Trade and Transport Facilitation Audit in South Asia
Dissemination of Study Findings

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Trade and Transport Facilitation in Bangladesh
An Audit of the State of Play

Presentation by
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Contents

- Section I: Introduction
- Section II: Trade direction and trade flow
- Section III: State of trade logistics
- Section IV: Main trade routes and corridors
- Section V: Ongoing activities relating to TF
- Section VI: Concluding remarks
Section I: Introduction

- Trade facilitation is gaining increasing importance as a key driver in unlocking the potential gains from the international trade.
- TF reduces cost of doing business significantly, and the attendant measures benefit all involved stakeholders.
- Bangladesh has taken several initiatives towards better TF which includes customs reforms, reductions in export-import documentation, introduction of Pre-Shipmemt Inspection (PSI) system, introduction of better management practices in ports, adoption of ICT measures and development of infrastructure at land customs stations.
- The developments seek to development value and supply chains and cross-border production networks and also the interests of regional and global integration of Bangladesh.
- However, inefficiencies and lack of modern operational practices in ports and customs points act as major barriers to trade.

MZS (2016): Trade and Transport Facilitation in Bangladesh
Section I: Introduction

Context

- An audit of the state of affairs as regards trade facilitation is important for Bangladesh on three counts:
  - the audit would evince what are the major trade facilitation related measures which are being undertaken in Bangladesh
  - identify the gaps in trade facilitation in view of the emerging needs
  - help promote the cause of undertaking the required investments towards better trade facilitation in Bangladesh
Section I: Introduction

Objective

- Set up a regional benchmark for trade and transport facilitation in South Asia
- To identify the trade and transport related bottlenecks
- To assess the benefits of removing the bottlenecks
- Estimate the required investments
Section I: Introduction

Methodology

- The present study is based on secondary data and information generated through Focus Group Discussions (FGDs), Key Informant Interviews (KIIIs) and selected field visits
- Secondary information was collected from various institutions and organisations including Bangladesh Bank, Export Promotion Bureau (EPB), National Board of Revenue (NBR), Ministry of Commerce and Ministry of Shipping
- Quantitative data was accessed from data sets maintained by the World Bank and the Organisation for Economic Co-operation and Development (OECD)
The volume of trade is still low compared to her trade with other regions in the world

- Bangladesh’s total trade with South Asia increased from USD 1.1 bln in FY98 to 7.2 bln in FY14
- Global trade of Bangladesh has seen a rise from only USD 12.7 bln to USD 69.5 bln during the same period
- Total trade as % of GDP has increased from 28.8% in FY98 to 40.0% in FY14

Bangladesh’s SAARC import dominated by import from India

- Import from the SAARC region constituted 17% (USD 6.7 bln) of Bangladesh’s total import in FY14 (13.8% in FY98)
- India is the most important import source for Bangladesh in the SAARC region (90% sourced from India within the region) and the second most important in the whole world
Section II: Trade direction and trade flow

- Regional export shows a declining trend
  - Export has been expanded to USD 30.2 bln in FY14 from only USD 5.1 bln in FY98
  - Indeed, SAARC share of export as % of global export has been declined to 1.9% (USD 560 mln) in FY14 from 2.4% in FY98
  - Bangladesh’s exports are mainly concentrated in the EU and North American region – which covers more than 70% of total export – where RMG is the main market
  - In SAARC countries, jute/jute goods (27%) and woven garments (14.4%) comprised the major share of regional export from Bangladesh
  - Bangladesh enjoys DFQF treatment in India since 2011—RMG other ratio 20:80 - potential for market diversification

MZS (2016): Trade and Transport Facilitation in Bangladesh
## Section II: Trade direction and trade flow

