



EABC - The Voice of the Private Sector
in East-Africa

EAST AFRICAN BUSINESS COUNCIL (EABC)

REPORT

FOR

AN IMPACT ASSESSMENT OF THE EAST AFRICAN HARMONIZED STANDARDS ON THE BUSINESS COMMUNITY

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TRADEMARK EAST AFRICA



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TABLE E OF CONTENTS

ACKNOWLEDGMENT	ii
LIST ACRONYMS.....	v
EXECUTIVE SUMMARY	vi
1. INTRODUCTION.....	1
2. BACKGROUND TO THE STUDY.....	1
2.1 Rationale of the study.....	2
2.2 Specific Objectives	2
3. EAC STANDARDIZATION SITUATION OVERVIEW	3
3.1 East African Standards Framework.....	3
3.2 The Benefits of Standardization.....	4
3.3 The Legal Framework for Standards and Certification in the EAC.....	5
3.4 The Administrative Structures for SQMT in the EAC	5
3.5 East African Standards Platform	6
3.6 Institutional Framework for Administration of Standards at National Level in the EAC Partner States	7
3.6.1 Burundi Bureau of Standards (BBN).....	7
3.6.2 Kenya Bureau of Standards (KEBS)-	7
3.6.3 The Rwanda Standards Board (RSB)	7
3.6.4 Tanzania Bureau of Standards (TBS)	8
3.6.5 Uganda National Bureau of Standards (UNBS)	8
3.7 WTO SPS AND TBT Agreements.....	8
3.8 Product Certification in the EAC	9
3.9 Access to Standards in the EAC.....	9
4. APPROACH AND METHODOLOGY	10
4.1 Limitations.....	10
5. FINDINGS	10
5.1 Impact of EAS Harmonization on Reducing Transaction Time	11
5.2 Impact of EAS Harmonization on Reducing Transaction Costs.....	12
5.3 Impact of EAS Harmonization on Improving Business Income	12
5.4 Impact of Standards harmonization on Intra- and Extra-EAC Trade	13
5.4.1 Intra-EAC Trade Values of the Selected Sampled Products	13
5.4.2 Extra-EAC Trade Values of the Selected Sampled Products Trends	14
5.4.3 Overall Trade Value Trends of the Selected Sampled Products	14
5.5 Impact Assessment of Harmonized EAS on the Six Selected Sampled Products	15
5.6 Adoption Rates of East African Standards by EAC Partner States.....	16
5.7 Assessment of Recognition of Quality Marks by Some Regulatory Agencies.....	17
6. CHALLENGES OF STANDARDS HARMONIZATION IN THE EAC.....	18
7. CONCLUSION.....	19
8. RECOMMENDATIONS TO INFORM EABC ADVOCACY ON STANDARDS	19
ANNEX 1: POSITION PAPER	22

ANNEX 2: LEVEL OF ADOPTION OF EAS OF THE SELECTED SAMPLED PRODUCTS.....	28
ANNEX 3: TRENDS OF INTRA AND EXTRA-EAC VALUES OF THE SELECTED SAMPLED PRODUCTS (US\$ '000').....	31
ANNEX 4: EXPORTS OF THE RESPECTIVE EAC PARTNER STATES OF THE SELECTED SAMPLED PRODUCTS.....	33
ANNEX 5: PERSONS CONTACTED	34
ANNEX 6: REFERENCES	38

LIST OF TABLES

Table 1: Stages of the Development of East African Standards	4
Table 2: Percentage response on the impact of standards harmonization.....	10
Table 3: Overall Intra -EAC Trade of the Sampled Selected Products, US\$ '000' (2010-2014)	13
Table 4: Extra-EAC Trade Values of the Selected Sampled Products, US\$ '000' (2010-2014)	14
Table 5: Notified Certification Marks by the EAC Partner States	17

LIST ACRONYMS

EABC	East African Business Council
EAC	East African Community
EASC	East African Standards Committee
EASP	East African Standards Platform
GDP	Gross Domestic Product
ICT	Information Communication Technology
ITC	International Trade Centre
NFPs	National Focal Points
NSB	National Standards Bodies
NTBs	Non-Tariff Barriers to Trade
SMC	Standards Management Committee
SPS	Sanitary and Phytosanitary
SQMT	Standards Quality Assurance Metrology and Testing
TBS	Tanzania Bureau of Standards
TBT	Technical Barriers to Trade
TC	Technical Committee
TFDA	Tanzania Food and Drug Authority
TMEA	Trade Mark East Africa
WTO	World Trade Organisation

EXECUTIVE SUMMARY

The main objective of the study was to undertake an impact assessment of the EAC harmonized standards on six amongst the 20 most traded products in the EAC region in terms of cost, time and trade values. The selected assessed products were; surface active agents; alcoholic beverages; steel and steel products; edible fats and oils; sugar confectionary and fish and fish products. A combination of approaches and methodology were used to collect data and obtain the necessary information for review and analysis to meet the objectives of this study. The data and information collected were triangulated, progressively analyzed and used to prepare this study report. The extent of the impact of standards harmonization on the selected products in terms trade values, time and cost was assessed using both qualitative and quantitative data.

