1.56	1.56	1.61	1.63	1.63	1.63	1.63	1.63	1.63	1.63
I	Trade-related investment measures	0.65	2.64	3.57	4.04	4.05	4.13	5.05	5.73	5.74	5.84	5.72	5.70	5.79	5.86
L	Subsidies (excl. export subsidies)	6.88	17.58	21.64	22.80	36.92	44.53	47.08	45.83	48.75	49.06	49.68	50.44	43.72	44.61
M	Government procurement restrictions	2.71	2.73	2.27	3.53	4.95	5.99	6.71	7.04	7.49	7.56	7.89	7.93	8.46	9.57
P	Export-related measures (incl. subsidies)	26.08	37.32	42.23	46.24	52.49	52.37	52.54	57.81	59.06	60.65	67.23	67.72	62.12	64.07
	Tariff measures	1.57	2.05	2.85	6.11	10.97	11.34	11.94	12.81	14.93	16.08	16.52	18.28	18.29	18.39
	Instrument unclear	0.02	1.30	1.44	1.48	3.81	4.48	6.08	6.25	5.99	5.56	5.63	5.63	5.64	5.69

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY BRAZIL'S DISCRIMINATORY INTERVENTIONS

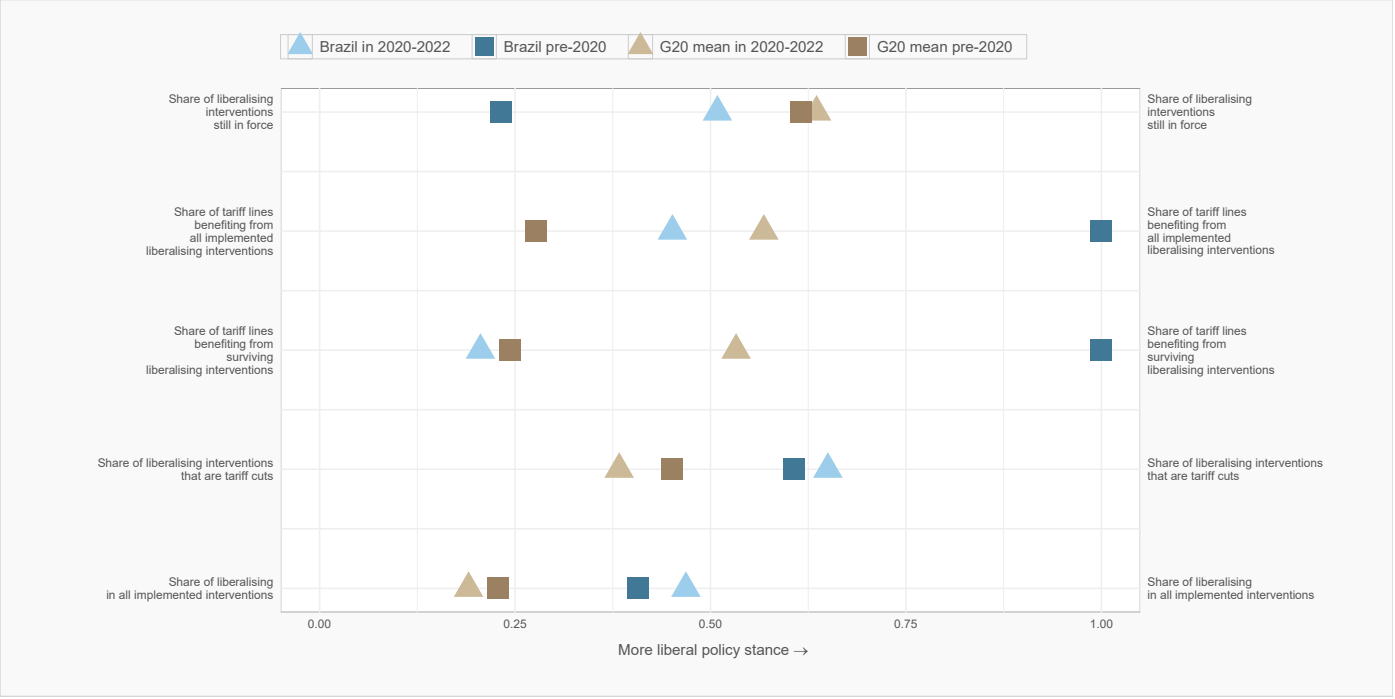


DISCRIMINATORY INTERVENTIONS HARMING BRAZIL'S INTERESTS



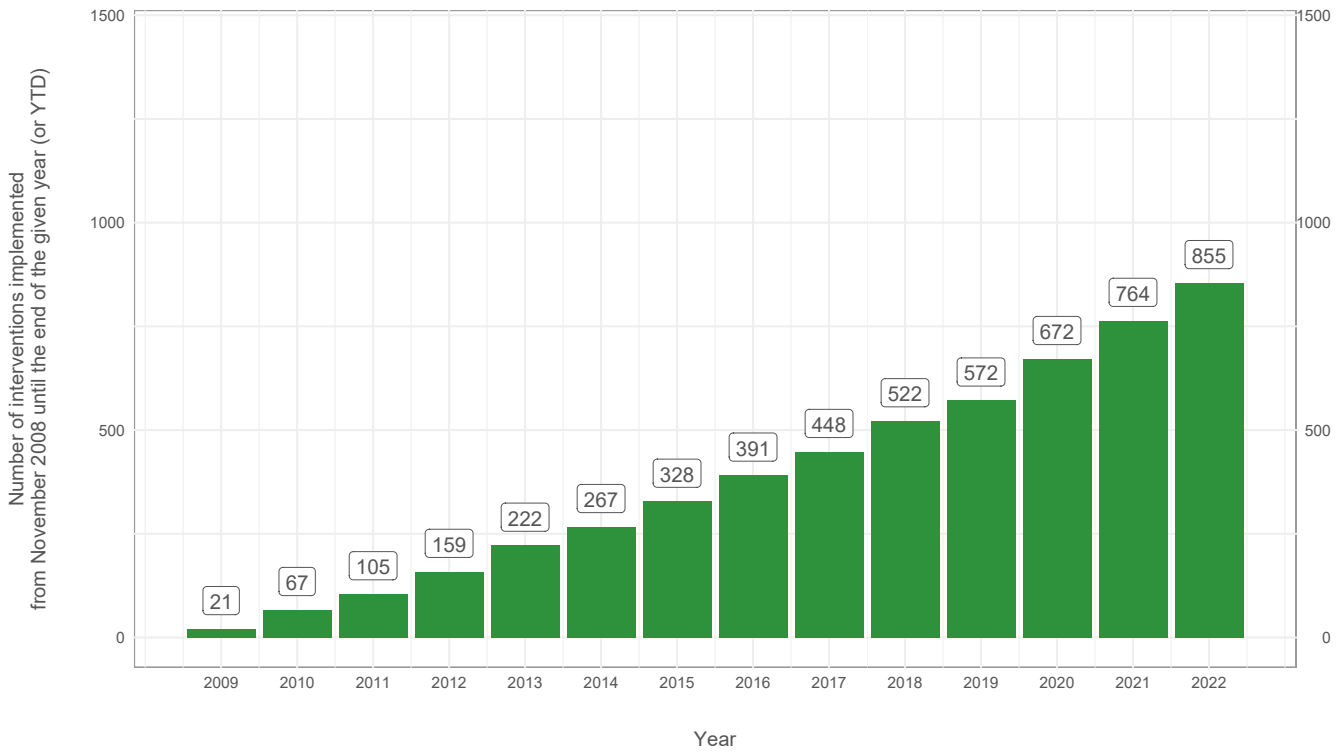
BRAZIL

Track record of liberalisation



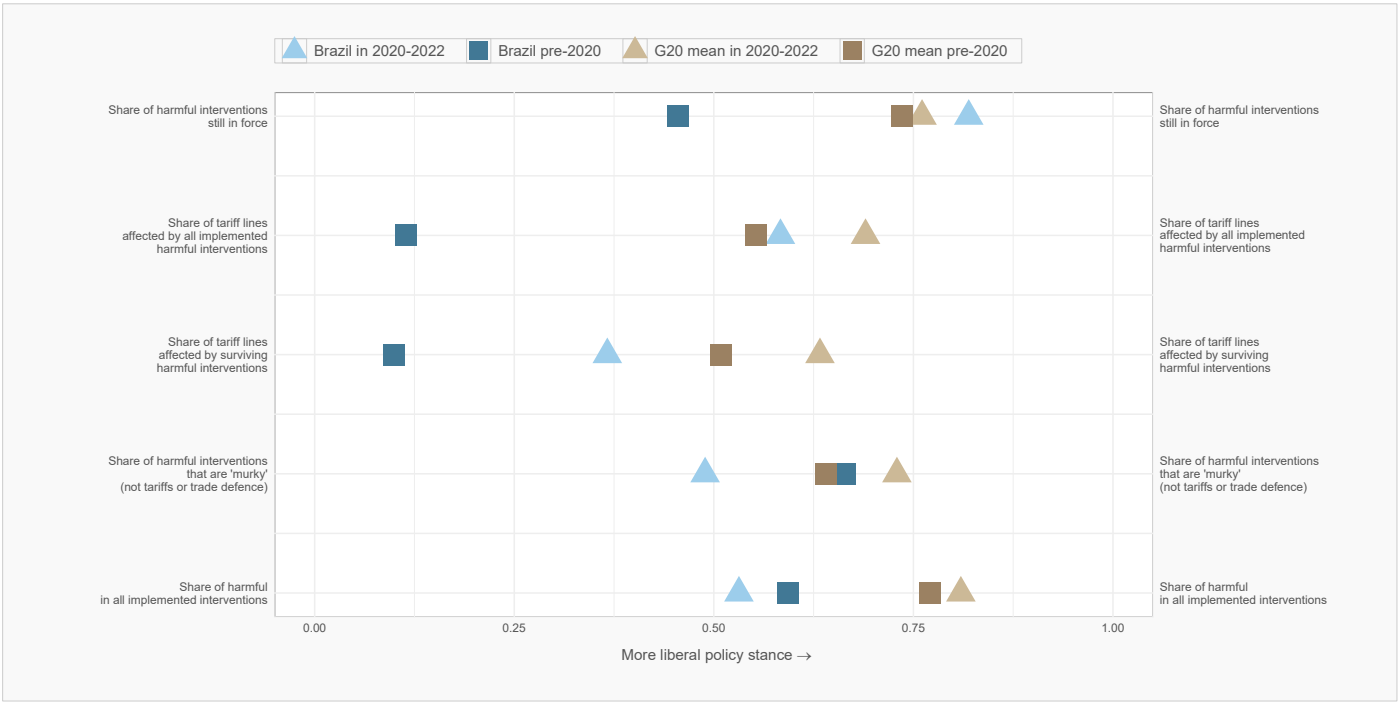
BRAZIL

Number of liberalising interventions imposed since November 2008



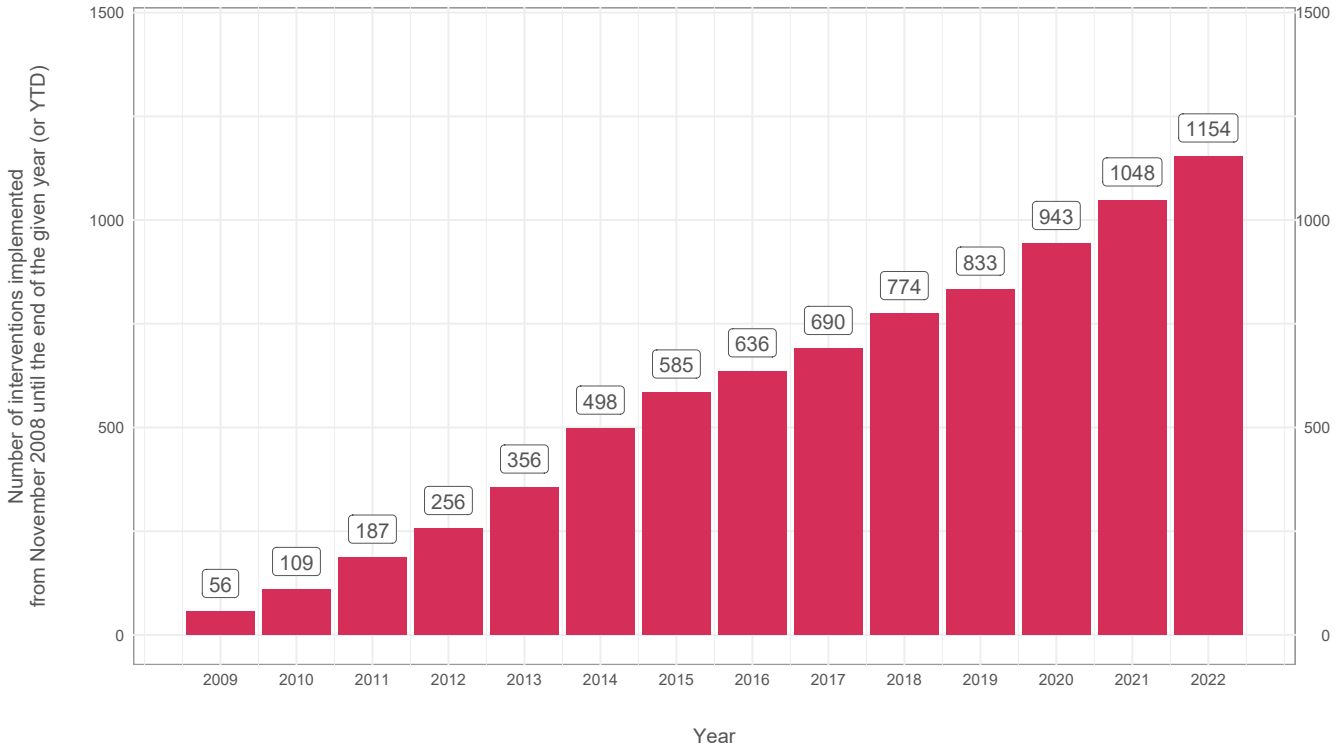
BRAZIL

Track record of protectionism



BRAZIL

Number of discriminatory interventions imposed since November 2008



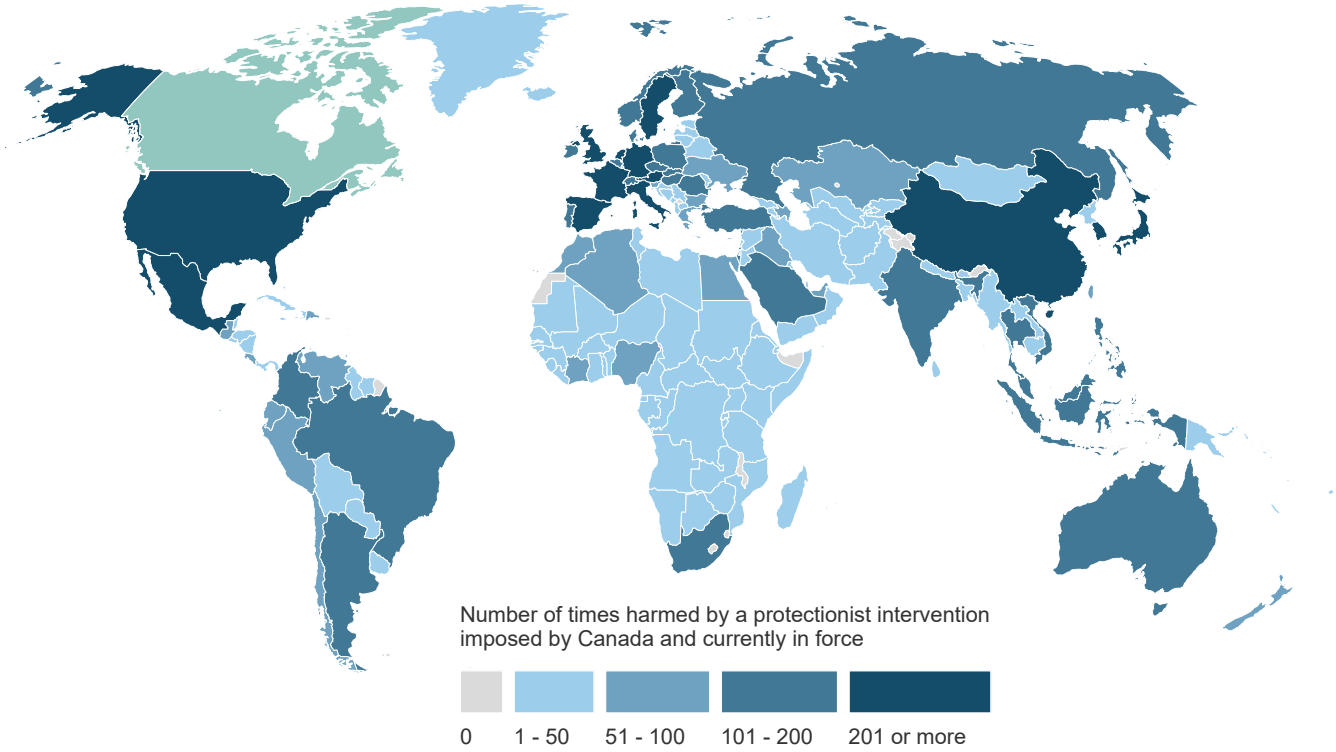
CANADA

What is at stake for Canada's goods exporters?

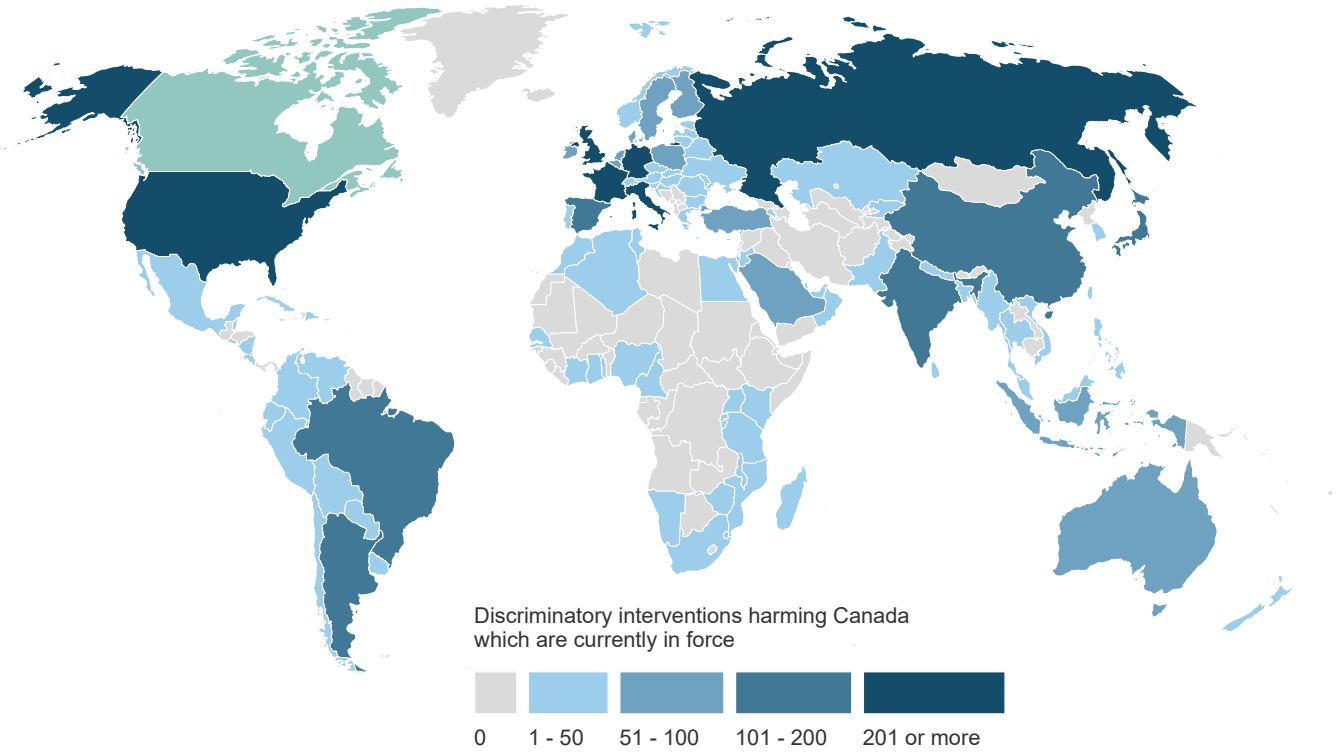
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	37.74	51.93	64.44	75.14	81.27	83.37	82.22	84.35	86.18	87.82	87.42	88.01	87.95	89.75
D	Contingent trade-protective measures	0.11	0.12	0.13	0.13	0.13	0.14	0.44	2.15	3.89	5.41	4.85	4.78	4.76	4.81
E	Non-automatic licensing, quotas etc.	0.61	0.72	0.83	0.89	1.12	1.15	1.24	1.30	2.53	3.26	3.36	3.42	4.51	5.64
F	Price-control measures, including additional taxes and charges	0.31	0.31	0.33	0.34	0.34	0.42	0.56	0.65	0.66	0.88	0.91	0.94	0.95	0.97
G	Finance measures	0.03	0.09	0.10	0.10	0.10	0.10	0.11	0.11	0.11	0.11	0.11	0.11	0.11	0.12
I	Trade-related investment measures	0.37	2.96	2.76	2.76	2.77	2.77	3.02	3.44	3.98	3.99	3.99	3.99	4.68	5.06
L	Subsidies (excl. export subsidies)	13.02	18.23	23.09	32.33	40.24	44.53	45.07	47.29	48.85	52.09	52.77	57.90	60.05	62.57
M	Government procurement restrictions	2.19	2.63	2.93	3.21	3.26	3.66	4.25	4.26	4.76	5.37	6.57	7.15	11.01	20.44
P	Export-related measures (incl. subsidies)	23.95	34.43	52.12	64.71	66.30	56.11	53.82	54.47	57.56	58.26	57.76	57.84	56.26	57.27
	Tariff measures	0.19	0.29	0.64	0.74	0.68	0.71	0.90	1.28	3.01	5.98	4.56	5.04	6.00	6.05
	Instrument unclear	0.01	0.14	0.03	0.13	1.10	1.67	1.93	2.34	2.62	2.97	2.98	3.02	3.00	3.03

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY CANADA'S DISCRIMINATORY INTERVENTIONS

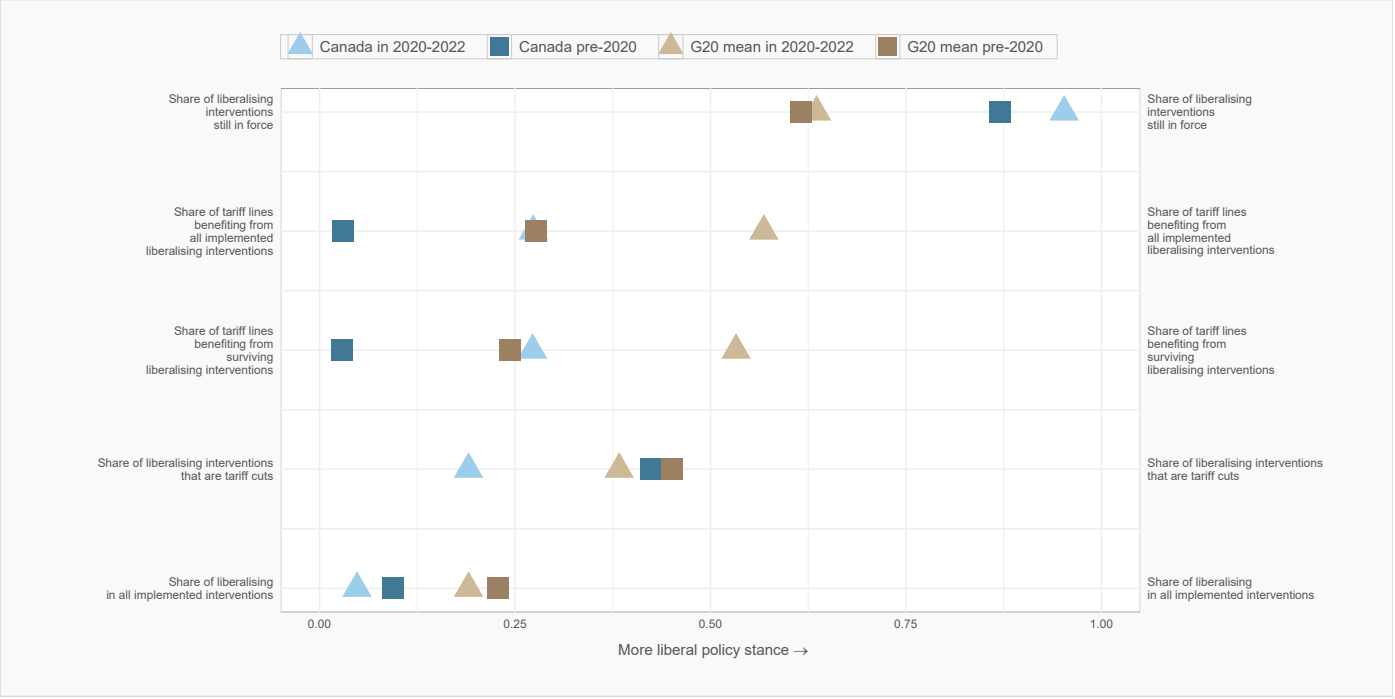


DISCRIMINATORY INTERVENTIONS HARMING CANADA'S INTERESTS



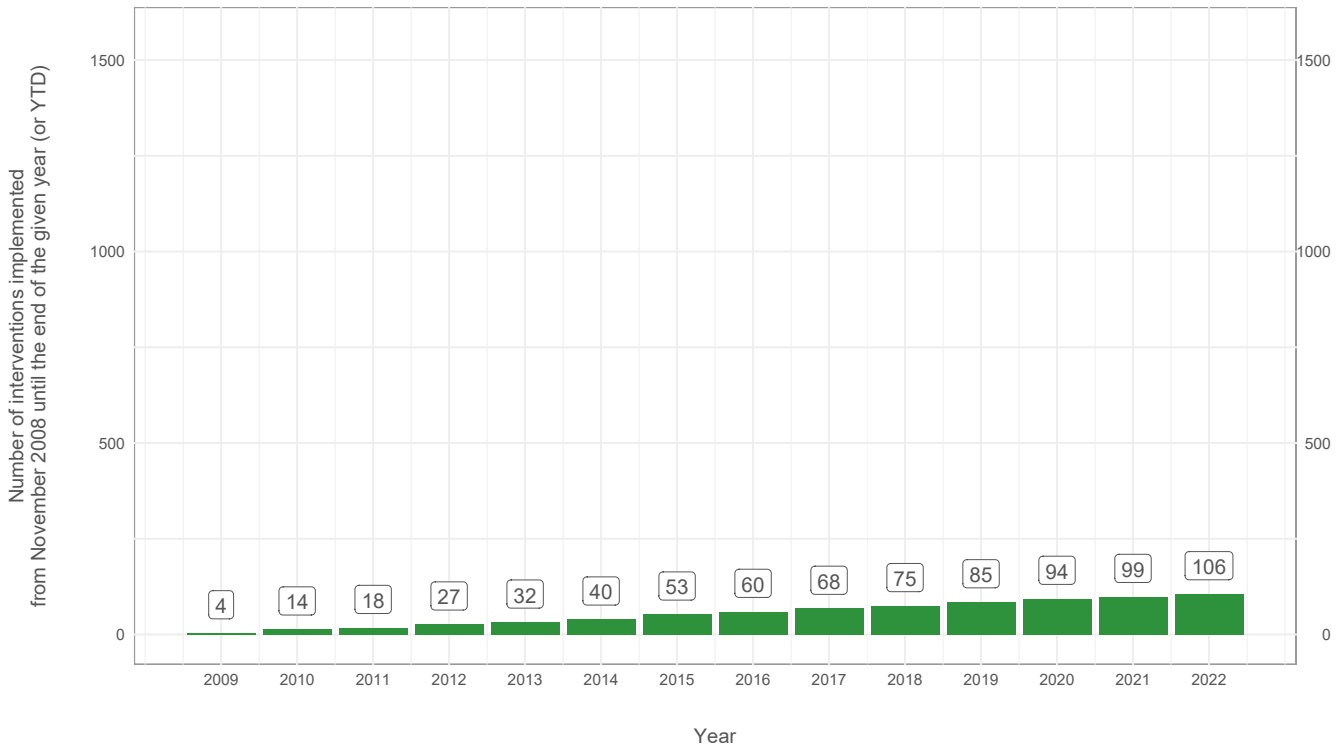
CANADA

Track record of liberalisation



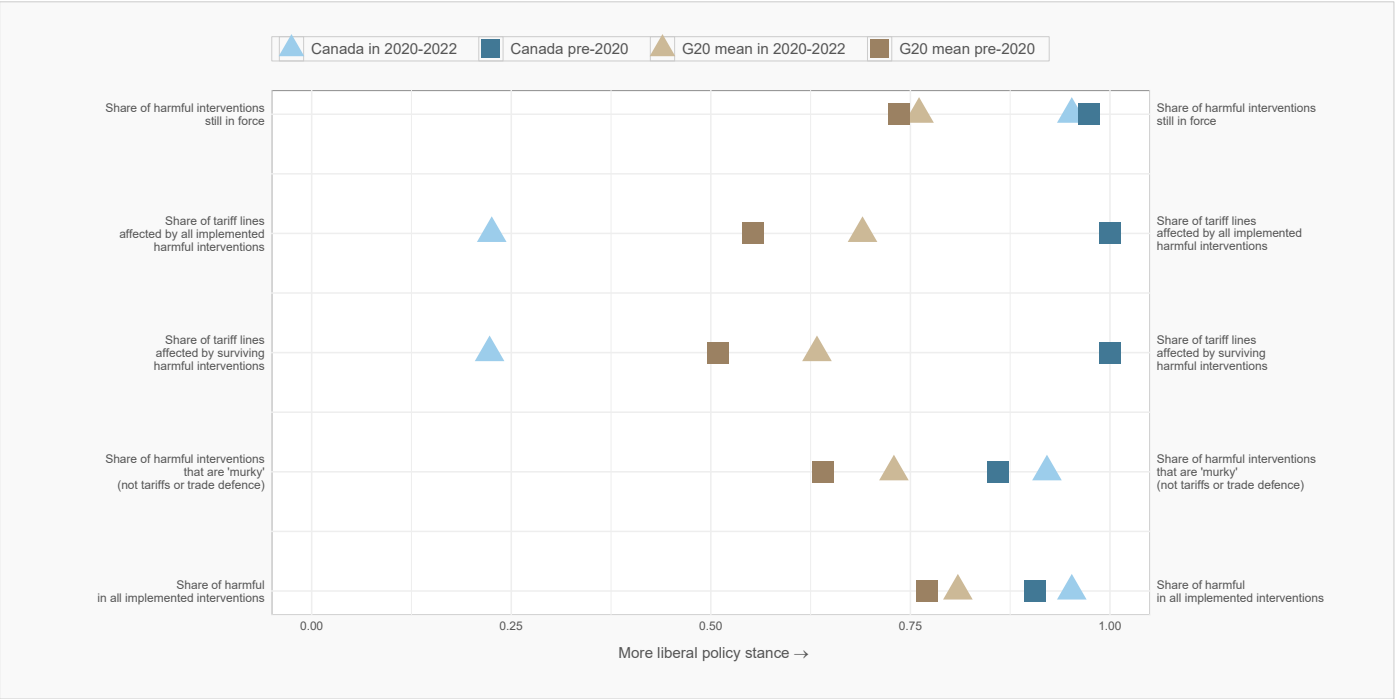
CANADA

Number of liberalising interventions imposed since November 2008



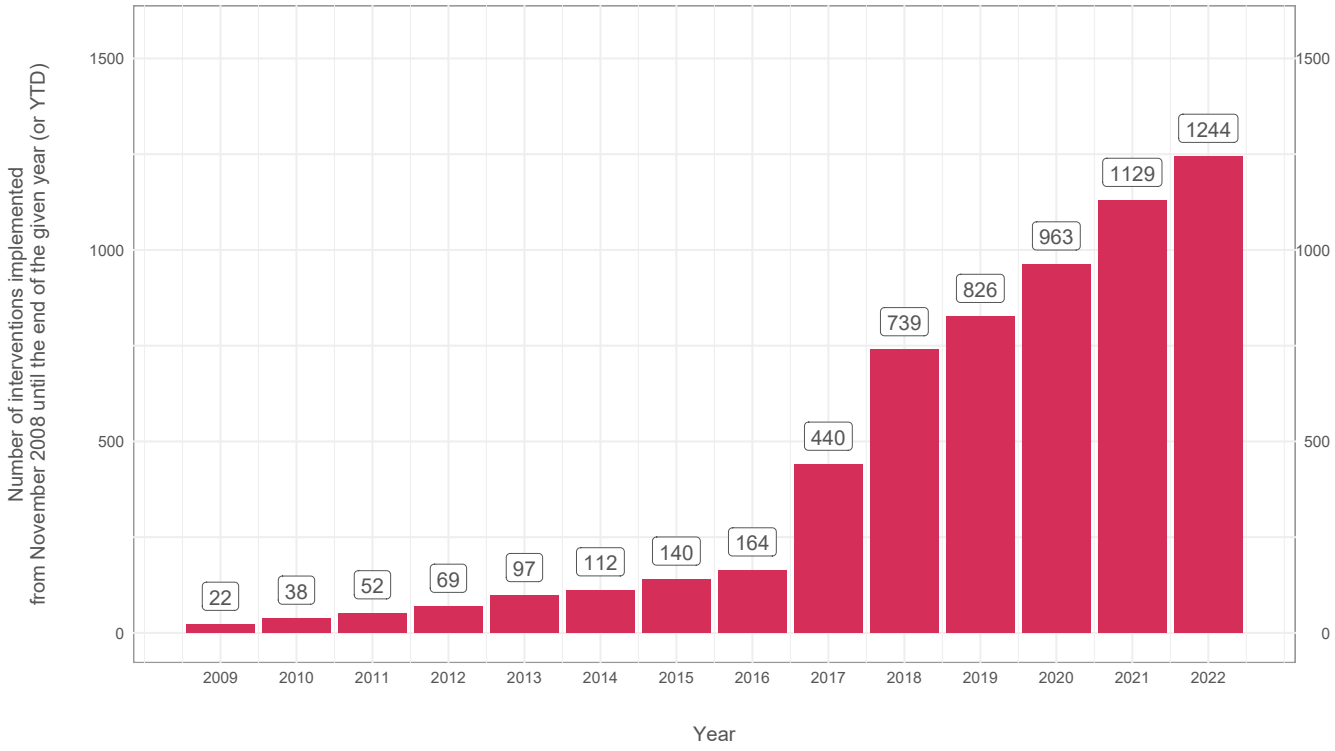
CANADA

Track record of protectionism



CANADA

Number of discriminatory interventions imposed since November 2008



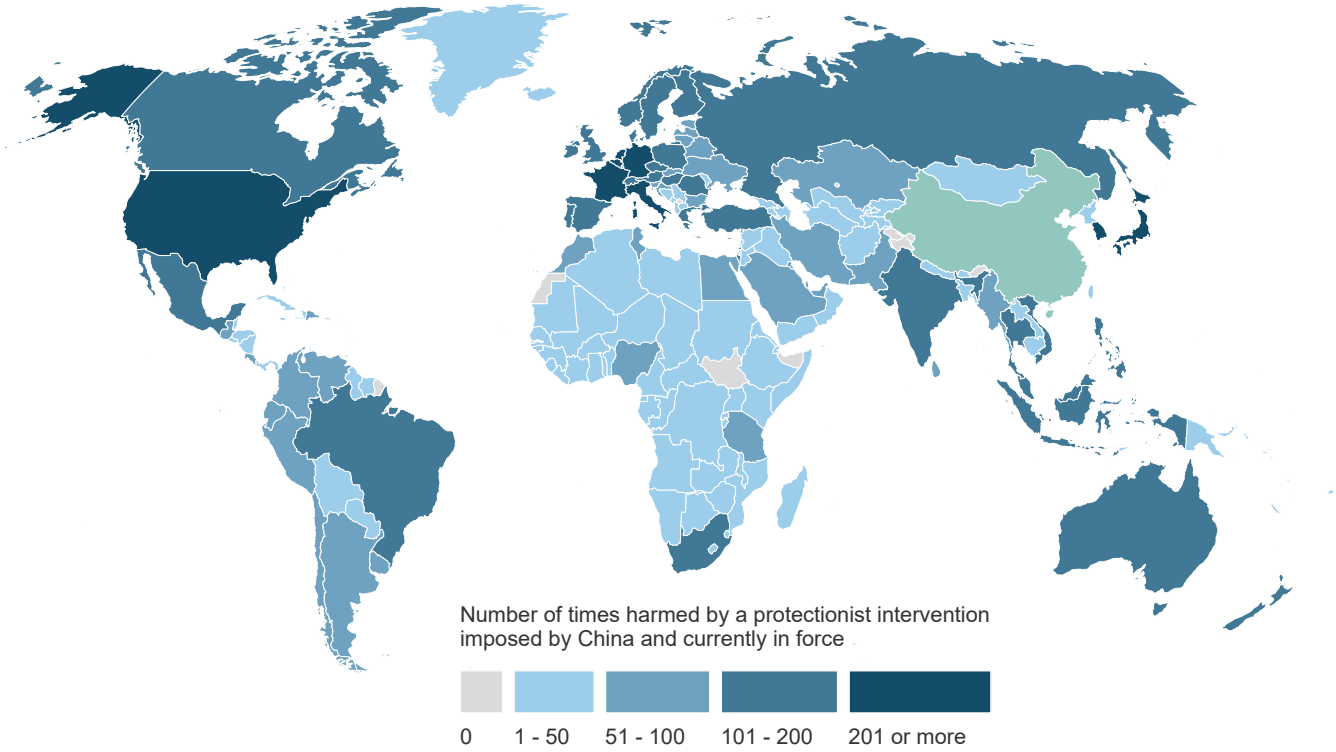
CHINA

What is at stake for China's goods exporters?