### Important Regional and Multilateral Agreements

<table>
<thead>
<tr>
<th>Name</th>
<th>No. of Members</th>
<th>Date of Establishment</th>
<th>Bangladesh’s Date of Entry</th>
<th>Area of Cooperation</th>
</tr>
</thead>
<tbody>
<tr>
<td>BCIM (Bangladesh, China, India and Myanmar)</td>
<td>4</td>
<td>1999</td>
<td>1999</td>
<td>To promote integration through cooperation in areas of connectivity, trade and investment among the four economies.</td>
</tr>
<tr>
<td>BIMSTEC (Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation)</td>
<td>7</td>
<td>6 June 1997</td>
<td>6 June 1997</td>
<td>Enabling rapid economic development and social progress in the region</td>
</tr>
<tr>
<td>IOR-ARC (Indian Ocean Rim-Association for Regional Cooperation)</td>
<td>20</td>
<td>6-7 March 1997</td>
<td>6-7 March 1997</td>
<td>To promote sustainable growth, balanced growth and economic cooperation and to ensure smooth flow of trade in the region.</td>
</tr>
<tr>
<td>SAFTA (South Asian Free Trade Area)</td>
<td>8</td>
<td>Signed: 6 January 2004 Implemented: 1 January 2006</td>
<td>Signed on 6 January 2004</td>
<td>To eliminate all the barriers to trade in South Asia and promote regional trade</td>
</tr>
<tr>
<td>SAPTA (SAARC Preferential Trading Arrangement)</td>
<td>7</td>
<td>Signed: 11 April 1993 Implemented: 7 December 1995</td>
<td>11 April 1993</td>
<td>To promote regional trade and economic cooperation in the SAARC region</td>
</tr>
<tr>
<td>SATIS (SAARC Agreement on Trade in Services)</td>
<td>8</td>
<td>Signed: April 2010 Implemented: 29 November 2012</td>
<td>Signed in April 2010 at the 16th SAARC Summit</td>
<td>To improve service sector trade in South Asia by removing barriers and promoting mutual cooperation</td>
</tr>
</tbody>
</table>
Institutional setup

Several ministries and institutions deal with trade and trade facilitation measures either directly or in an indirect way. These include:

- **Ministry of Commerce**: Export Promotion Bureau (EPB); Free Trade Area (FTA) Wing; World Trade Organisation (WTO) Cell;
- **Ministry of Finance**: National Board of Revenue (NBR);
- **Ministry of Industry**: Bangladesh Standards and Testing Institution (BSTI);
- Office of the Register of Joint Stock Companies and Firms (RJSC);
- **Ministry of Shipping**: Bangladesh Land Port Authority (BLPA); Chittagong Port Authority (CPA); Mongla Port Authority; Bangladesh Inland Water Transport Authority (BIWTA);
- **Ministry of Communication**: Bangladesh Railway (BR); Bangladesh Road Transport Authority (BRTA);
- **Board of Investment**

Besides, in some areas such as land customs administration, there are a number of projects which operate on the basis of Public-Private Partnerships (PPPs)

*Strengthening capacity of these institutions is critically important from TF vantage point*
Section III: State of trade logistics

Ease of Doing Business

- Bangladesh ranked 130th among 189 countries

Overall Distance to Frontier (DTF) data, however, indicates somewhat better performance, with 51.8 percentage points

- Performance improved somewhat for starting a business (1.8%)
- ‘no change’ was discerned in terms of getting credit, protecting investors, paying taxes and enforcing contracts, when compared with 2013 position
## Section III: State of trade logistics