Compliance with standards and market requirements are prerequisites for successful market access and for improving the competitiveness of exporters in the EAC. The study results indicated that the use of harmonized standards in the region to produce the selected sampled products improved their competitiveness and market access which has contributed to increment in the intra-EAC trade values of the sampled products from US\$291.2 million in 2010 to US\$ 343 million in 2014 which is an increment of 18%.

The study findings further indicated that the selected sampled products manufactured based harmonized East African Standards (EAS) has also contributed to the increment in extra-EAC trade values from US\$851.6 million in 2010 to US\$950.8 million in 2014 which was an increment of 12%. The study findings revealed that overall there was general increase in the trade value trend of the sampled products. The total export value (intra-EAC and extra-EAC) of the selected sampled products increased to US\$ 1,293.7 million in 2014 from US\$ 1,142.8 million in 2010 which was 13% increment.

Study findings further revealed that 78% of the interviewed manufacturers/exporters indicated that certification of the products with the quality marks based on EAS significantly reduced the standards related delays at the borders. The study noted that the standards related clearance time at the borders for such products had on average reduced from 38 days in 2010 before standards were harmonized to 0.5 days after standards harmonization which was a 99% time reduction. As a result of the reduced delays at the borders because of trading in certified products based on EAS, the standards related cost due to the delays at the borders have also reduced to almost zero compared to an average of US\$ 500 per consignment before standards were harmonized.

The study findings also indicate that there were qualitative impact caused by standard harmonization that included: improved quality and safety of the products, consumer protection; improvement in the revised versions of standards used by the NSBs; trade facilitation and reduction of standards related technical barriers to trade and improved competitiveness of the products. The study also found out that the adoption rates of the EAS by the EAC Partner States for the selected sampled products was 100% as indicated in annex 2. The adoption rates had improved for the EAS that were harmonized from 2010 onwards because there was effective

participation of the key stakeholders in the standards harmonization process. The study further found that the high adoption rates of EAS in the region had contributed to increased co-operation between the NSBs in a number of areas of SQMT which consequently further contributed to coordinated import and export of products in the EAC.

The study findings further indicated that the NSBs in the EAC Partner States were recognizing as equal to their own, product certification marks awarded by national quality system institutions of other EAC Partner States in line with the SQMT Act. However, in Tanzania TFDA used a different regulatory regime by registering food and cosmetic products to address safety issues that were not within the scope of SQMT Act 2006, but carried out in accordance with the World Trade Organization Technical Barrier to Trade/ Sanitary and Phytosanitary (WTO –TBT/ SPS) Agreements. This was because food safety regulations and harmonization of food safety controls had not been done and the EAC - SPS protocol was under ratification.

The TFDA evaluates and registers pre-packaged food products after compliance with safety requirements. This is provided for under Section 28 of the Tanzania Food, Drugs and Cosmetics Act CAP 219 and Registration of Food Regulations 2011. This was being done for both local and imported food products. Once a food product was assessed and registered by TFDA, it had a validity of five years and therefore TFDA import procedures for conformity assessment of food products was done prior to importation and no further retesting is conducted at the border. Only products that were not registered were assessed at the borders.

The study identified the following as challenges of standards harmonization in the EAC: standards harmonization process was taking long; inadequate time given to the private to adjust to implement the harmonized standards; inadequate funding for standards harmonization; inadequate data to support standards development and harmonization; insufficient staffing in NSBs and at EAC standards office; inadequate participation of the private sector in the standards development and harmonization process; not appropriately numbering the adopted EAS; and low awareness on harmonised EAS.

Certification of products based on harmonized EAS was significantly contributing to trade facilitation in the EAC by reducing the standards related time and cost of doing business. In addition, standards harmonization was contributing to the competitiveness of the products that were manufactured based on the EAS at national, regional and international levels. Harmonization of food standards is an important step towards promoting regional trade. However, harmonization of product control systems among the Partner States is very important in order to provide assurance on the safety of the products moving across member states. Ratification of EAC – SPS Protocol by the EAC Partner States will go a long way in solving issues related to Food products control system applied in food safety.

From the study findings, the following recommendations were made.

#	RECOMMENDATIONS
i)	The EABC should closely collaborate with the EAC and continue with the standardization activities in the region through the existing framework of the East African Standards Platform (EASP) as this will enhance coordinated participation of the private sector in the region.
ii)	The EAC should continue with the peer assessment of the SQMT infrastructure in each of the EAC Partner States to enhance trust and promote mutual recognition of the conformity assessment services in the region. In addition, accreditation of conformity assessment services to ISO/IEC 17020, ISO/IEC 17021, ISO/IEC 17025, ISO/IEC 17065 should be supported to promote recognition of the services in the region. In addition, to foster mutual recognition and acceptance of the product certification by all the stakeholders across the region, the EAC should consider adoption of a single certification mark for the EAC region.
iii)	The EAC Secretariat and EAC Partner States through their NSBs should increase their staffing levels appropriately to effectively handle standardization activities.
iv)	The EAC Secretariat through the Standards office should establish a monitoring mechanism of adopted EAS by the EAC Partner States.
v)	The EAC Secretariat should harmonize and review the standards for products whose trade is impeded in the region due to disparate standards in the EAC.
vi)	The EAC regional standards office and NSBs should embrace ICT where possible to reduce the cost and the time taken to harmonize standards.
vii)	The NSBs in collaboration with the private sector should ensure that there is adequate private sector participation in regional standardization activities.
viii)	The East African Standards Platform (EASP) in collaboration with the NSBs should increase the level of awareness on the standardization activities and harmonized standards in the region.
ix)	The EAC Secretariat should fast-track the ratification of EAC SPS Protocol by EAC Partner States to address issues regarding food safety regulations and harmonization of food safety controls in the EAC.
x)	The EAC Secretariat and/or EABC should develop EAC Standardization Strategic Plan in line with other EAC policies related to industry development and trade promotion to improve on funding for regional standardization activities.
xi)	The NSBs should embrace single numbering of the adopted EAS to ensure traceability.
xii)	The NSBs should provide advance notification and adequate time whenever there changes in the standards specifications to enable the private sector adjust to implement