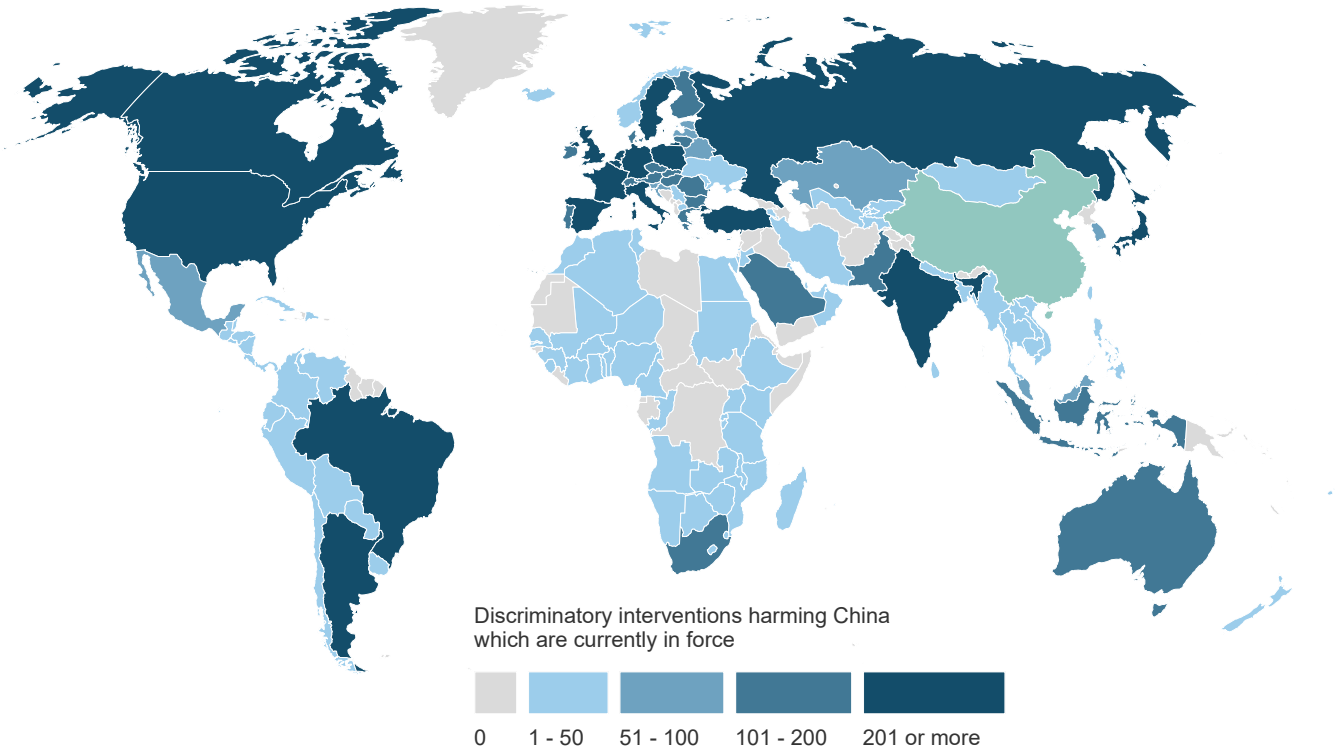
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	16.73	32.31	48.96	56.16	71.87	73.85	71.69	74.20	75.62	77.07	78.32	78.96	76.86	78.18
D	Contingent trade-protective measures	0.77	2.18	4.15	4.38	4.77	5.32	5.47	5.79	6.09	6.37	6.59	6.91	7.04	7.15
E	Non-automatic licensing, quotas etc.	0.28	0.25	0.42	0.52	0.71	0.69	0.92	1.20	1.55	1.59	1.87	2.24	2.72	4.13
F	Price-control measures, including additional taxes and charges	0.04	0.07	0.13	0.16	0.17	0.29	0.40	0.43	0.44	1.01	1.11	1.70	1.73	1.74
G	Finance measures	0.28	0.61	1.00	1.00	1.00	1.00	1.01	1.01	1.01	1.02	1.04	1.04	1.03	1.08
I	Trade-related investment measures	0.22	2.24	2.27	2.30	2.32	2.35	2.55	2.73	2.85	2.87	2.86	2.92	3.19	3.35
L	Subsidies (excl. export subsidies)	2.91	8.95	15.18	17.49	38.01	39.21	41.63	42.87	43.13	43.91	45.18	46.74	38.04	39.07
M	Government procurement restrictions	0.83	0.87	1.22	1.60	3.69	4.85	5.25	5.20	5.40	5.46	5.57	5.69	6.20	7.38
P	Export-related measures (incl. subsidies)	11.37	22.65	37.01	47.02	54.42	55.30	46.80	55.07	57.80	59.54	59.86	60.09	51.91	53.93
	Tariff measures	0.94	1.25	2.08	2.68	3.21	23.47	22.39	23.70	26.69	30.85	37.19	38.25	37.67	37.91
	Instrument unclear	0.15	0.34	0.39	0.41	0.55	0.94	1.02	1.09	1.08	1.16	1.27	1.32	1.37	1.46

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY CHINA'S DISCRIMINATORY INTERVENTIONS

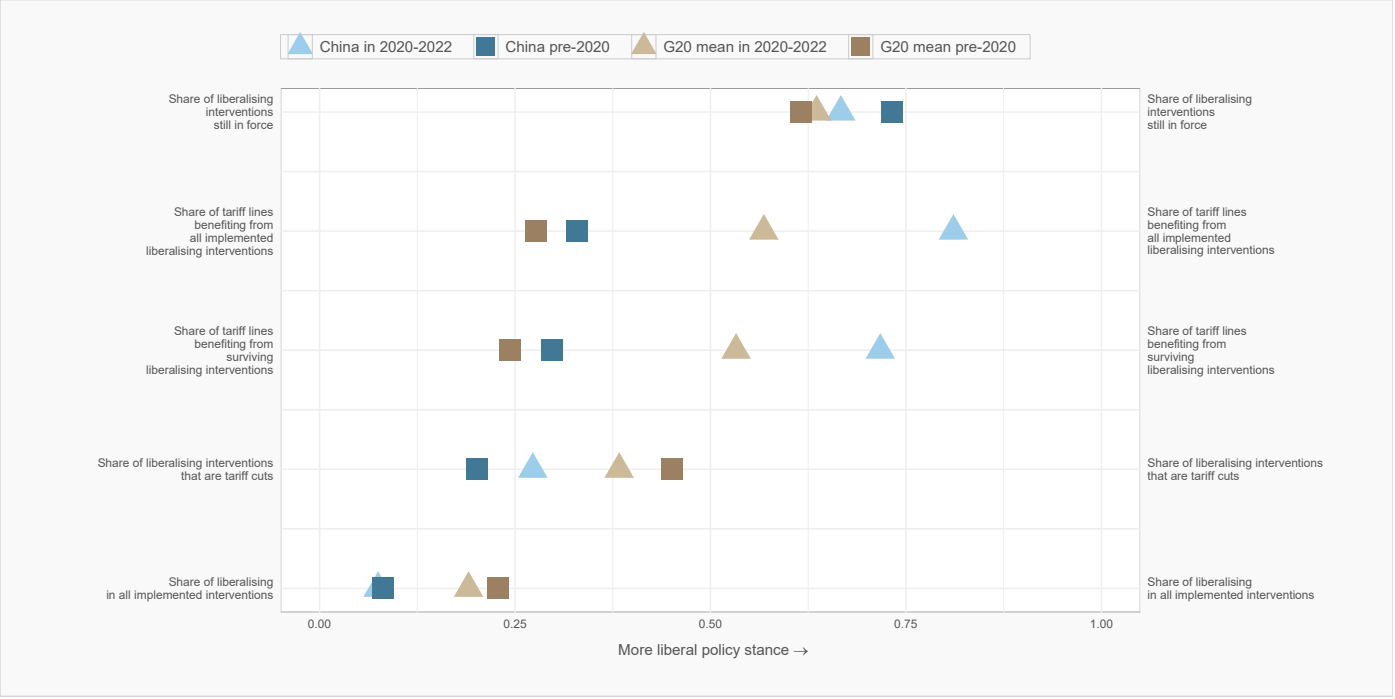


DISCRIMINATORY INTERVENTIONS HARMING CHINA'S INTERESTS



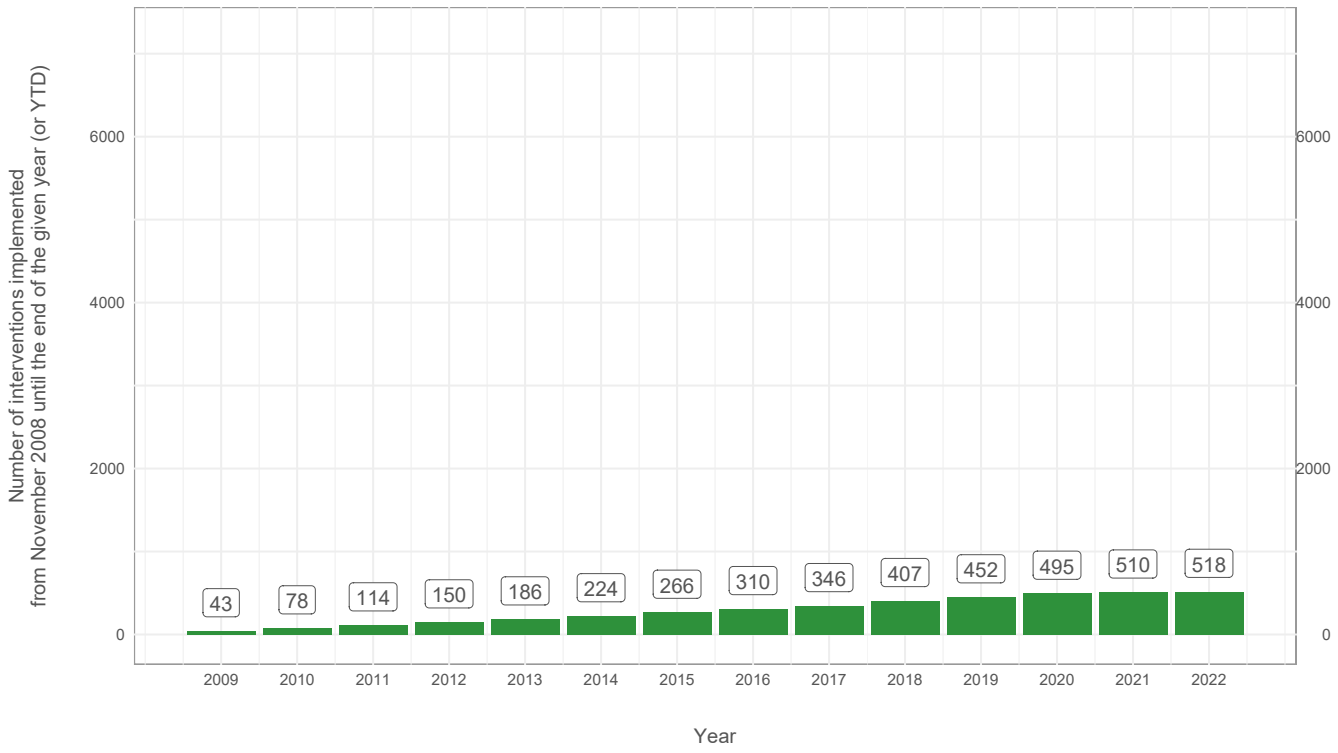
CHINA

Track record of liberalisation



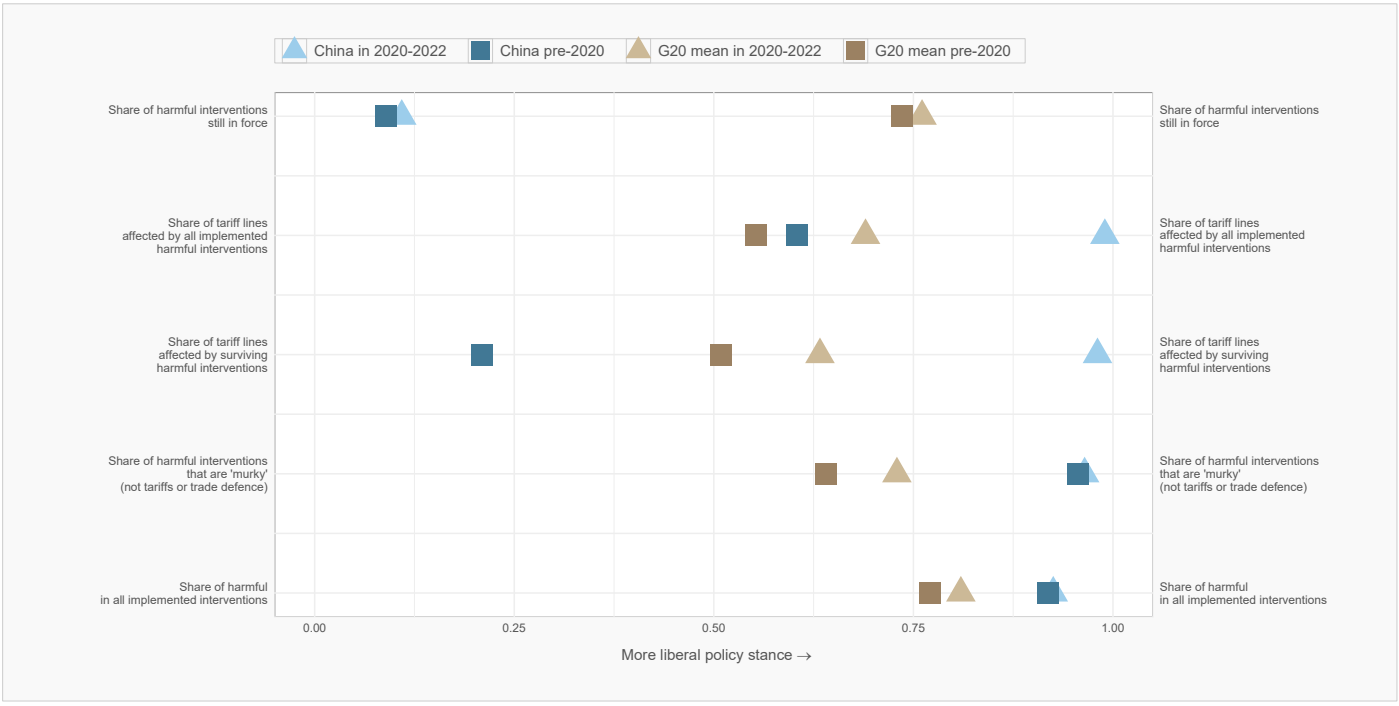
CHINA

Number of liberalising interventions imposed since November 2008



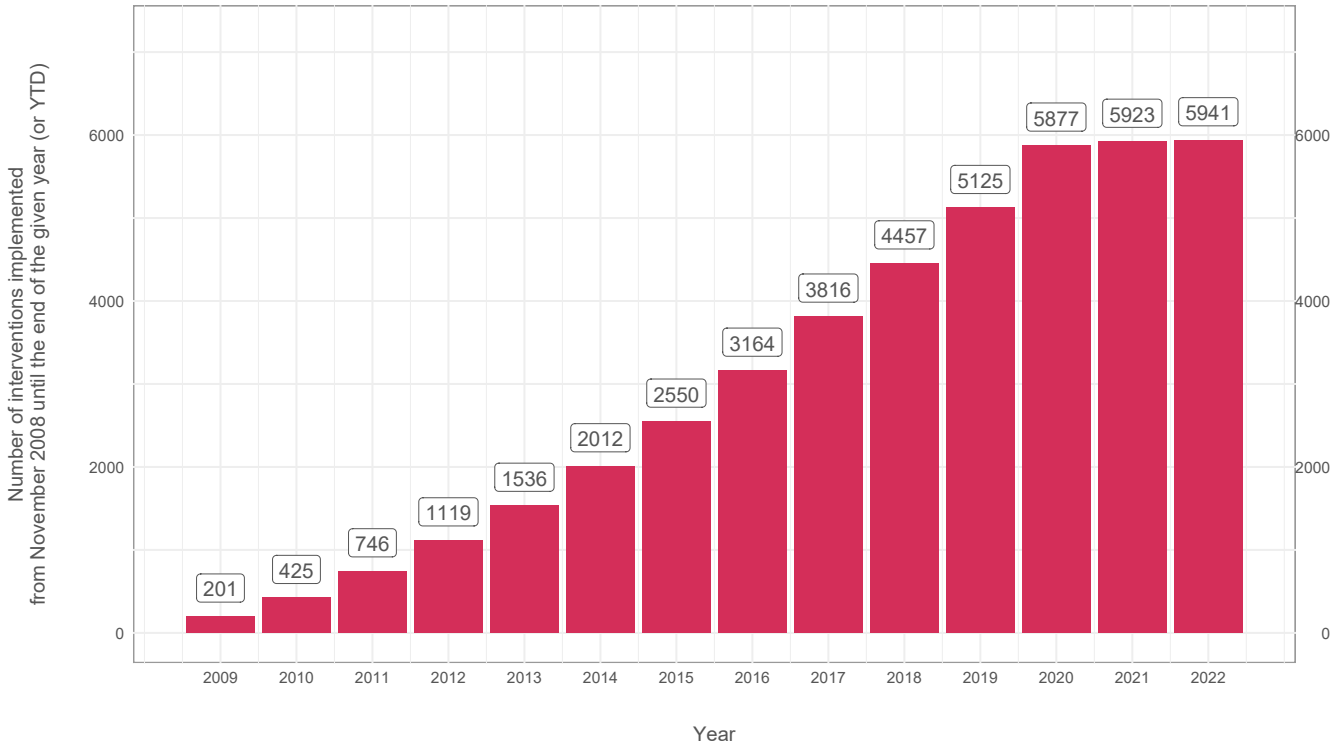
CHINA

Track record of protectionism



CHINA

Number of discriminatory interventions imposed since November 2008



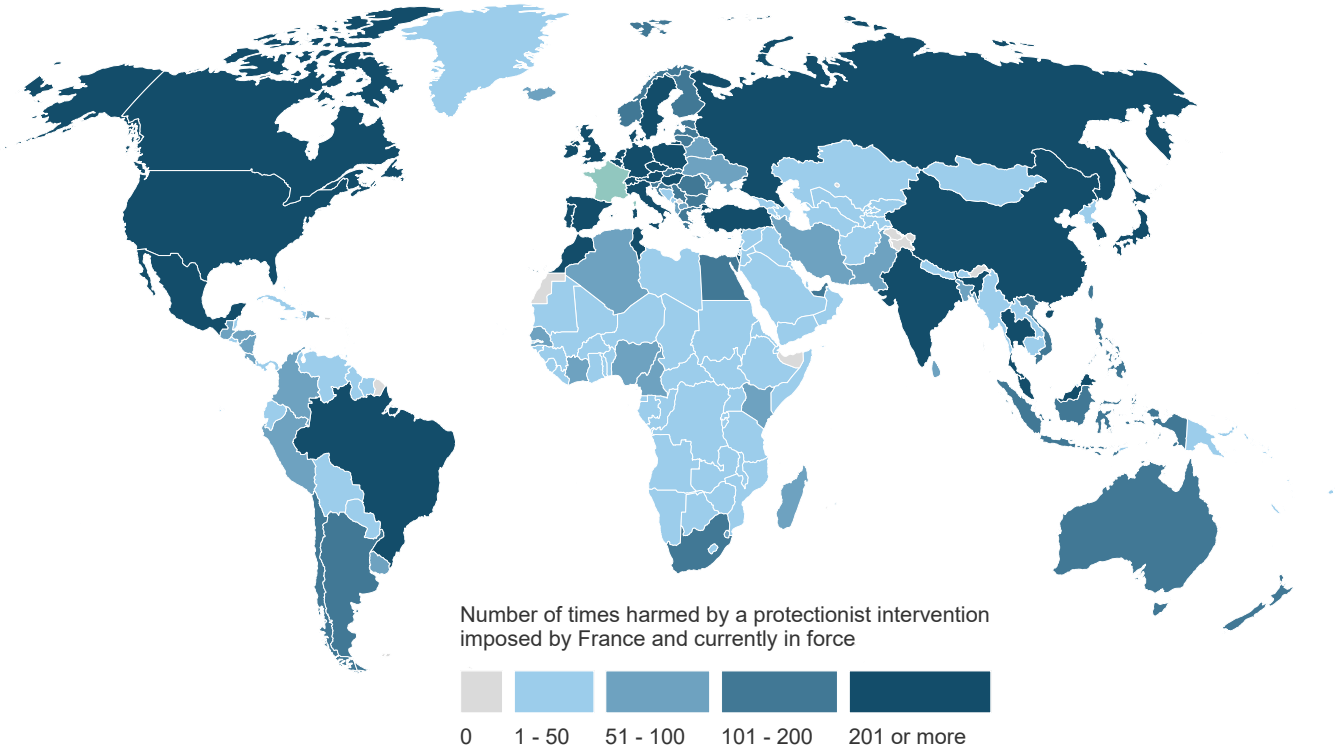
FRANCE

What is at stake for France's goods exporters?

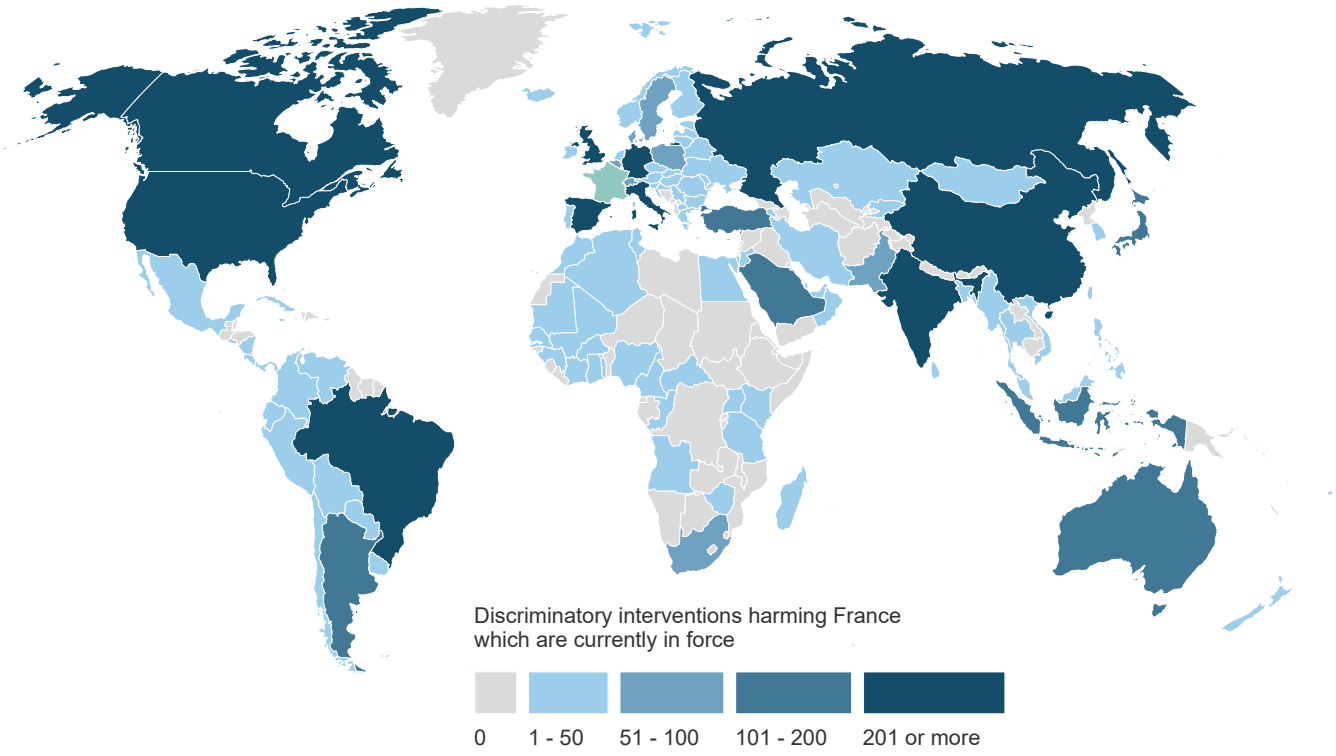
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	38.33	57.69	62.08	65.86	68.41	70.88	74.87	76.69	77.72	78.38	80.40	81.02	80.27	80.72
D	Contingent trade-protective measures	0.01	0.03	0.03	0.04	0.07	0.17	0.16	0.26	0.28	0.33	0.34	0.34	0.39	0.43
E	Non-automatic licensing, quotas etc.	0.21	0.28	1.17	1.29	1.40	1.57	1.64	1.62	2.08	2.69	2.71	2.69	2.93	3.28
F	Price-control measures, including additional taxes and charges	0.01	0.02	0.06	0.08	0.29	0.82	0.97	1.05	1.09	1.25	1.27	1.41	1.42	1.41
G	Finance measures	0.17	0.24	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30
I	Trade-related investment measures	0.13	0.46	0.50	0.51	0.54	0.63	0.76	1.06	1.61	1.55	1.56	1.50	1.60	1.66
L	Subsidies (excl. export subsidies)	10.19	22.04	21.96	23.60	24.79	28.33	35.67	38.17	39.03	39.65	40.54	42.91	43.28	44.62
M	Government procurement restrictions	0.34	0.43	0.32	0.49	0.63	0.83	1.10	1.23	1.29	1.39	1.62	2.12	2.34	2.85
P	Export-related measures (incl. subsidies)	30.32	46.45	53.50	59.09	61.87	61.70	60.50	62.18	63.83	64.80	68.30	69.06	67.86	68.71
	Tariff measures	0.24	0.36	0.55	0.71	1.25	0.98	1.23	1.72	2.19	2.45	3.14	4.33	4.75	4.68
	Instrument unclear	0.15	0.28	0.31	0.33	0.95	1.25	1.36	1.43	1.52	1.64	1.60	1.58	1.58	1.59

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY FRANCE'S DISCRIMINATORY INTERVENTIONS

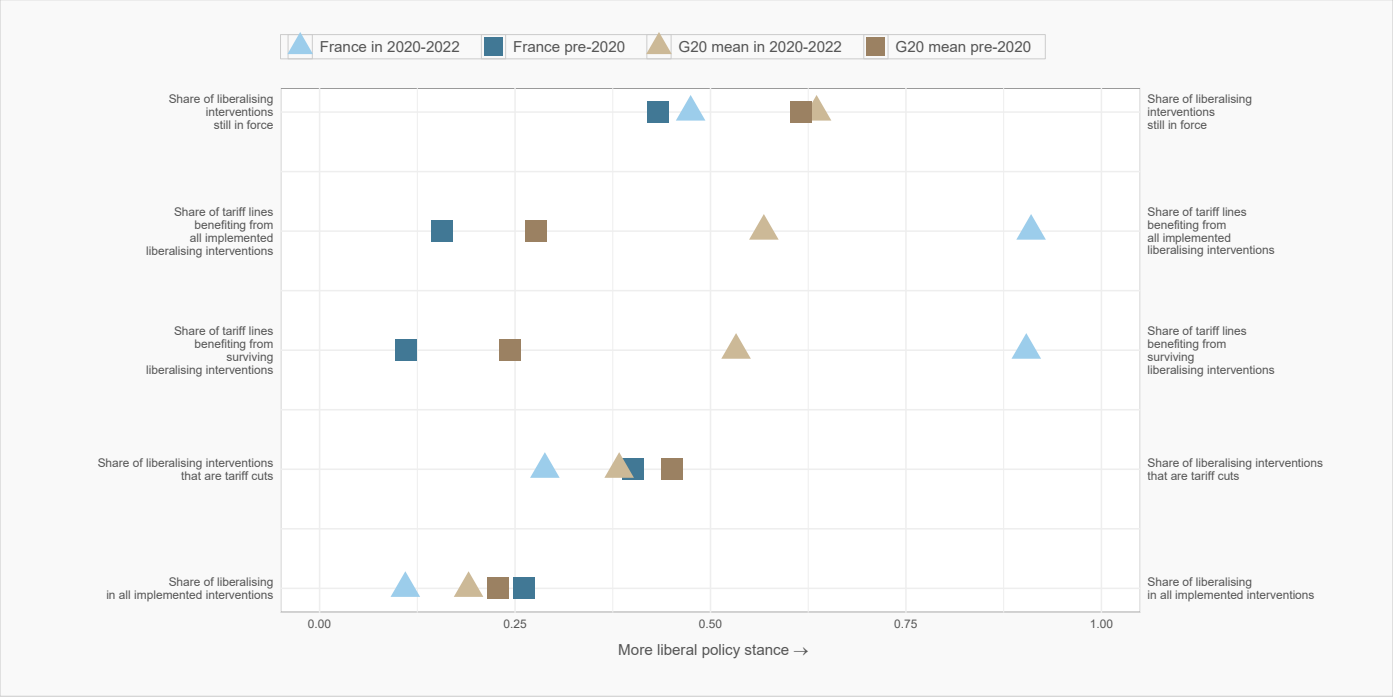


DISCRIMINATORY INTERVENTIONS HARMING FRANCE'S INTERESTS



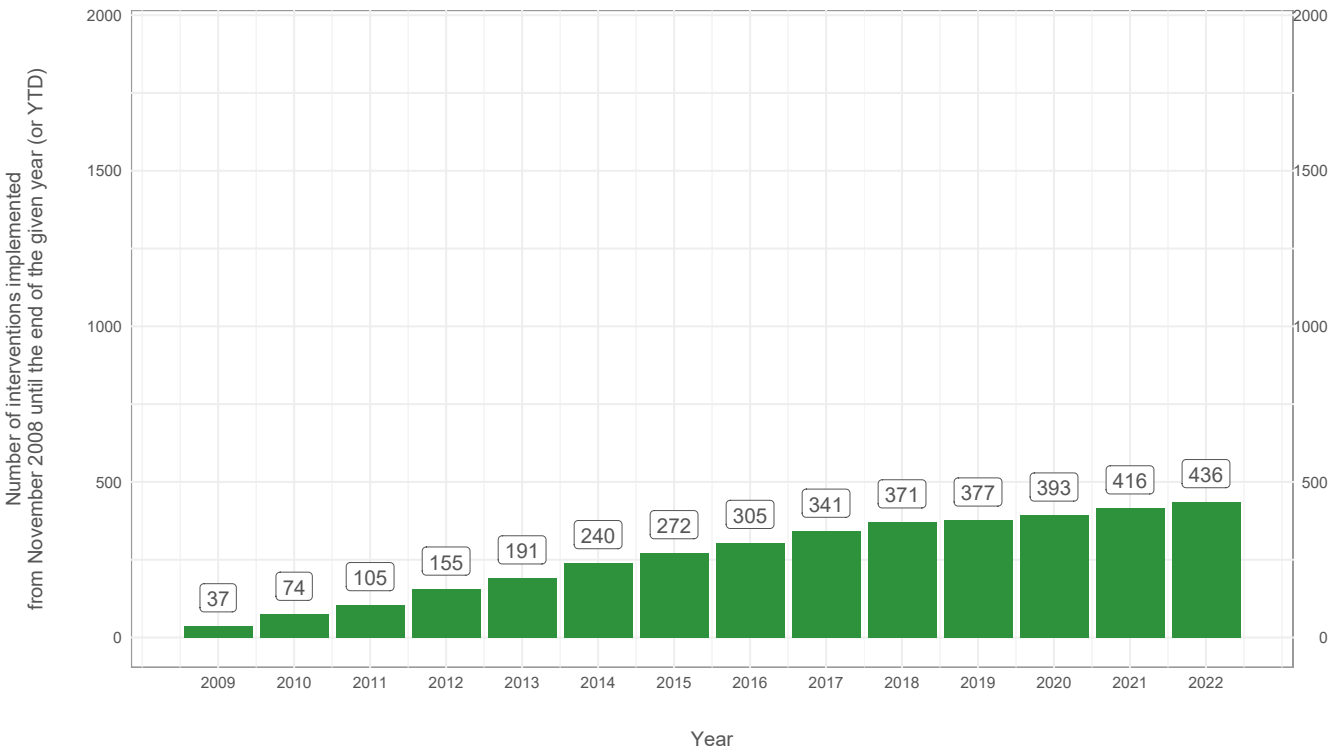
FRANCE

Track record of liberalisation



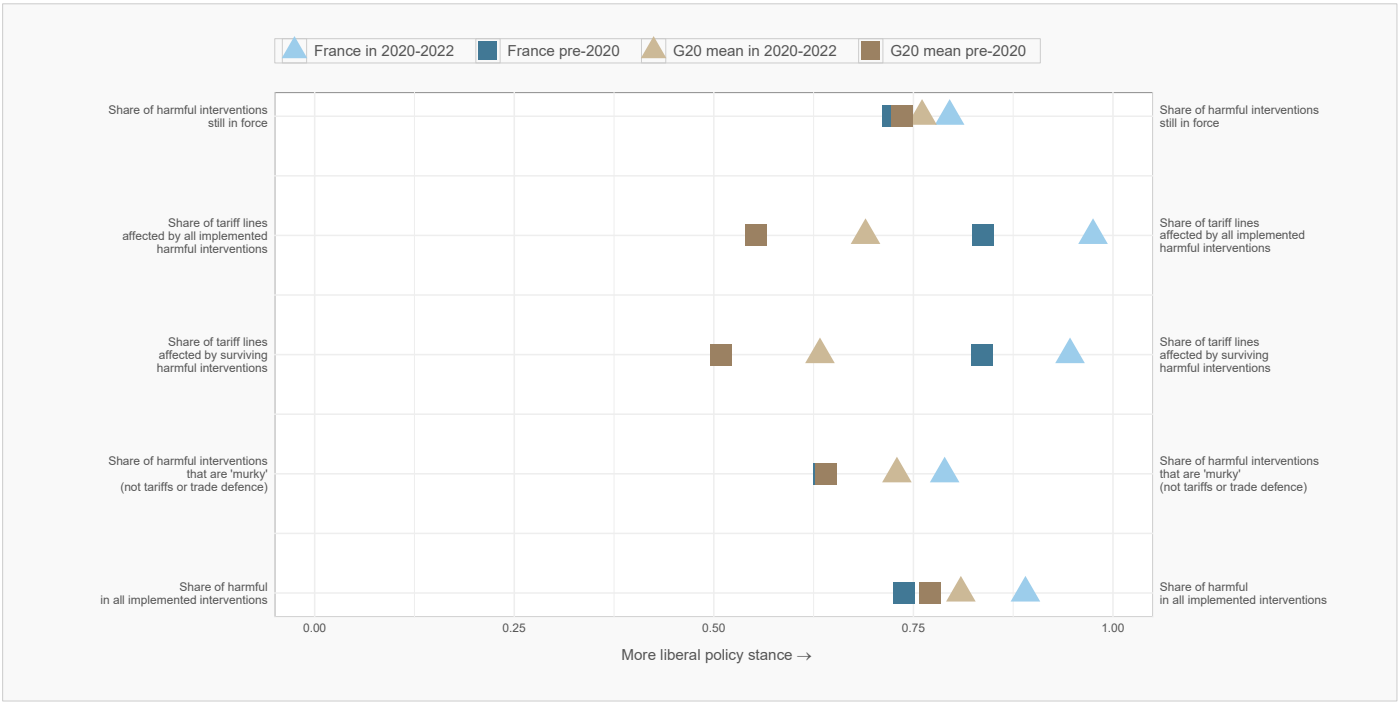
FRANCE

Number of liberalising interventions imposed since November 2008



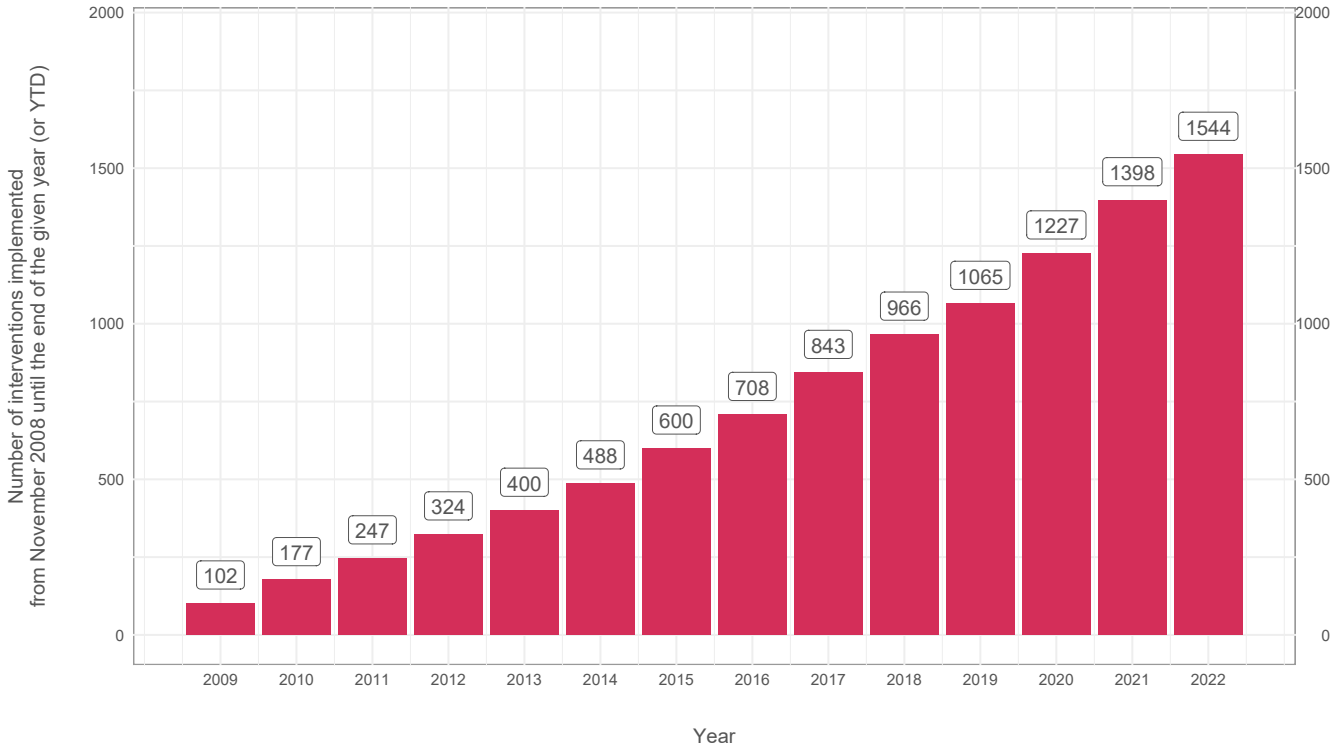
FRANCE

Track record of protectionism



FRANCE

Number of discriminatory interventions imposed since November 2008



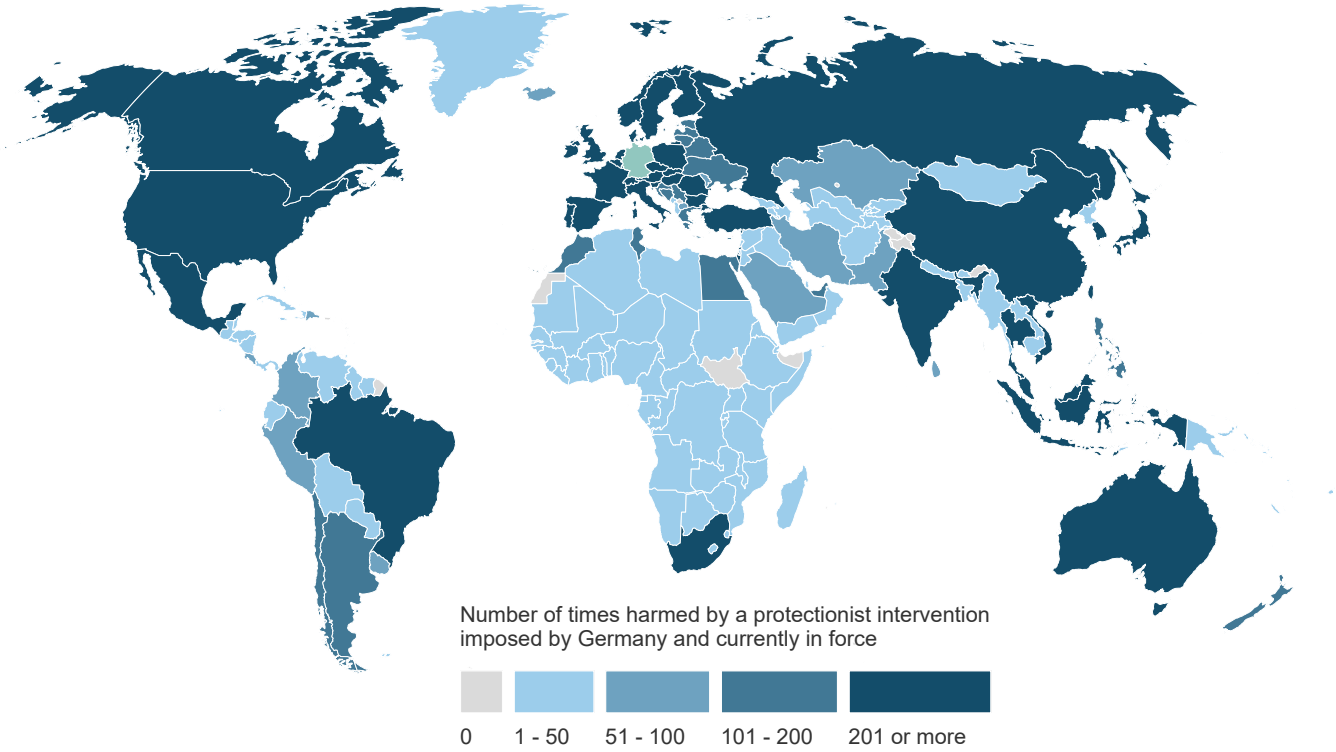
GERMANY

What is at stake for Germany's goods exporters?

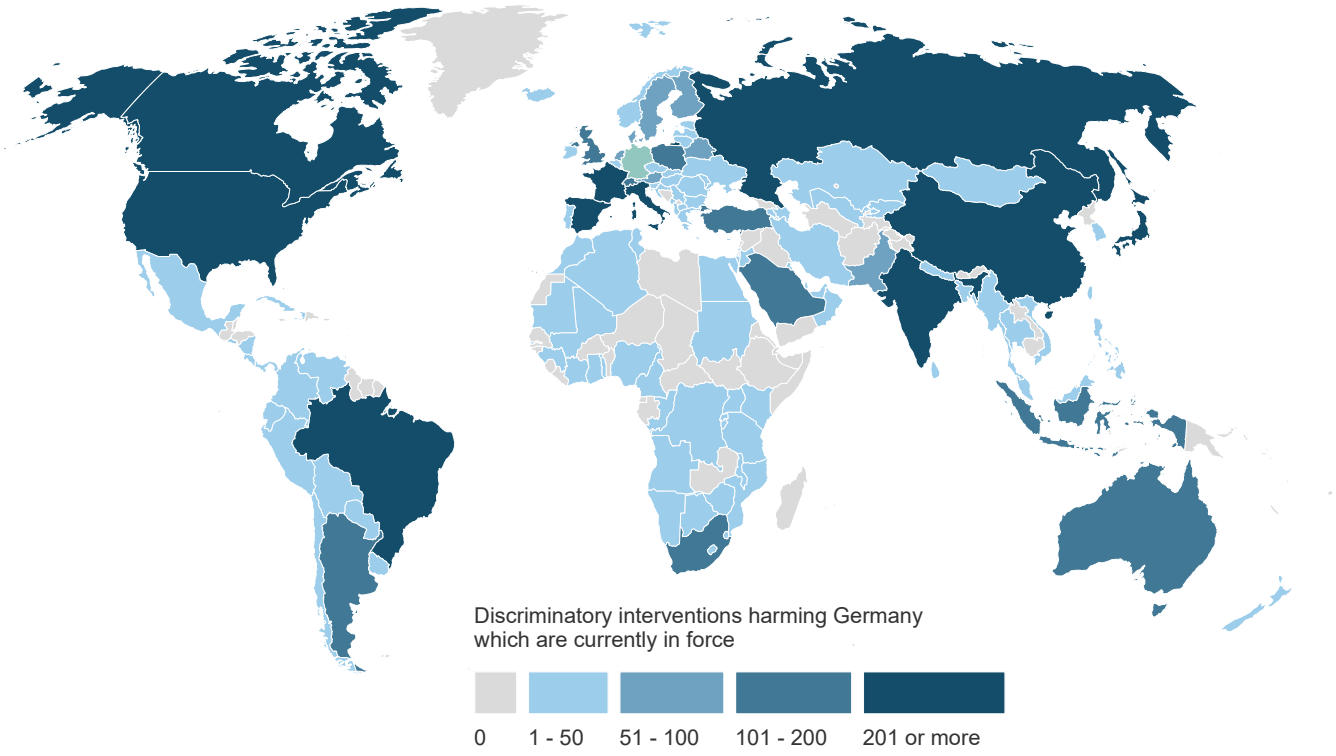
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...													
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	45.58	57.25	59.57	62.75	65.26	67.37	69.33	71.11	72.81	74.11	76.79	77.39	76.14	76.29
D	Contingent trade-protective measures	0.04	0.08	0.09	0.13	0.21	0.23	0.21	0.30	0.31	0.38	0.44	0.51	0.61	0.67
E	Non-automatic licensing, quotas etc.	0.77	0.91	1.64	1.73	2.13	1.83	1.89	1.88	2.19	2.58	2.62	2.69	2.79	2.86
F	Price-control measures, including additional taxes and charges	0.01	0.05	0.07	0.11	0.14	0.28	0.43	0.54	0.83	1.21	1.25	1.43	1.45	1.46
G	Finance measures	0.19	0.26	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.31
I	Trade-related investment measures	0.28	1.96	2.17	2.20	2.24	2.28	2.52	2.70	2.78	2.72	2.75	2.76	2.95	3.12
L	Subsidies (excl. export subsidies)	14.64	22.87	22.35	23.53	25.01	27.97	31.98	34.42	35.81	36.89	38.35	40.94	39.24	39.81
M	Government procurement restrictions	0.33	0.54	0.55	0.82	0.91	1.33	1.75	1.85	1.92	1.97	2.06	2.50	3.18	4.01
P	Export-related measures (incl. subsidies)	33.19	44.45	48.99	54.44	56.91	56.03	55.88	58.26	60.02	61.27	64.48	65.13	62.35	63.08
	Tariff measures	0.49	0.52	0.64	1.19	1.99	1.32	1.52	2.10	2.59	2.76	3.29	3.89	4.78	4.76
	Instrument unclear	0.05	0.24	0.32	0.34	0.48	0.57	0.78	0.80	0.94	1.03	1.00	0.98	1.02	1.00