### Performance of Bangladesh in Trading Across Borders Indicator, 2006-2014

<table>
<thead>
<tr>
<th>Year</th>
<th>Ease of Doing Business Rank</th>
<th>Rank</th>
<th>Docs Required to Export (Number)</th>
<th>Time to Export (days)</th>
<th>Cost to Export (USD per Container)</th>
<th>Docs Required to Import (Number)</th>
<th>Time to Import (days)</th>
<th>Cost to Import (USD per Container)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>65</td>
<td>-</td>
<td>7</td>
<td>35</td>
<td>-</td>
<td>16</td>
<td>57</td>
<td>-</td>
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<tr>
<td>2007</td>
<td>88</td>
<td>134</td>
<td>7</td>
<td>35</td>
<td>902</td>
<td>16</td>
<td>57</td>
<td>1287</td>
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<tr>
<td>2008</td>
<td>107</td>
<td>112</td>
<td>7</td>
<td>28</td>
<td>844</td>
<td>9</td>
<td>32</td>
<td>1148</td>
</tr>
<tr>
<td>2009</td>
<td>110</td>
<td>105</td>
<td>6</td>
<td>28</td>
<td>970</td>
<td>8</td>
<td>32</td>
<td>1375</td>
</tr>
<tr>
<td>2010</td>
<td>119</td>
<td>107</td>
<td>6</td>
<td>25</td>
<td>970</td>
<td>8</td>
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<td>1375</td>
</tr>
<tr>
<td>2011</td>
<td>107</td>
<td>112</td>
<td>6</td>
<td>22</td>
<td>985</td>
<td>8</td>
<td>31</td>
<td>1390</td>
</tr>
<tr>
<td>2012</td>
<td>122</td>
<td>115</td>
<td>6</td>
<td>25</td>
<td>965</td>
<td>8</td>
<td>31</td>
<td>1370</td>
</tr>
<tr>
<td>2013</td>
<td>129</td>
<td>119</td>
<td>6</td>
<td>25</td>
<td>1025</td>
<td>8</td>
<td>34</td>
<td>1430</td>
</tr>
<tr>
<td>2014</td>
<td>130</td>
<td>130</td>
<td>6</td>
<td>25</td>
<td>1075</td>
<td>8</td>
<td>35</td>
<td>1470</td>
</tr>
</tbody>
</table>

**Time to Export (number of days), for Bangladesh and Other Countries, 2006-2014**

*Source: MZS (2016): Trade and Transport Facilitation in Bangladesh*
## Section III: State of trade logistics

### Domestic LPI Performance of Bangladesh and Other Countries in 2014

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Bangladesh</th>
<th>India</th>
<th>Nepal</th>
<th>Vietnam</th>
<th>Region: South Asia</th>
<th>Income: Low income</th>
<th>High income: OECD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipments meeting quality criteria (%)</td>
<td>72%</td>
<td>67%</td>
<td>40%</td>
<td>76%</td>
<td>68%</td>
<td>62%</td>
<td>90%</td>
</tr>
<tr>
<td>Number of agencies - exports</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>3.7</td>
<td>3.5</td>
<td>2.1</td>
</tr>
<tr>
<td>Number of agencies - imports</td>
<td>4</td>
<td>3</td>
<td>5</td>
<td>4</td>
<td>3.7</td>
<td>3.9</td>
<td>2.5</td>
</tr>
<tr>
<td>Number of documents - exports</td>
<td>5</td>
<td>4</td>
<td>6</td>
<td>3</td>
<td>4</td>
<td>4.1</td>
<td>1.9</td>
</tr>
<tr>
<td>Number of documents - imports</td>
<td>5</td>
<td>4</td>
<td>6</td>
<td>5</td>
<td>4.5</td>
<td>4.3</td>
<td>2</td>
</tr>
<tr>
<td>Clearance time without physical inspection (days)</td>
<td>2 days</td>
<td>1 day</td>
<td>1 day</td>
<td>1 day</td>
<td>1.7 days</td>
<td>2.8 days</td>
<td>1.1 days</td>
</tr>
<tr>
<td>Clearance time with physical inspection (days)</td>
<td>3 days</td>
<td>2 days</td>
<td>1 day</td>
<td>2 days</td>
<td>3.2 days</td>
<td>2.8 days</td>
<td>1.3 days</td>
</tr>
<tr>
<td>Physical inspection (%)</td>
<td>35%</td>
<td>22%</td>
<td>9%</td>
<td>54%</td>
<td>24%</td>
<td>41%</td>
<td>4</td>
</tr>
<tr>
<td>Multiple inspection (%)</td>
<td>7%</td>
<td>8%</td>
<td>10%</td>
<td>7%</td>
<td>7%</td>
<td>20%</td>
<td>2%</td>
</tr>
</tbody>
</table>
### Section III: State of trade logistics