	the standards.
xiii)	The lengthy process of standards harmonisation should be shortened by declaring the East African Standards by the East African Standards Committee (EASC) and the Council of Ministers notified, as proposed in the East African Community Standardisation, Accreditation and Conformity assessment (SACA) Bill, 2016.

1. INTRODUCTION

The East African Community (EAC), with its headquarters in Arusha, Tanzania, is the regional inter-governmental organization of the Republics of Burundi, Kenya, Rwanda, Tanzania, Uganda and South Sudan that recently joined the community.

The East African Business Council (EABC) is the apex body of business associations of the Private Sector and Corporates from the five EAC Partner States. It was established in 1997 to foster the interests of the Private Sector in the integration process of the EAC. EABC had 54 associations and over one hundred corporate members as at 2016. Amongst the associations were all the national private sector apex bodies in every EAC Partner State, manufacturers' associations, Chambers of Commerce, employer associations, bankers associations etc. With its secretariat in Arusha, EABC was represented in each of the EAC Partner States through its National Focal Points (NFPs) – being at the same time the national private sector apex bodies.

EABC's overarching objective is to be the dynamic voice of the private sector in the EAC in fostering sustained economic growth and prosperity. EABC further seeks to be an effective change agent for fostering an enabling business environment and to promote private sector's regional and global competitiveness in trade and investment. In this regard, the EABC provides a regional platform through which the business community can present their concerns at the EAC policy level, with the overall aim of creating a more conducive business environment through targeted policy reforms. Additionally, EABC also works towards promoting private sector's regional and global competitiveness in trade and investment through provision of services such as business summits and market information. Among EABC's key stakeholders are primarily the EAC Secretariat, the business community as represented through associations, associate and corporate members, national policy makers, EAC organs and institutions and other key national and regional organizations working towards enhancing private sector participation in the EAC and global integration. EABC has an "Observer Status" at the EAC, which enables EABC to attend and participate in all the relevant EAC activities and deliberations, not only at the Secretariat but also in other organs and institutions.

2. BACKGROUND TO THE STUDY

In 2013 EABC undertook a study on the prioritization of EAC standards and technical regulations for development, harmonization, revision or withdrawal. This study identified 20 of the EAC most traded goods for which the East African Standards Platform would base on to advocate for their products standards harmonization.

Out of the 20 most traded products, at least 79 East African standards were harmonized for products that included sugar and sugar confectioneries, minerals, maize and related products, essential oils and cosmetics, iron and steel related products, alcoholic beverages, edible fats and oils, and packaging materials. Six (6) of the products had harmonized standards which were approved and declared as East African Standards by the EAC Council of Ministers. Several of

these standards were adopted and implemented by the EAC Partner States. However, no study had been undertaken to assess the impact of the already harmonized standards on the overall business environment in the EAC.

This study was therefore meant to assess the impact of standards harmonization of the six (6) products that were harmonized in the EAC on the business community in terms of costs and time to trade goods in the EAC and the overall business environment so that the EASP is able to advocate for further harmonization of standards in the EAC by having clear, realistic and robust information on standards harmonization and development in the region.

2.1 Rationale of the study

The main objective of the assignment was to undertake an impact assessment of the EAC harmonized standards on the six (6) amongst the 20 most traded products in the EAC region in terms of cost, time and trade values. The selected products that were sampled and assessed were;

- i. Surface active agents
- ii. Alcoholic beverages
- iii. Steel and steel products
- iv. Edible fats and oils
- v. Sugar confectionary
- vi. Fish and fish products

In order for the EASP and EABC to keep track of the ongoing harmonization process of standards and ensure that the already harmonized standards are impacting positively on the business community in terms of costs and time related to standards NTBs and to be able to advocate for faster harmonization of standards in the EAC, it was very critical that this study was undertaken for EABC/EASP to have clear, realistic and robust information on the impact of standards harmonization in the region.

2.2 Specific Objectives

The scope and specific objectives of this assignment were to:

- a) Establish the cost and time implications of harmonized EAC standards on six (6) products from the list of the 20 of the most traded goods in the EAC region.
- b) Assess whether intra-EAC trade on the six (6) products has increased as a result of harmonized standards.
- c) Assess the impact of the already harmonized EAC standards on the six (6) products from the list of the 20 of the most traded goods in the EAC region.
- d) Analyze the challenges to the full implementation of harmonized standards on the 20 most traded goods in the EAC and provide recommendations on how the standards harmonization process can be fast tracked.