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY GERMANY'S DISCRIMINATORY INTERVENTIONS

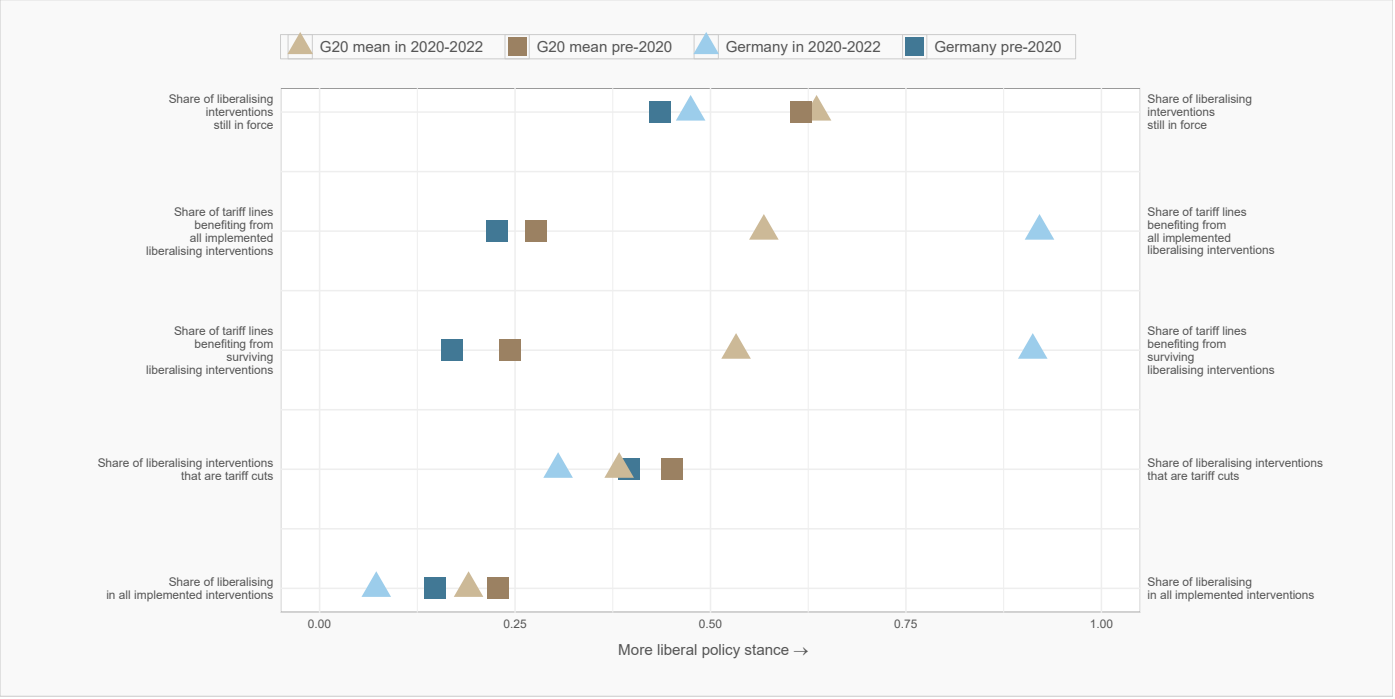


DISCRIMINATORY INTERVENTIONS HARMING GERMANY'S INTERESTS



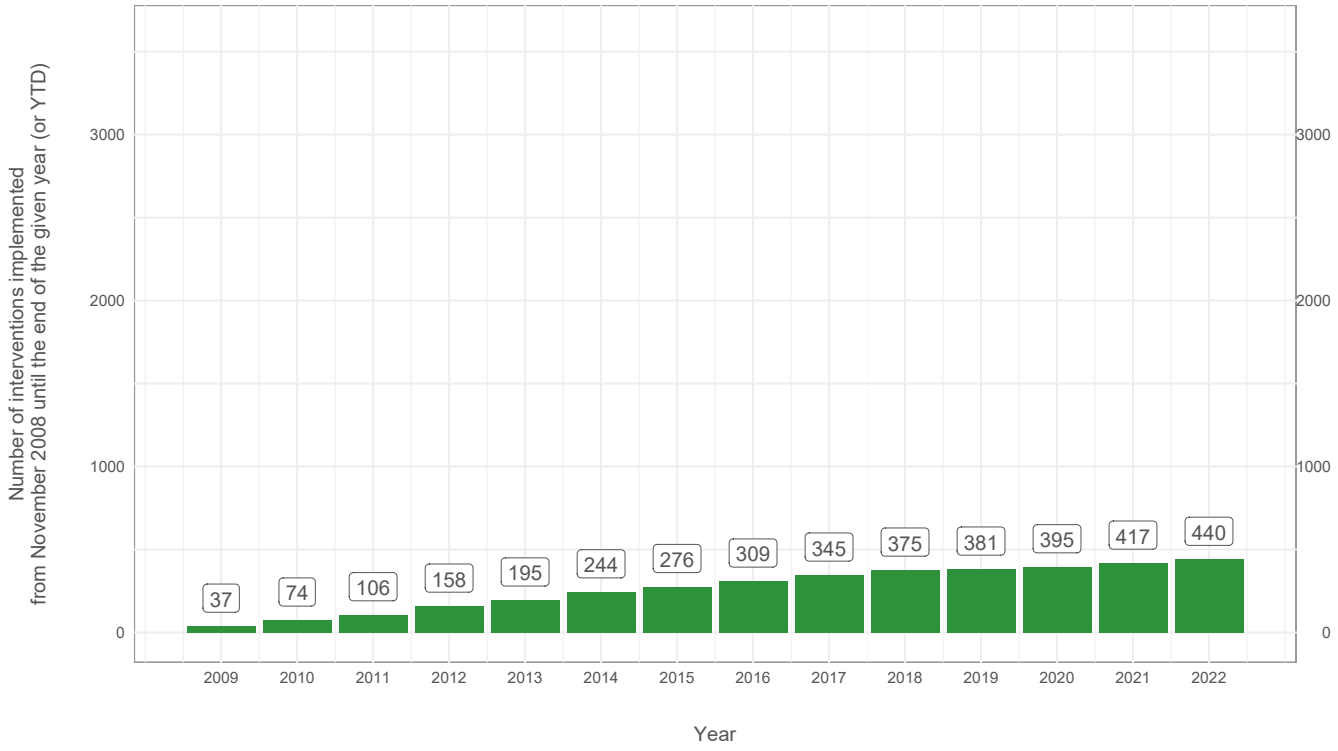
GERMANY

Track record of liberalisation



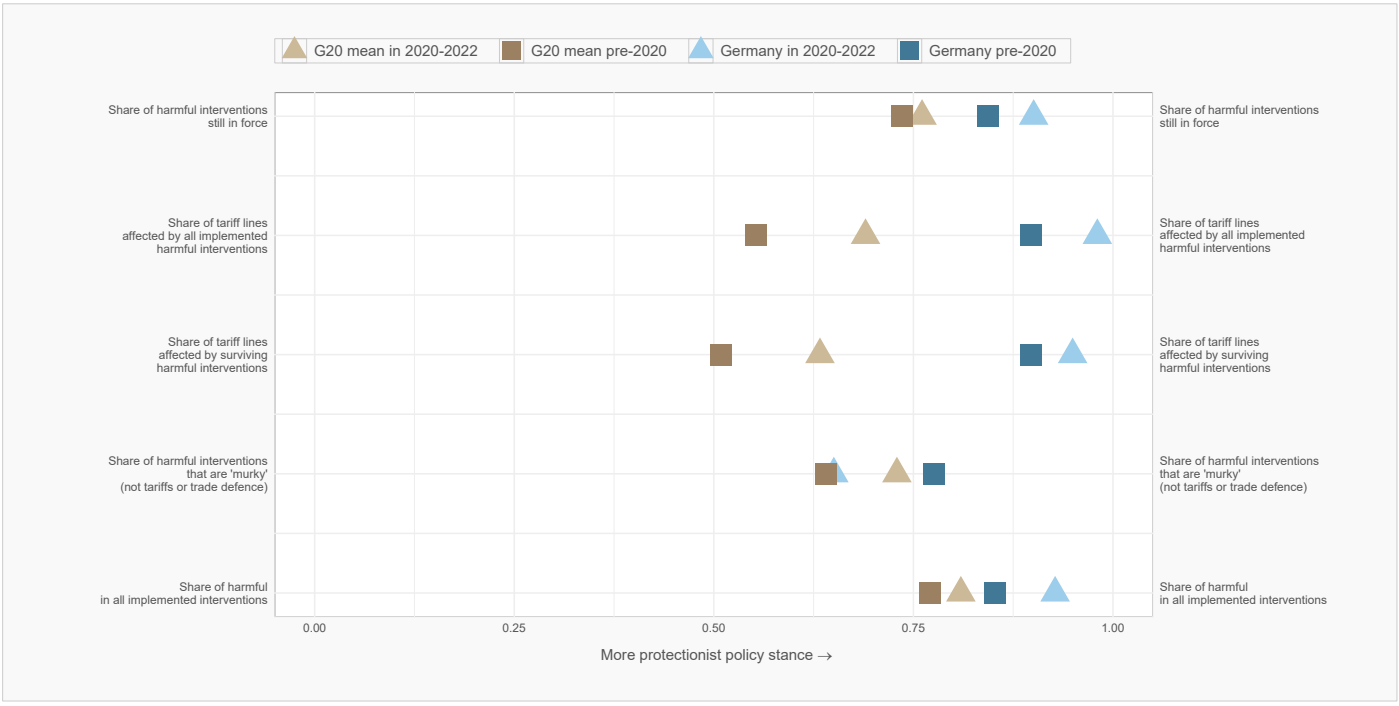
GERMANY

Number of liberalising interventions imposed since November 2008



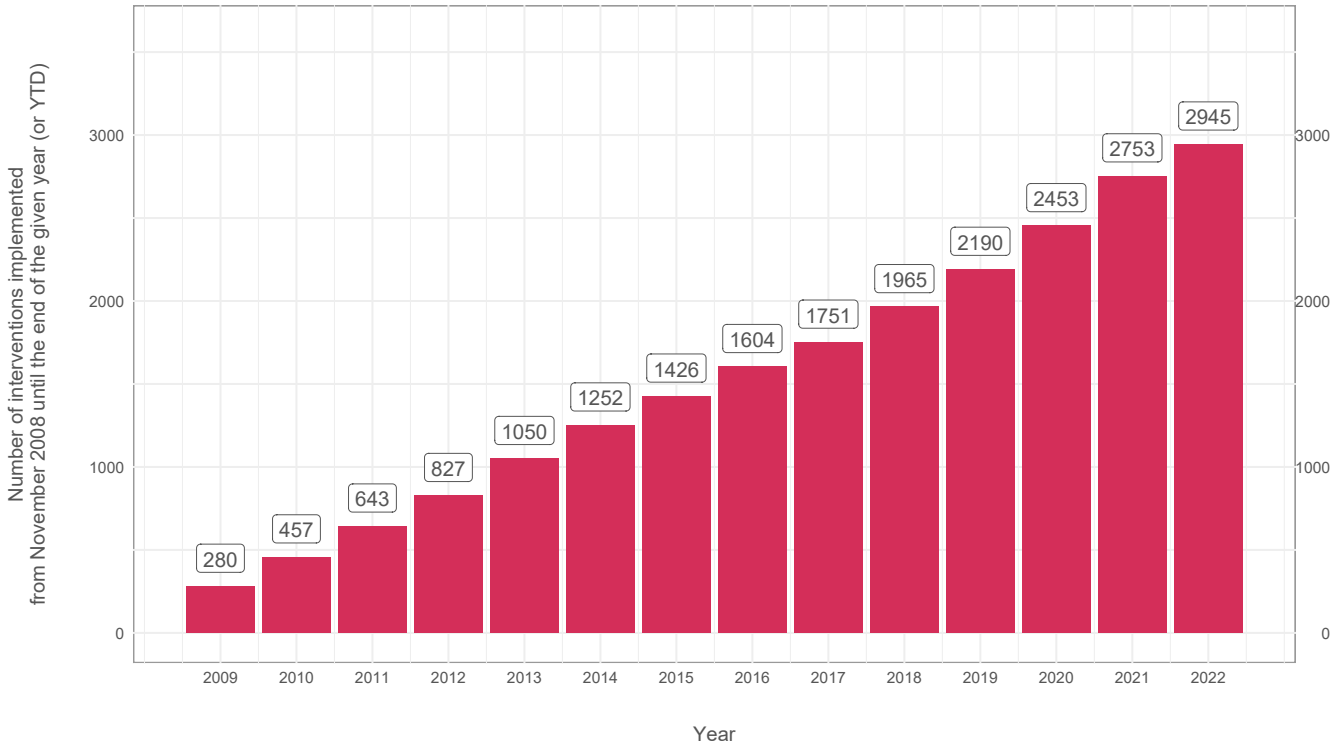
GERMANY

Track record of protectionism



GERMANY

Number of discriminatory interventions imposed since November 2008



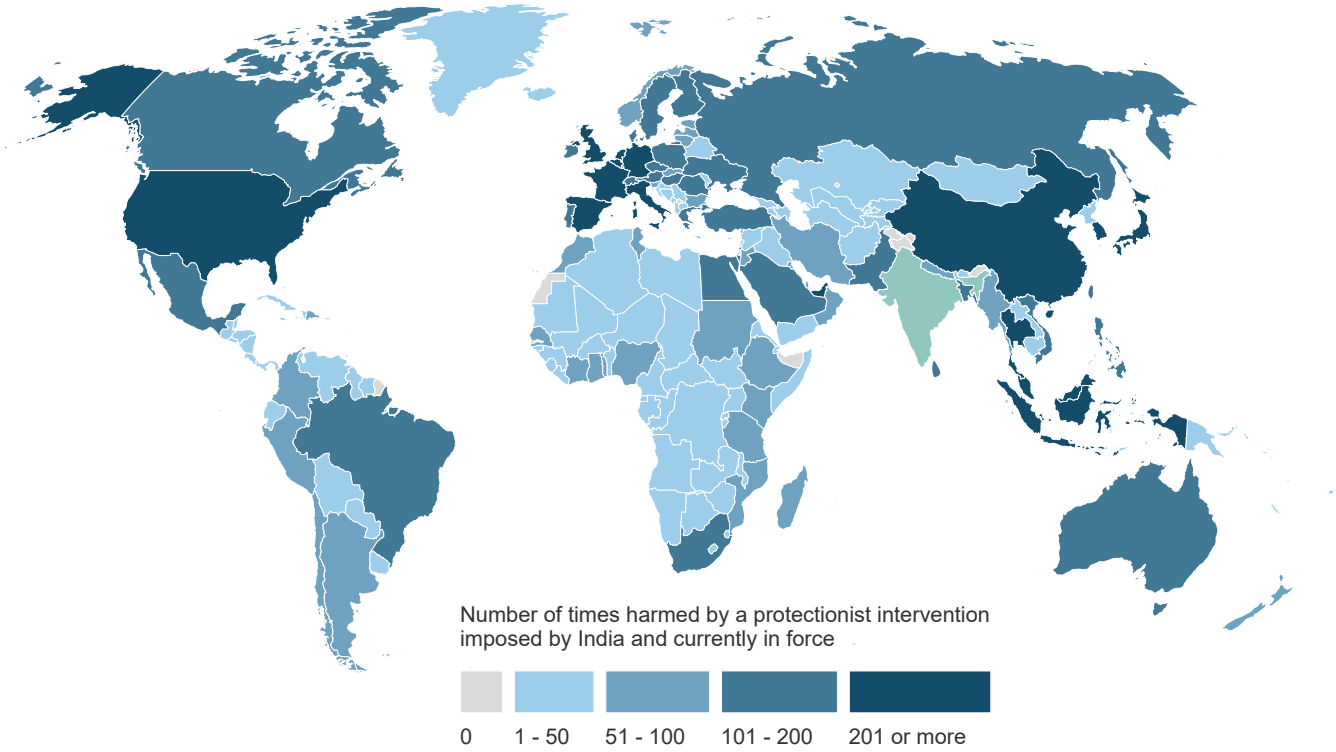
INDIA

What is at stake for India's goods exporters?

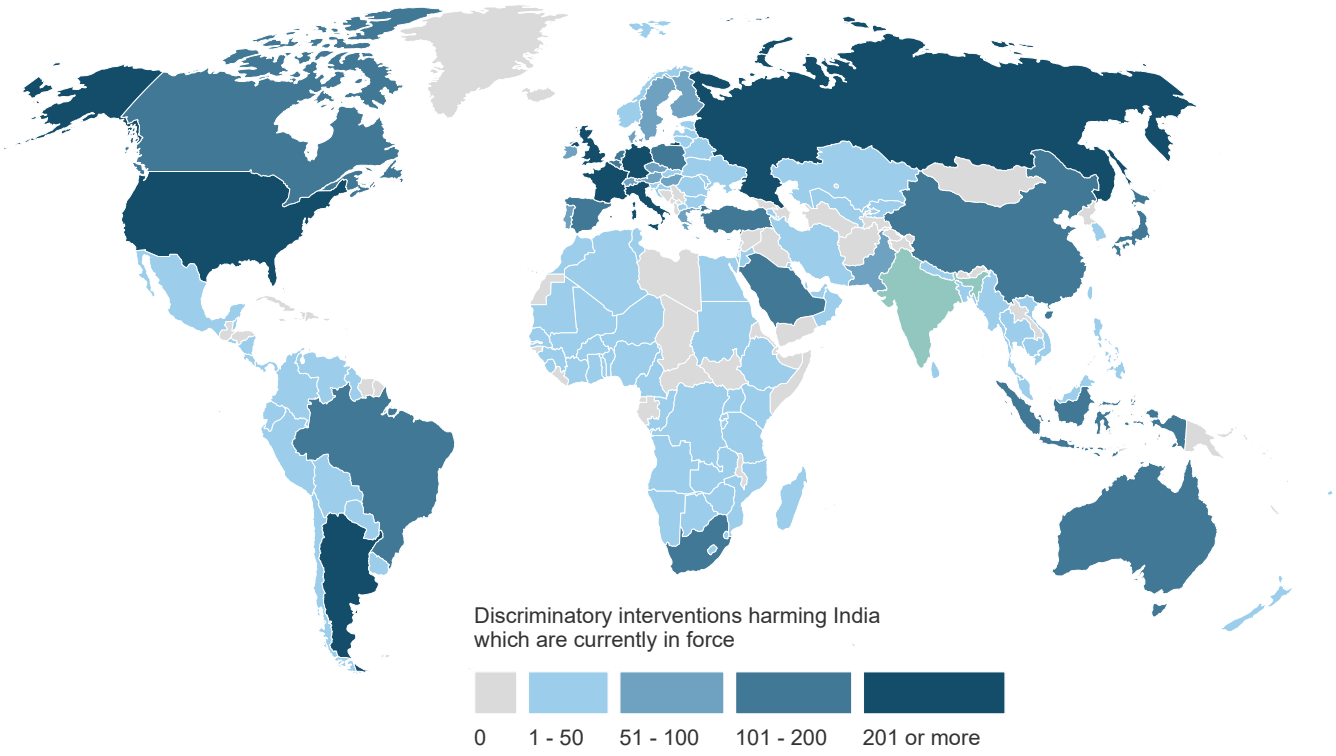
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	39.69	47.60	57.78	53.62	61.20	65.47	75.57	76.14	76.61	76.89	77.57	77.94	77.15	77.29
D	Contingent trade-protective measures	0.18	0.25	0.64	0.87	0.90	1.07	1.12	1.72	1.87	2.54	3.12	3.13	3.26	3.31
E	Non-automatic licensing, quotas etc.	5.67	6.17	6.41	7.99	7.27	7.59	7.93	8.83	10.04	10.31	10.16	10.09	9.63	9.79
F	Price-control measures, including additional taxes and charges	5.35	5.37	5.37	5.37	5.37	5.53	5.59	5.62	5.63	5.66	5.69	5.81	5.91	6.14
G	Finance measures	0.60	0.88	1.27	1.27	1.35	1.27	1.30	1.30	1.30	1.36	1.50	1.49	1.48	1.51
I	Trade-related investment measures	0.13	1.27	1.24	1.25	1.28	1.34	1.45	1.56	1.52	1.44	1.43	1.60	1.70	1.75
L	Subsidies (excl. export subsidies)	3.46	7.25	12.82	14.73	30.97	33.28	35.53	36.25	35.90	36.24	37.23	38.20	23.49	25.03
M	Government procurement restrictions	1.10	1.22	1.34	1.67	1.77	1.94	2.28	2.47	2.40	2.44	2.60	2.65	3.12	3.80
P	Export-related measures (incl. subsidies)	32.44	40.66	51.38	46.01	50.39	55.53	67.21	67.76	69.31	69.87	70.72	70.93	70.82	70.80
	Tariff measures	1.04	1.33	1.74	3.02	3.39	21.20	9.62	11.98	12.89	14.36	17.73	18.00	19.03	19.30
	Instrument unclear	0.10	0.26	0.17	0.20	0.25	0.43	0.55	0.72	0.82	0.88	0.94	0.94	0.92	1.12

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY INDIA'S DISCRIMINATORY INTERVENTIONS

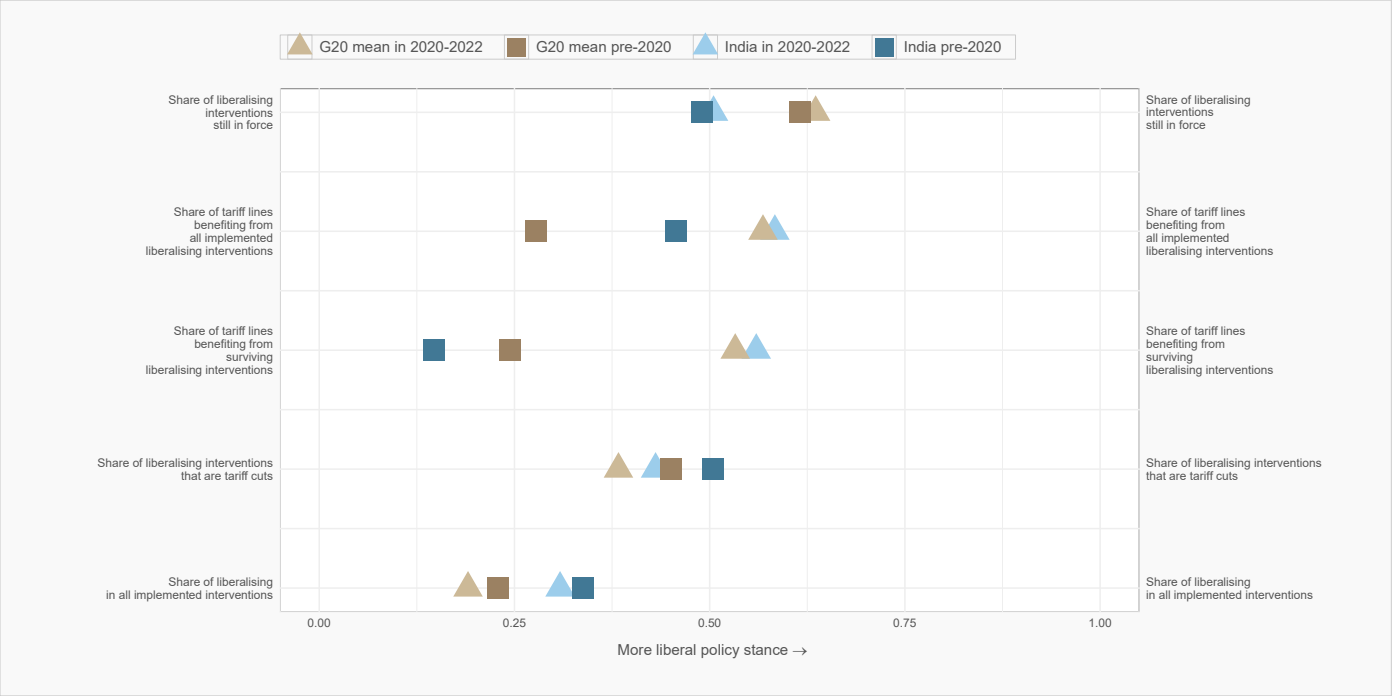


DISCRIMINATORY INTERVENTIONS HARMING INDIA'S INTERESTS



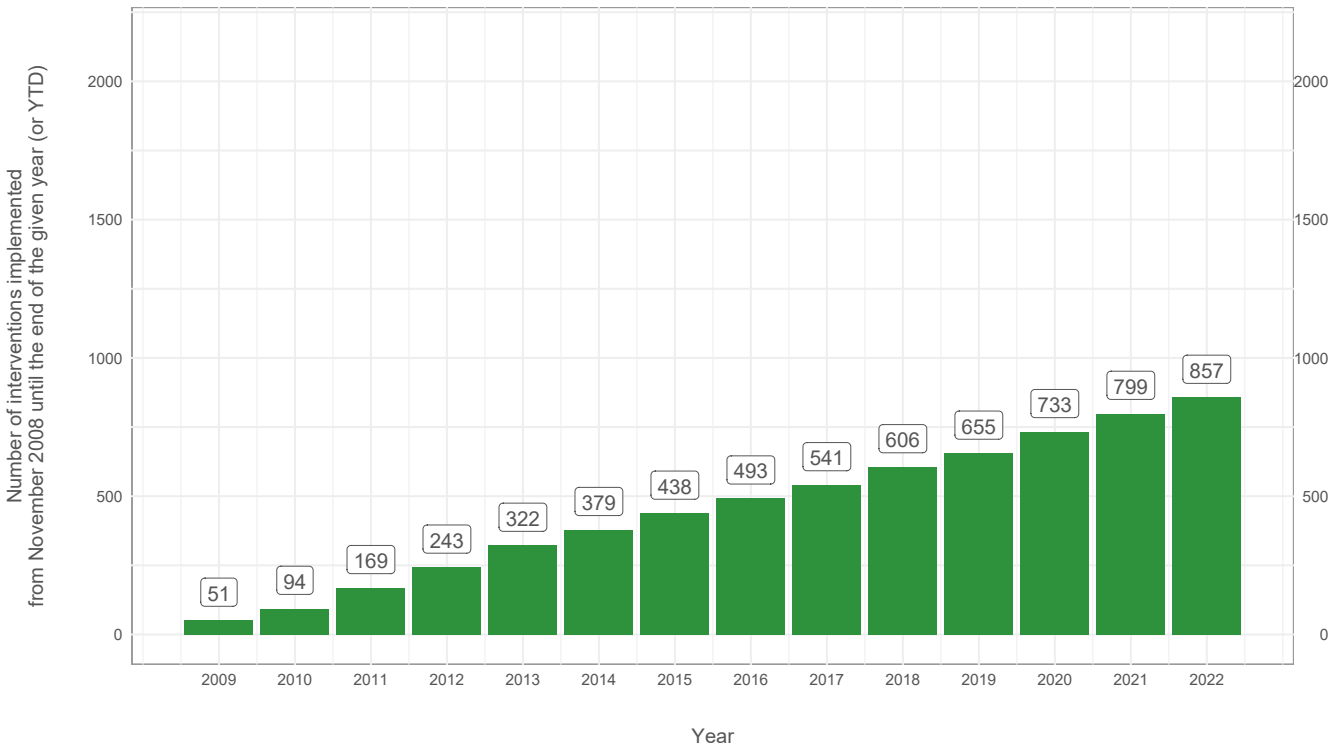
INDIA

Track record of liberalisation



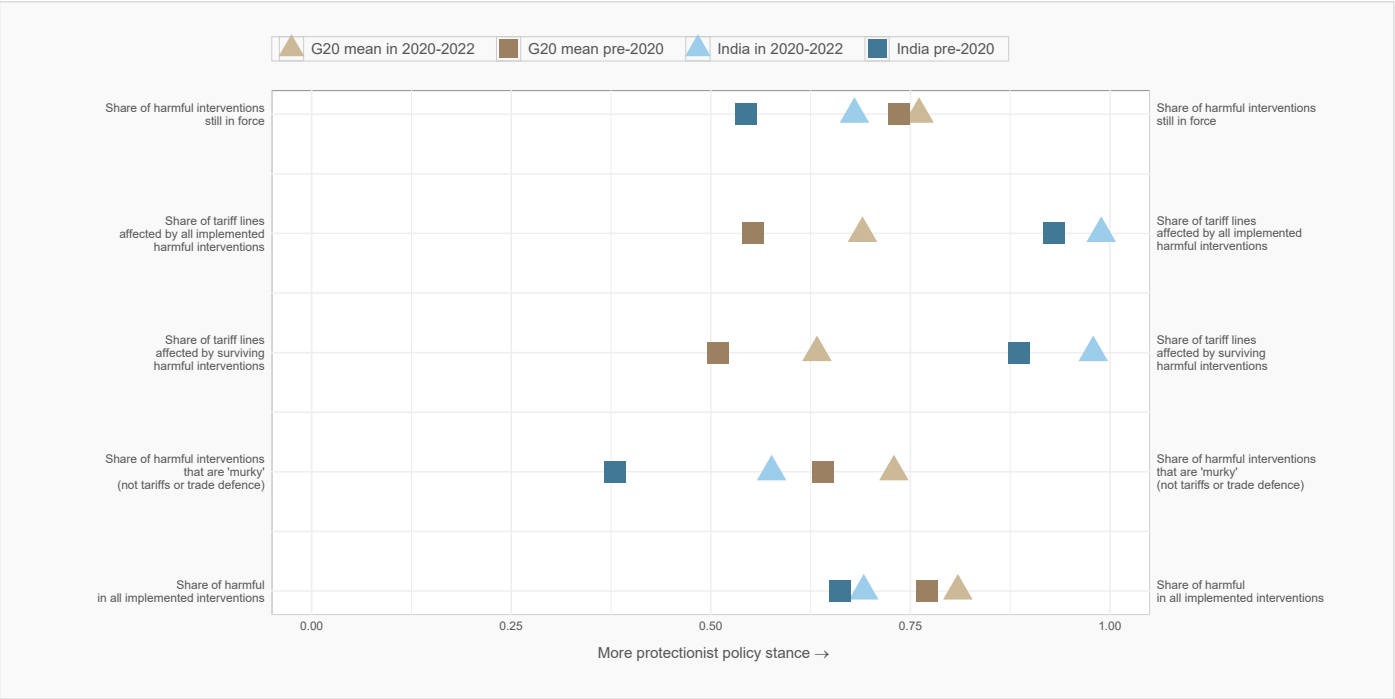
INDIA

Number of liberalising interventions imposed since November 2008



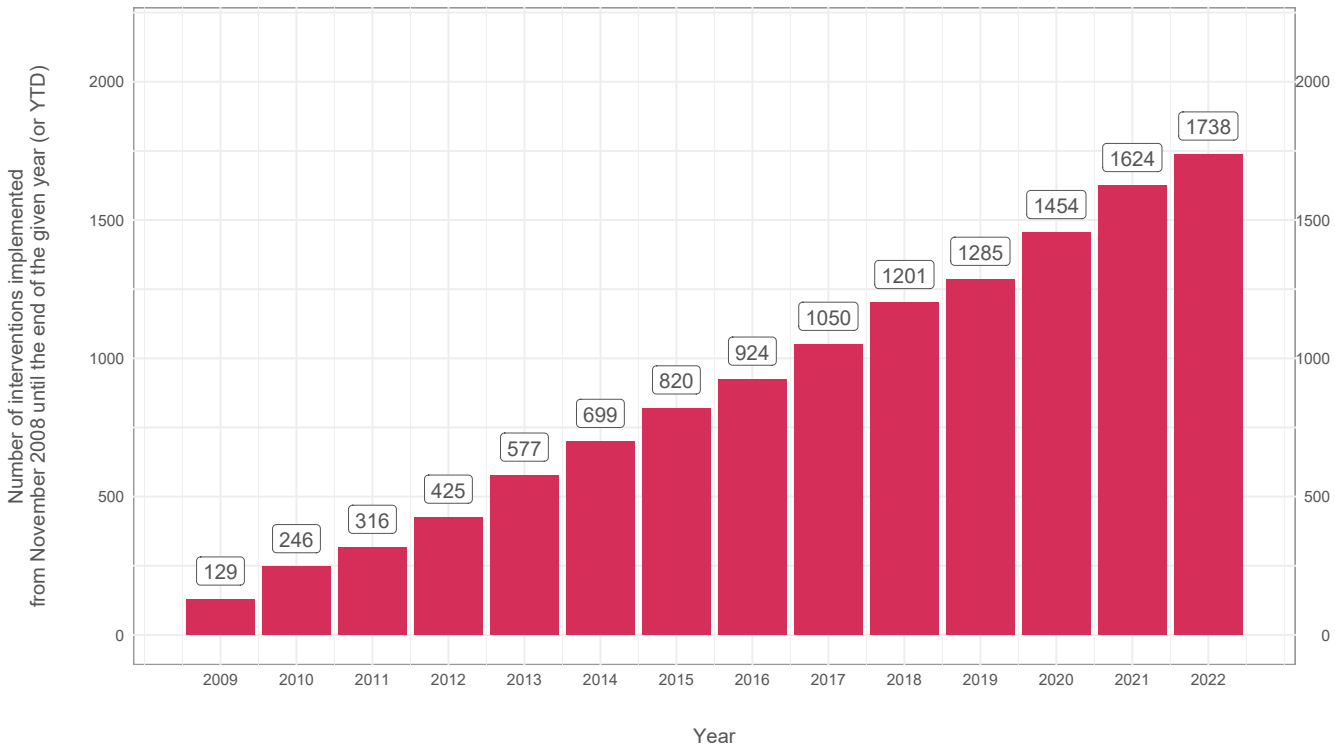
INDIA

Track record of protectionism



INDIA

Number of discriminatory interventions imposed since November 2008



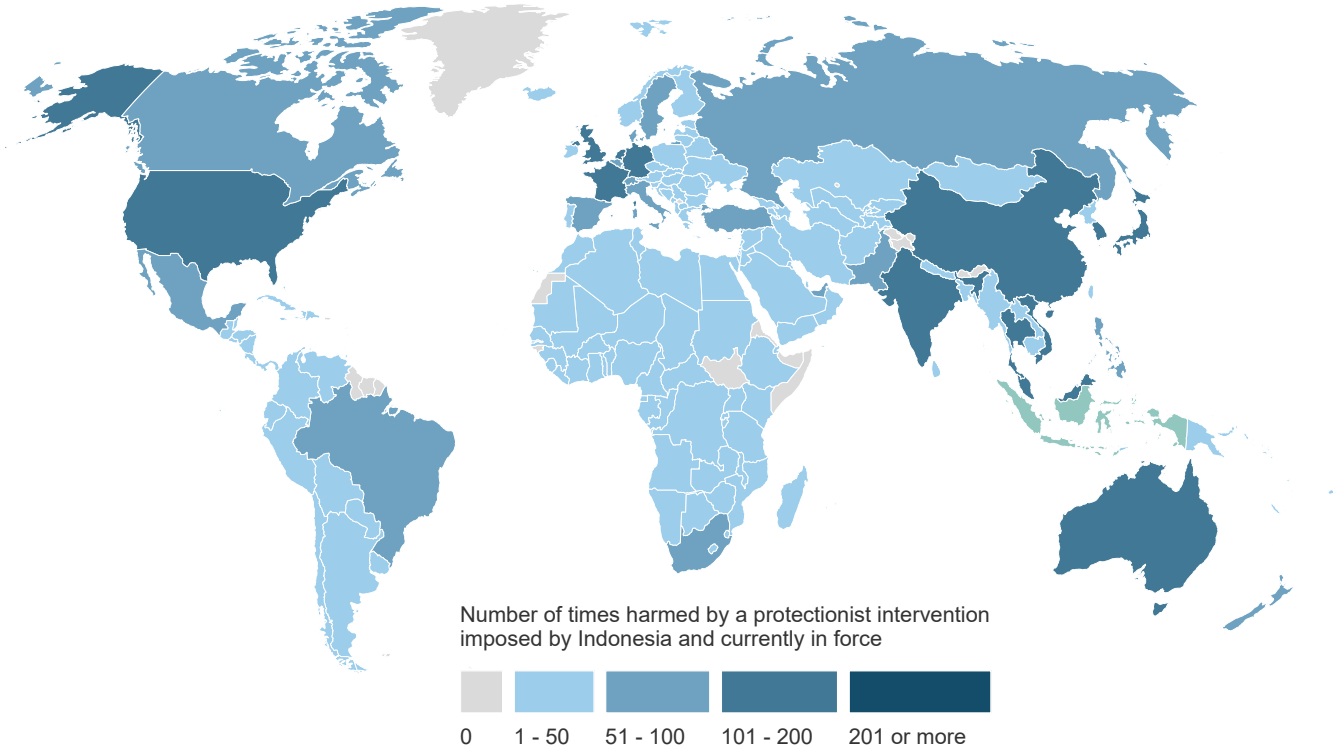
INDONESIA

What is at stake for Indonesia's goods exporters?

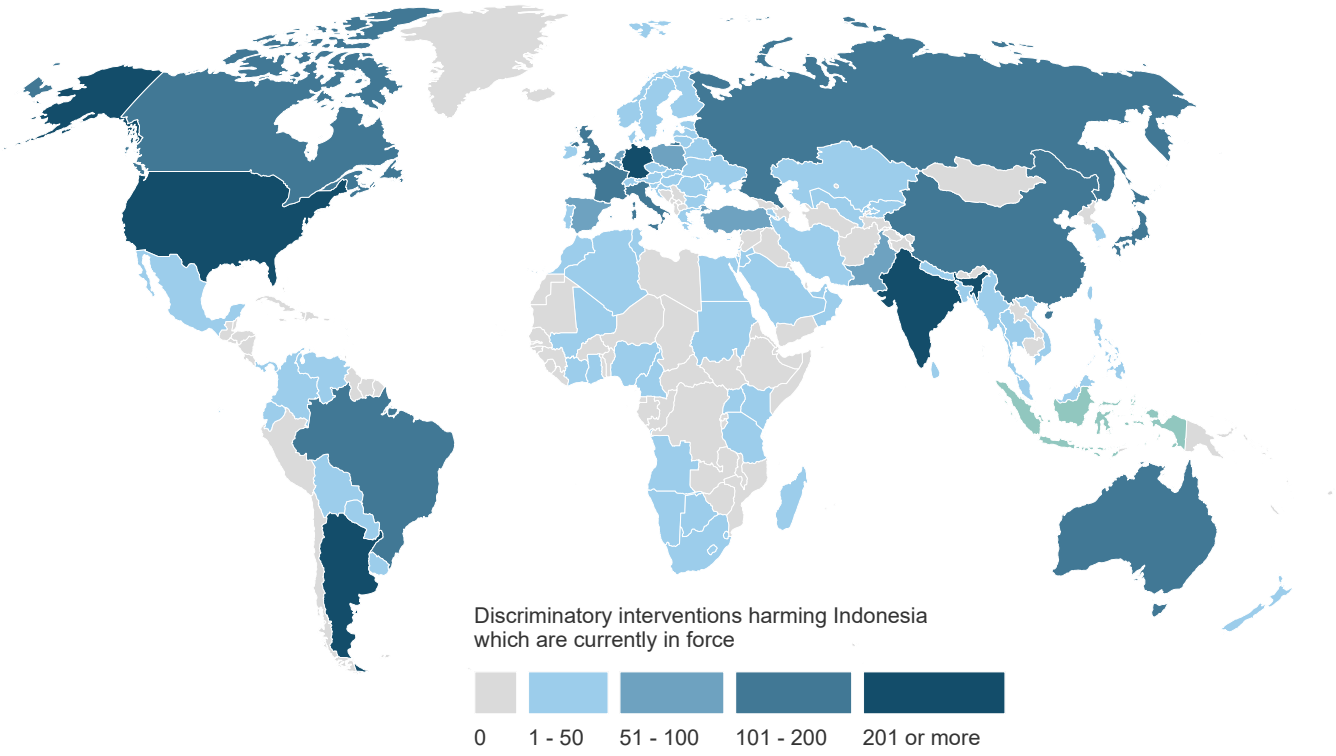
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	39.76	48.57	62.12	65.78	72.51	75.15	74.59	75.53	76.42	77.08	77.65	77.93	75.41	76.57
D	Contingent trade-protective measures	0.17	0.26	0.30	0.36	0.50	0.44	0.46	0.52	0.54	1.08	1.07	1.11	1.84	2.06
E	Non-automatic licensing, quotas etc.	4.20	3.93	4.23	4.53	4.28	4.32	4.63	5.18	5.31	5.33	5.35	5.60	5.66	6.65
F	Price-control measures, including additional taxes and charges	1.20	1.20	1.26	1.30	1.30	2.02	2.53	2.54	2.54	5.05	5.32	5.43	5.46	5.66
G	Finance measures	0.06	0.31	0.70	0.70	0.70	0.70	0.70	0.70	0.70	0.71	0.73	0.72	0.71	0.73
I	Trade-related investment measures	0.01	0.13	0.13	0.14	0.15	0.22	0.26	0.32	0.35	0.35	0.34	0.37	0.44	0.56
L	Subsidies (excl. export subsidies)	5.02	8.23	10.31	10.48	21.62	23.44	25.30	26.13	26.25	26.49	27.41	27.18	19.58	22.12
M	Government procurement restrictions	0.32	1.70	1.68	1.85	1.99	2.06	2.27	2.27	2.32	2.37	2.65	2.62	2.76	4.16
P	Export-related measures (incl. subsidies)	32.48	40.93	54.80	57.76	62.66	65.53	62.93	64.28	65.21	65.56	66.34	66.69	64.52	66.17
	Tariff measures	0.52	0.70	1.58	2.52	3.81	12.87	6.44	8.41	10.45	10.69	11.20	11.12	11.29	11.38
	Instrument unclear	0.01	0.21	0.05	0.05	0.19	0.32	0.47	0.85	1.13	1.20	1.21	1.21	1.28	1.36