#### Enabling Trade Report

- Bangladesh ranked 115\(^{th}\) in ranking among 138 countries

<table>
<thead>
<tr>
<th>Country/Economy</th>
<th>Year</th>
<th>OVERALL INDEX</th>
<th>Market access</th>
<th>Border Administration</th>
<th>Transport and Communications infrastructure</th>
<th>Business environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bangladesh</td>
<td>2014</td>
<td>115</td>
<td>57</td>
<td>3.8</td>
<td>123</td>
<td>119</td>
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<td>99</td>
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<tr>
<td></td>
<td>2012</td>
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<td>65</td>
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<td>95</td>
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<td>2010</td>
<td>113</td>
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<td>114</td>
</tr>
<tr>
<td>India</td>
<td>2014</td>
<td>96</td>
<td>136</td>
<td>2.4</td>
<td>74</td>
<td>67</td>
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<td>2012</td>
<td>100</td>
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<td>2.6</td>
<td>77</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>58</td>
</tr>
<tr>
<td>Sri Lanka</td>
<td>2014</td>
<td>84</td>
<td>104</td>
<td>3.3</td>
<td>87</td>
<td>83</td>
</tr>
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<td></td>
<td>2010</td>
<td>99</td>
<td>107</td>
<td>3.7</td>
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<td>86</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>Vietnam</td>
<td>2014</td>
<td>72</td>
<td>34</td>
<td>4.2</td>
<td>86</td>
<td>60</td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td>81</td>
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<tr>
<td></td>
<td>2012</td>
<td>68</td>
<td>41</td>
<td>4.4</td>
<td>94</td>
<td>56</td>
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<td></td>
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<td>69</td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>71</td>
<td>50</td>
<td>4.4</td>
<td>88</td>
<td>68</td>
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<td></td>
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<td></td>
<td>64</td>
</tr>
</tbody>
</table>

*MZS (2016): Trade and Transport Facilitation in Bangladesh*
Section III: State of trade logistics

- Summary of trade logistics indicators
  - Bangladesh has indeed been able to post improvements in terms of some of the important indicators
  - However, performances of many of her comparators and competitors have been better
**Section IV: Main trade routes and corridors**

**Land Customs Stations (LCs)**

- Total 33 LCs operational; 148 inactive
- Road transport is the dominant mode of trading activity between Bangladesh and South Asia
- The overwhelming part of trading activities between Bangladesh and India also takes place through land customs stations and land routes
- Bangladesh allows export of all items using these customs points but maintains specific lists for which imports are allowed through different land customs points.
- According to the 2009 transit related core committee’s estimation, investment worth USD 6.4 bln will be required to make the routes operational for carrying transit cargoes; the renovation process may take nearly four years
- Nepal is also interested to get transit and transshipment facility through Bangladesh
- Bhutan and Bangladesh's trade currently takes place through two LCSs—Burimari and Tamabil
### Section IV: Main trade routes and corridors

<table>
<thead>
<tr>
<th>Routes</th>
<th>no. of LCs</th>
<th>Major LCs</th>
<th>Important border ports</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Water routes</strong></td>
<td>9</td>
<td>Darshana, Birol and Rohanpur</td>
<td>Darshana-Gede, Burimari-Changrabandha and Akhaura-Agartala.</td>
</tr>
<tr>
<td><strong>Rail routes</strong></td>
<td>3</td>
<td>Road-rail: Burimari land port (Burimari-Changrabandha); Road-water: Cox's Bazar port; Water-rail: Shirajganj port</td>
<td><em>Import as regards trade with North-East of India,</em> Bibirbazar – Srimantpur, Akhaura – Agartala and Tamabil – Dawki</td>
</tr>
<tr>
<td><strong>Mixed routes</strong></td>
<td>5</td>
<td>Road-rail: Burimari land port (Burimari-Changrabandha); Road-water: Cox's Bazar port; Water-rail: Shirajganj port</td>
<td><em>Import as regards trade with North-East of India,</em> Bibirbazar – Srimantpur, Akhaura – Agartala and Tamabil – Dawki</td>
</tr>
</tbody>
</table>