- e) Establish the reasons behind the low adoption of East African standards by some Partner States.
- f) Propose recommendations and a position paper that the Standards Platforms and EABC can use to lobby and advocate the other Partner States to adopt the EAC Standards.
- g) Assess the reasons behind why other regulatory agencies don't fully recognize the quality marks from other National Bureaus of Standards as a tool to facilitate intra-EAC trade and propose recommendations that will help in advocating for recognition of quality marks from regulatory authorities at the national level.

3. EAC STANDARDIZATION SITUATION OVERVIEW

In the EAC, standards developed or adopted by the respective national standards bodies have been in existence for many years. The EAC Standardization, Quality Assurance, Metrology and Testing (SQMT) Act (2006) was developed in line with the EAC Protocol on SQMT which provided for regional cooperation in the areas of standards, metrology, conformity assessment, accreditation and technical regulations. The objective of the SQMT Act was to facilitate industrial development and trade and to ensure the protection of health and safety of society and the environment within the community. It is important to note that the SQMT Act also provided for the development of East African Standards (EAS). The standards are developed jointly by the national standards bodies of the EAC Partner States in accordance with the procedures approved and maintained by the East African Standards Committee (EASC).

Standards are essential in helping the business community to be innovative, reduce business costs, improve quality and maintain competitiveness in local, regional and international marketplace. As the move towards a global economy becomes real, complying with standardization issues continue to be of critical importance to the survival and prosperity of businesses locally, regionally and internationally.

3.1 East African Standards Framework

A standard is a document that provides requirements, specifications, guidelines or characteristics that can be used consistently to ensure that materials, products, processes and services are fit for their purpose. Once a standard has been developed, it must be applied across individual businesses in the same, or in a standard way. Standards contain specifications for a product agreed to by a panel of experts within a technical committee (TC) which involves a wide range of participants that may include product technical specialists, health and safety regulators, consumer groups, academia and others that agree on the specifications that are important for a product.

The EAC Partner States developed the Principles and Procedures for the Development of East African Standards (EAS). These procedures were intended to be used as a reference tool and guide for the development of EAS. They establish a preferred style for the development of the standards thereby allowing for consistency of the documents, as well as elaborating on the methodologies and publication of standards. The procedures define the methodologies for the development and

maintenance of EAS through the activities of technical committees and their subsidiary bodies. The procedures are intended to be used as resource materials for standards writers, editors, technical chairpersons and technical committee members and can additionally be used as a training tool.

Once the need for a standard is established, it is assessed and a draft standard is developed that normally originates from any of the NSBs in the region and thereafter the draft is deliberated upon by the TC members, comments on the draft are generated, assessed and incorporated into the draft until consensus is reached and the draft becomes a final draft EAS. The final draft EAS becomes a EAS after it has been declared so by the Council of Ministers and gazetted. The table 1 shows the stages of the development process of the EAS.

Table 1: Stages of the Development of East African Standards

Stage	Associated Document	Time Frame
0. Preliminary stage	Preliminary work item (PWI)	Not applicable
1. Proposal stage	New Work Item Proposal (NWIP)	2 - 4 months
2. Preparatory stage	Working Draft (WD)	2 months
3. Committee stage including internal commenting	Committee Draft(s) (CD)	6 months
4. Enquiry stage including preparation for balloting	Draft East African Standard (DEAS)	2 months
5. Ballot stage	Final Draft East African Standard (FDEAS)	1 Month
6. Approval and Declaration stage	East African Standard (EAS)	Not applicable
7. Publication stage	East African Standard (EAS)	Not applicable
Total		19 Months

Source: Principles and Procedures for Development of EAS (2012)

If an International Standard (IS) is adopted, it is circulated primarily for objection or acceptance at the balloting stage (stage 5). Four (4) months were allowed for national consultations and one month for balloting on the NWIP. Developing an EAS, as outlined in the current EAC Standards Development Procedures, takes a minimum of 19 months. However, this period could be shortened to 6 months if an equivalent standard developed by a recognized body was adopted. If a document with a certain degree of maturity is available at the start of a standardization project, for example a standard developed by another recognized organization, it is possible to omit certain stages in the standardization process.

3.2 The Benefits of Standardization

Harmonization of standards reduces technical barriers to trade and is an essential requirement towards greater economic integration in the EAC and trade facilitation. The EAC product standards are made specifically to apply to products, for example the agricultural and food products, electrical products, building components, vehicle components, consumer goods, among

others. The EAS set measurable characteristics and parameters for the products and characteristics that instil in the product a certain level of quality or safety. Examples of these characteristics include: flavor, durability, purity, melting points, size, thickness, color and other relevant desirable characters. Ultimately, buyers, consumers or importers normally expect all products on the market to be in conformity with the standards. Standards are common in all forms of human activity and are designed to both simplify transactions and provide an element of certainty in exchange.

Standards fulfill a number of diverse functions. In the technical realm, standards lower risk, increase credibility and trust, and facilitate predictability for buyers and sellers. Therefore, standards are necessary for the smooth functioning of exchange between anonymous economic agents, as parties to a transaction must be assured of the nature and quality of the product involved. However, depending on the specific content of a standard and on market characteristics, standards can have a negative impact on two important contributors to economic growth: innovation and market competition. In light of these positive and negative effects, a number of empirical studies have attempted to isolate the net economic effect of standards and all the results point to the fact that, under the right conditions, standards have a net beneficial effect on economic growth.