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY INDONESIA'S DISCRIMINATORY INTERVENTIONS

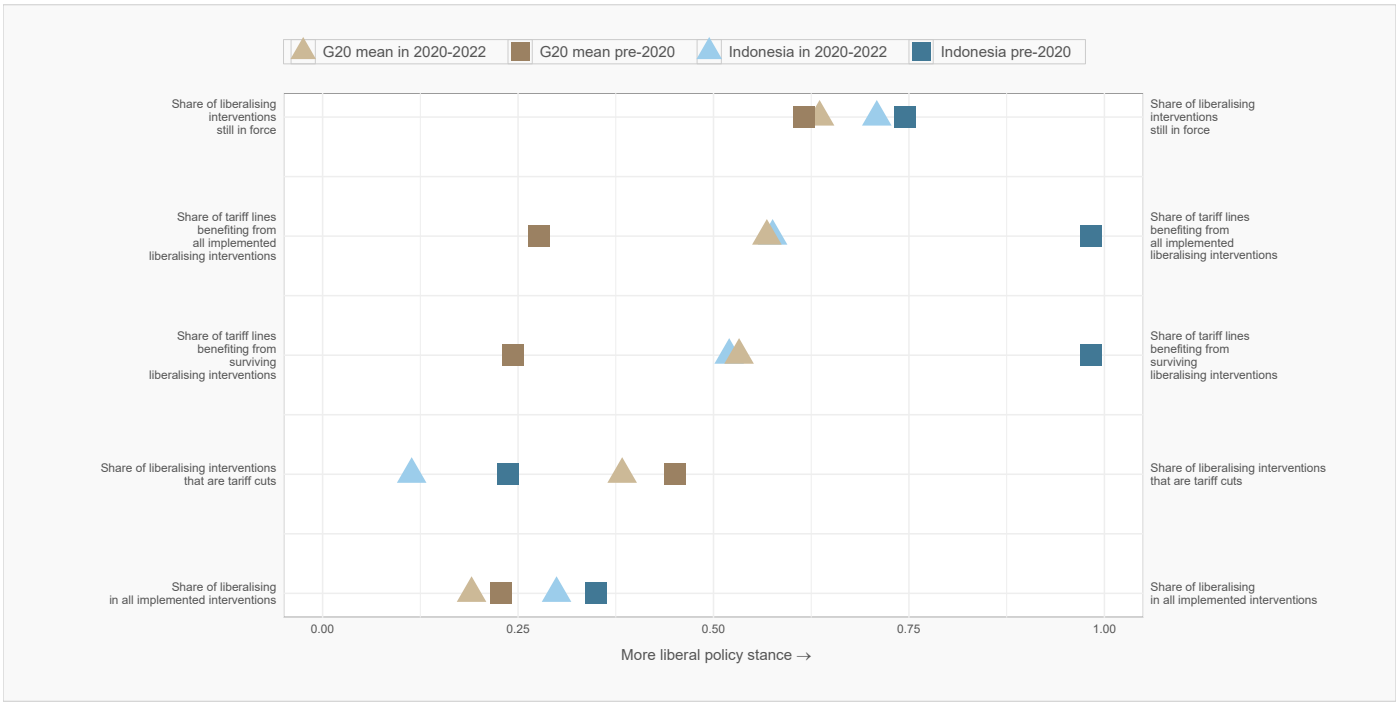


DISCRIMINATORY INTERVENTIONS HARMING INDONESIA'S INTERESTS



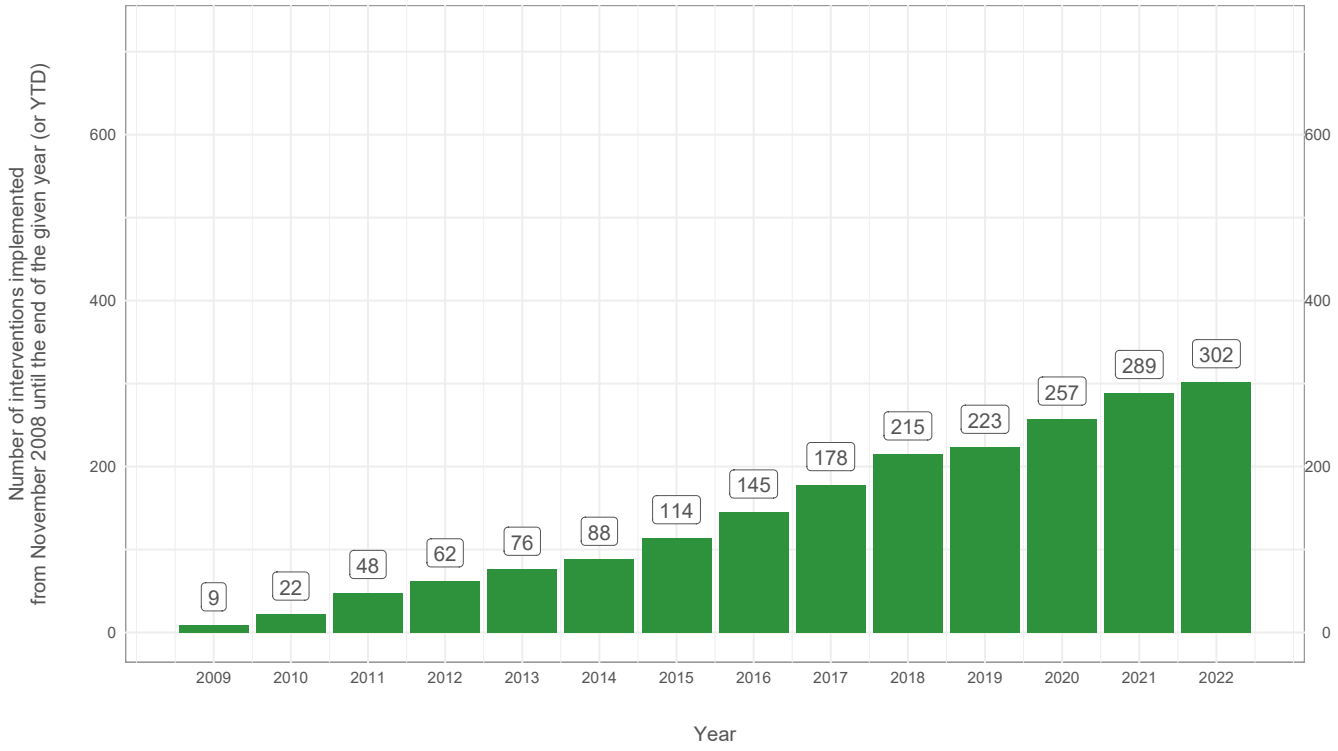
INDONESIA

Track record of liberalisation



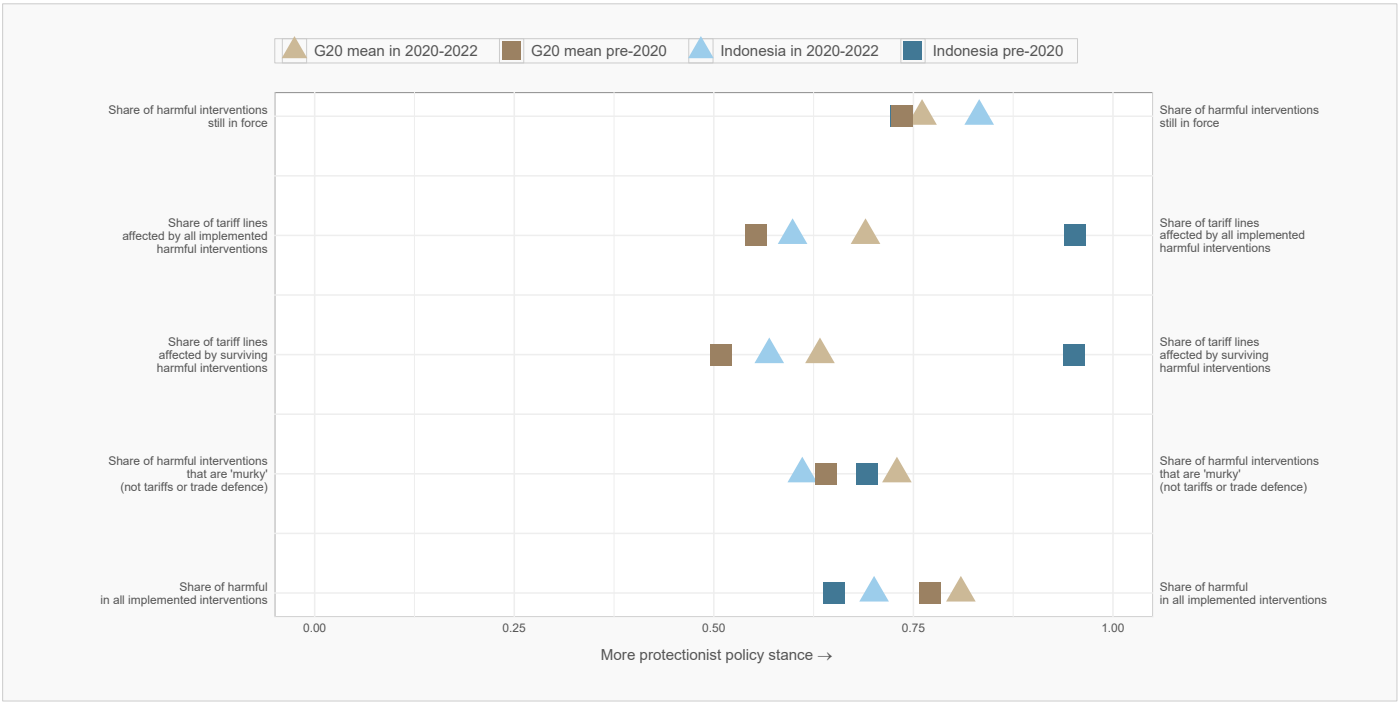
INDONESIA

Number of liberalising interventions imposed since November 2008



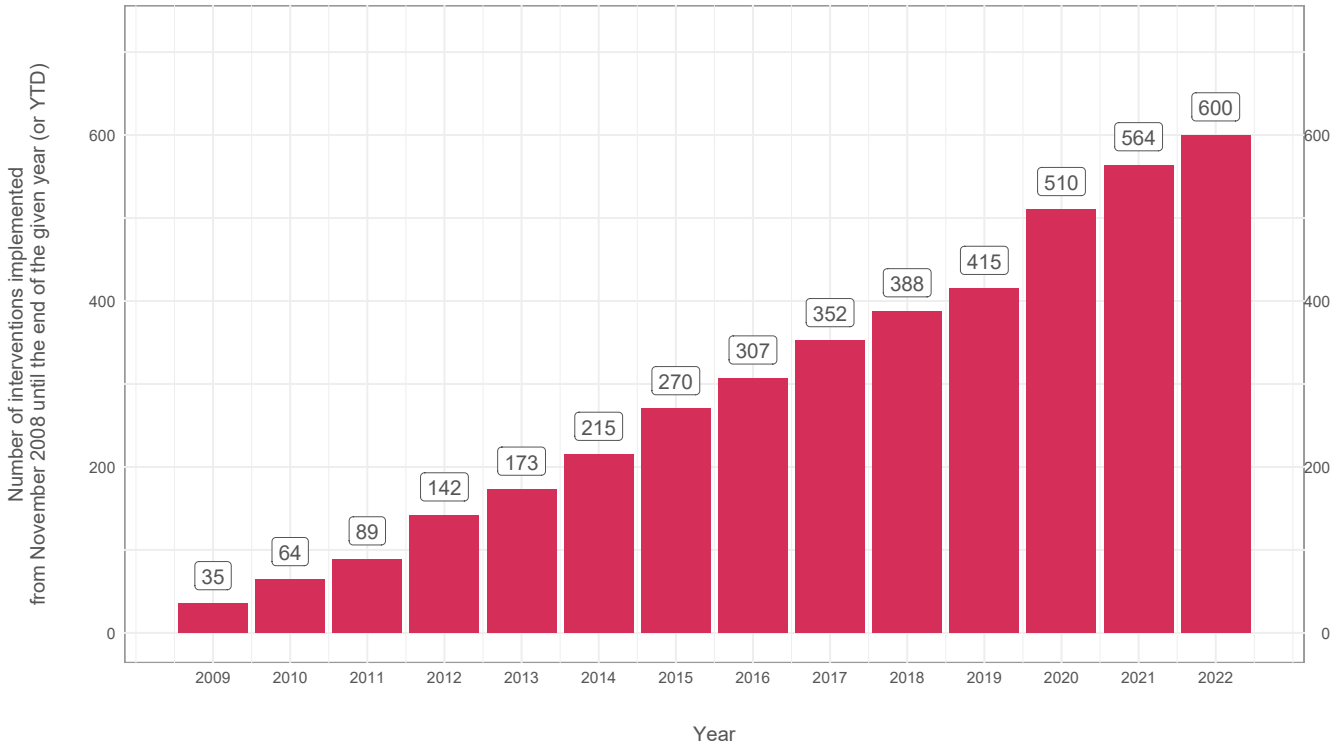
INDONESIA

Track record of protectionism



INDONESIA

Number of discriminatory interventions imposed since November 2008



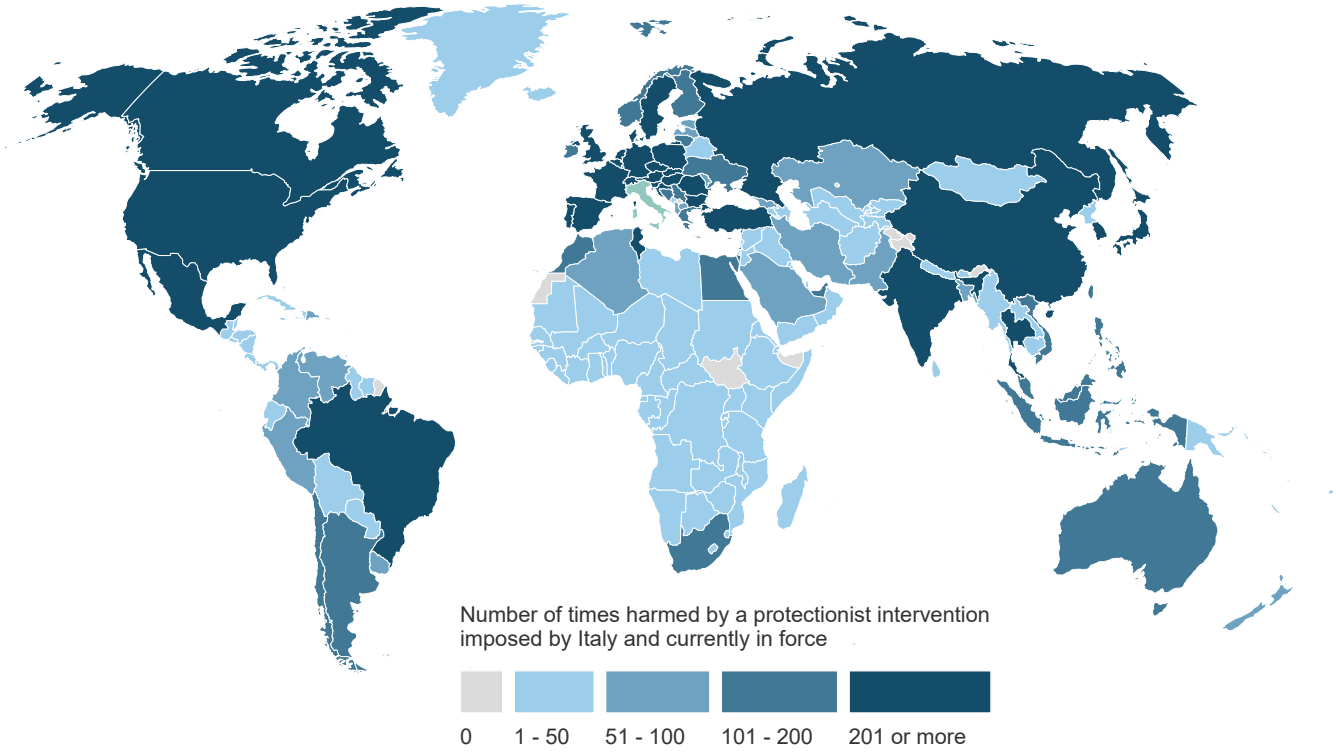
ITALY

What is at stake for Italy's goods exporters?

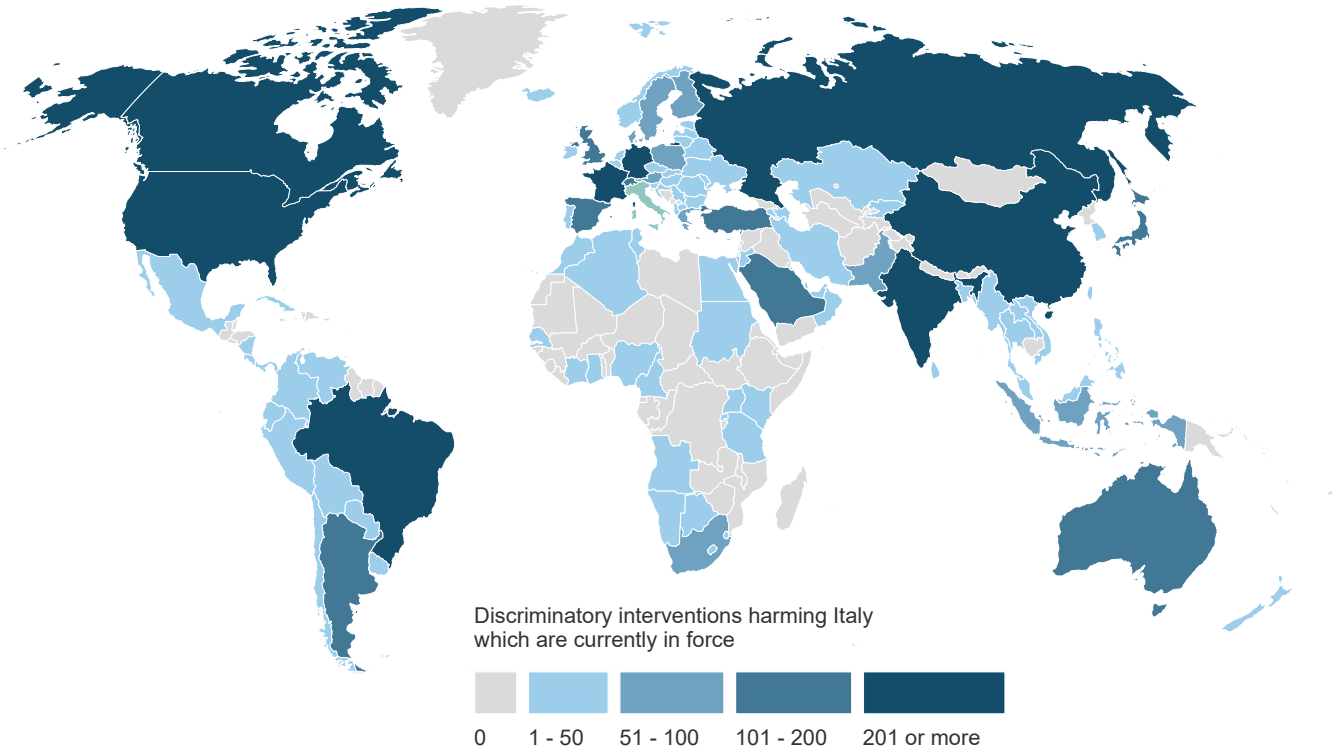
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	49.77	62.24	64.82	67.50	69.80	71.85	73.46	75.50	76.86	77.78	79.86	80.20	78.41	78.97
D	Contingent trade-protective measures	0.03	0.06	0.07	0.12	0.18	0.19	0.18	0.30	0.31	0.35	0.47	0.55	0.61	0.64
E	Non-automatic licensing, quotas etc.	0.35	0.38	0.67	0.79	0.84	0.87	1.12	1.12	1.39	1.66	1.70	1.74	1.75	1.92
F	Price-control measures, including additional taxes and charges	0.00	0.03	0.12	0.19	0.19	0.21	0.35	0.41	0.43	0.78	0.82	0.99	1.00	1.01
G	Finance measures	0.23	0.34	0.37	0.37	0.37	0.37	0.37	0.37	0.37	0.37	0.38	0.38	0.37	0.39
I	Trade-related investment measures	0.06	1.09	1.25	1.27	1.30	1.40	1.52	1.64	1.70	1.67	1.64	1.64	1.76	1.90
L	Subsidies (excl. export subsidies)	7.50	15.58	15.79	16.72	18.32	22.25	26.97	29.91	31.50	32.64	34.14	36.32	34.35	36.00
M	Government procurement restrictions	0.37	0.42	0.40	0.68	0.76	1.27	1.71	1.80	1.97	2.14	2.36	2.42	2.85	3.42
P	Export-related measures (incl. subsidies)	44.33	55.10	59.04	62.95	65.50	65.53	65.42	68.40	69.58	70.42	72.61	72.84	70.00	70.57
	Tariff measures	0.24	0.39	0.46	0.82	1.38	0.97	1.43	1.93	2.47	2.90	3.86	5.00	5.43	5.38
	Instrument unclear	0.07	0.14	0.16	0.17	0.26	0.30	0.47	0.61	0.71	0.80	0.81	0.81	0.82	0.83

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY ITALY'S DISCRIMINATORY INTERVENTIONS

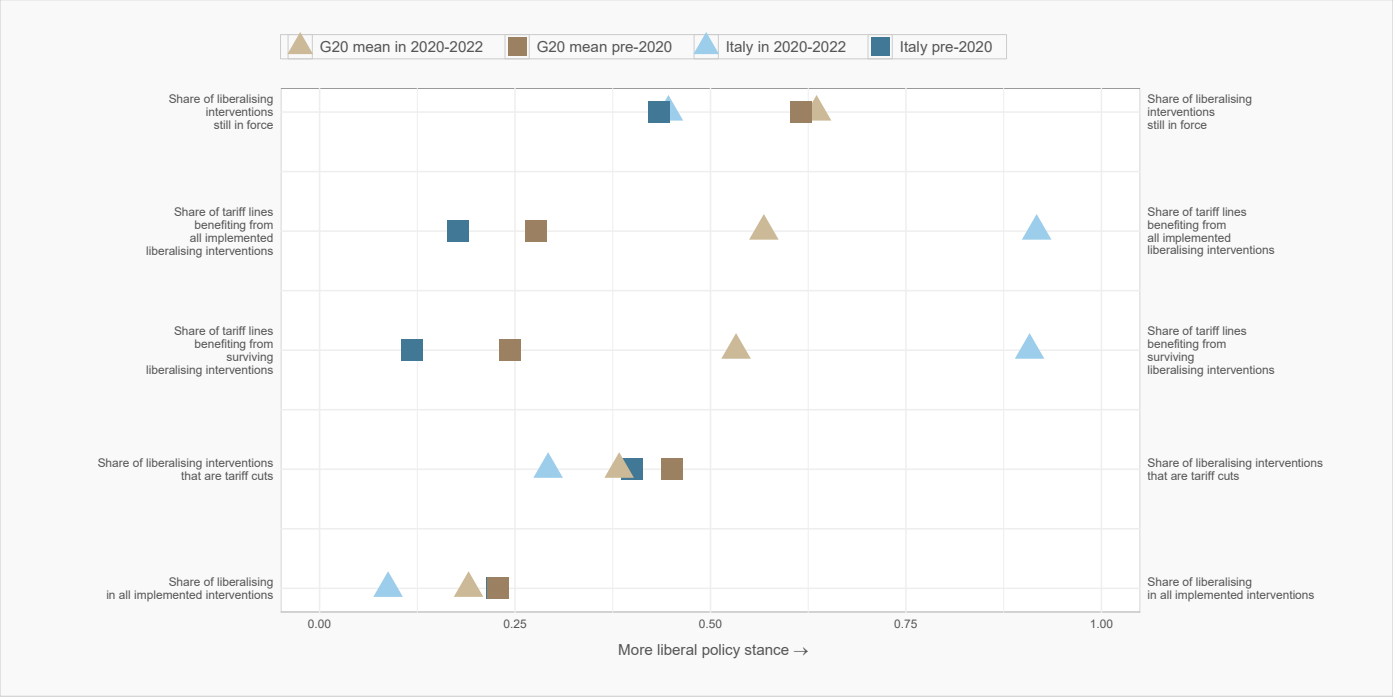


DISCRIMINATORY INTERVENTIONS HARMING ITALY'S INTERESTS



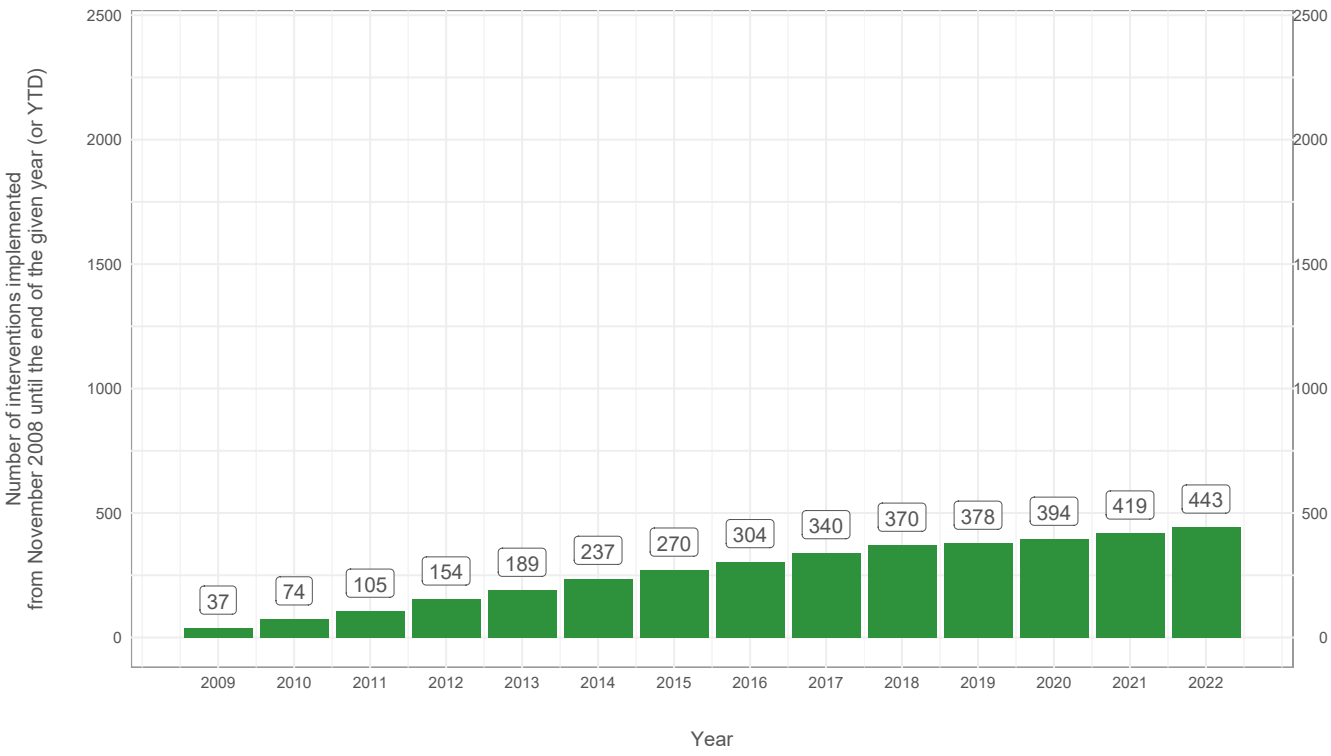
ITALY

Track record of liberalisation



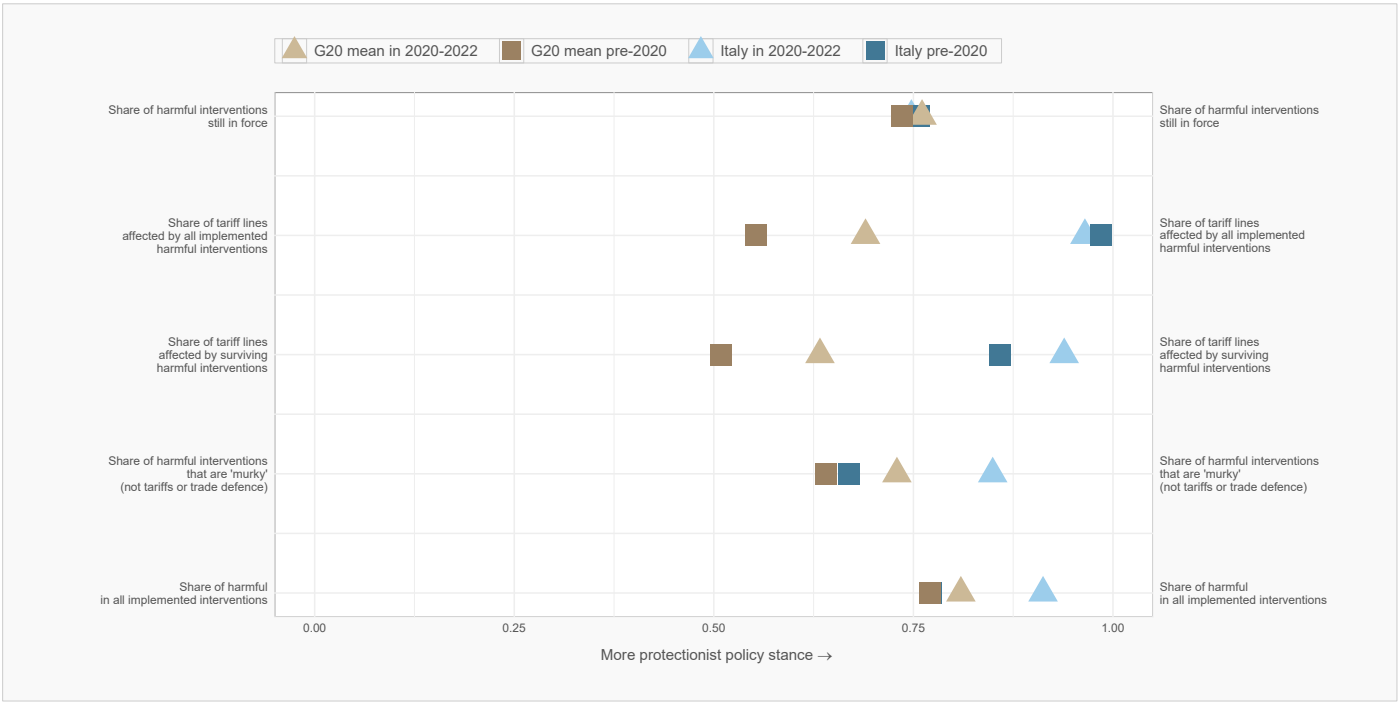
ITALY

Number of liberalising interventions imposed since November 2008



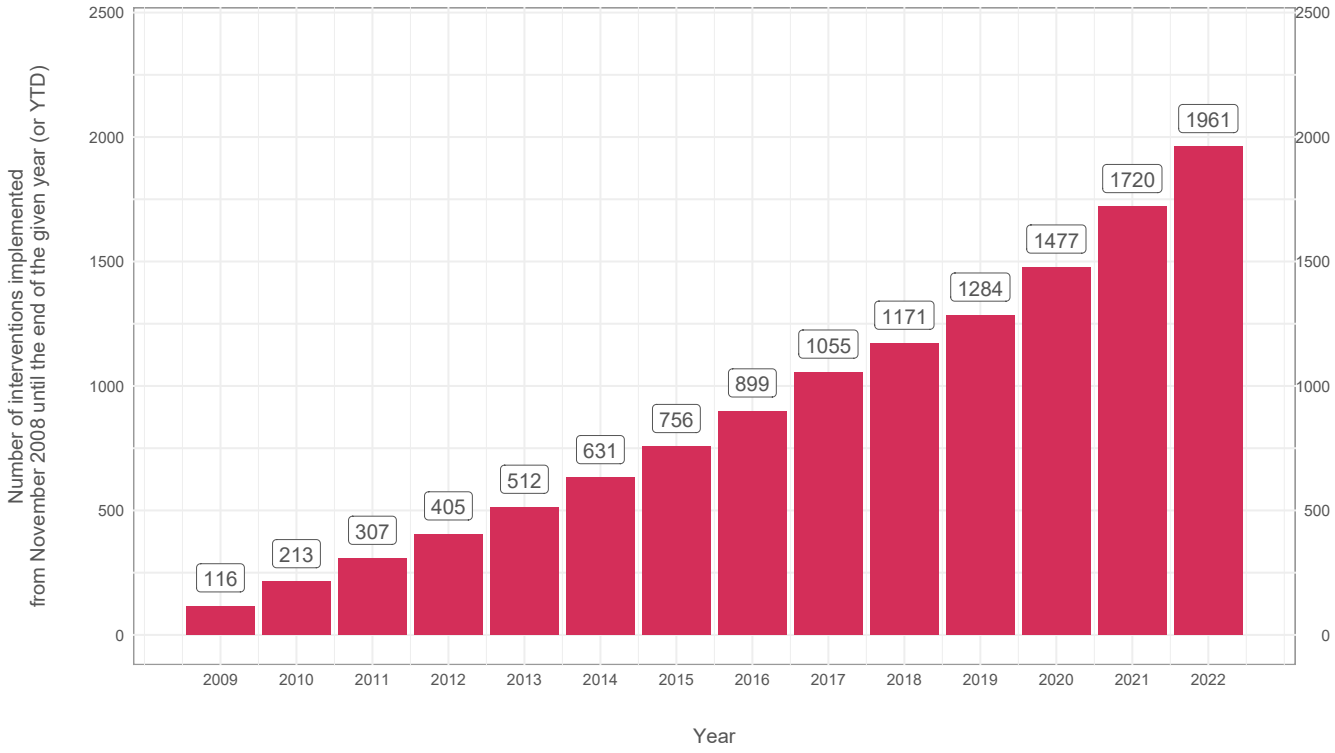
ITALY

Track record of protectionism



ITALY

Number of discriminatory interventions imposed since November 2008



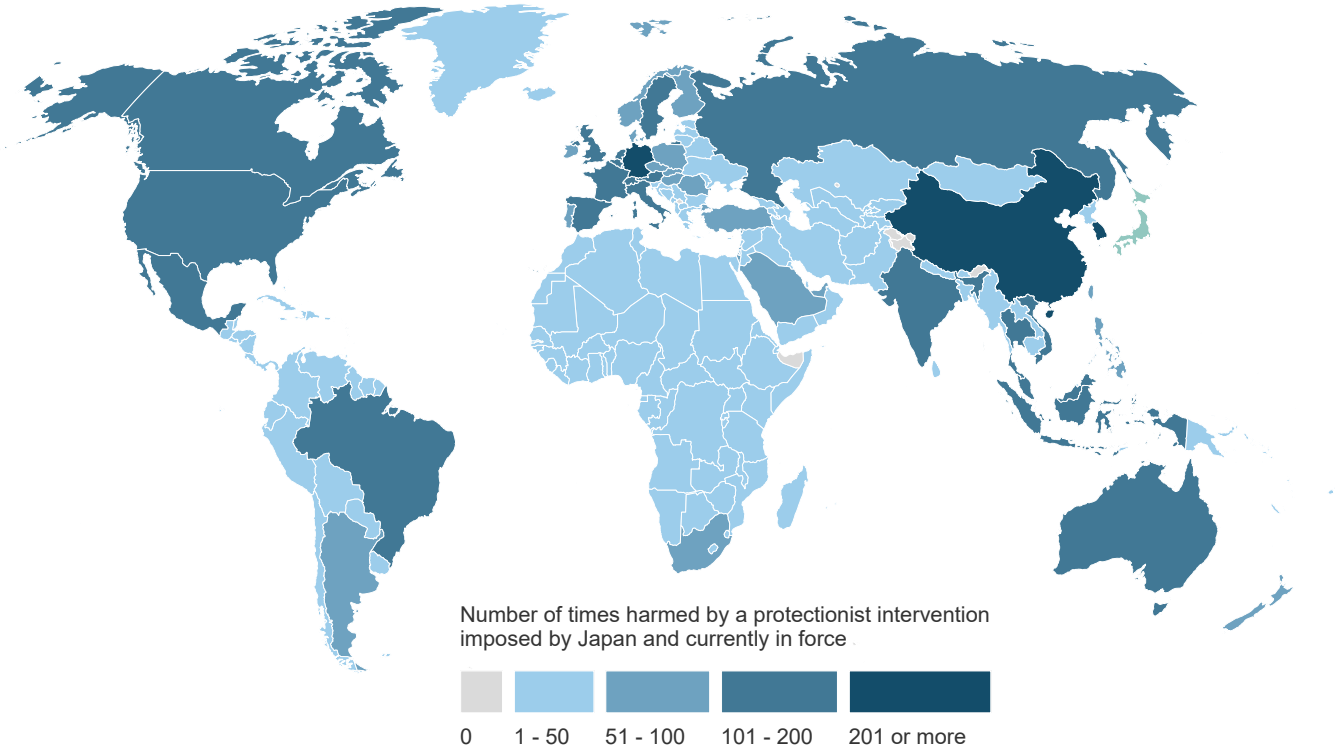
JAPAN

What is at stake for Japan's goods exporters?

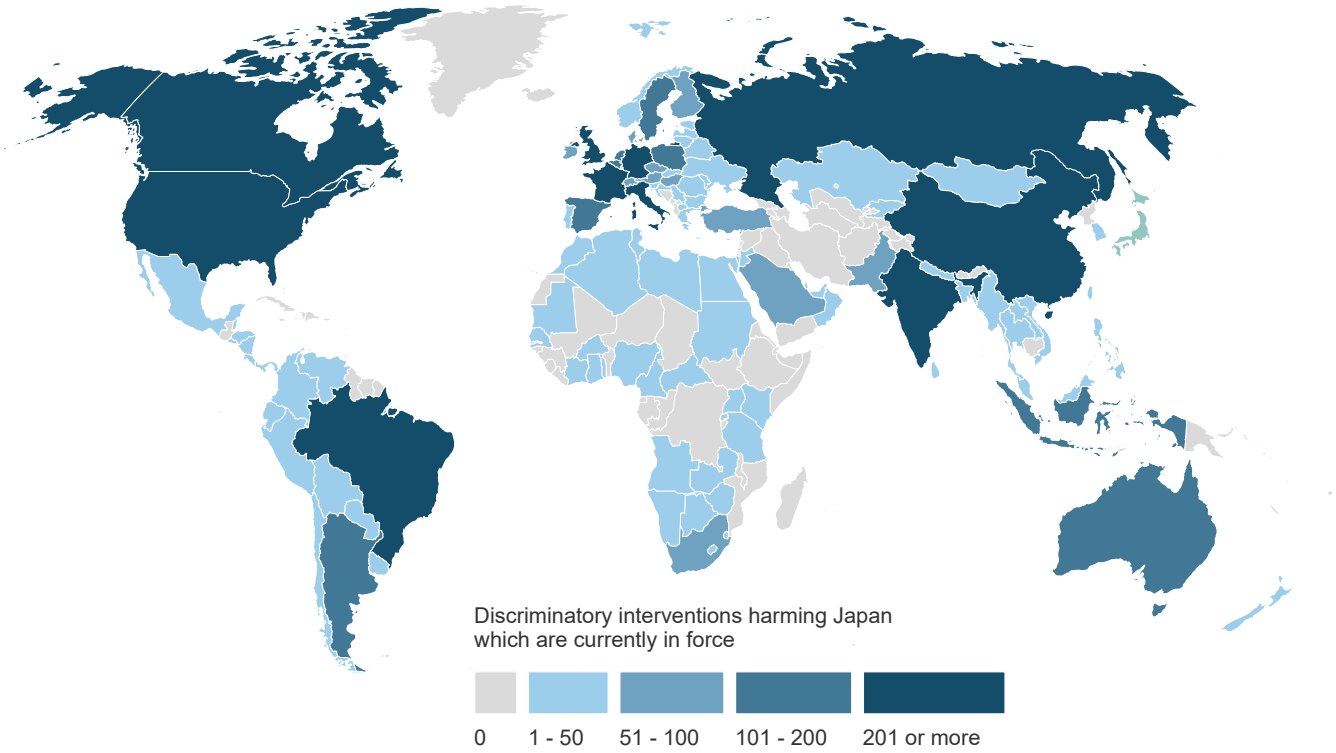
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	59.91	72.39	75.50	79.55	84.99	85.84	85.78	86.30	87.23	87.80	89.35	89.58	85.60	86.30
D	Contingent trade-protective measures	0.15	0.32	0.36	0.43	0.57	0.64	0.62	0.85	0.93	1.10	1.21	1.22	1.24	1.25
E	Non-automatic licensing, quotas etc.	2.65	3.24	5.13	5.45	7.39	5.86	6.69	6.99	7.37	7.44	7.46	7.99	8.71	9.01
F	Price-control measures, including additional taxes and charges	0.04	0.06	0.08	0.10	0.09	0.45	0.91	1.03	1.32	1.64	1.71	1.89	2.03	2.11
G	Finance measures	0.16	0.43	0.80	0.80	0.81	0.80	0.81	0.81	0.81	0.83	0.87	0.87	0.86	0.92
I	Trade-related investment measures	0.83	2.32	2.25	2.33	2.36	2.38	2.85	3.11	3.01	2.99	2.90	2.83	3.17	3.26
L	Subsidies (excl. export subsidies)	21.52	32.03	36.14	38.06	48.63	49.23	50.81	51.55	51.49	51.58	53.03	54.28	41.09	41.68
M	Government procurement restrictions	0.47	1.47	1.84	2.08	2.16	2.54	3.51	3.57	3.64	3.68	3.71	3.85	4.91	6.60
P	Export-related measures (incl. subsidies)	39.69	52.68	58.04	67.02	70.50	68.02	66.70	68.39	70.16	70.94	72.60	73.05	71.27	72.15
	Tariff measures	1.93	1.82	2.99	4.95	8.76	5.55	6.95	11.28	12.94	11.95	12.26	12.82	15.07	15.07
	Instrument unclear	0.27	0.95	1.37	1.41	1.48	1.94	1.92	1.80	1.93	2.31	2.38	2.38	2.50	2.62

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY JAPAN'S DISCRIMINATORY INTERVENTIONS