**Total operational**: 33

**Inoperative**: 148

**Total**: 181
Sea Ports and Shipping

- The Chittagong sea port handles over 90% of the Bangladesh’s total external trade – about 41.9 mln tons of Cargo in 2014 (37 mln for import, 4.8 mln for export)
- The port suffers from a number of constraints concerning port capacity and operations. ADB (2013) notes that severe capacity bottlenecks impede rail and road traffic between Chittagong port and Dhaka
- There is a possibility to expand the port on the South Bank, but is constrained by poor connectivity
- Mongla port handled 2.5 million metric tons of cargo in 2012
### Section IV: Main trade routes and corridors

#### Major Road Corridors between Bangladesh and South Asian Countries

<table>
<thead>
<tr>
<th>Corridors</th>
<th>Countries</th>
<th>Interchange Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lahore–New Delhi–Kolkata–Petrapole/Benapole–Dhaka–Akhaura/Agartala (2463 KM)</td>
<td>Pakistan, India &amp; Bangladesh</td>
<td>Wagh (Pakistan)/Wagha Border (India); Petrapole (India)/Benapole (Bangladesh); Akhaura (Bangladesh)/Agartala (India)</td>
</tr>
<tr>
<td>Kathmandu–Kakarvitta–Phulbari–Banglabandha–Mongla/Chittagong (1394 KM)</td>
<td>Nepal, India &amp; Bangladesh</td>
<td>Kakarvitta (Nepal) – Panitanki (India); Fulbari (India)-Banglabandha (Bangladesh)</td>
</tr>
<tr>
<td>Samdrup Jongkhar–Guwahati–Shillong–Sylhet–Dhaka–Kolkata (906KM)</td>
<td>Bhutan, India &amp; Bangladesh</td>
<td>Samdrup Jongkhar (Bhutan)/Assam (India); Dawki (India)/Tamabil (Bangladesh); Benapole (Bangladesh)/Petrapole (India)</td>
</tr>
<tr>
<td>Agartala–Akhaura–Chittagong (227 KM)</td>
<td>India &amp; Bangladesh</td>
<td>Agartala (India) / Akhaura (India)</td>
</tr>
<tr>
<td>Thimphu–Phuentsholing–Jaigaon–Burimari–Mongla / Chittagong (880 KM to Mongla or 966 KM to Chittagong)</td>
<td>Bhutan, India &amp; Bangladesh</td>
<td>Phuentsholing (Bhutan)-Jaigaon (India); Changrabandha (India)-Burimari (Bangladesh)</td>
</tr>
<tr>
<td>Malda–Shibganj–Jamuna Bridge (Bangladesh) (252.5 KM)</td>
<td>Nepal &amp; India</td>
<td>Mehedipur (India)-Sonamasjid (Bangladesh)</td>
</tr>
</tbody>
</table>

**Source:** SAARC Secretariat, 2006
Section IV: Main trade routes and corridors

**Rail Corridors**
- Railway corridors have the potential to become crucial transport mode for the purpose of trade between Bangladesh and other SAARC countries.
- Rail transport system in Bangladesh has remained underdeveloped due to persistent negligence and needs significant investment (ADB financed USD 1.5 bln project in 2016 for rail development in the eastern part to connect Bangladesh-Myanmar).

**Major rail corridors**
- Ranaghat – Dhaka; Bongaon – Khulna; Old Malda – Ishwardi Jn.
- Barosi – Parbatipur; New Mayanguri – Lalmonirhat; Karimganj - Kulaura and Badarpur – Bhairab would connect India and Bangladesh.
- Lahore-Delhi-Kolkata-Dhaka-Imphal (2830 km) to connect Pakistan, India and Bangladesh.
- Birgunj-Katihar-Chittagong (1146 km), would connect Bangladesh, Nepal and India.