3.3 The Legal Framework for Standards and Certification in the EAC

Article 81 of the Treaty for Establishing EAC recognizes the significance of Standardization, Quality Assurance, Metrology and Testing (SQMT) in promotion of trade and investment and the EAC Partner States undertook to evolve and apply a common policy for SQMT on goods and services produced and traded within the Community.

In Article 5(2a) of the EAC Common Market Protocol, the EAC Partner States agreed to eliminate technical barriers to trade and harmonize and mutually recognize standards and implement a common trade policy for the Community.

The restoration of the EAC has led to many positive steps in the field of standards in the region. The EAC SQMT Act (2006) was enacted and provided for regional cooperation in the areas of SQMT and Section 24 of the SQMT Act, provided for declaration and acceptance of product certification marks issued by the National Standards Bodies (NSBs).

The EAC SQMT Act was being amended by introduction of the East African Community Standardization, Accreditation and Conformity Assessment Bill, 2016 to address the administrative and legal challenges being faced in the implementation of standards in the region.

3.4 The Administrative Structures for SQMT in the EAC

The three administrative structures for the SQMT implementation according to the SQMT Act are: The East African Standards Committee (EASC), The Liaison Office, and The East African Accreditation Board (EAAB).

The EASC established under Section 4 of the SQMT Act, has a crucial mandate that includes coordinating activities related to standardization, metrology and conformity assessment in the

EAC. The Standards Technical Management Committee (STMC) is responsible for developing and harmonizing East African Standards (EAS).

The Liaison Office under section 5 of the Act provides administrative support to the EASC. Its other functions include providing logistical support to the EASC in the design and management of EAC projects for the implementation of standardization, metrology and conformity assessment activities and also maintains the catalogue and authoritative texts of the declared EAS. The Liaison Office is based at the EAC Secretariat in Arusha, Tanzania.

The East African Accreditation Board (EAAB) under section 11 comprises of the chief executives of the national accreditation bodies and national focal points. The Board facilitates cooperation and coordinates accreditation activities to avoid duplication of functions of the national accreditation bodies and national focal points and also promote the acceptability of test certification and inspection results from accredited organizations within the Community.

3.5 East African Standards Platform

The EABC provides a regional platform through which the business community can present their concerns at the EAC policy level, with the overall aim of creating a more conducive business environment through targeted policy reforms. Thus, in 2012 the EABC established the East African Standards Platform (EASP), an EAC regional private sector standards platform in response to the challenges and unnecessary trade barriers faced by suppliers in intra-regional trade due to differences in technical regulations and standards amongst the EAC Partner States.

To deal with these challenges the EASP collaborates and actively engage with the EASC as well as its national counterparts in order to bring about the necessary changes required to enhance intra-regional trade without negating the safety and health aspects of products and services. The EASP works with the relevant EAC structures to harmonize the disparities in technical regulations development and administration and facilitates the further harmonization of standards across the region by presenting private sector needs to the regional technical committees and active participation in standards development and harmonization.

Specifically, the implementation of the standardization activities of the EASP was being supported by TradeMark East Africa (TMEA) under a project titled “Support to Regional Platforms through EABC”. The activities included advocating for the full implementation of EAC Customs Union Protocol on the free movement of goods in the region. In this regard, the EASP has championed the development, harmonization and revision of the East African Standards of the most traded goods in the region so as to facilitate intra-EAC trade. Members of the private sector have been involved in the Technical Committees (TCs) developing, harmonizing or revising these standards however there is need for more engagement of the private sector to ensure successful implementation of EAS in the EAC Partner States. In pursuit of the above, the EASP through the EABC received two-year support from TMEA with an objective of strengthening Private Sector participation in the development and implementation of EAS as well as the development of a regional technical regulations framework.

3.6 Institutional Framework for Administration of Standards at National Level in the EAC Partner States

The EAC SQMT Act provides for each Partner State to designate a national quality system institution. The said institution functions as a National Standards Body (NSB), a National Metrology Institute, a National Legal Metrology Department and a National Accreditation Body (NAB). In the EAC Partner States, these were the institutions that administer standards at the national level and may take the form of several institutions or one institution that combines all the above responsibilities.

The NSBs are mandated, among others, to develop and publish standards in line with internationally recognized procedures and give effect to the decisions and recommendations of the Council and the EASC with regard to East African Standards. The NSBs represent the country on the EASC and in all relevant regional and international standardization organizations such as the International Organization for Standardization (ISO).

Each EAC Partner State has an NSB responsible for implementation of standards at national level, namely: Kenya Bureau of Standards (KEBS) for Kenya; Rwanda Standards Board (RSB) for Rwanda; Tanzania Bureau of Standards (TBS) for Tanzania; Uganda National Bureau of Standards (UNBS) for Uganda and Burundi Bureau of Standards (BBN) for Burundi.

3.6.1 Burundi Bureau of Standards (BBN)

The Burundi Bureau of Standards and Quality Control (BBN) was established in 1992 by an Act of Parliament as the national organization in Burundi in charge of quality control of all products sold in Burundi and those produced in the country for export. It issues certificate of sale to marketable products, and a certificate of compliance with quality to the export products.

The functions of the BBN include: Promotion of standardization, developing standards, promoting quality assurance, implementing and enforcing standards and technical regulations.