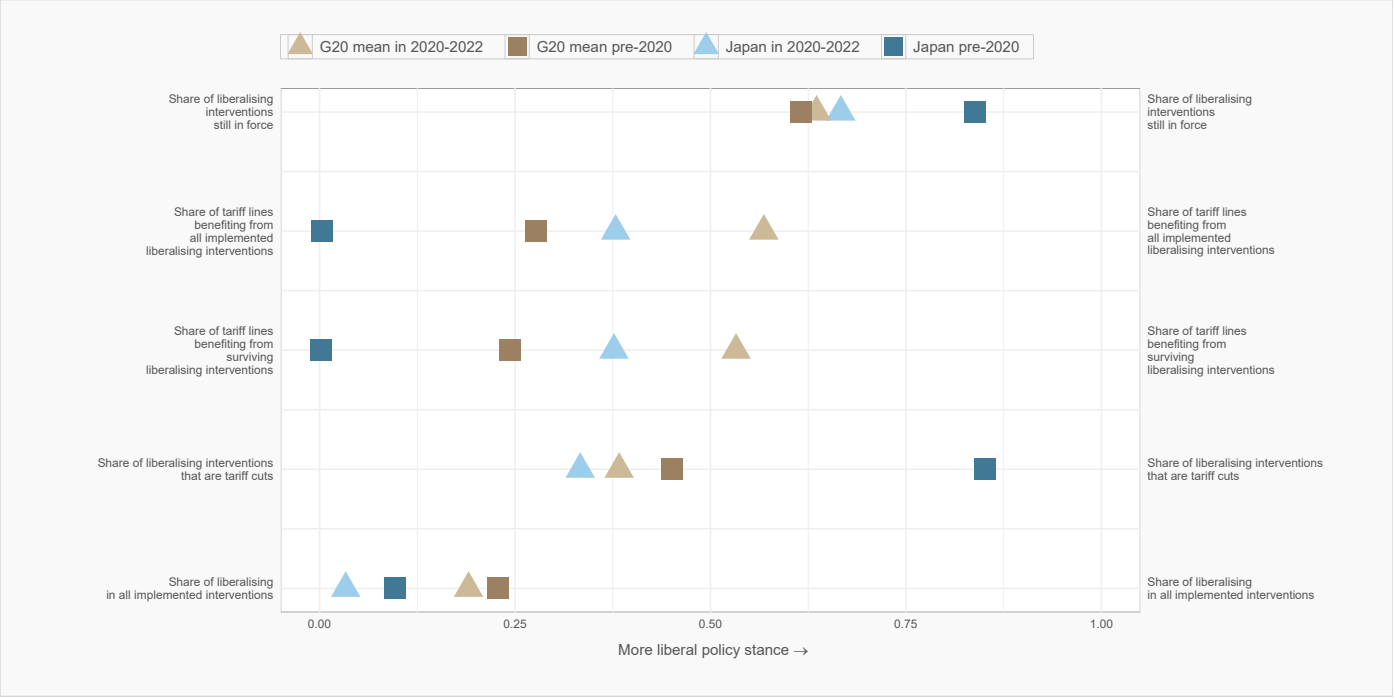


DISCRIMINATORY INTERVENTIONS HARMING JAPAN'S INTERESTS



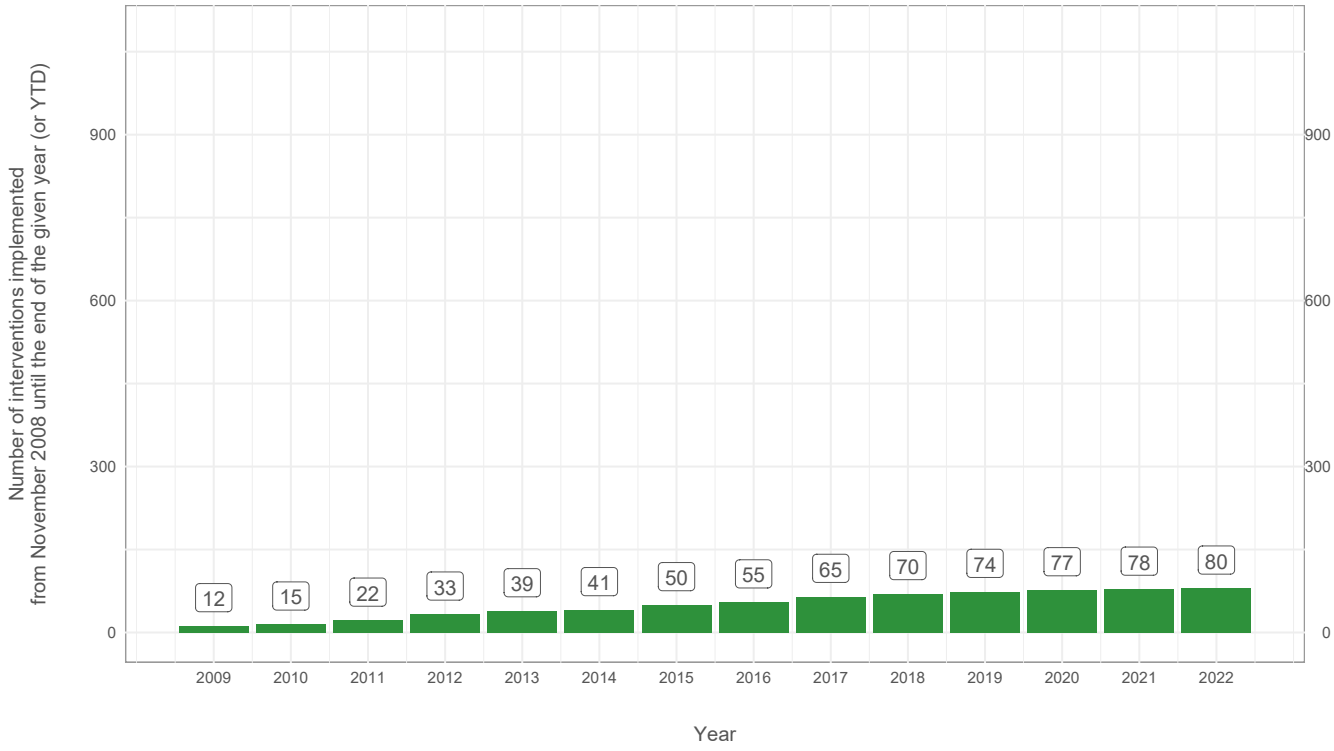
JAPAN

Track record of liberalisation



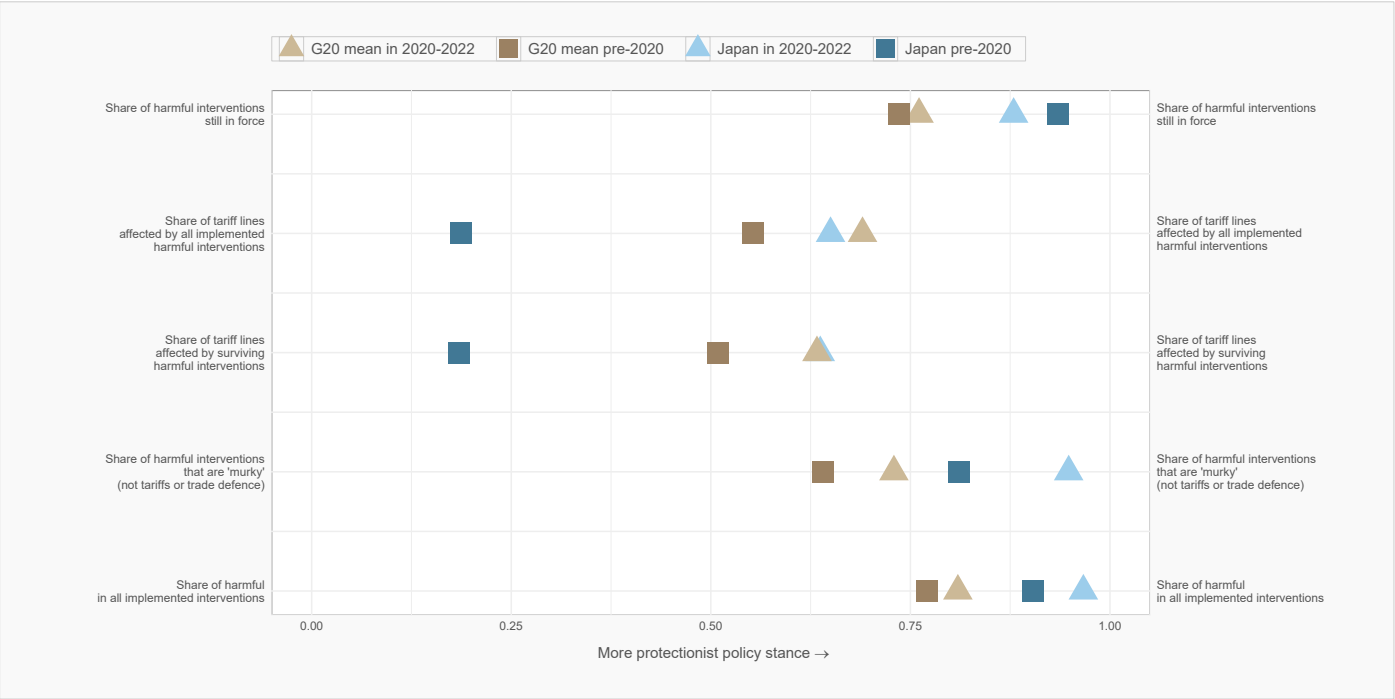
JAPAN

Number of liberalising interventions imposed since November 2008



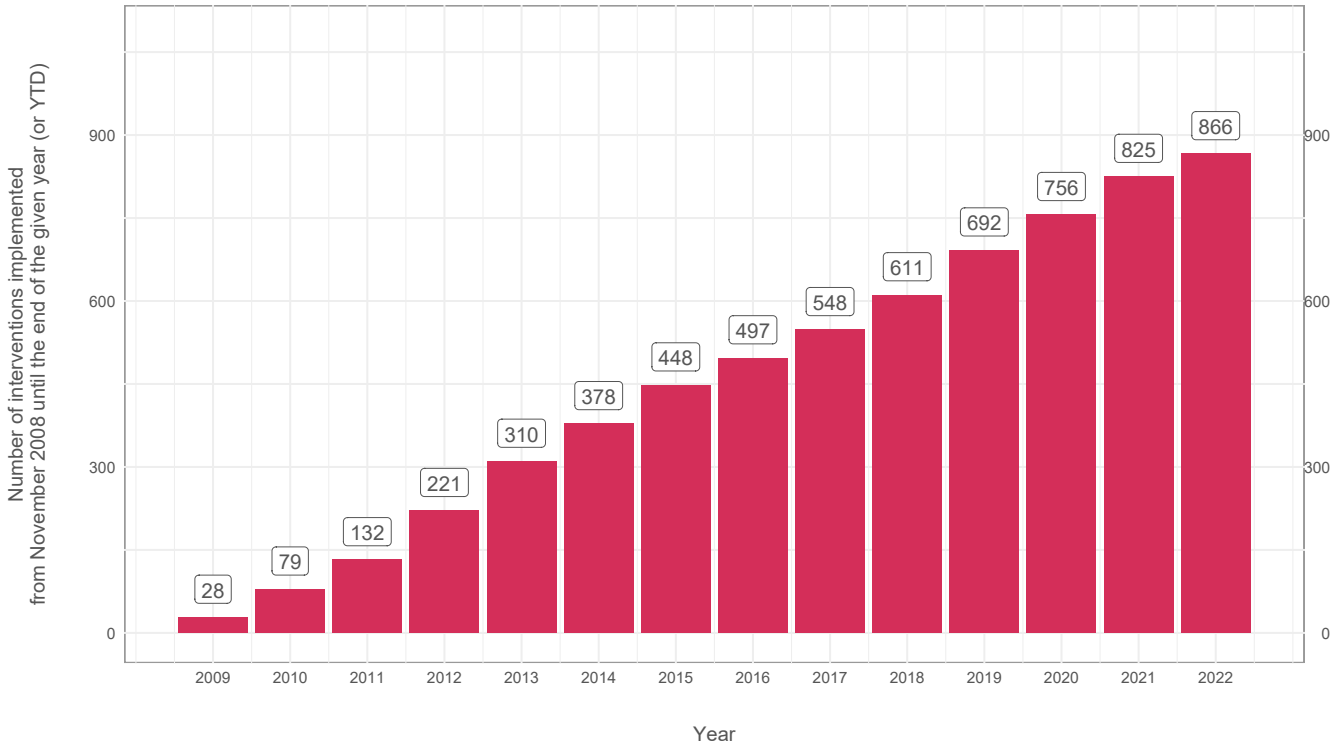
JAPAN

Track record of protectionism



JAPAN

Number of discriminatory interventions imposed since November 2008



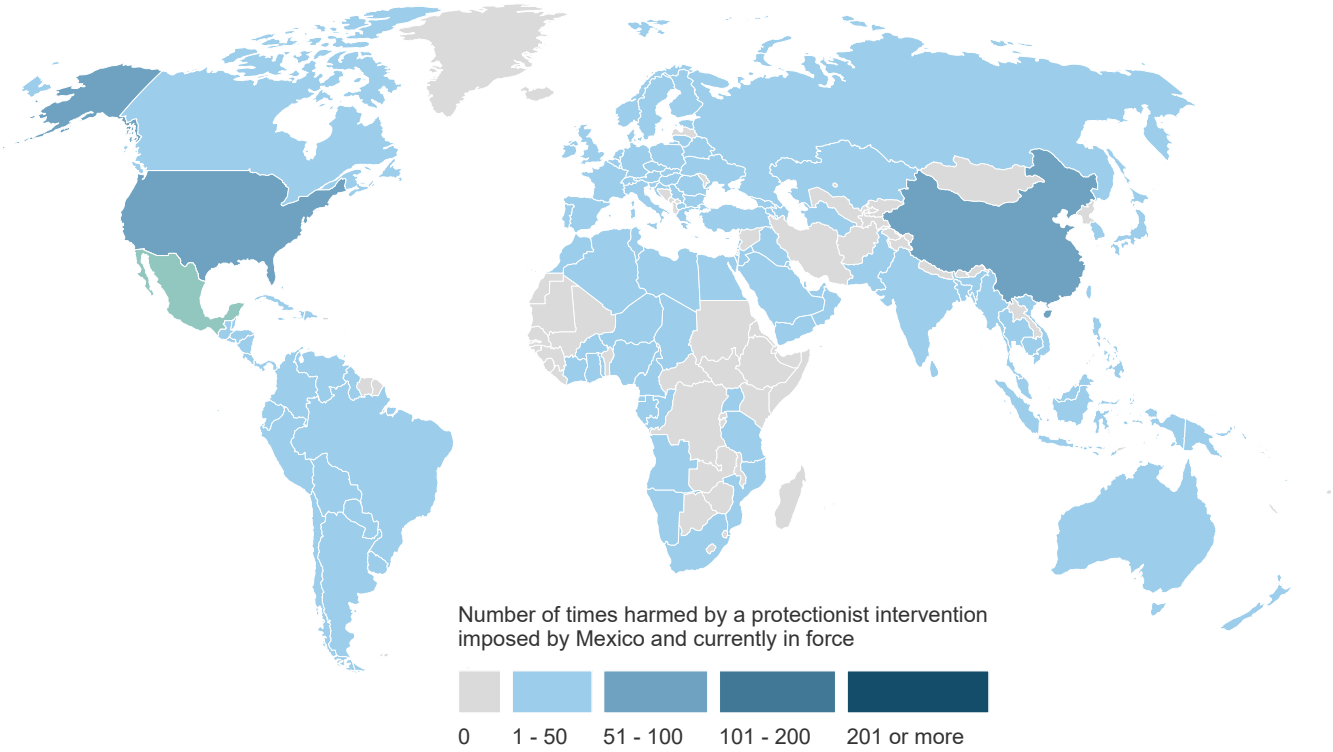
MEXICO

What is at stake for Mexico's goods exporters?

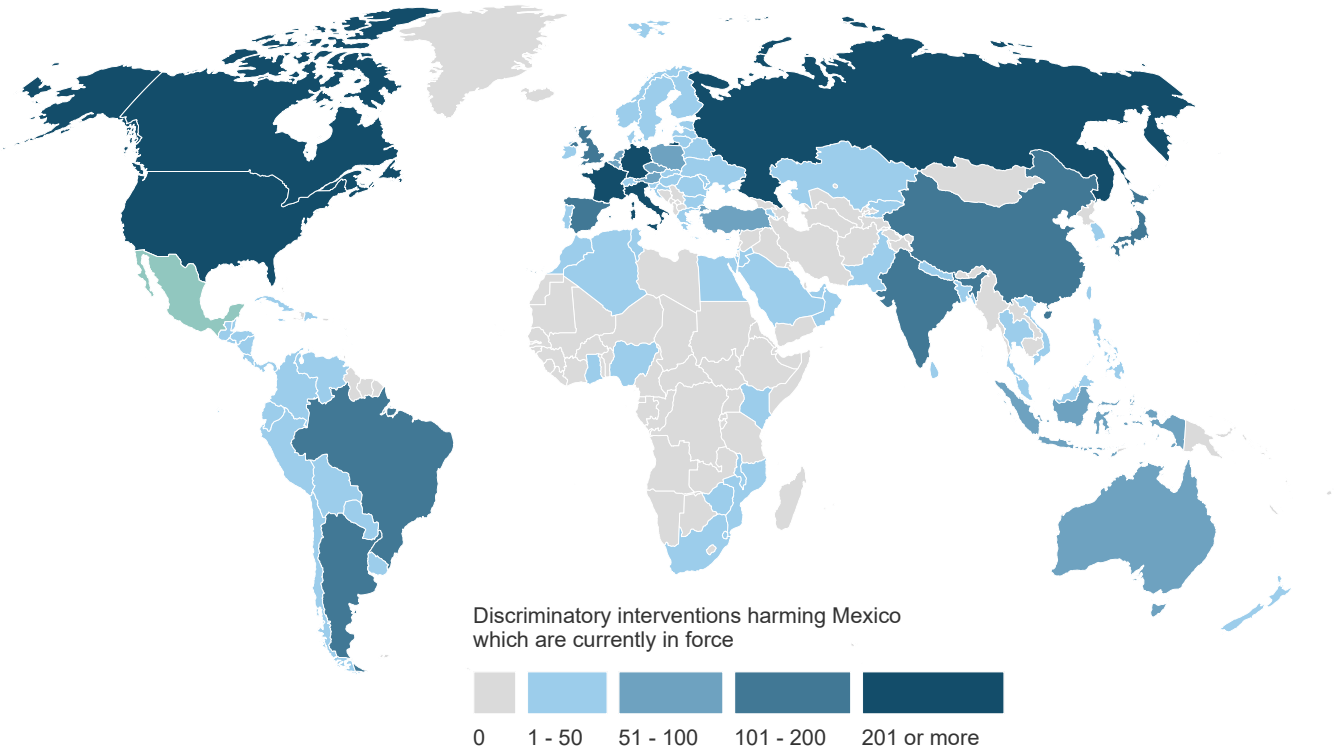
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	59.62	72.55	86.24	88.53	89.91	91.99	91.84	92.12	93.22	94.03	94.39	94.52	94.43	94.92
D	Contingent trade-protective measures	0.00	0.33	0.65	0.87	0.67	0.80	0.88	1.62	1.79	2.18	2.43	2.67	2.67	2.68
E	Non-automatic licensing, quotas etc.	0.24	0.32	0.63	0.85	0.95	1.01	0.88	0.83	1.70	1.77	1.75	1.90	2.37	4.11
F	Price-control measures, including additional taxes and charges	0.11	0.11	0.16	0.26	0.14	0.27	0.33	0.40	0.42	0.58	0.61	1.00	1.00	1.00
G	Finance measures	0.02	0.41	0.42	0.42	0.42	0.42	0.42	0.42	0.42	0.42	0.42	0.42	0.42	0.42
I	Trade-related investment measures	0.57	6.46	6.58	6.69	6.67	6.73	6.78	6.83	6.83	6.77	6.77	6.77	6.89	7.12
L	Subsidies (excl. export subsidies)	9.08	13.95	27.77	33.05	37.53	42.27	44.66	45.86	46.85	51.17	52.29	56.16	60.35	63.08
M	Government procurement restrictions	1.81	2.14	2.61	3.12	3.30	3.94	6.58	6.55	7.35	8.80	10.35	8.69	11.85	17.75
P	Export-related measures (incl. subsidies)	49.65	59.59	77.18	85.72	86.91	83.17	81.59	82.11	82.91	83.51	84.33	84.71	83.68	84.00
	Tariff measures	0.11	0.16	0.33	0.51	2.52	2.48	2.49	3.21	5.10	6.78	5.72	8.31	10.84	10.95
	Instrument unclear	0.00	0.13	0.08	0.09	0.31	0.66	0.67	0.77	0.88	0.94	0.95	0.95	0.96	0.98

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY MEXICO'S DISCRIMINATORY INTERVENTIONS

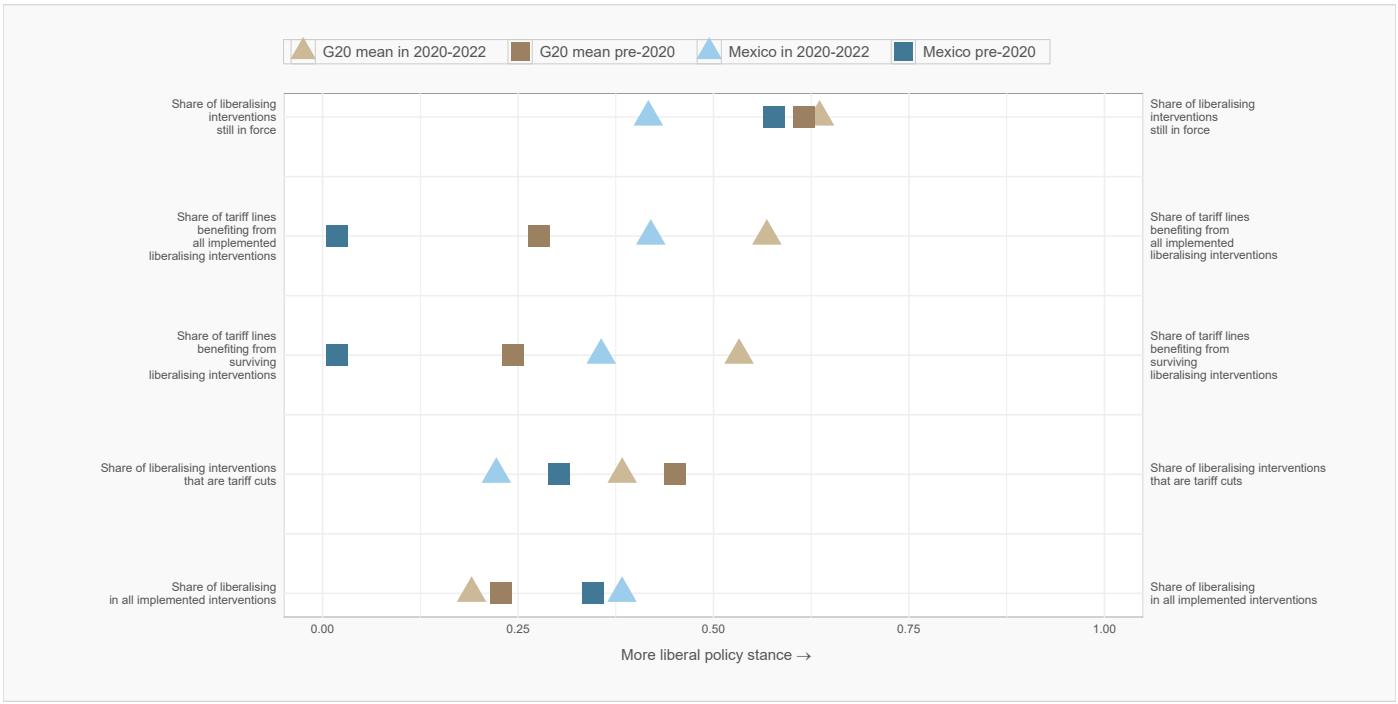


DISCRIMINATORY INTERVENTIONS HARMING MEXICO'S INTERESTS



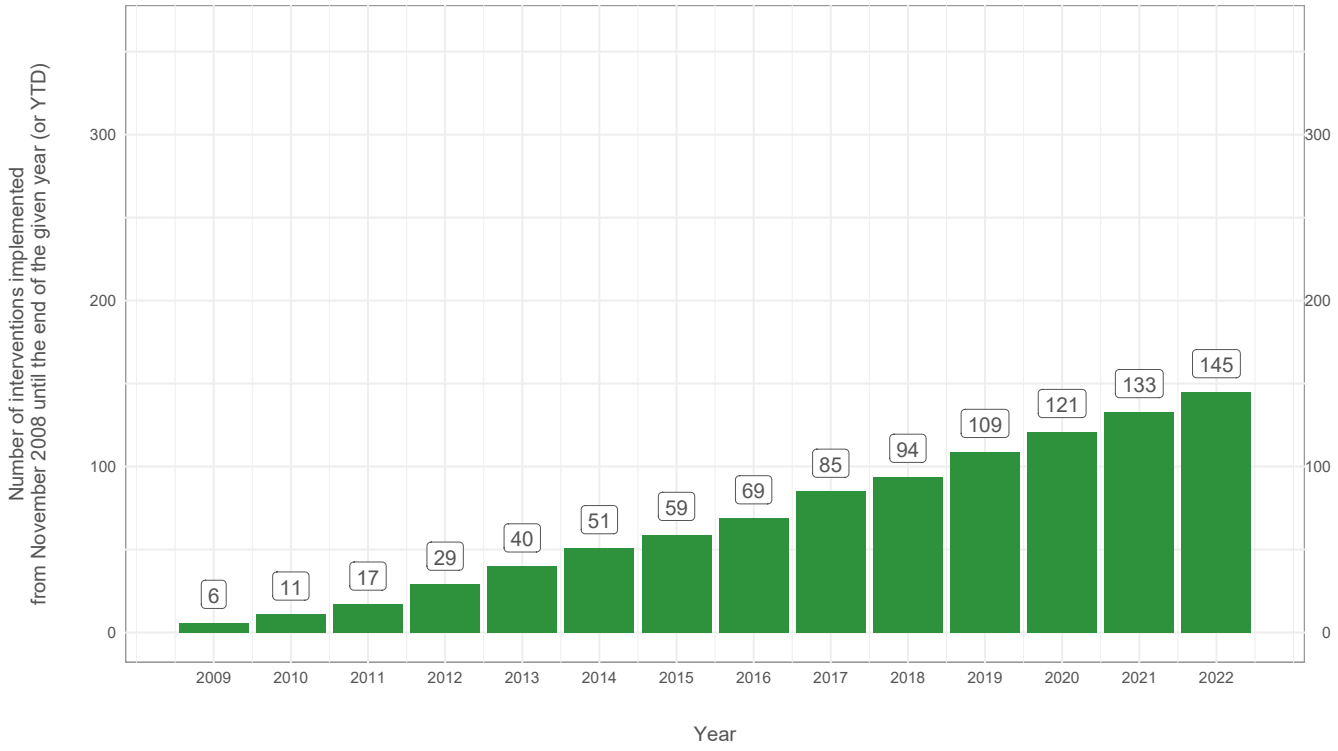
MEXICO

Track record of liberalisation



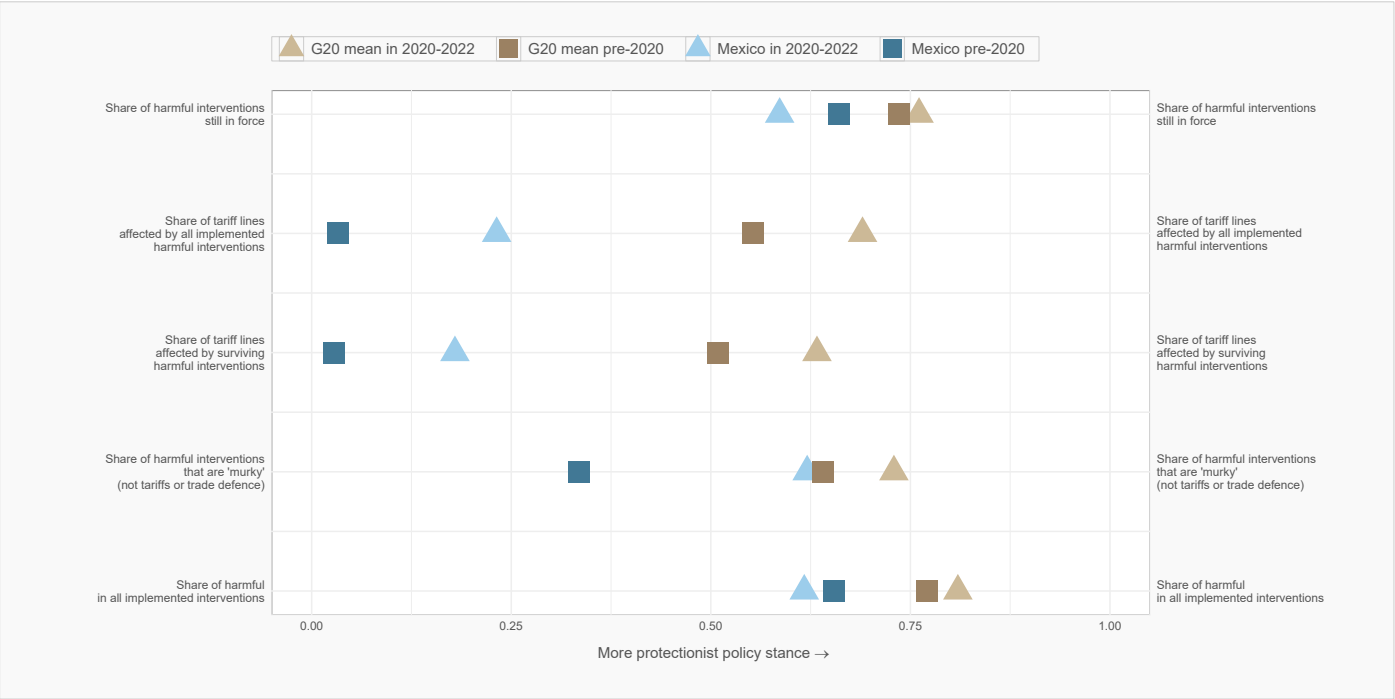
MEXICO

Number of liberalising interventions imposed since November 2008



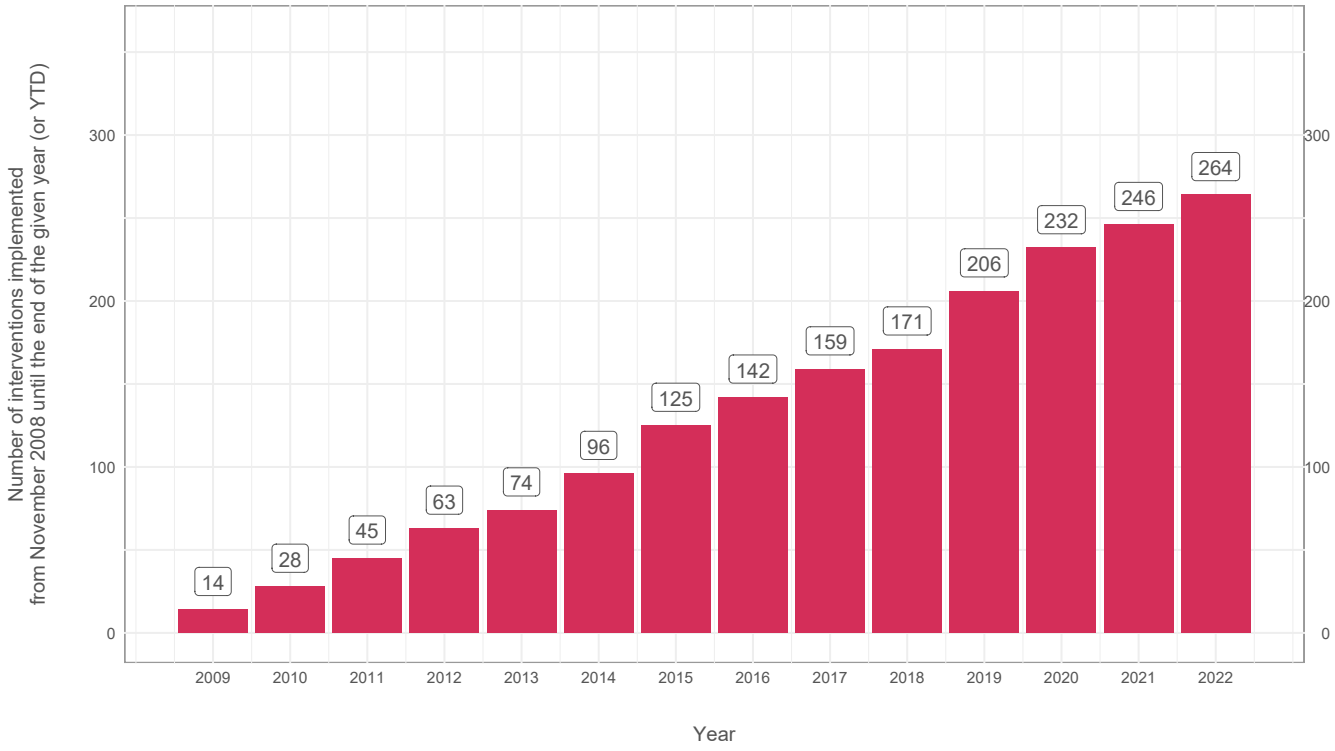
MEXICO

Track record of protectionism



MEXICO

Number of discriminatory interventions imposed since November 2008



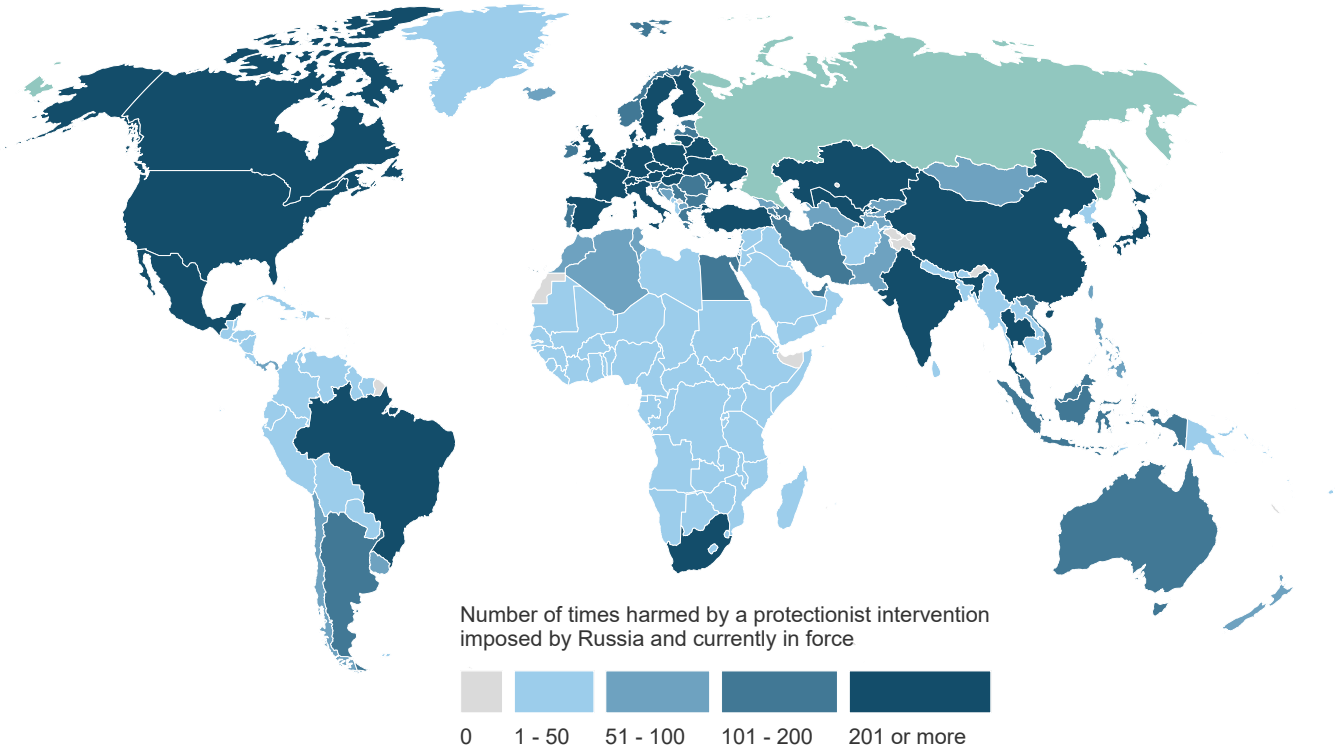
RUSSIA

What is at stake for Russia's goods exporters?

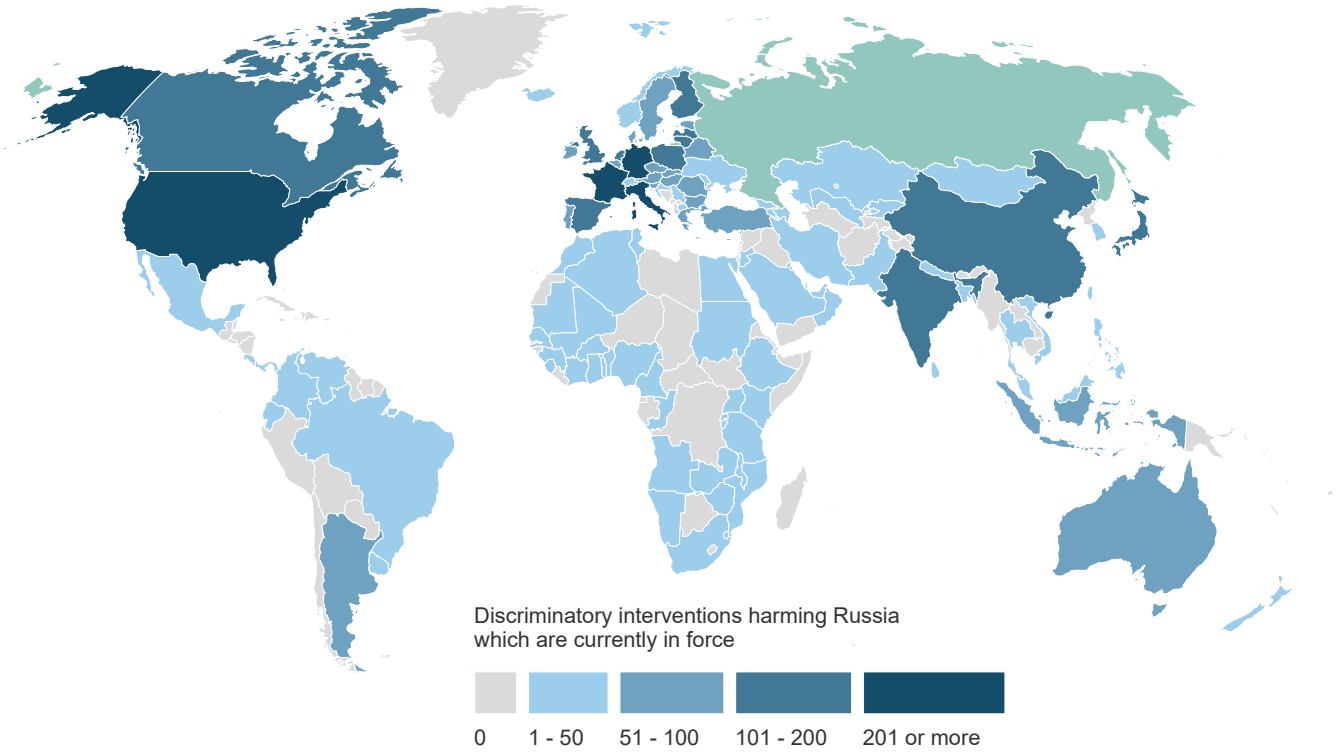
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...													
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	17.02	28.07	36.23	39.52	75.94	75.55	77.15	75.26	77.04	78.15	77.92	78.58	77.40	80.27
D	Contingent trade-protective measures	0.03	0.15	0.23	0.59	0.77	0.87	0.85	1.16	1.32	2.30	3.20	2.68	2.31	2.42
E	Non-automatic licensing, quotas etc.	4.13	3.73	3.84	4.10	4.83	4.71	4.76	5.23	5.79	5.89	5.92	8.57	8.61	19.68
F	Price-control measures, including additional taxes and charges	0.22	0.22	0.23	0.24	0.25	1.02	1.21	1.49	1.49	2.02	2.08	2.17	2.17	2.17
G	Finance measures	2.80	3.19	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.31
I	Trade-related investment measures	0.05	1.44	1.43	1.42	1.52	1.62	1.62	1.62	1.63	1.63	1.68	1.69	1.79	1.93
L	Subsidies (excl. export subsidies)	7.44	15.64	17.31	15.32	53.05	53.73	52.82	53.86	54.11	54.33	55.97	57.45	53.96	55.57
M	Government procurement restrictions	0.51	0.73	0.83	0.85	0.87	0.88	0.93	1.00	1.13	1.17	1.16	1.13	1.31	2.35
P	Export-related measures (incl. subsidies)	4.56	10.32	20.39	24.31	26.74	25.26	27.61	28.44	32.92	34.15	41.87	42.09	40.56	41.99
	Tariff measures	1.03	1.92	2.11	2.26	12.85	13.01	18.14	15.45	15.89	16.84	17.29	17.38	17.42	55.02
	Instrument unclear	0.00	0.06	0.00	0.08	0.19	2.21	3.57	3.68	3.82	3.76	3.84	3.84	3.84	5.70

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY RUSSIA'S DISCRIMINATORY INTERVENTIONS