*These would require extensive measures in developing the needed hardware and software – also constrained by lack of cross border agreement.*
Section IV: Main trade routes and corridors

- Inland Water Transport (IWT) Corridors
- SAARC Secretariat (2006) identified four existing and potential IWT corridors:
  - Kolkata-Haldia-Raimongal-Mongla-Kaukhali-Barishal-Hizla-Chandpur-Narayanganj-Aricha-Sirajganj-Bahadurabad-Chilmari-Pandu between Bangladesh and India
  - Rajshahi-Godagari-Dhulian between Bangladesh and India
  - Karimganj-Zakiganj-Fenchuganj-Sherpur-Markuli-Ajmiriganj-Bhairabbazar-Naryanganj-Chandpur-Aricha-Sirajganj-Bahadurabad-Chilmari-Dhubri-Pandu between Bangladesh and India

- These routes remain highly underutilised, partly due to lack of adequate drafts, navigational aids, and limited number of ports of call and non-renewal of the protocol for longer periods (Rahmatullah, 2010)
- Use Chittagong Port was limited due to the width and curvature of the Karnaphuli River (ADB, 2013)
Section V: Ongoing activities relating to TF

- **Land port development and road connectivity**
  - BLPA has been implementing several projects aimed at modernizing major land ports including Benapole, Bhomra and Nakugaon land ports
  - Japan has supported worth USD 1.5 million to improve operational efficiency of Benapole and Burimari land ports whereas USAID has financed to improve TF at the Benapole port
  - Under SASEC road connectivity project, infrastructure of several roads connecting to land ports has been improved
  - Dhaka-Chittagong Expressway is being implemented under PPP
  - A Public-Private Infrastructure Development Facility (PPIDF) program has been designed to improve the needed infrastructure facilities with estimated cost of USD 165 mln

- **Railway Infrastructure**
  - ADB has been financing several projects worth more than USD 162.5 mln under SASEC project
Section V: Ongoing activities relating to TF

- Bangladesh has also been taking advantage of the Indian USD 1.0 bln (LoC) for implementing several projects; geared towards improvement of the TF in Bangladesh (Renovation of the rail line from Kulaura to Shahbazpur)

  - **Sea Port Development**
    - GoB and the ADB are implementing a USD 42 million worth project to Chittagong port TF

  - **Pilot project for National Single Window**
    - Trade portal launched in 2016

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**Chittagong Port Trade Facilitation Project Outcomes**

- Automated manifest system & container scanning system at Chitagong Customs House (CCH)
- Container terminal management system (at CPA)
- Improved access through connector road from Chittagong Port Access Road (CPAR) to New Mooring Container Terminal (NMCT) and Chittagong Container Terminal (CCT)
- Improved terminal traffic circulation and gate house system
- Oil-waste reception and treatment facility and spill management system implemented
- Port Service Improvement Committee established
Section V: Ongoing activities relating to TF

- **Customs Automation and Modernisation**
  - Installed four Container Scanners at the Chittagong Port
  - Live operation of ASYCUDA World at the CCH and the Kamalapur Inland Container Depot (ICD)
  - NBR and UNCTAD will interconnect 12 major customs houses under the ‘ASYCUDA World’ system

- **Strengthening Bangladesh Standards and Testing Institution (BSTI)**
  - USD 2.6 million commitment is geared towards establishment, modernisation and development of BSTI offices
  - Establish BSTI regional offices and laboratories in Sylhet and Barisal Divisions

- **Regional Transport Connectivity**
- **Trade Policy Support Programme**
- **Country Strategy towards National & Regional Connectivity**
Section VI: Concluding remarks

- The Bali decision will require Bangladesh to undertake appropriate measures towards improved trade facilitation, now and in future.
- Bangladesh will need to notify which TF measures she already has in place, which she plans to undertake within the stipulated time and those TF measures for which she will need technical and financial assistance from the WTO and other organisations.
- TF measures are of heightened importance to reduce cost of doing business, bring down the lead time, raise compliance and improve overall competitive strength of Bangladesh’s trading sector.
  - Will Help Bangladesh’s exporters to be competitive in the global market,
  - will contribute to reducing production cost of importers and
  - will benefit consumers through reduced import prices
- Modern and efficient trade and transport facilitation is a necessary precondition to develop regional and global value and supply chains
Thank You