3.6.2 Kenya Bureau of Standards (KEBS)-

Kenya Bureau of Standards (KEBS) was established in 1974 and its functions include: standards development and harmonization, laboratory testing, measurement (calibration), enforcement of standards, product inspection, education and training in standardization, metrology and conformity assessment, management systems certification and product certification.

3.6.3 The Rwanda Standards Board (RSB)

Rwanda Standards Board (RSB) is a public institution established by Rwanda Government Legislation N° 30 of 29/07/2013 to undertake all activities pertaining to the development of standards, quality assurance and metrology in Rwanda. It is the only body with powers to define and possess national standards. Public services and public or private firms must present their standards to RSB for adoption at national level. The Bureau is governed by the Board of Directors composed of major stakeholders from government, industry, academic institutions, and consumer associations.

3.6.4 Tanzania Bureau of Standards (TBS)

Tanzania Bureau of Standards (TBS) was established by an Act No.3 of Parliament in 1975 as the National Standards Institute and became operational in April 1976. It was subsequently renamed Tanzania Bureau of Standards through an amendment to the Act in 1977. The standards Act No. 3 of 1975 was later repealed and replaced by the Standards Act. No.2 of 2009, which gave the Bureau more powers in carrying out its mandate.

Specifically, TBS was mandated to undertake measures for quality control of products of all descriptions and to promote standardization in industry and commerce. TBS functions include: formulation and promulgation of Tanzania Standards, implementation of standards, improving product quality, undertaking testing of products, calibration and promotion of standardization and quality assurance.

3.6.5 Uganda National Bureau of Standards (UNBS)

Uganda National Bureau of Standards (UNBS) is a statutory organization established by an Act of Parliament of 1983 and became operational in 1989. The UNBS is mandated to develop and promote standardisation, quality assurance, laboratory testing and metrology.

3.7 WTO SPS AND TBT Agreements

The World Trade Organization (WTO)¹ was established in 1995 with the overriding objective of helping trade to flow easily. The technical and other requirements for products, as well as requirements for conformity assessment such as testing, certification, etc. were originally introduced to protect the public from hazardous or substandard products and practices in each country, and the requirements are one of the most important tools to this effect. As the systems developed according to national preferences, they gradually became effective barriers to trade. Certain countries have even used such requirements to establish new barriers to trade. To avert these practices, the WTO developed rules for the handling of such requirements. These are manifested in the two agreements namely, the WTO Technical Barriers to Trade Agreement (TBT agreement) and the WTO Agreement on the Application of Sanitary and Phytosanitary Measures (SPS agreement).

The TBT agreement deals mostly with industrial goods, but also includes certain aspects, such as packaging and labeling of agricultural or agro-industrial products. This agreement covers technical regulations, standards and conformity assessment procedures. Technical regulations are mandatory requirements of governments, designed to fulfill objectives such as prevention of deceptive practices, protection of safety, health and the environment. Standards are voluntary documents, developed for common use. Their objective includes those of the technical regulations, but they also aim wider, for example uniformity of products, in order to facilitate trade. Voluntary standards

¹ The World Trade Organization (WTO) deals with the global rules of trade between nations. Its main function is to ensure that trade flows as smoothly, fairly, predictably and freely as possible. As 2016, all the EAC Partner States are members of the WTO except South Sudan.

are usually developed by the participation of a wide range of interest groups, such as government, trade and industry, consumers and researchers.

The SPS agreement deals with food safety, animal and plant health. The agreement affirms the rights of WTO members to restrict international trade when necessary to protect human, animal or plant life or health. At the same time, it aims to ensure that unnecessary health and safety regulations are not used as an excuse for protecting domestic producers from trade competition. This agreement affirms the rights of WTO members to restrict international trade when necessary to protect human, animal or plant life or health. To avoid SPS measures being used as disguised trade restrictions, the SPS agreement requires such measures to be based on scientific arguments, and they may not discriminate between countries where similar conditions prevail. The SPS agreement requires WTO members to base their SPS measures on international standards and explicitly recognize three intergovernmental organizations: the FAO/WHO Codex Alimentarius Commission (Codex) for food safety, the Office International des Epizooties (OIE) for animal health, and the FAO International Plant Protection Convention (IPPC) for plant health. Measures based on these organizations' standards are deemed to comply with the SPS agreement.

3.8 Product Certification in the EAC

Certification is the procedure by which a third party gives written assurance that a product, process or service conforms to specified requirements. Product certification involves the issuance of a certificate and/or mark to demonstrate that a specific product meets a defined set of required standards. The process for certification generally involves applying to the respective NSB by completing an application form to provide the NSB with general information about the company, its products, personnel, production systems and other relevant requirements. Depending on the product and its technical complexity, companies are asked for detailed technical information on the product such as design, specifications and in almost all cases samples are required for testing by the NSB laboratories and audits are carried out by the NSB to ensure products, process and systems meet requirements specified in the applicable EAS. The collected samples are tested and inspected and a complete report with the findings of the test, inspection and certification are issued to the manufacture or client. The process of certification in the EAC varies in length of time and cost depending on the scope.

3.9 Access to Standards in the EAC

The first step for obtaining information on standards is to contact the NSB in the respective EAC Partner States which normally have a Standards Information Centre. NSBs keep a collection of their own standards, and they generally have collections of national standards of other countries, of regional and of international standards. At the standards information centers of NSBs, there are usually catalogues of standards from various standards bodies to find out which of them apply to a specific product or any other information relating to standards, which may be needed. Copies of standards are generally not distributed free of charge. The NSBs in the region sell standards and if

it does not have the standard one needs, a request can be made to the NSB in one's country to order for the standard from the relevant NSB, against some payment.