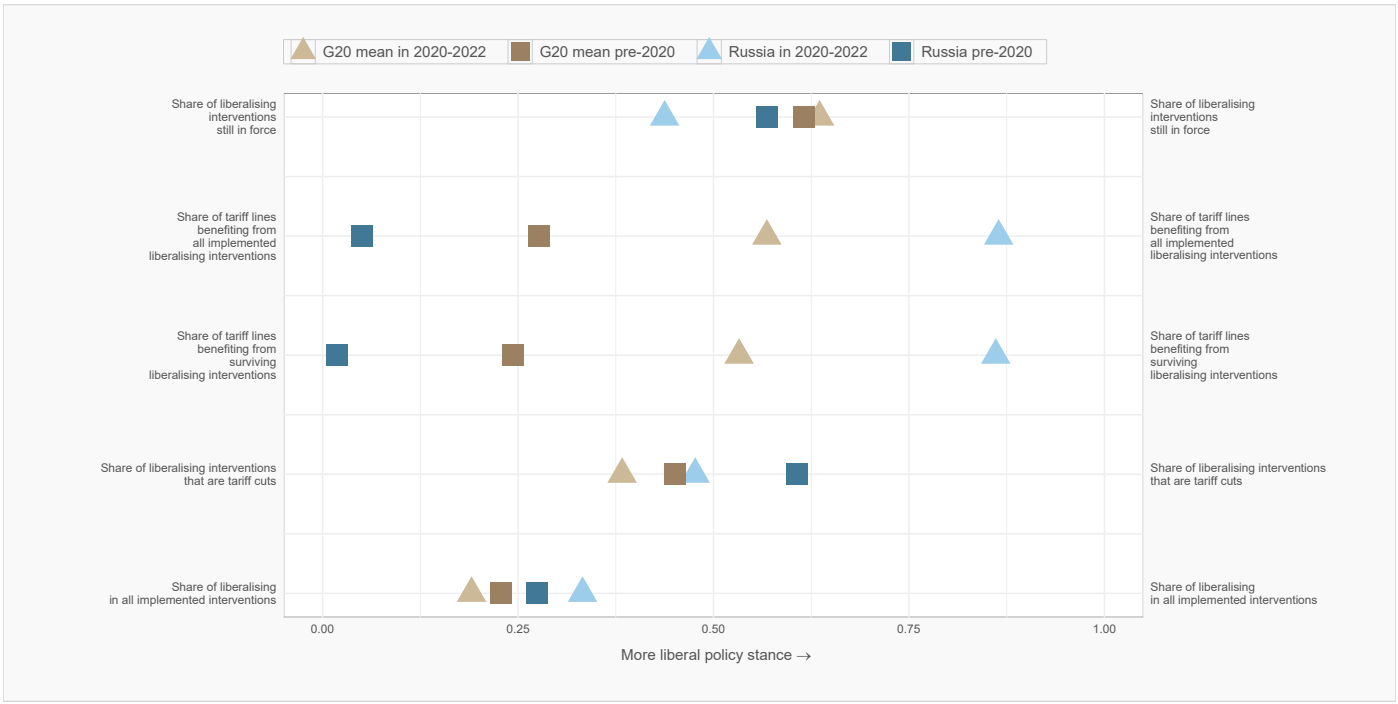


DISCRIMINATORY INTERVENTIONS HARMING RUSSIA'S INTERESTS



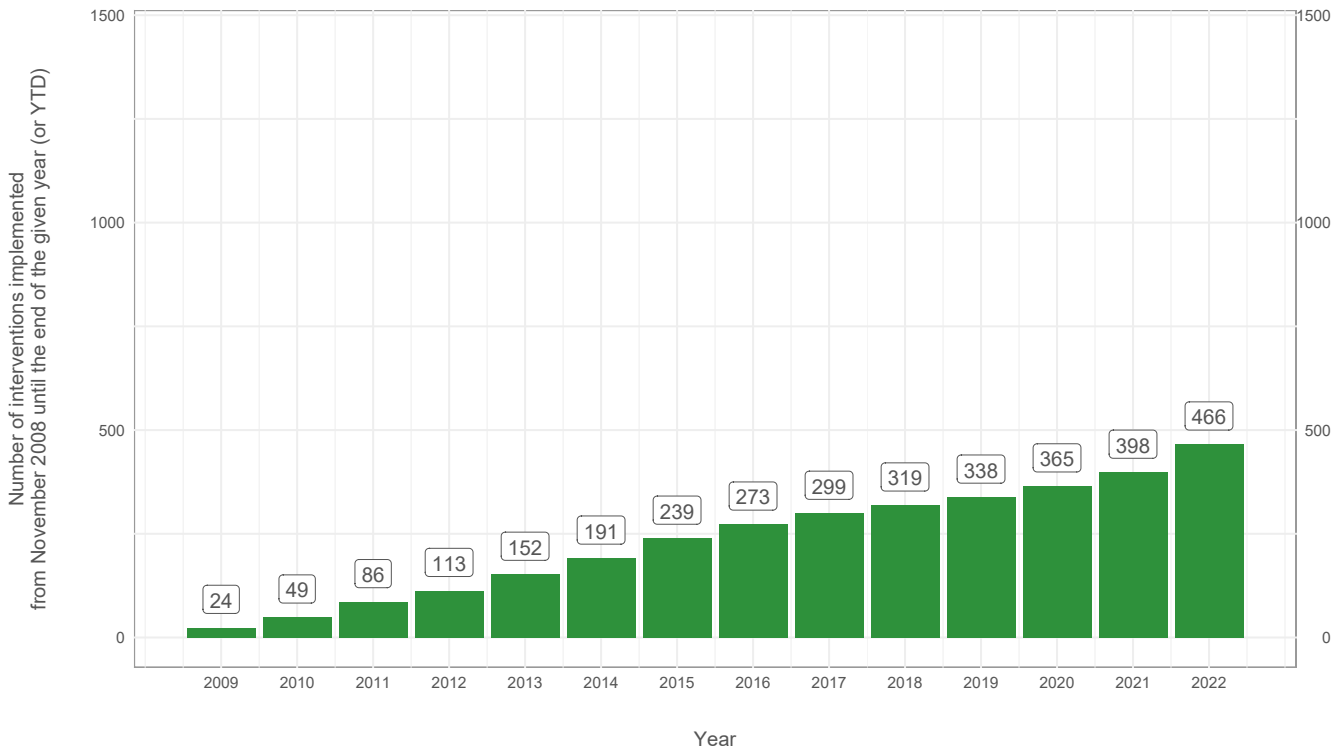
RUSSIA

Track record of liberalisation



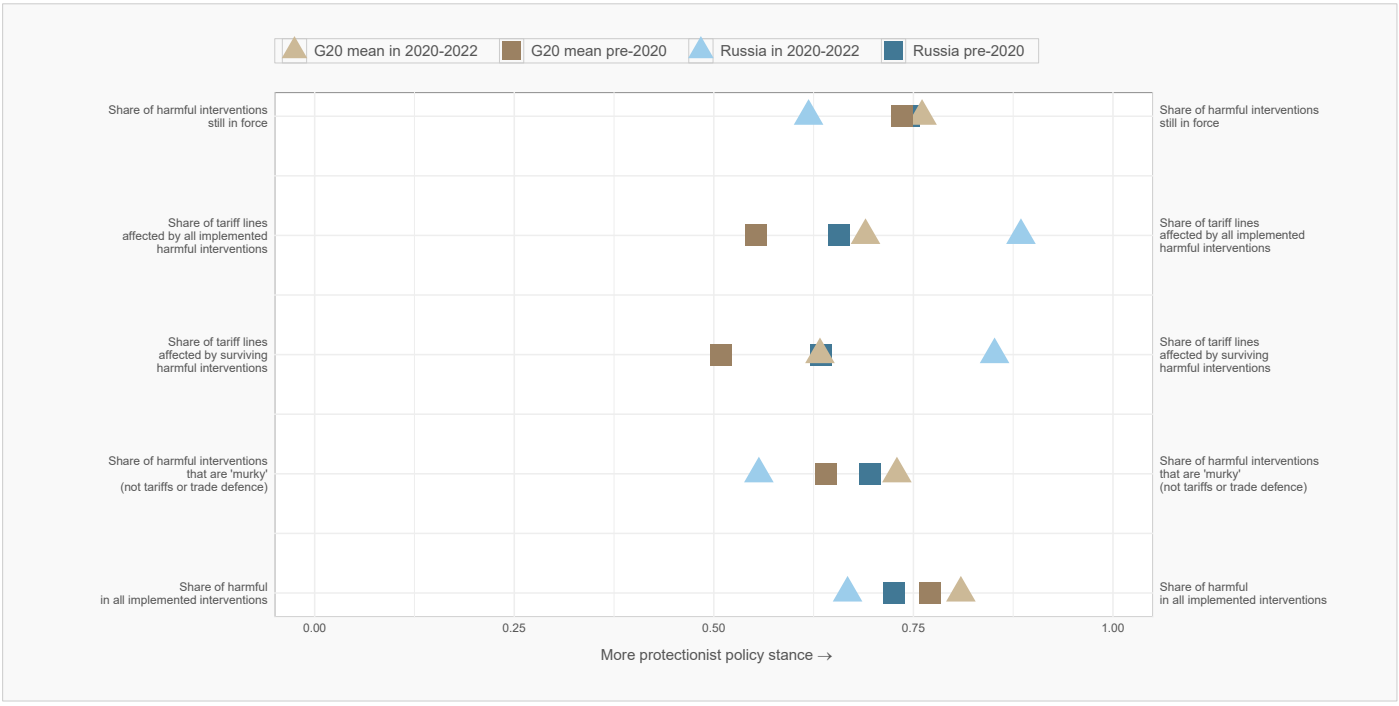
RUSSIA

Number of liberalising interventions imposed since November 2008



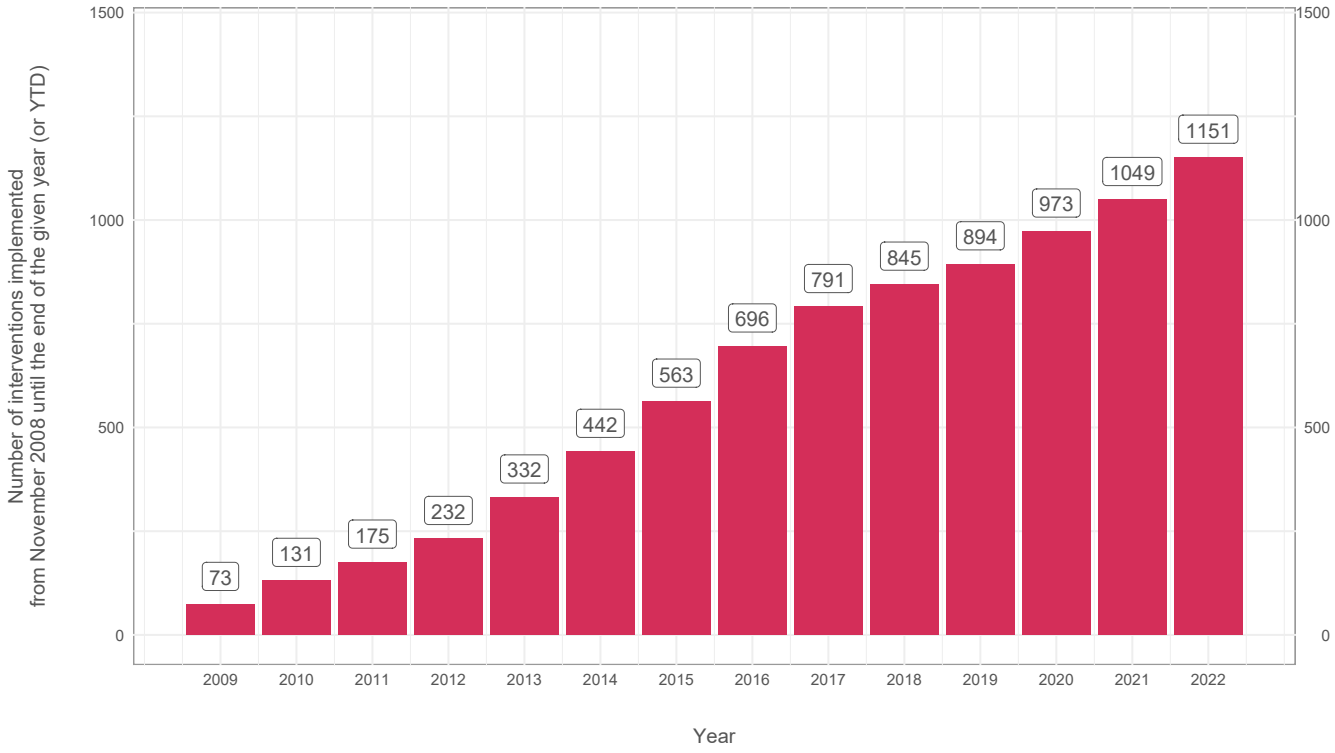
RUSSIA

Track record of protectionism



RUSSIA

Number of discriminatory interventions imposed since November 2008



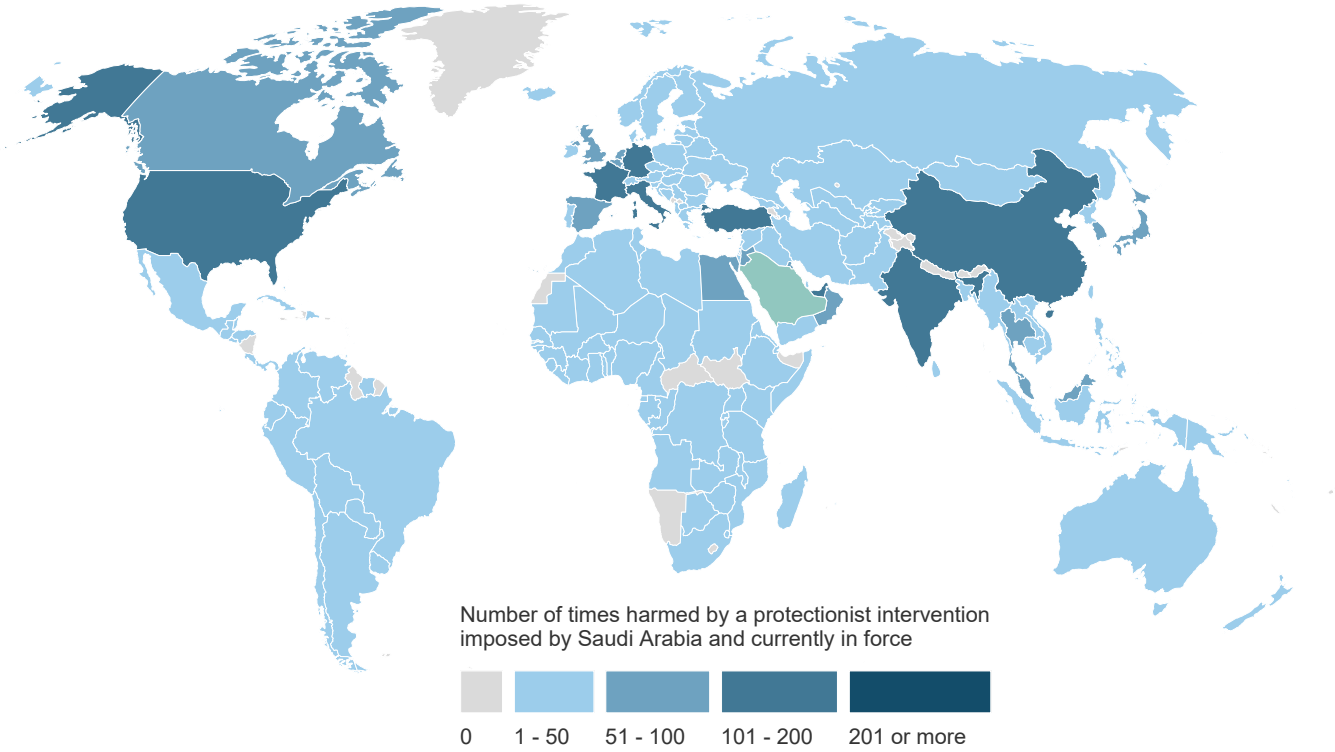
SAUDI ARABIA

What is at stake for Saudi Arabia's goods exporters?

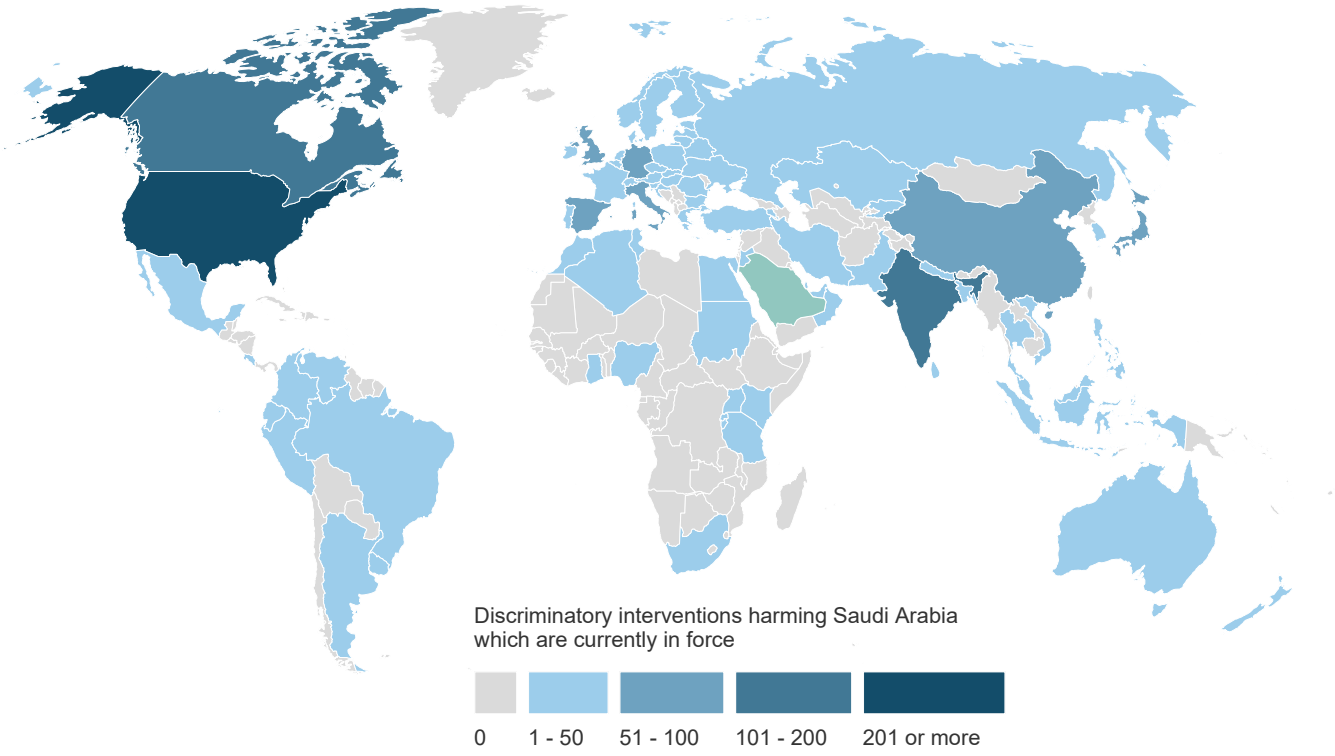
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	18.85	48.61	84.67	86.13	88.32	88.82	90.37	91.54	91.84	91.42	91.88	92.46	92.19	92.36
D	Contingent trade-protective measures	0.01	0.04	0.08	0.10	0.08	0.08	0.05	0.00	0.00	0.00	0.00	0.02	0.11	0.18
E	Non-automatic licensing, quotas etc.	10.49	5.99	5.99	6.75	6.04	6.05	7.33	7.89	7.98	8.17	8.74	8.87	8.33	12.81
F	Price-control measures, including additional taxes and charges	0.07	0.07	0.16	0.28	0.28	0.40	0.41	0.41	0.41	4.86	5.29	5.29	5.27	5.34
G	Finance measures	0.04	0.06	0.10	0.10	0.10	0.10	1.17	1.52	1.52	1.52	1.52	1.52	1.53	1.54
I	Trade-related investment measures	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.54
L	Subsidies (excl. export subsidies)	8.72	25.26	27.54	22.49	41.25	41.55	41.49	41.55	42.11	42.43	42.47	43.03	36.81	39.67
M	Government procurement restrictions	0.00	0.00	0.00	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.02	0.03
P	Export-related measures (incl. subsidies)	2.36	21.84	81.80	83.80	85.11	85.34	85.70	87.07	87.48	86.12	86.24	86.20	86.04	86.50
	Tariff measures	7.56	9.18	9.53	10.00	13.32	13.47	15.99	18.34	18.37	18.40	20.64	24.48	25.27	25.34
	Instrument unclear	0.00	0.00	0.00	0.00	0.04	0.87	0.89	0.89	0.89	1.36	2.34	2.34	2.34	2.43

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY SAUDI ARABIA'S DISCRIMINATORY INTERVENTIONS

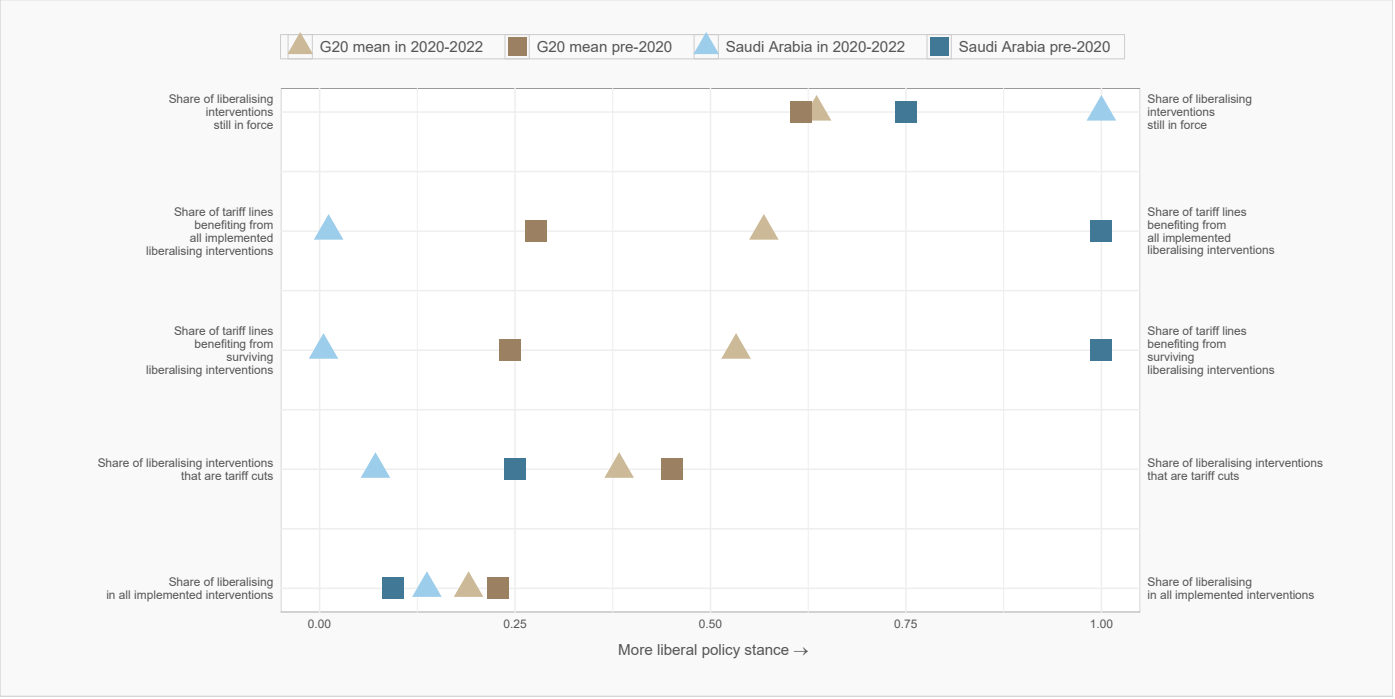


DISCRIMINATORY INTERVENTIONS HARMING SAUDI ARABIA'S INTERESTS



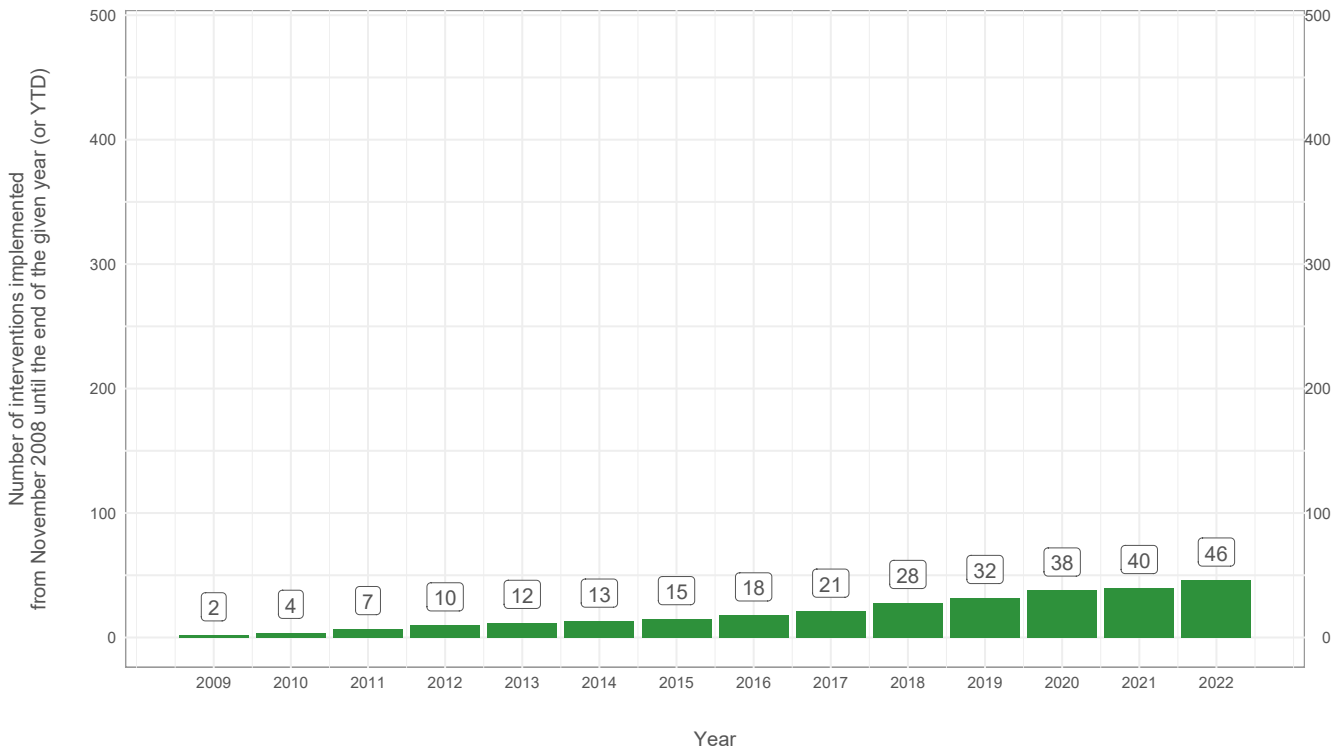
SAUDI ARABIA

Track record of liberalisation



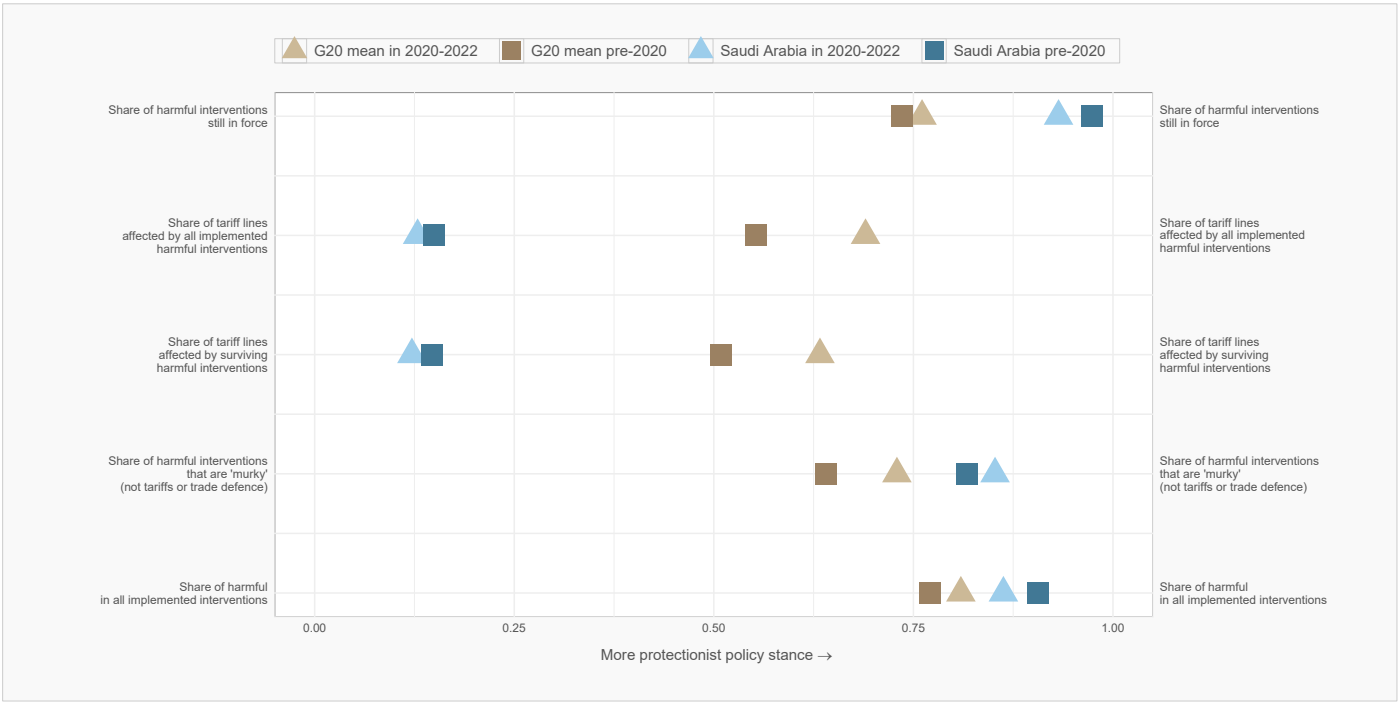
SAUDI ARABIA

Number of liberalising interventions imposed since November 2008



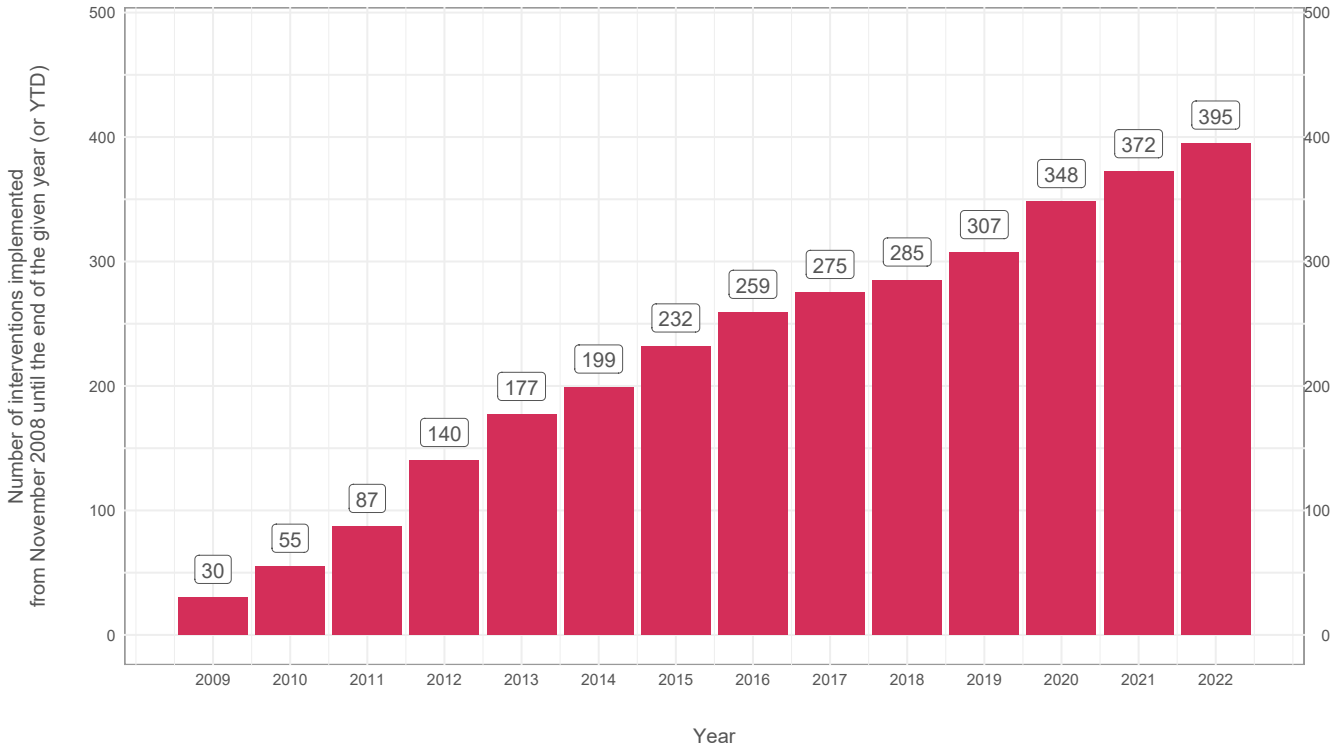
SAUDI ARABIA

Track record of protectionism



SAUDI ARABIA

Number of discriminatory interventions imposed since November 2008



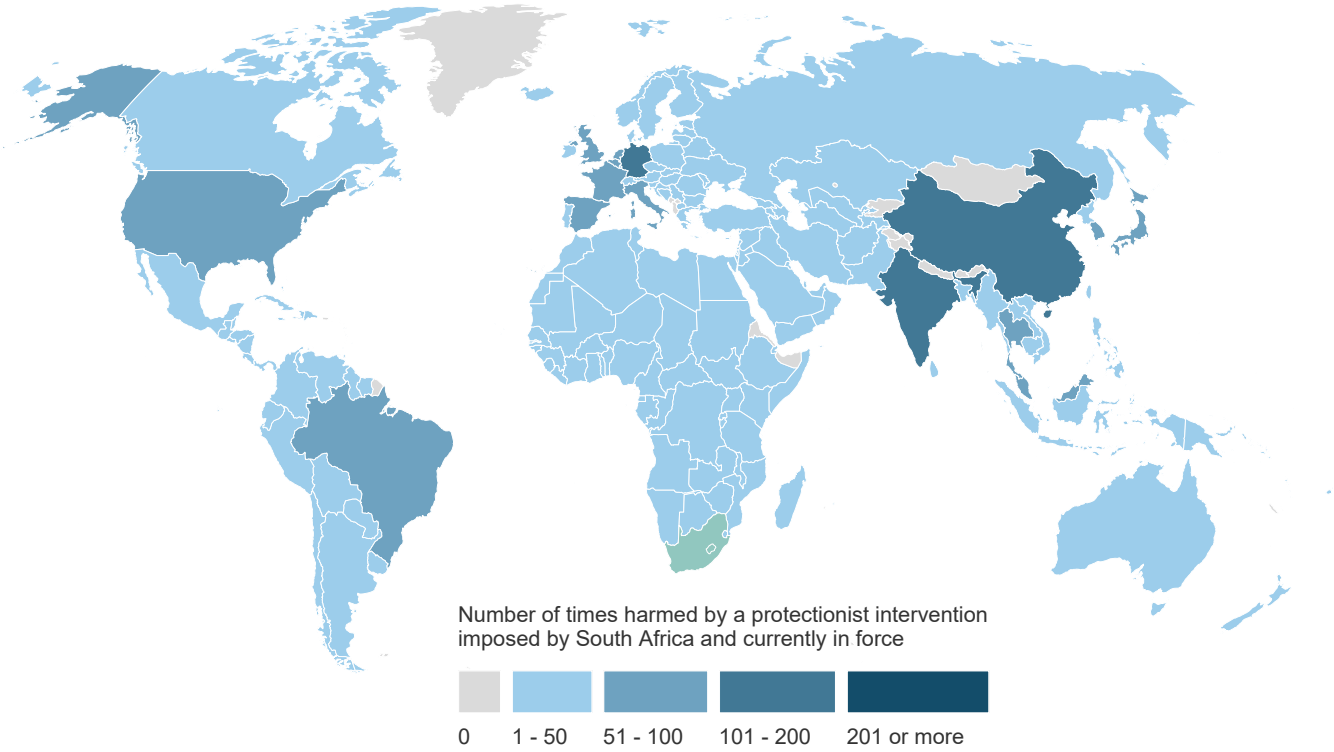
SOUTH AFRICA

What is at stake for South Africa's goods exporters?

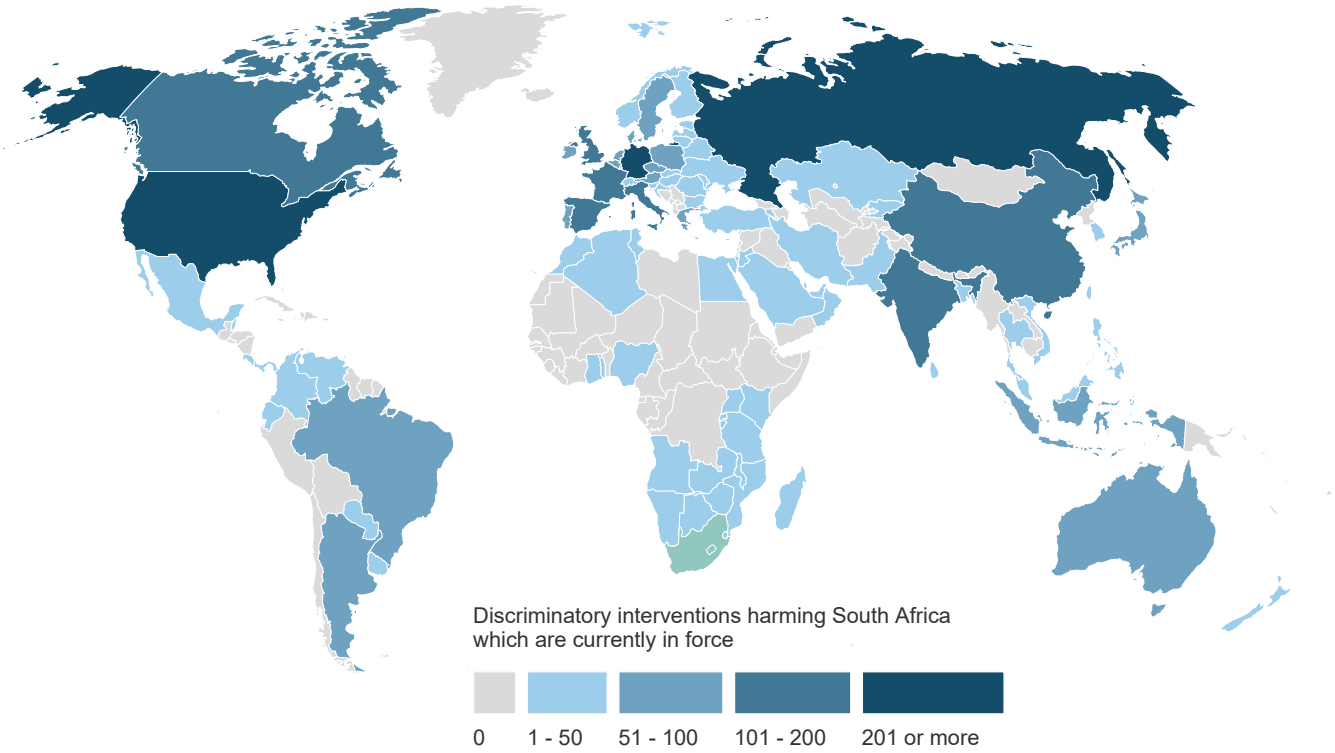
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	28.14	34.89	42.45	48.09	62.24	59.97	56.40	57.79	59.19	59.34	60.15	61.36	63.32	67.60
D	Contingent trade-protective measures	0.03	0.05	0.08	0.13	0.13	0.17	0.20	0.54	0.63	1.05	1.29	1.14	1.56	2.23
E	Non-automatic licensing, quotas etc.	3.03	3.40	4.71	5.34	5.50	5.97	5.71	6.32	6.72	6.95	6.94	8.35	8.46	8.54
F	Price-control measures, including additional taxes and charges	2.12	2.12	2.15	2.22	2.22	2.23	2.25	2.25	2.27	4.90	5.16	5.26	5.11	5.29
G	Finance measures	0.43	0.47	0.51	0.51	0.51	0.51	0.52	0.52	0.52	0.52	0.52	0.52	0.52	0.56
I	Trade-related investment measures	0.02	0.43	0.48	0.51	0.54	0.60	0.62	0.64	0.66	0.65	0.63	0.60	0.78	0.91
L	Subsidies (excl. export subsidies)	6.27	9.00	10.12	12.03	36.58	37.05	33.19	33.84	34.25	34.25	35.94	37.16	35.03	38.48
M	Government procurement restrictions	0.90	0.88	1.06	1.15	1.20	1.29	1.45	1.52	1.50	1.58	1.68	1.67	1.89	5.93
P	Export-related measures (incl. subsidies)	19.17	24.91	34.02	38.57	40.50	33.65	31.27	34.32	36.80	38.15	39.97	40.29	38.74	44.57
	Tariff measures	0.39	2.05	2.47	5.34	14.15	13.93	14.56	15.51	15.98	17.52	17.63	18.50	18.75	18.08
	Instrument unclear	0.05	0.70	0.69	0.70	1.78	2.66	0.32	0.44	1.09	2.20	2.23	2.23	2.25	2.33

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY SOUTH AFRICA'S DISCRIMINATORY INTERVENTIONS

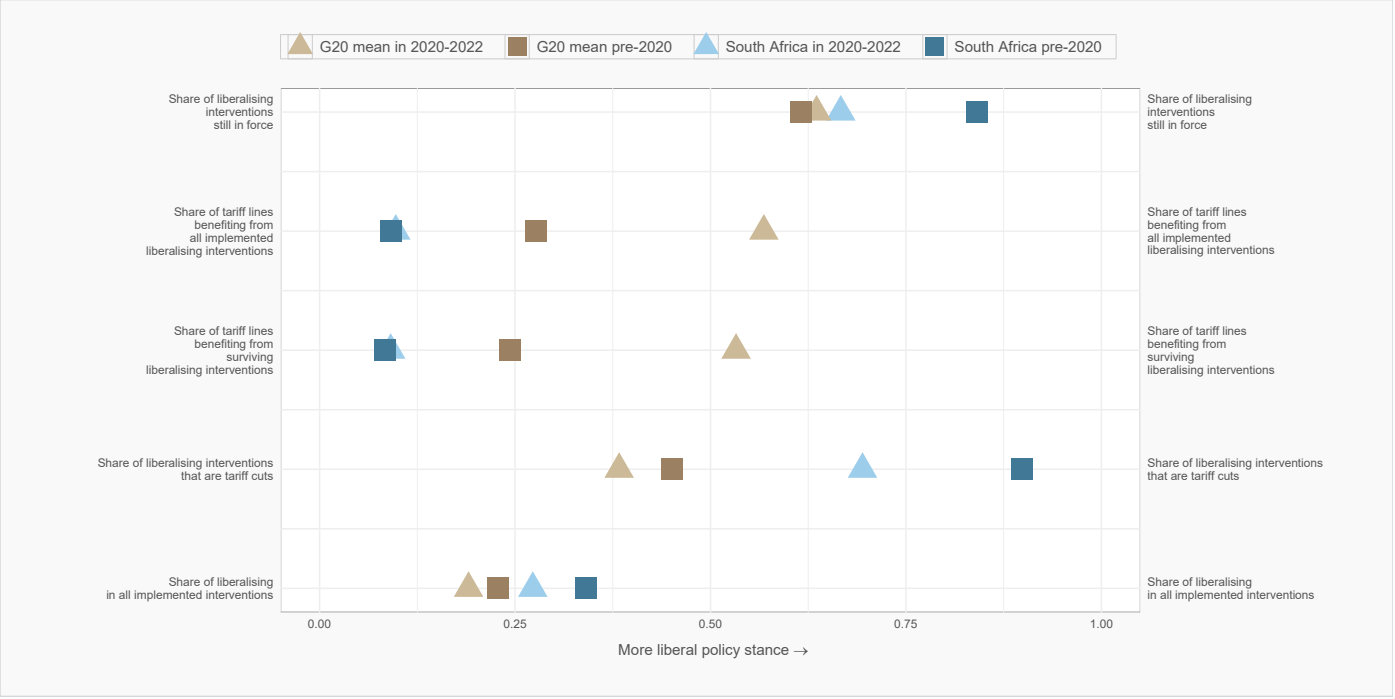


DISCRIMINATORY INTERVENTIONS HARMING SOUTH AFRICA'S INTERESTS



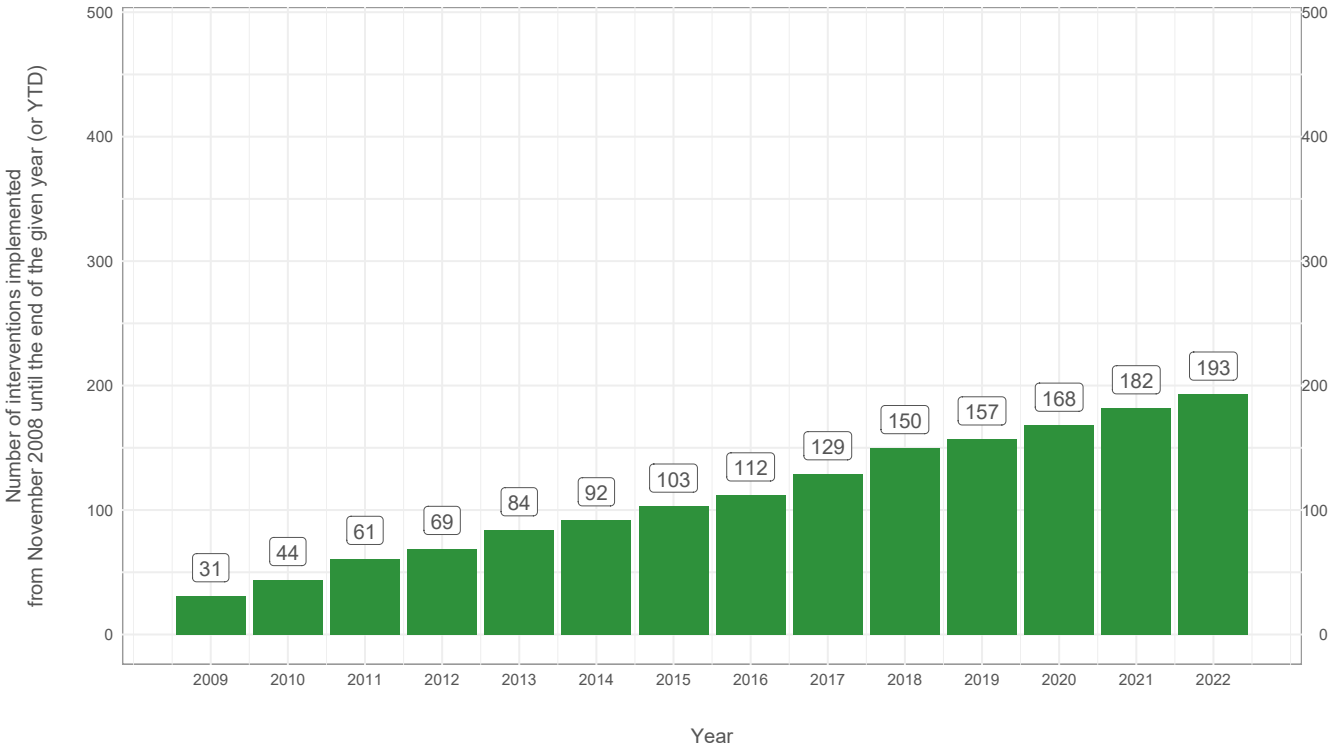
SOUTH AFRICA

Track record of liberalisation



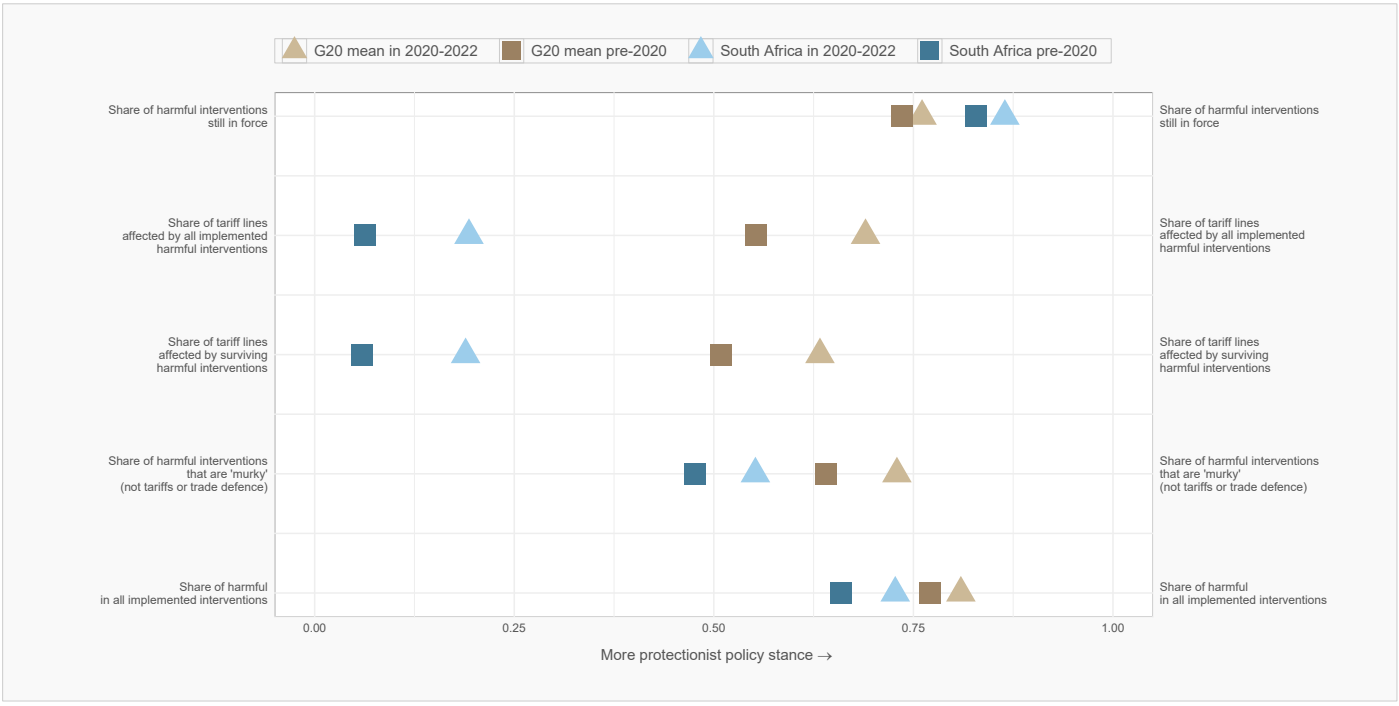
SOUTH AFRICA

Number of liberalising interventions imposed since November 2008



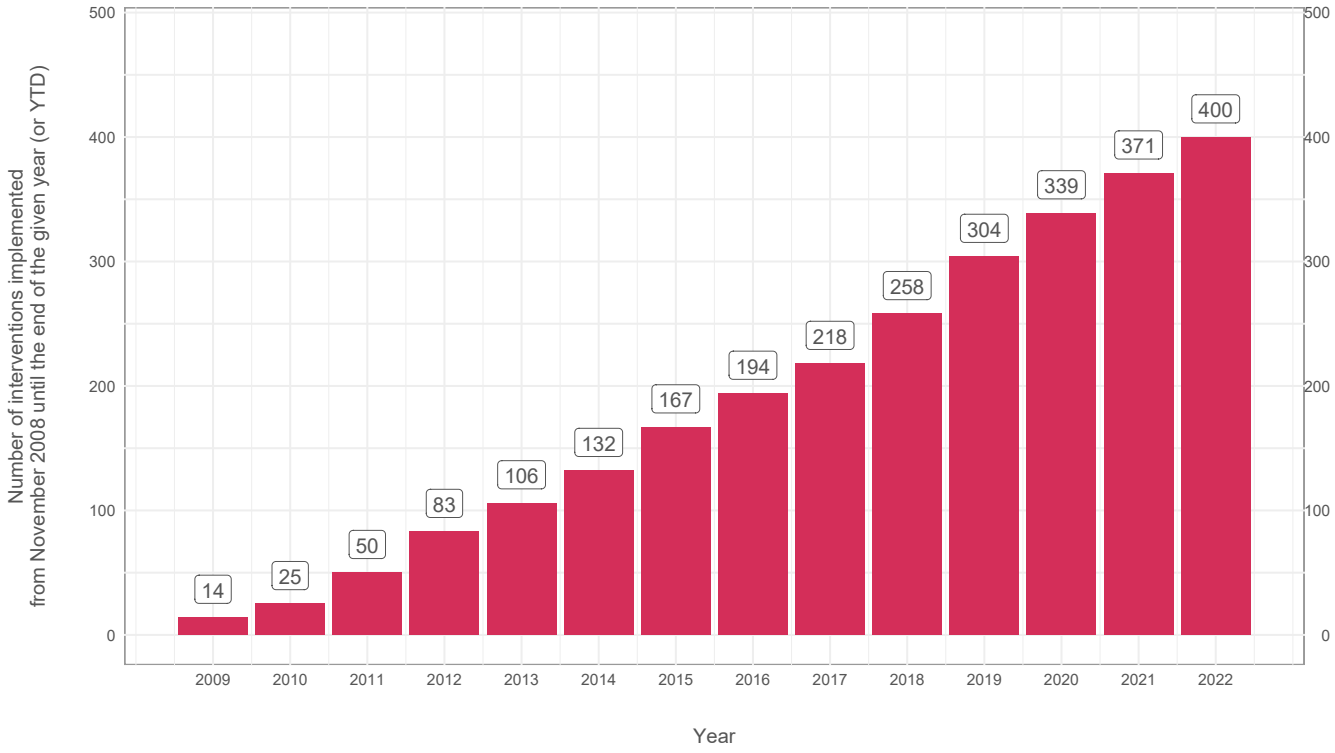
SOUTH AFRICA

Track record of protectionism



SOUTH AFRICA

Number of discriminatory interventions imposed since November 2008



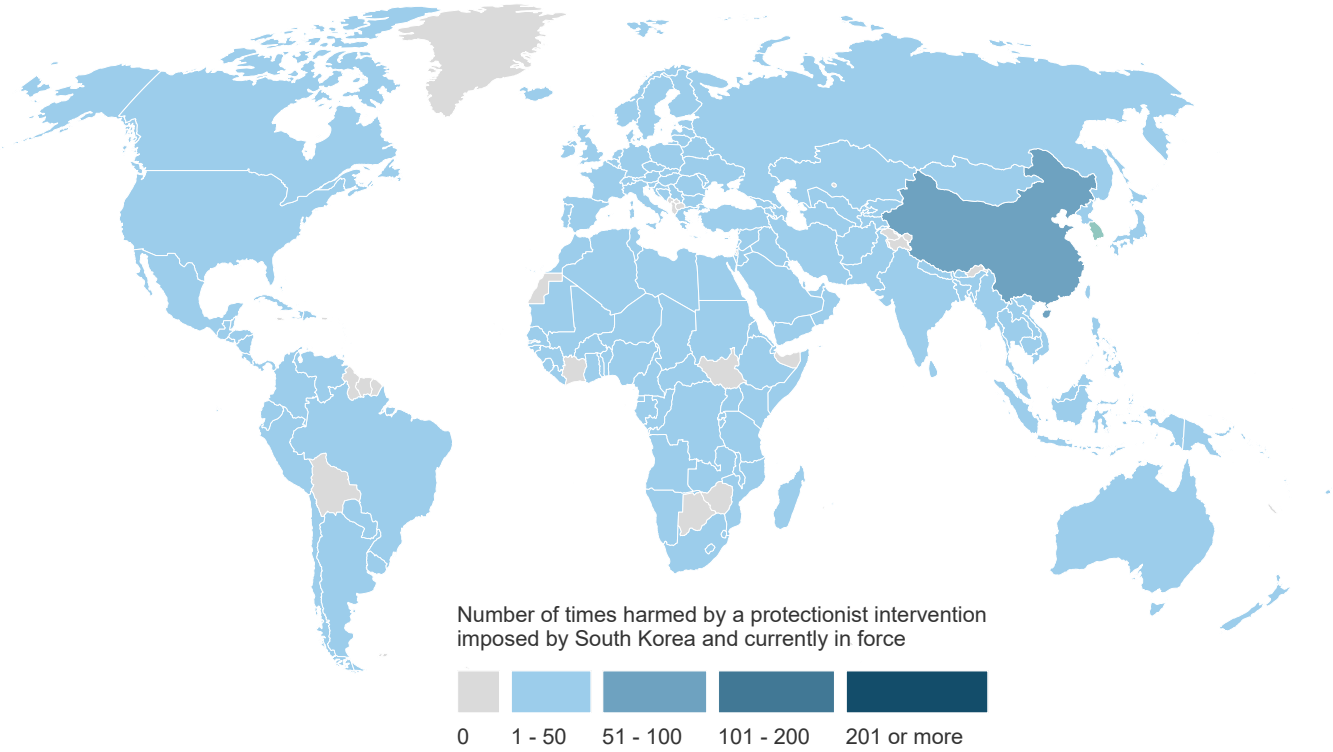
SOUTH KOREA

What is at stake for South Korea's goods exporters?