4. APPROACH AND METHODOLOGY

A combination of approaches and methodology were used to collect data and obtaining the necessary information for the review and analysis on the impact assessment of the East African harmonized standards on the business community. Secondary data was collected through literature review/desk study that included an intensive literature search, review and synthesis of relevant documents (Refer to Annex 6 for documents reviewed /references). Primary data was collected through questionnaires and interviews of key informants in both public and private sectors stakeholder institutions in all the five EAC Partner States (Refer to Annex 5 for persons contacted). The data and information collected were triangulated, progressively analyzed and used to prepare the study report.

4.1 Limitations

The limitations in this study were mainly those relating to the availability of key respondents for interviews at the time of the field survey. These limitations were overcome by continuing to engage respondents even after the field survey so that their views could be included in the final report. In addition, the TORs assumed that the sampled product manufacturers were evenly distributed in all the EAC Partner States which was not the case.

5. FINDINGS

This section of the report provides the findings of the impact assessment of the East African Harmonized Standards on the business community based on the six (6) selected sampled products by examining whether as a result of using Harmonized East African Standards, the trade values of products increased, the transaction time and cost reduced and improved their business income. The study in addition examined the quality aspects of harmonizing standards. The study findings indicated that the harmonized East African Standards made contributions to the economic growth in the region. Assessment of the findings from the respective NSBs and manufacturers/exporters of the selected sampled products under study whose standards were harmonized indicated that the standards harmonization had contributed to both quantitative and qualitative impacts. Table 2 shows the responses by the business community on the impact of standards harmonization on transaction time, cost and business income.

Table 2: Percentage response on the impact of standards harmonization

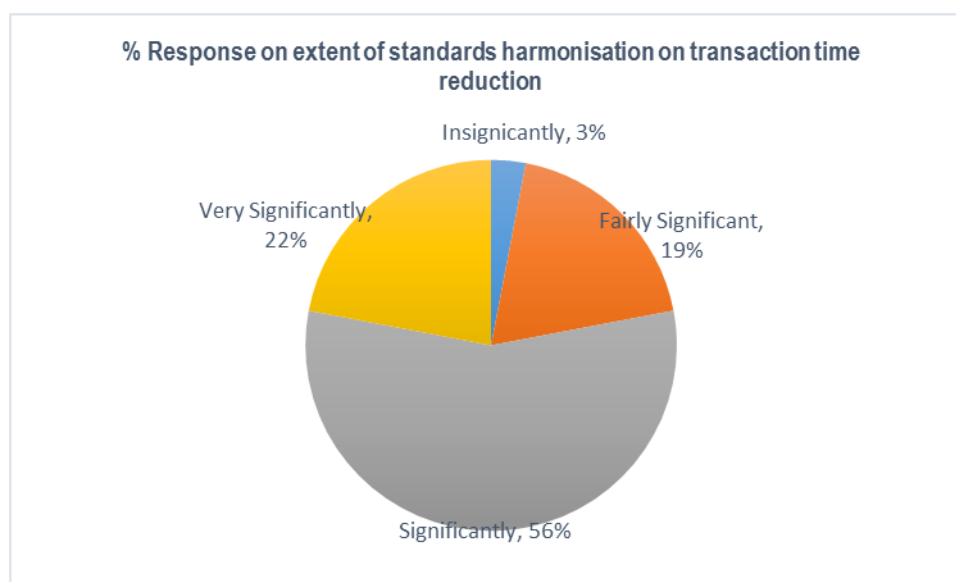
N#	Variable	EXTENT STANDARDS HARMONIZATION ON														
		Reduced transaction time					Reduced transaction cost					Improved business income				
	Product/ Score	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
1.	Alcoholic beverages	-	-	75%	25%	-	-	-	50%	50%	-	-	25%	25%	25%	25%
2.	Steel and steel products	-	25%	25%	50%	-	25%	-	50%	25%	-	-	25%	25%	25%	25%

N#	Variable	EXTENT STANDARDS HARMONIZATION ON														
		Reduced transaction time					Reduced transaction cost					Improved business income				
3.	surface active agents	-	30%	50%	20%	-	18%	18%	46%	18%	-	-	-	50%	25%	25%
4.	Fats and oil	-	-	50%	50%	-	14%	14%	58%	14%	-	-	29%	57%	14%	-
5.	Sweets and confectionery	25%	-	25%	50%	-	25%	50%	-	25%	-	25%	25%	25%	25%	-
6.	Member organizations	-	-	87%	13%	-	-	13%	61%	13%	13%	-	13%	75%	-	12%
7.	Overall	3%	19%	56%	22%	-	12%	18%	46%	21%	3%	2%	21%	54%	15%	8%

Source: Field Survey; Key to Score: 5. Exceedingly Significant; 4. Very Significant; 3. Significant; 2 Fairly Significant; 1. Not Significant.