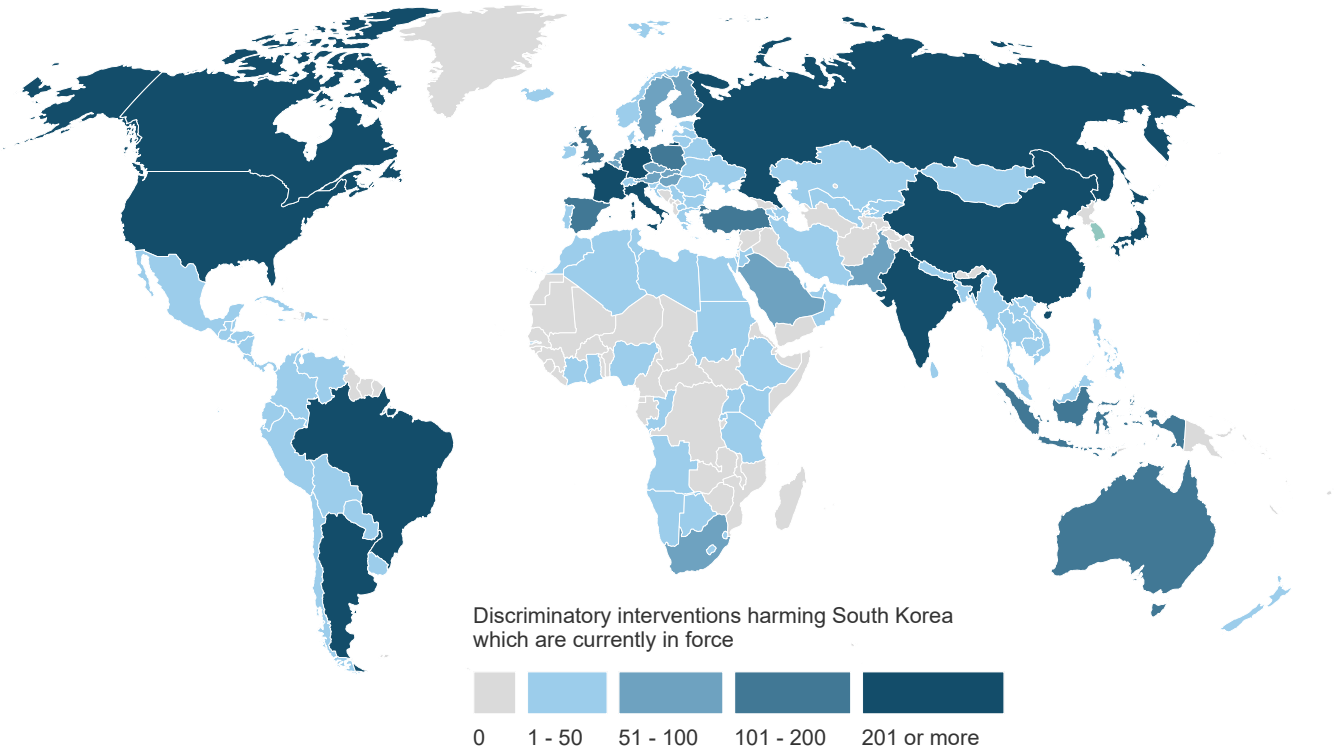
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	61.94	76.64	79.15	82.63	87.84	88.39	87.94	88.65	89.19	90.23	91.47	91.80	88.30	89.00
D	Contingent trade-protective measures	0.25	1.22	1.36	1.63	1.79	1.84	1.85	2.25	2.47	3.10	3.56	3.82	4.08	4.12
E	Non-automatic licensing, quotas etc.	3.26	3.63	5.65	5.81	5.96	6.21	7.15	7.97	8.34	8.47	8.56	8.67	10.38	11.01
F	Price-control measures, including additional taxes and charges	0.06	0.13	0.14	0.12	0.08	1.53	1.97	2.04	2.25	3.07	3.30	3.75	3.78	3.80
G	Finance measures	0.19	0.66	1.37	1.37	1.37	1.37	1.37	1.37	1.37	1.38	1.38	1.38	1.38	1.40
I	Trade-related investment measures	0.60	3.40	3.56	3.66	3.67	3.71	4.11	4.32	4.38	4.44	4.41	4.30	4.48	4.69
L	Subsidies (excl. export subsidies)	24.74	35.65	39.68	41.85	52.00	52.36	54.28	55.05	54.23	55.94	56.95	57.84	43.08	44.32
M	Government procurement restrictions	0.85	2.19	2.33	2.48	2.80	3.21	3.66	3.71	3.93	4.02	3.95	4.21	4.99	6.41
P	Export-related measures (incl. subsidies)	41.99	57.46	62.32	69.91	74.19	74.05	72.13	73.42	74.50	75.55	77.86	78.21	77.10	77.99
	Tariff measures	2.18	2.54	6.46	7.48	13.35	9.50	10.13	14.13	16.52	14.43	15.11	14.86	16.77	16.95
	Instrument unclear	0.12	0.56	0.80	0.84	0.76	0.82	0.85	0.96	0.96	1.42	1.58	1.58	1.61	1.69

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY SOUTH KOREA'S DISCRIMINATORY INTERVENTIONS

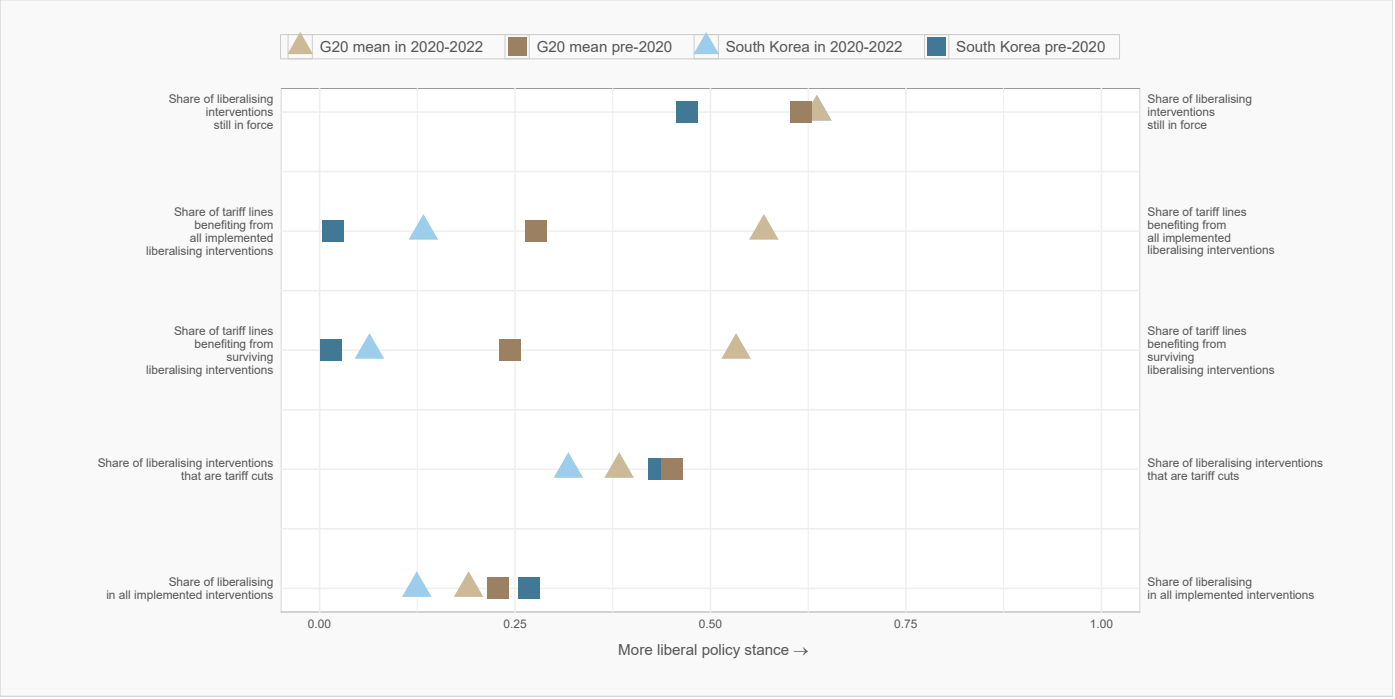


DISCRIMINATORY INTERVENTIONS HARMING SOUTH KOREA'S INTERESTS



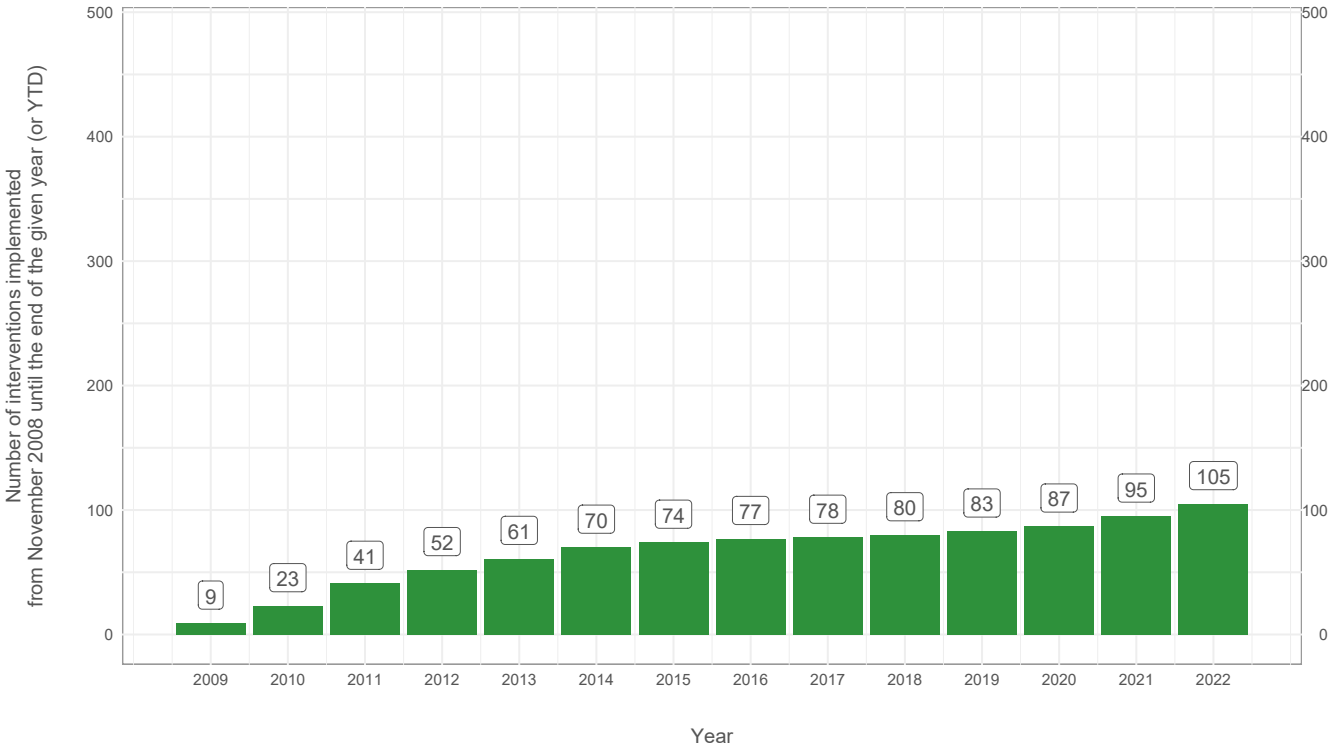
SOUTH KOREA

Track record of liberalisation



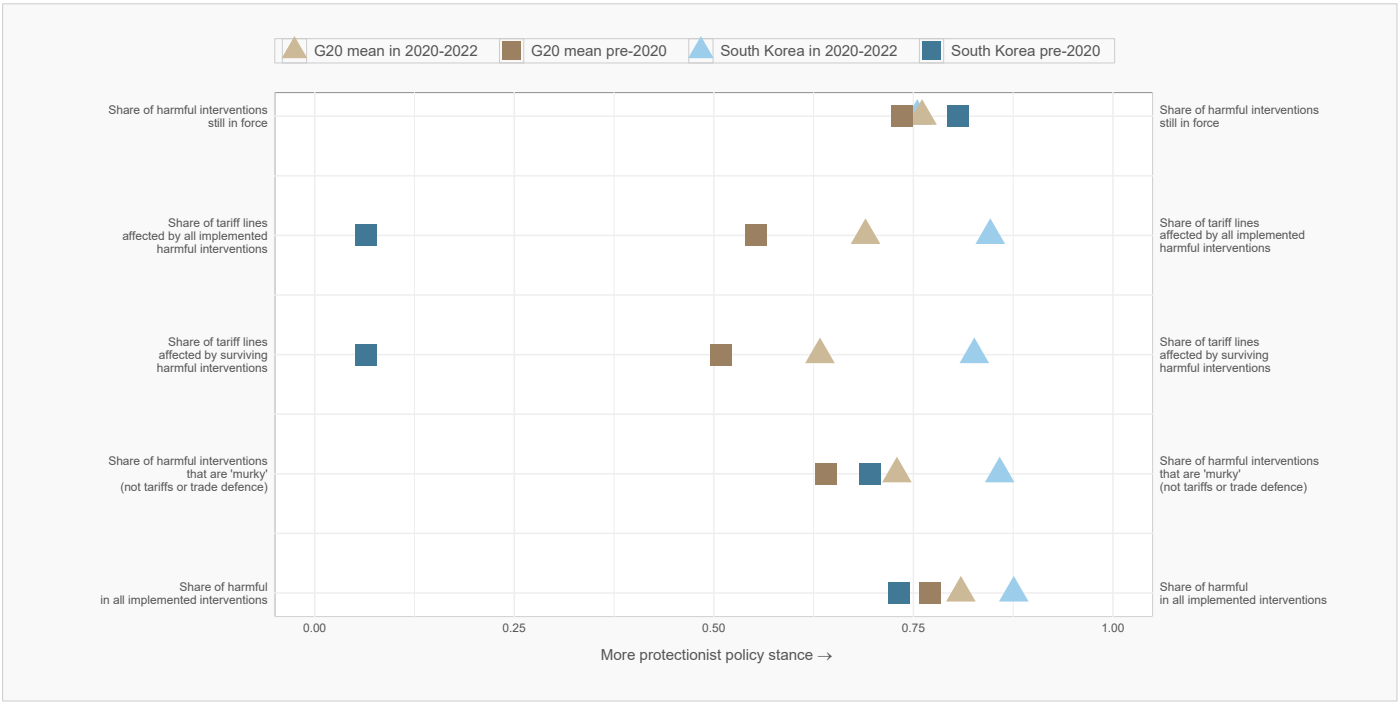
SOUTH KOREA

Number of liberalising interventions imposed since November 2008



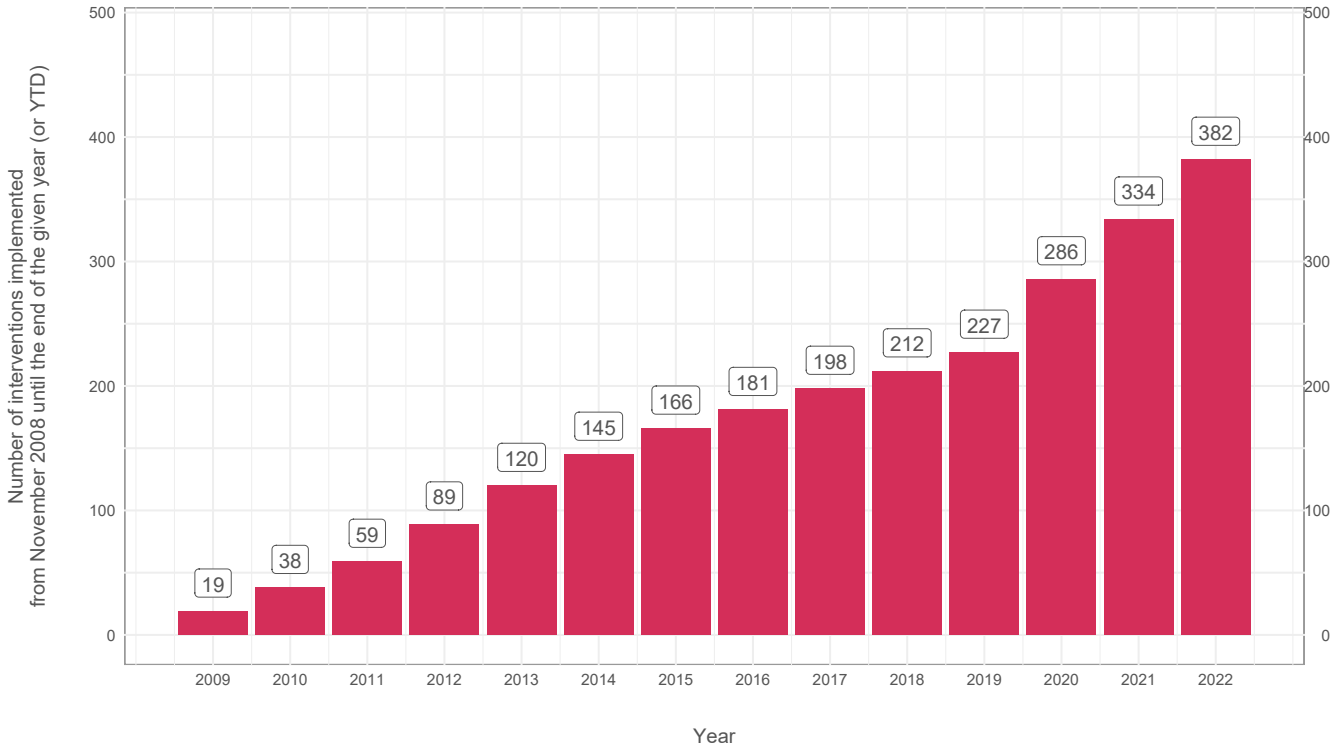
SOUTH KOREA

Track record of protectionism



SOUTH KOREA

Number of discriminatory interventions imposed since November 2008



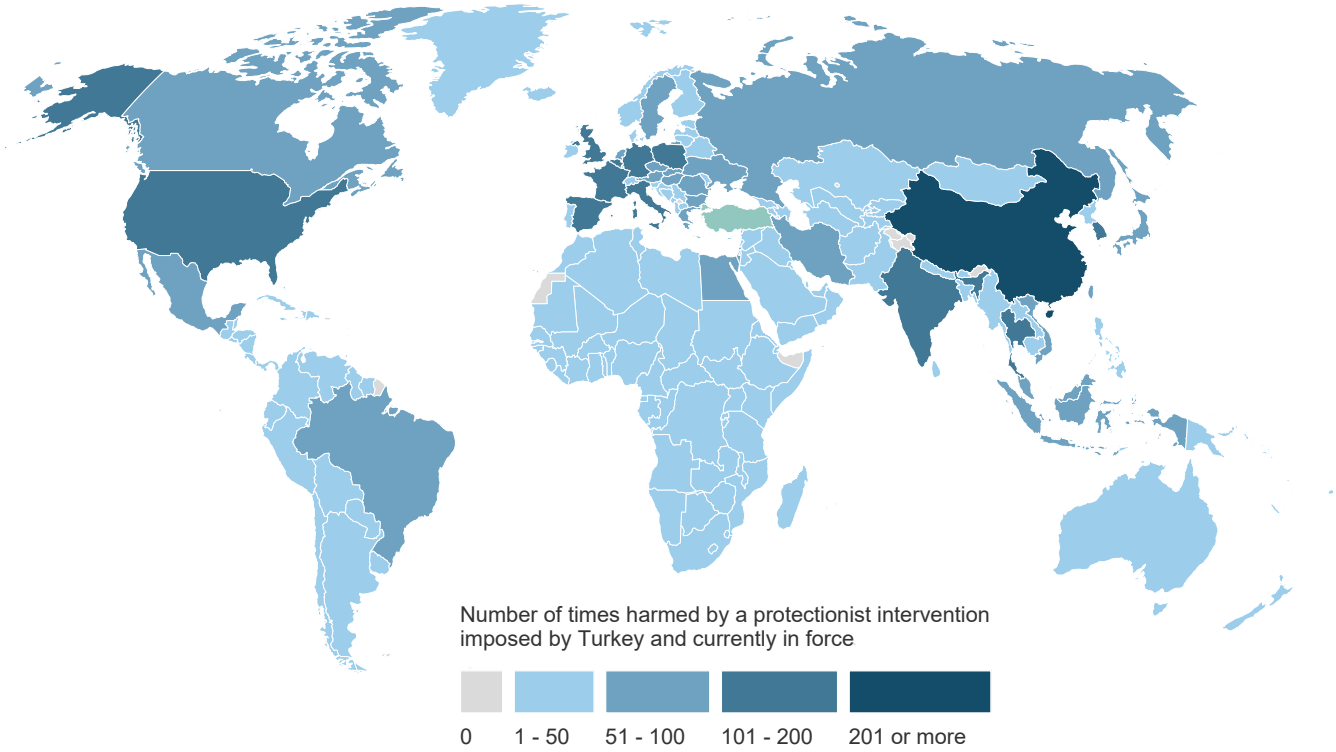
TURKEY

What is at stake for Turkey's goods exporters?

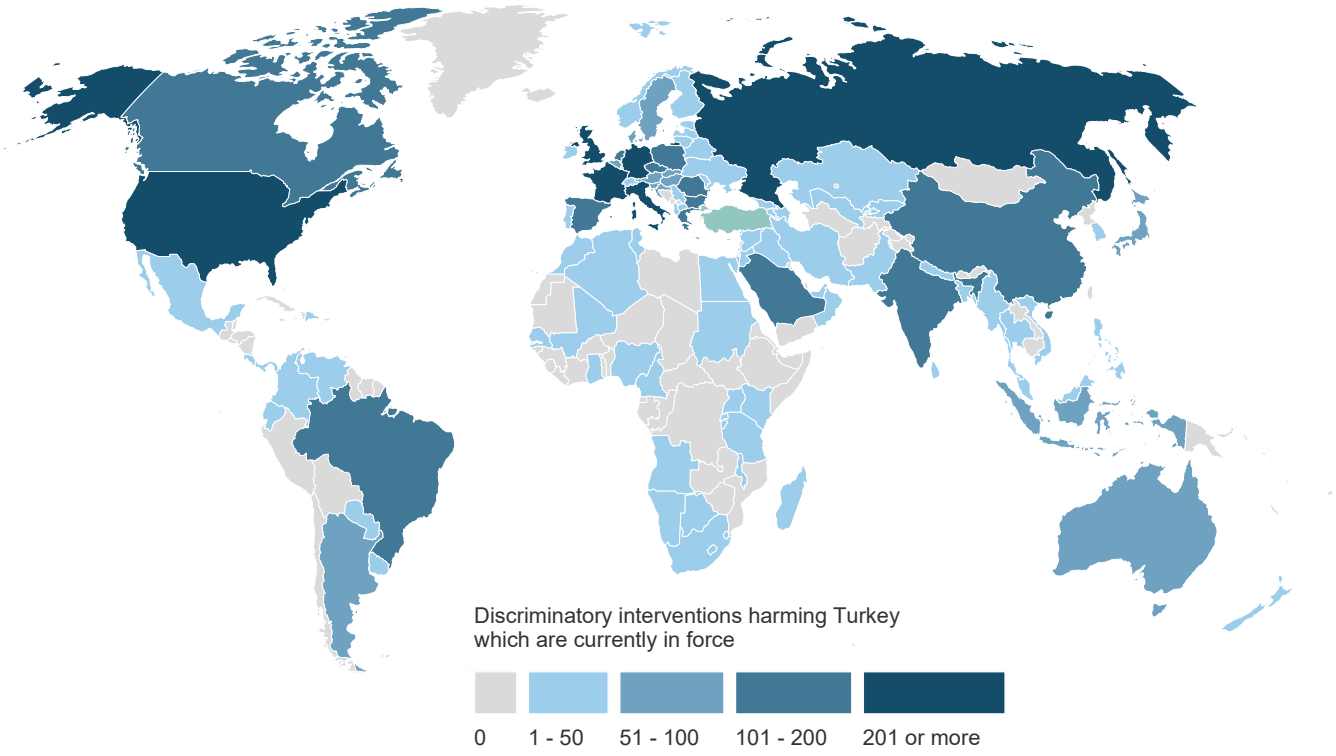
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	56.75	68.00	70.46	72.71	81.02	82.82	82.44	83.09	83.76	84.36	85.20	85.43	82.79	83.28
D	Contingent trade-protective measures	0.08	0.01	0.03	0.05	0.26	0.76	0.87	1.01	1.09	2.86	4.88	4.45	4.19	4.30
E	Non-automatic licensing, quotas etc.	0.12	0.21	0.76	0.97	1.00	1.04	1.26	2.87	4.44	4.60	4.60	3.81	3.26	3.05
F	Price-control measures, including additional taxes and charges	0.43	0.46	0.46	0.47	0.47	0.57	0.60	0.61	0.61	1.00	1.04	1.07	1.07	1.07
G	Finance measures	0.53	0.50	0.51	0.51	0.51	0.51	0.72	0.79	0.79	0.80	0.82	0.82	0.82	0.83
I	Trade-related investment measures	0.53	3.01	3.25	3.26	3.28	3.32	3.40	3.41	3.42	3.39	3.39	3.47	3.57	3.93
L	Subsidies (excl. export subsidies)	12.15	19.46	19.25	20.13	60.69	64.44	65.41	66.15	66.35	67.09	68.18	68.88	45.42	46.69
M	Government procurement restrictions	0.94	1.43	1.38	1.46	1.53	2.02	2.54	2.76	2.89	2.92	2.91	3.34	3.59	3.72
P	Export-related measures (incl. subsidies)	47.54	58.84	62.15	65.16	67.42	66.97	66.17	68.22	69.17	69.88	71.70	72.15	71.16	71.88
	Tariff measures	0.31	0.39	0.75	1.22	1.44	1.22	4.77	5.12	5.68	7.14	8.81	9.58	9.62	9.67
	Instrument unclear	0.00	0.46	0.66	0.70	0.70	0.75	0.81	0.90	0.92	1.07	1.30	1.30	1.28	1.82

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY TURKEY'S DISCRIMINATORY INTERVENTIONS

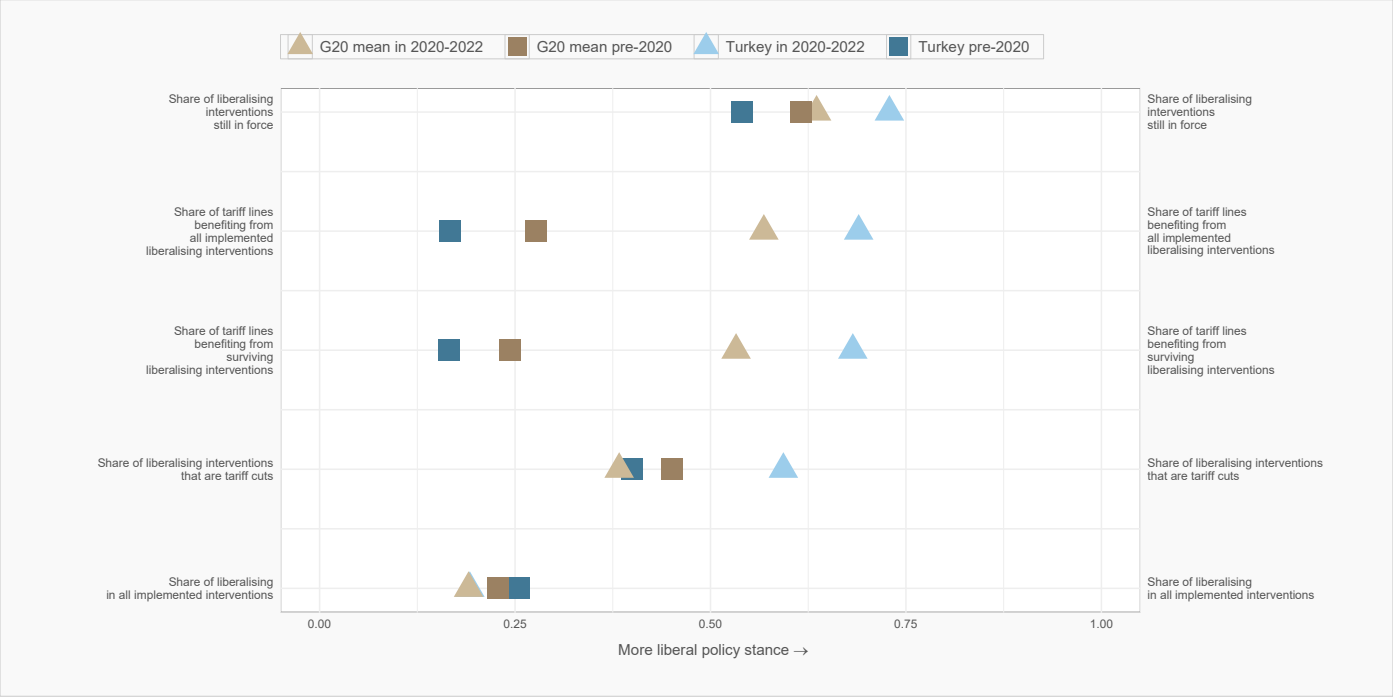


DISCRIMINATORY INTERVENTIONS HARMING TURKEY'S INTERESTS



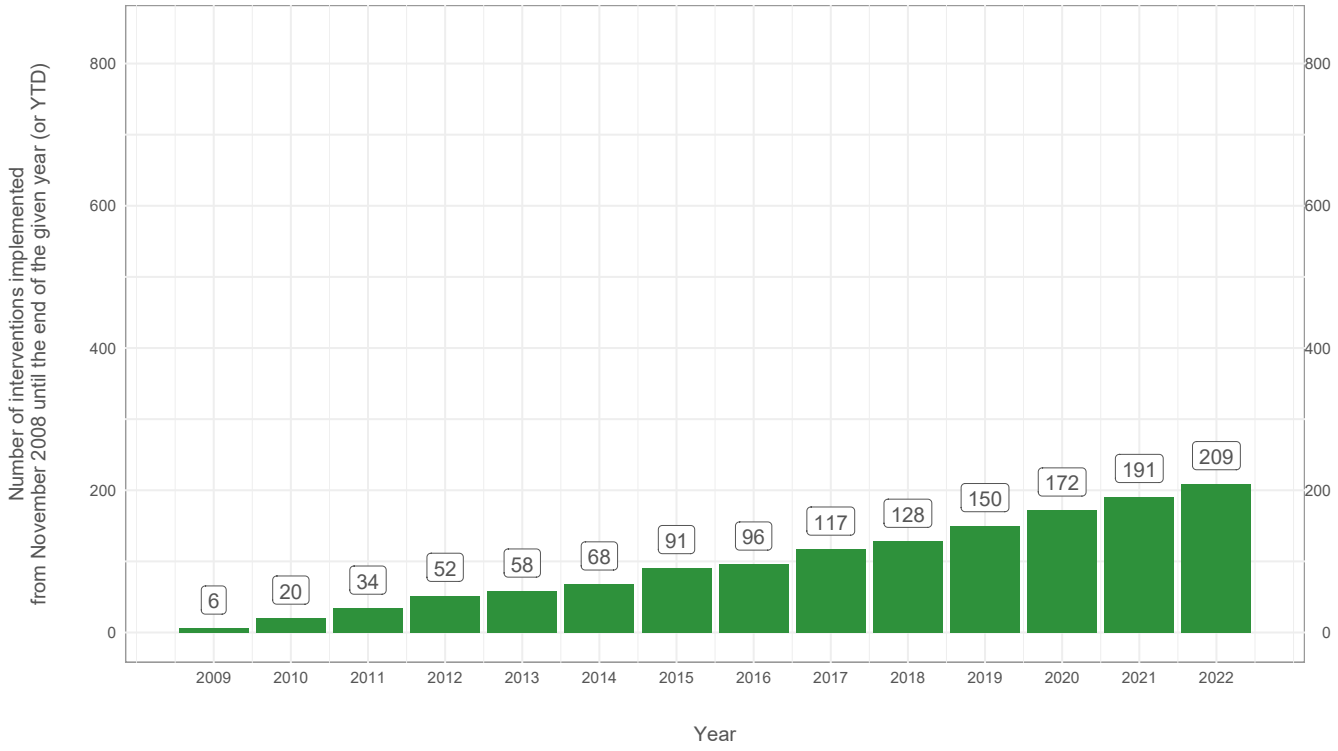
TURKEY

Track record of liberalisation



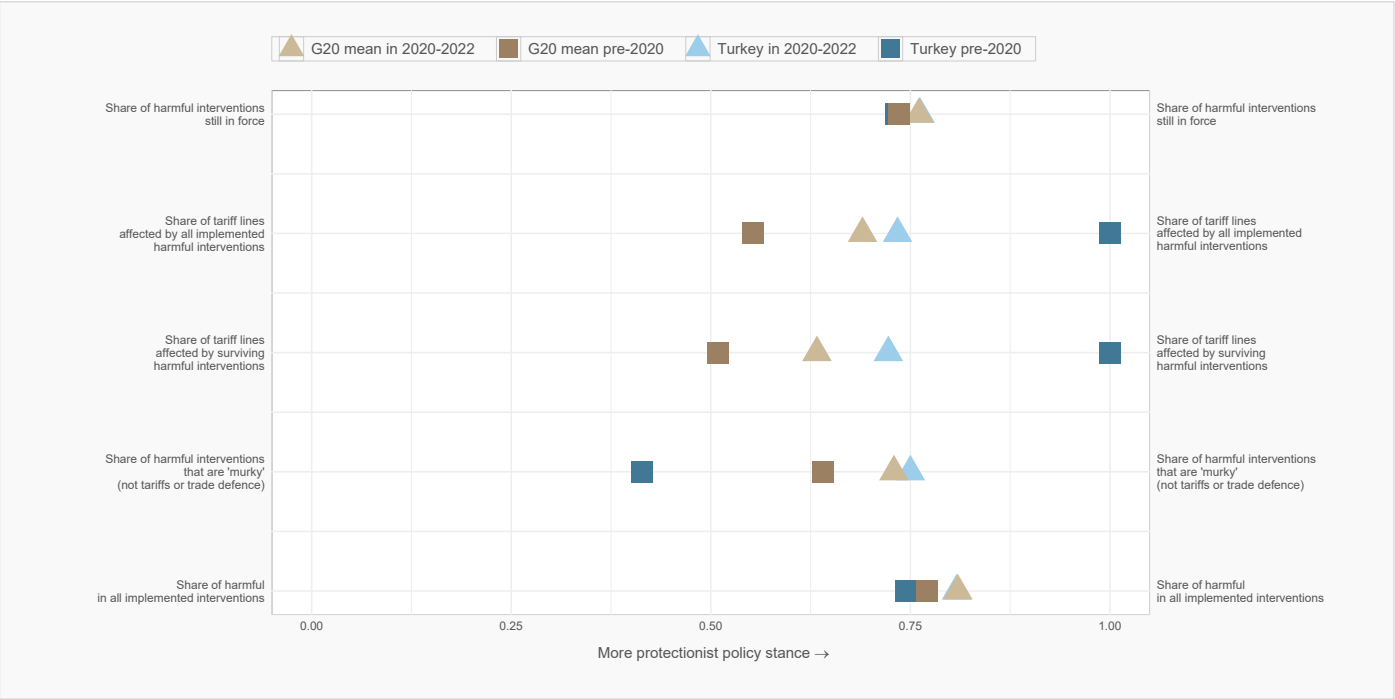
TURKEY

Number of liberalising interventions imposed since November 2008



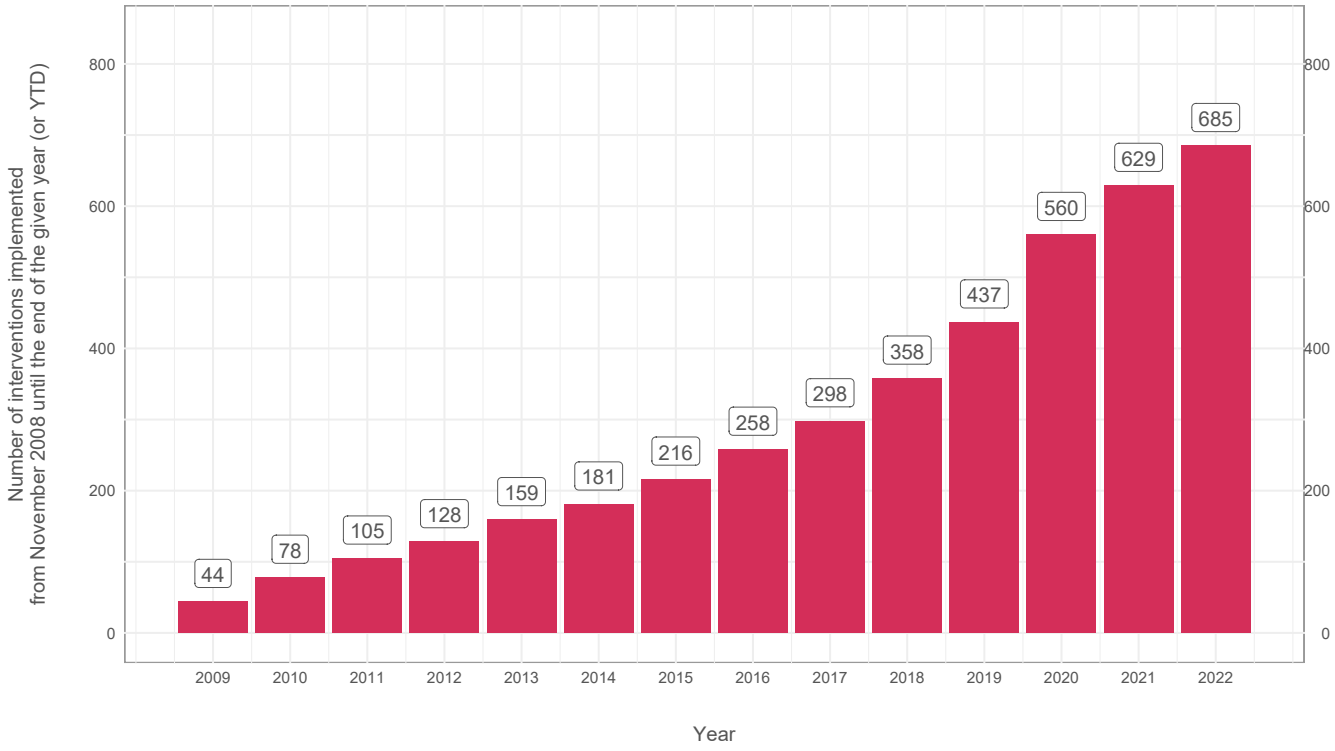
TURKEY

Track record of protectionism



TURKEY

Number of discriminatory interventions imposed since November 2008



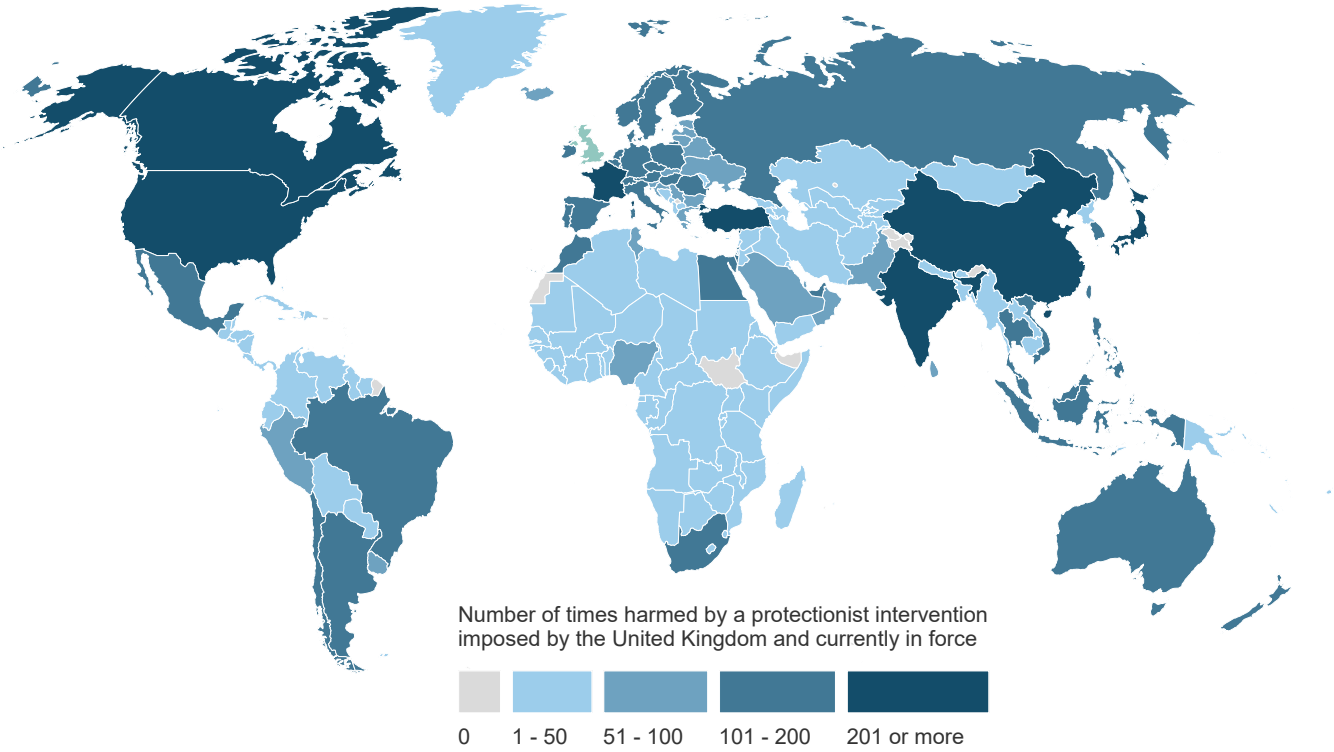
UNITED KINGDOM

What is at stake for the United Kingdom's goods exporters?

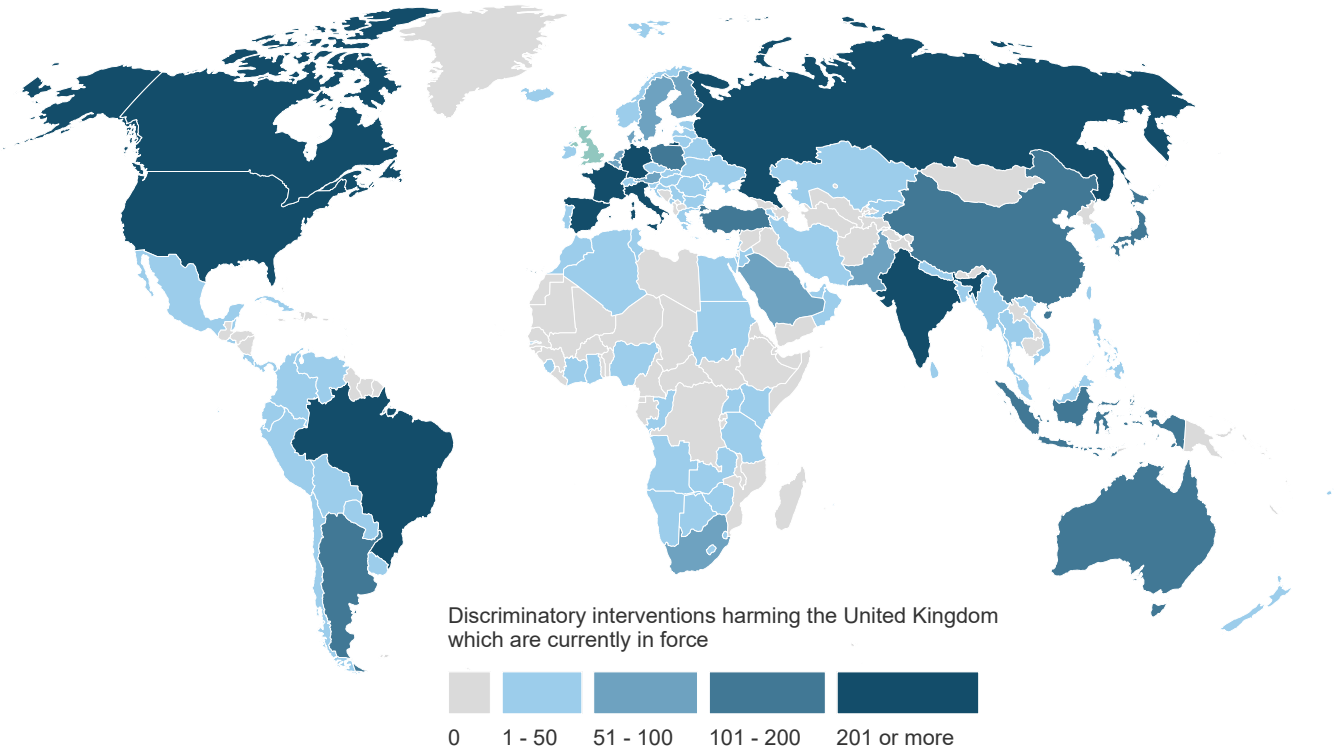
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	38.56	51.46	60.63	65.90	69.47	71.40	73.83	75.77	77.06	78.01	79.78	80.61	79.27	79.61
D	Contingent trade-protective measures	0.01	0.02	0.03	0.04	0.06	0.07	0.10	0.14	0.15	0.19	0.22	0.27	0.29	0.31
E	Non-automatic licensing, quotas etc.	0.38	0.45	0.64	0.71	0.81	0.83	0.93	0.89	1.54	2.39	2.41	3.40	3.83	5.44
F	Price-control measures, including additional taxes and charges	0.01	0.04	0.06	0.08	0.07	0.09	0.16	0.21	0.33	1.10	1.18	1.28	1.33	1.36
G	Finance measures	0.40	0.46	0.47	0.47	0.47	0.47	0.47	0.47	0.47	0.48	0.49	0.49	0.48	0.50
I	Trade-related investment measures	0.37	1.64	1.76	1.78	1.78	1.80	1.88	1.96	1.99	1.97	2.00	2.05	2.11	2.15
L	Subsidies (excl. export subsidies)	8.86	17.78	20.44	22.39	24.06	28.98	31.58	33.60	37.56	38.87	40.62	43.83	42.41	44.50
M	Government procurement restrictions	0.36	0.70	0.79	1.00	1.07	1.28	1.67	1.71	1.73	1.77	1.91	2.62	2.98	4.19
P	Export-related measures (incl. subsidies)	30.63	41.26	52.95	60.51	63.81	61.93	63.26	65.89	67.35	68.15	69.75	70.37	67.55	68.74
	Tariff measures	0.60	0.59	0.65	1.04	1.70	1.75	2.13	2.58	2.94	3.12	3.49	4.18	4.70	4.80
	Instrument unclear	0.02	0.29	0.41	0.42	0.50	1.79	2.06	2.14	2.25	2.39	2.39	2.39	2.42	2.67

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY THE UK'S DISCRIMINATORY INTERVENTIONS

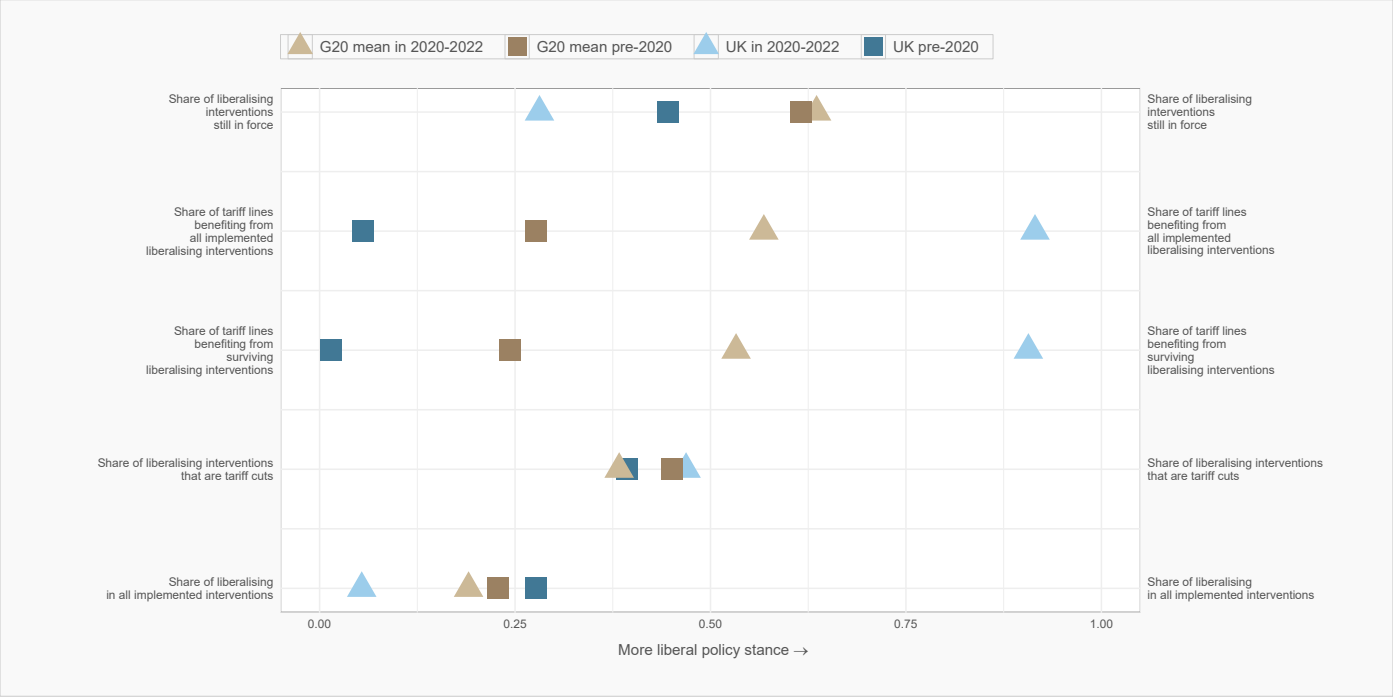


DISCRIMINATORY INTERVENTIONS HARMING THE UK'S INTERESTS



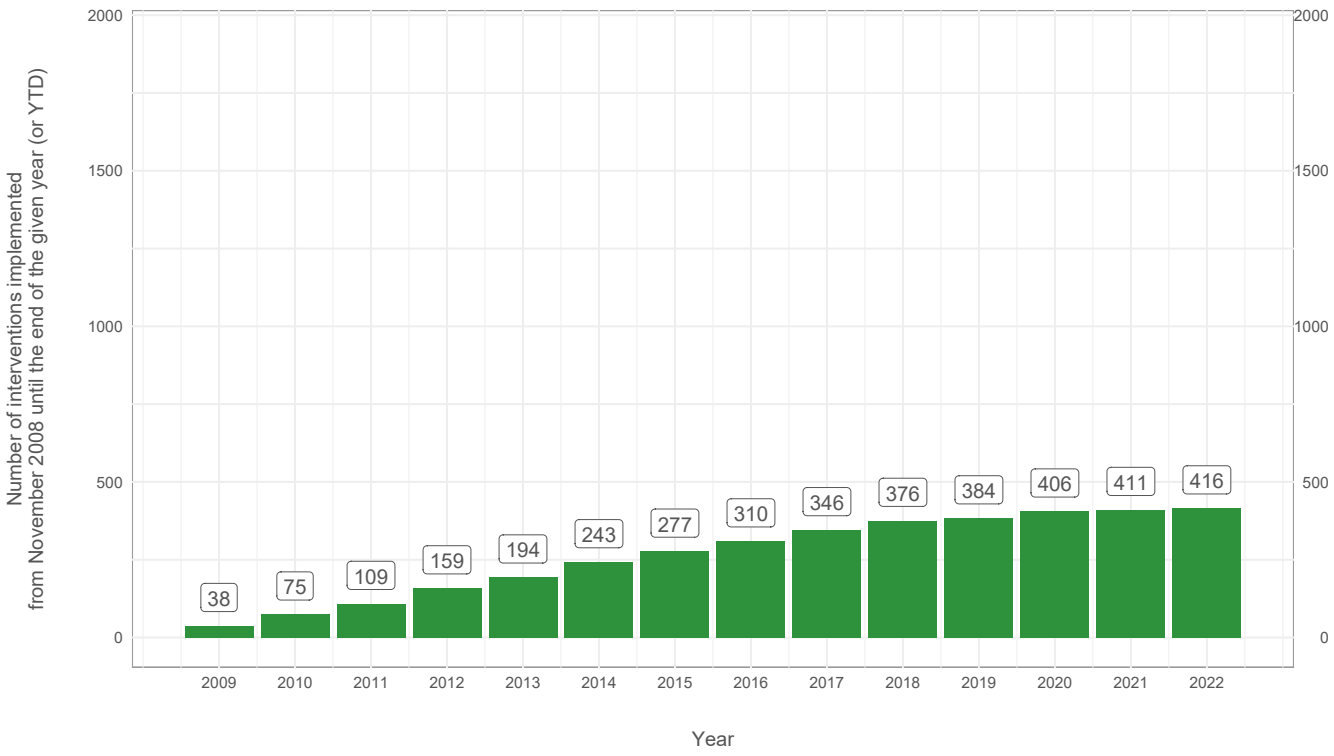
UNITED KINGDOM

Track record of liberalisation



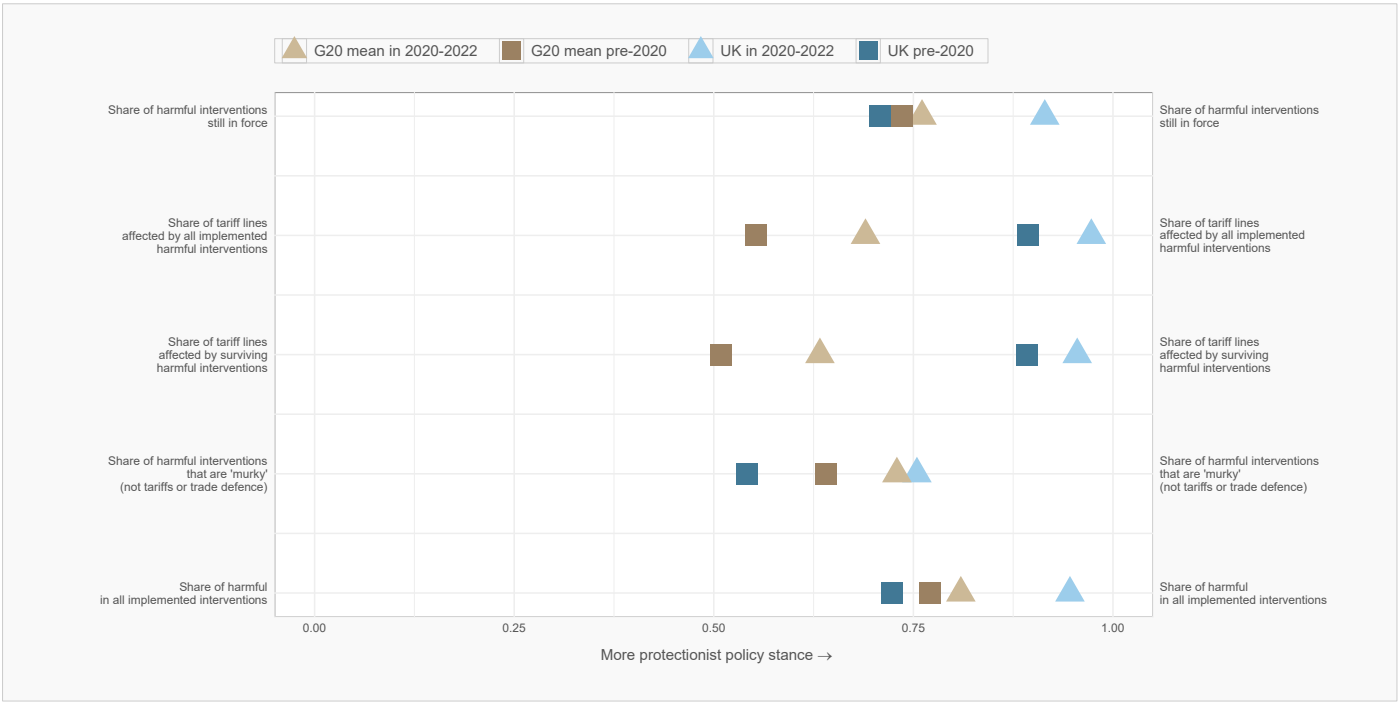
UNITED KINGDOM

Number of liberalising interventions imposed since November 2008



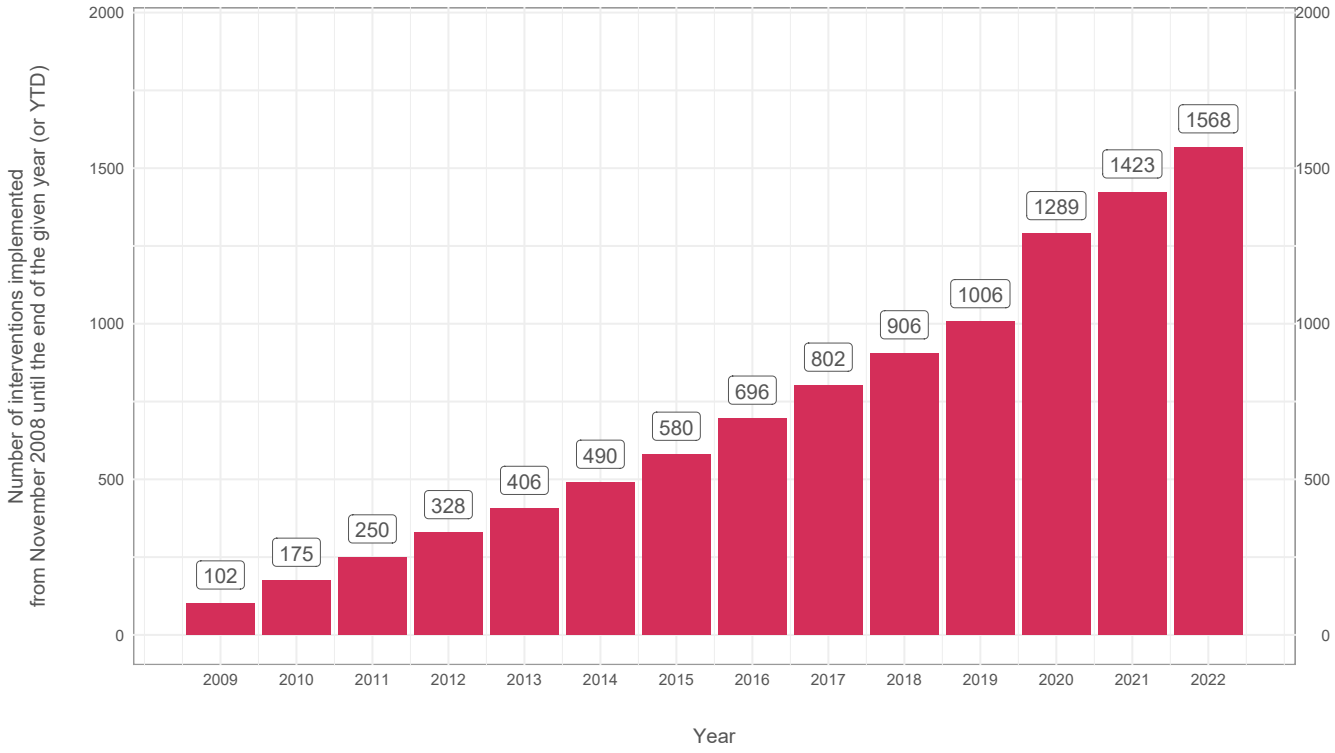
UNITED KINGDOM

Track record of protectionism



UNITED KINGDOM

Number of discriminatory interventions imposed since November 2008



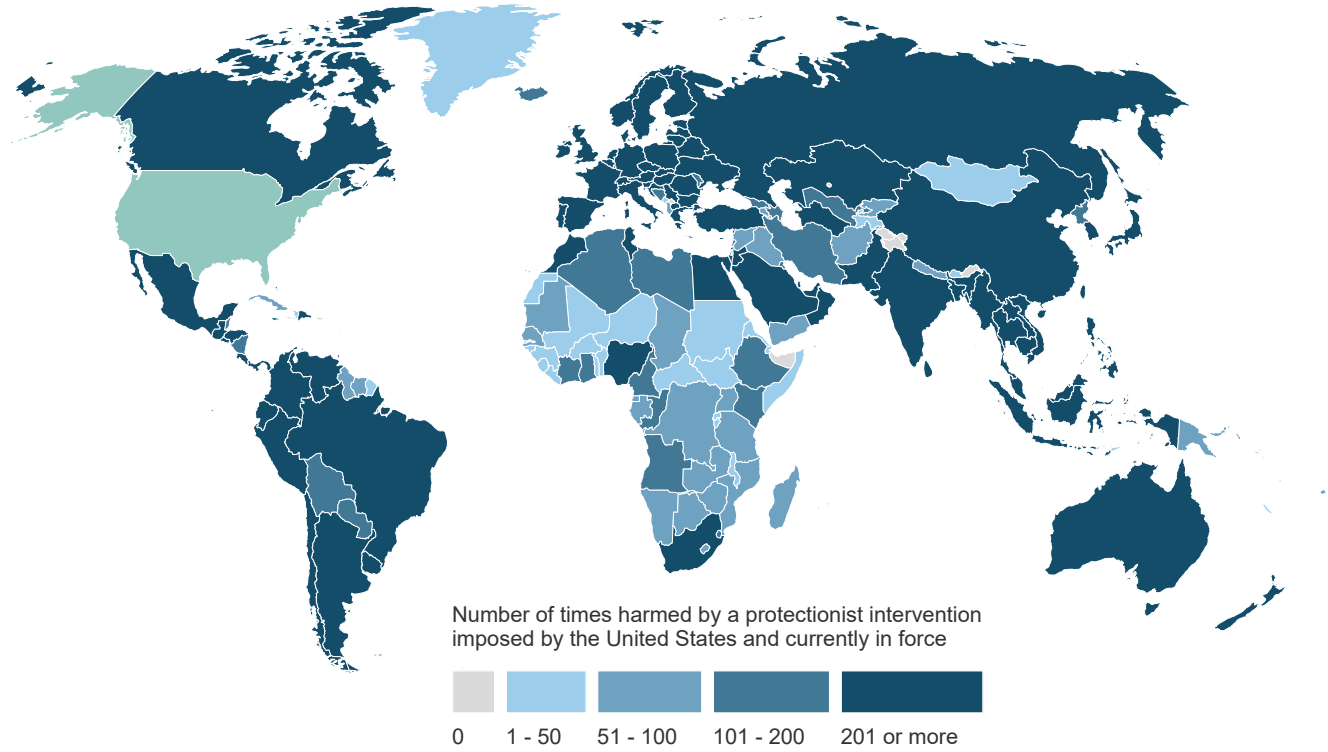
UNITED STATES

What is at stake for the United States' goods exporters?

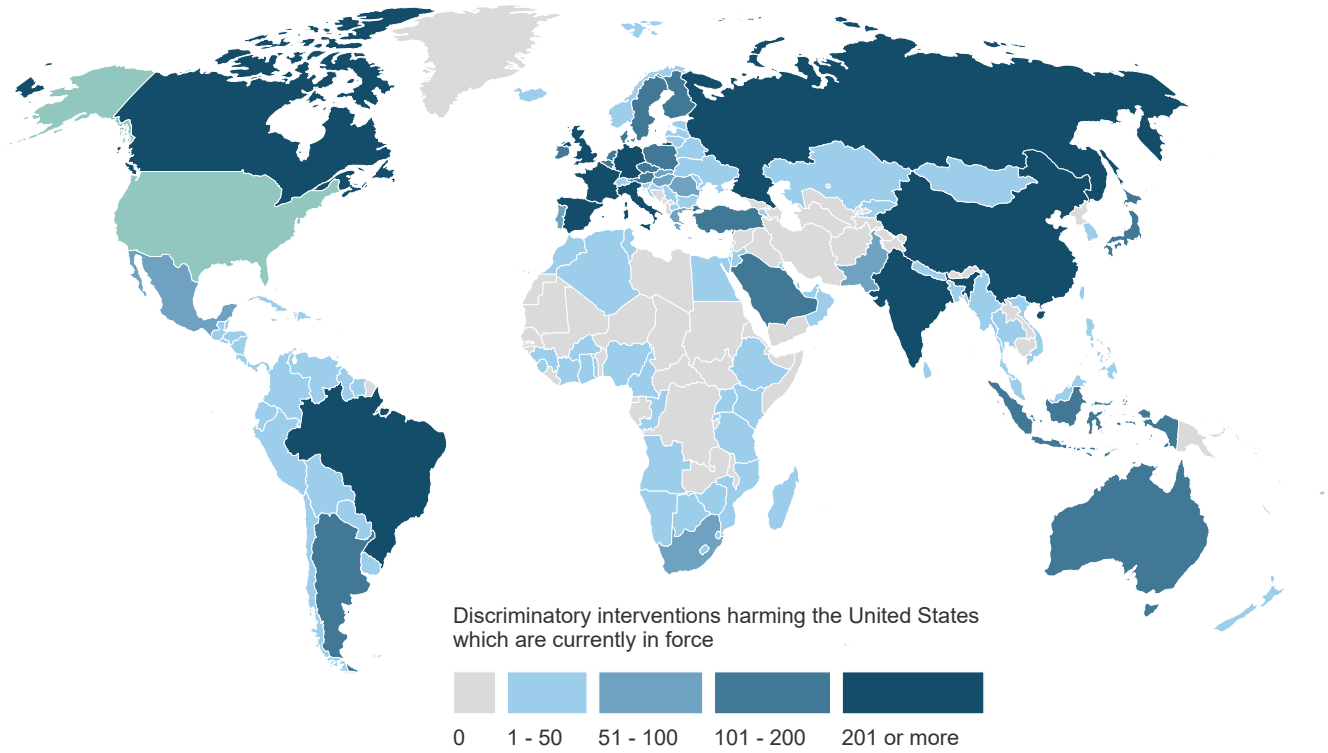
UN MAST chapter	Foreign discriminatory policy instrument	Percentage of this G20 member's exports at risk due to ...												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	All instruments	44.06	53.90	59.96	65.14	72.53	75.13	76.41	77.49	79.55	81.48	83.15	83.54	81.59	82.22
D	Contingent trade-protective measures	0.30	0.44	0.49	0.60	0.66	0.63	0.64	0.70	0.80	1.35	1.55	1.76	1.75	1.78
E	Non-automatic licensing, quotas etc.	1.01	1.44	2.24	2.86	4.05	3.84	5.30	5.38	5.52	5.57	5.54	5.90	6.03	6.57
F	Price-control measures, including additional taxes and charges	0.08	0.10	0.14	0.20	0.33	0.66	0.89	1.03	1.11	1.53	1.60	2.16	2.19	2.20
G	Finance measures	0.34	1.03	1.10	1.10	1.10	1.10	1.10	1.10	1.10	1.11	1.11	1.11	1.11	1.12
I	Trade-related investment measures	0.36	0.77	0.46	0.49	0.50	0.57	1.23	1.61	1.17	1.09	1.09	1.11	1.17	1.23
L	Subsidies (excl. export subsidies)	7.36	10.95	10.93	12.10	29.84	31.07	34.00	34.74	35.95	36.86	38.88	39.72	32.64	33.89
M	Government procurement restrictions	0.08	0.35	0.35	0.57	0.85	1.36	1.92	1.82	1.83	1.97	2.00	2.11	2.31	2.28
P	Export-related measures (incl. subsidies)	36.53	44.32	51.37	57.63	60.58	62.22	62.01	64.21	66.98	68.14	70.16	70.76	69.23	69.99
	Tariff measures	1.65	2.28	2.79	2.54	3.85	2.94	4.64	6.58	10.29	12.79	14.95	16.08	17.74	17.90
	Instrument unclear	0.10	0.24	0.32	0.42	0.57	1.53	1.88	1.94	1.95	2.40	2.75	2.75	2.83	2.93

Note: This table presents estimates of the percentage of a nation's exports that face different harmful policy interventions in their export markets. Only those harmful interventions implemented after November 2008 count towards these totals--therefore, the estimates indicate the exposure of national exports to crisis-era policy intervention that favours domestic commercial interests. The trade data used in the estimation is taken from UN Comtrade and at the six-digit level of the Harmonised System product classification. For each product exported by a nation, the foreign markets accounted for in this estimate are those where bilateral exports exceeded $1 million for the given product. De minimis trade flows are therefore excluded. To limit endogeneity problems (that is, the harmful policy interventions affecting the total value of exports observed) pre-crisis shares of world trade are employed in these calculations. The pre-crisis shares are computed as the mean weight for the years 2005-7. The calculations also take into account when a harmful policy intervention comes into force and, where relevant, lapses. When an intervention lasts for only part of a year, the trade flow is discounted by the fraction of the year the harmful measure is not in force.

COUNTRIES HARMED BY THE US' DISCRIMINATORY INTERVENTIONS

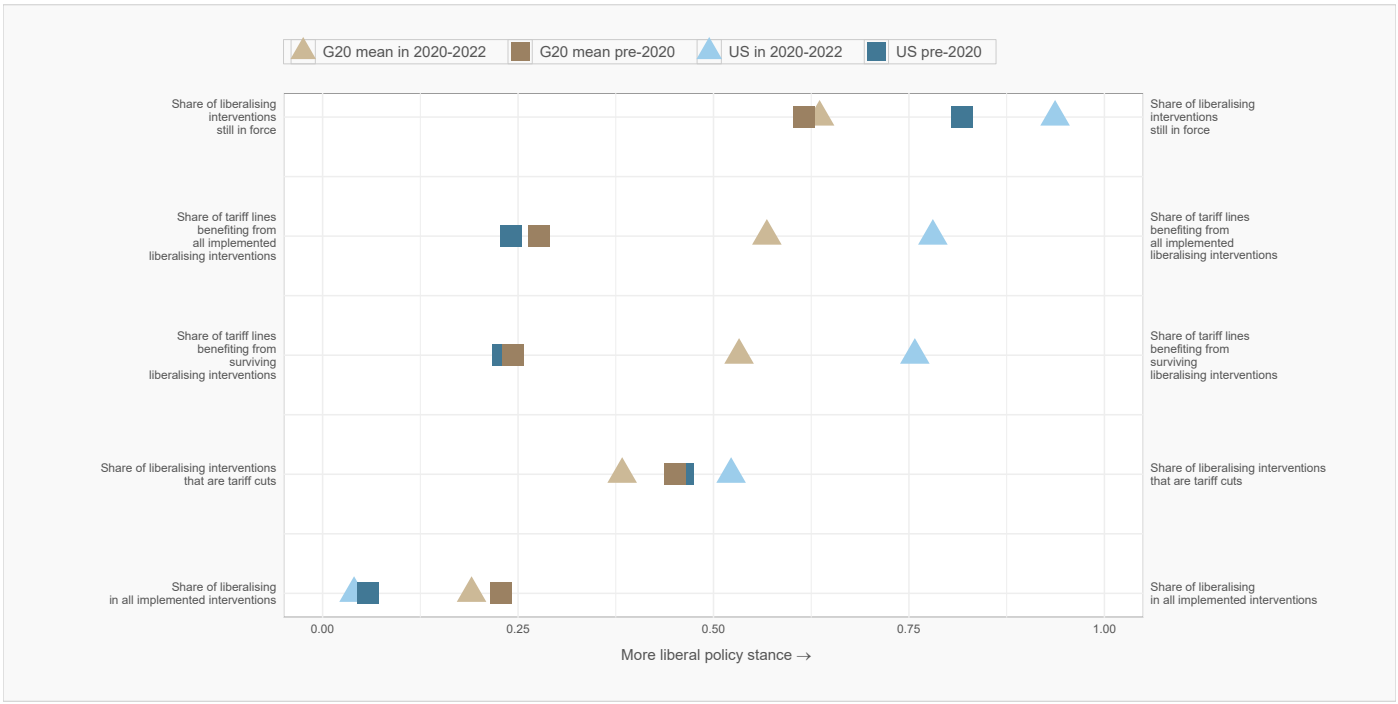


DISCRIMINATORY INTERVENTIONS HARMING THE US' INTERESTS



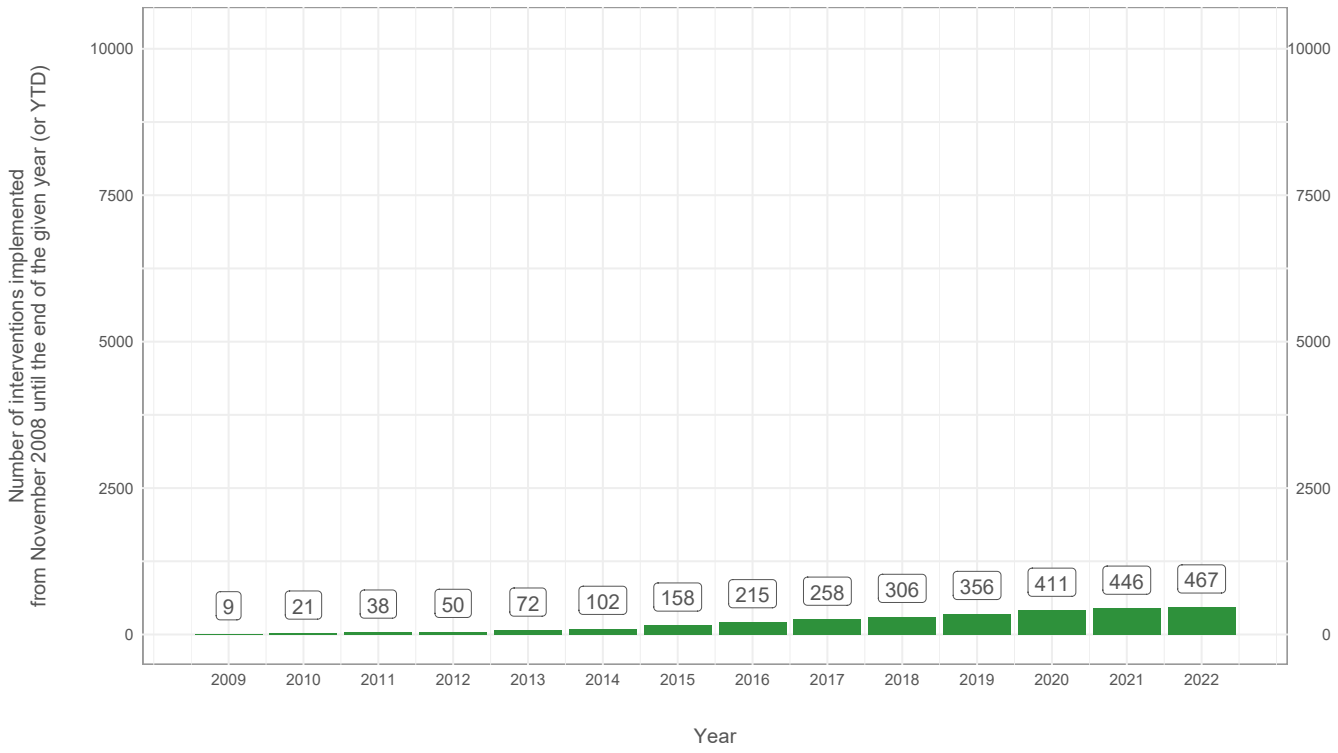
UNITED STATES

Track record of liberalisation



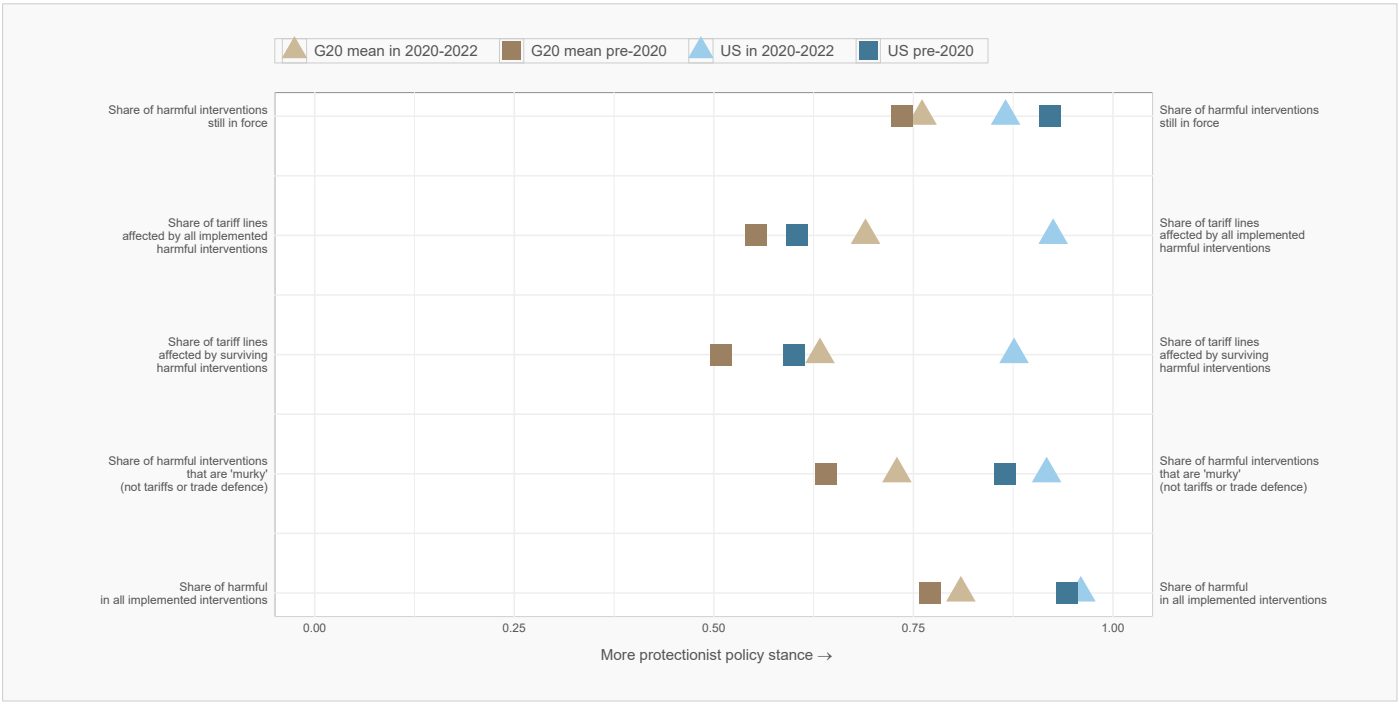
UNITED STATES

Number of liberalising interventions imposed since November 2008



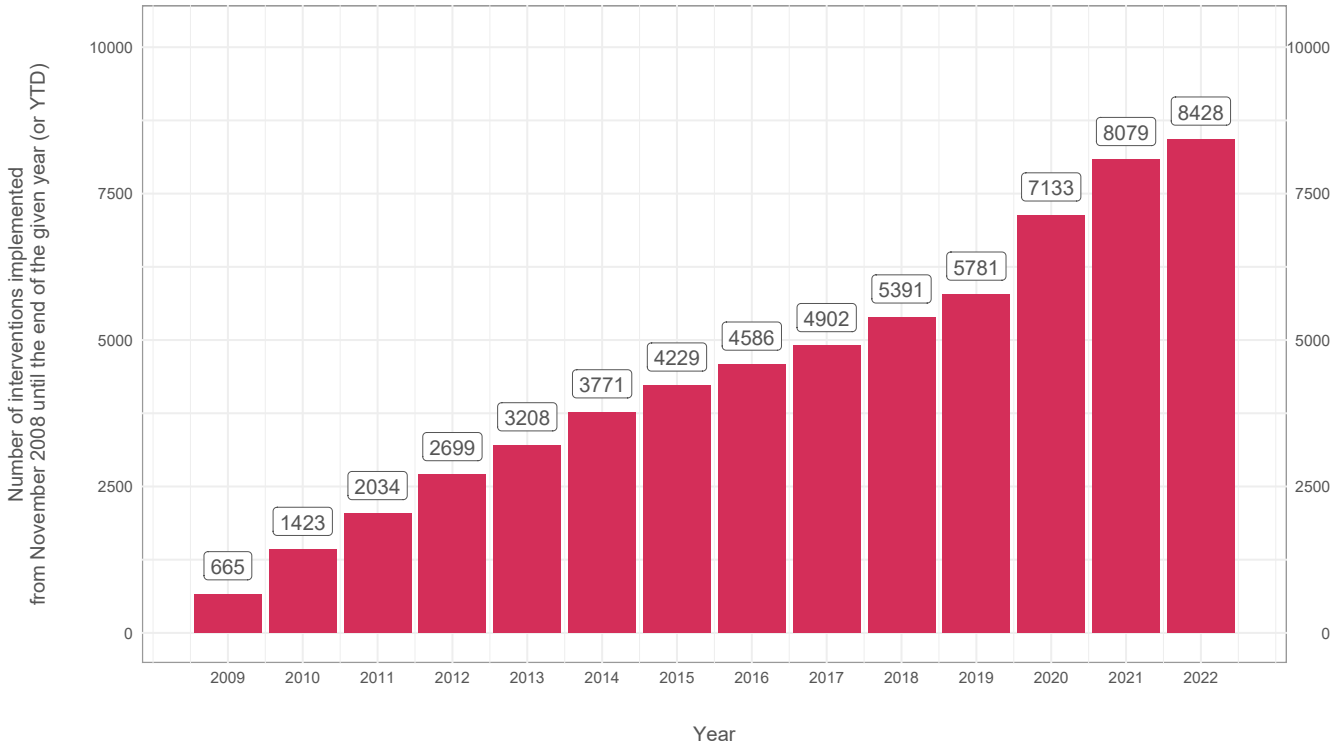
UNITED STATES

Track record of protectionism



UNITED STATES

Number of discriminatory interventions imposed since November 2008



The 2030 Agenda for Sustainable Development was adopted by governments in 2015. Central to that Agenda is making progress on 17 Sustainable Development Goals (SDGs). Implemented at a time when globalisation is being buffeted by populism, a pandemic and its fallout, intensifying geopolitical rivalry, and attendant supply chain reconfiguration, the contribution of government commercial policies to attaining these Goals is in the spotlight.

Drawing upon evidence from tens of thousands of unilateral trade, investment, industrial and other policy steps that affect cross-border commerce, this report sheds light on that contribution. Central to this analysis is developing for the indicators associated with seven SDGs a mapping between different types of commercial policy interventions and the likely impact on those indicators.

The extent to which there is a tension between the trade and investment reform and attaining the SDGs is one of the central questions addressed in this report. So is the interpretation of evidence of the extent of such tensions, a matter of critical importance given the doubts of many in the trade policy community as to the logic and drafting of some of the SDGs. The report also identifies four reform scenarios whereby openness to cross-border commerce can contribute more to the attainment of the SDGs.

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