5.1 Impact of EAS Harmonization on Reducing Transaction Time

Study findings indicated harmonization of standards had reduced the transaction time while clearing goods at the EAC borders because one standard was applied across the EAC. 78% of the respondents indicated that standards harmonization had significantly reduced the transaction time while clearing goods at the borders (56% significantly and 22% very significantly). Further findings indicated that in the EAC Partner States where the quality marks and certificates of analysis based on EAS were recognized by the NSBs, the standards related average clearance time at the borders had reduced to 0.5 days compared to compared to about 38 days it would take in the year 2010 before standards were harmonized which was a 99% reduction in the border transaction clearance time. The delays were due to sampling and retesting of the goods based on multiple standards, which have been eliminated due to standards harmonization.

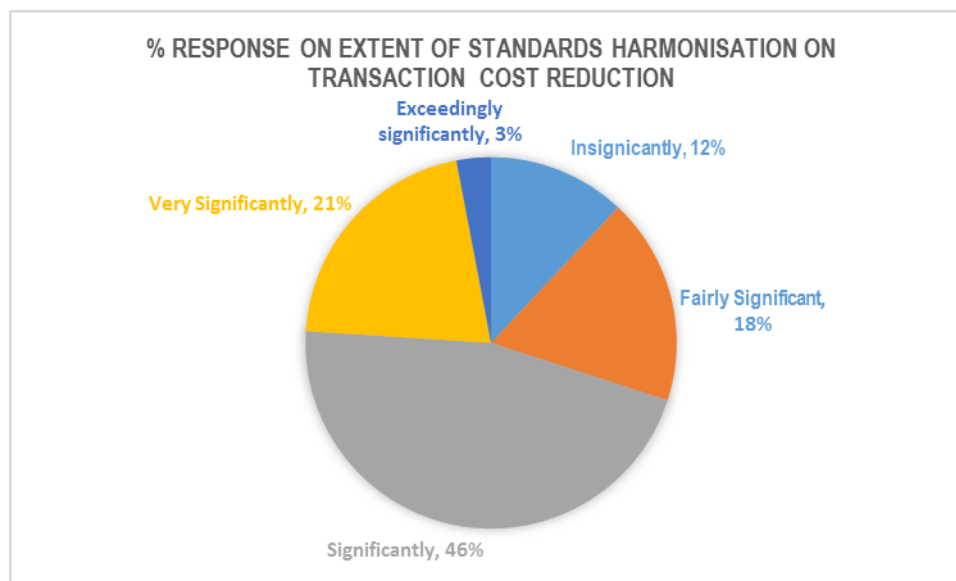


The interviewed manufacturers/exporters of the selected sampled products where standards had been harmonized indicated that certification of the products with the quality marks based on East

African Standards (EAS) significantly reduced the standards related delays at the borders. The significant reduction in standards related delays was attributed standards harmonization because the products that were certified by the NSBs and/or accompanied by Certificates of Analysis from the NSBs were not re-sampled for retesting at the borders but only cleared after routine inspections. However, in Tanzania, the Tanzania Food and Drug Authority (TFDA) still insisted on sampling and retesting of food and cosmetic products if they are not assessed and registered with the TFDA prior to importation.

5.2 Impact of EAS Harmonization on Reducing Transaction Costs

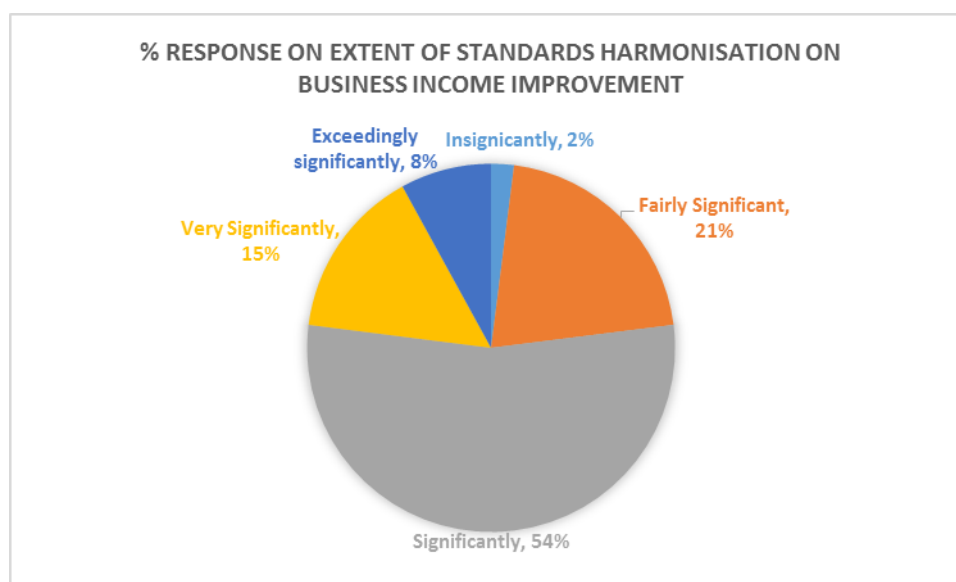
The study findings indicated that as a result of the reduced delays at the borders because of trading in certified products based on EAS, the standards related cost due to the delays at the borders had reduced to almost zero compared to an average of US\$ 500 before standards were harmonized that would be paid on re-testing, demurrage (delayed trucks) and subsistence allowance for the drivers/staff which also contributes to increased costs of doing business. The study findings further revealed that the reduction in time and cost due to the use of harmonized standards had contributed to the more effective use of resources by the NSBs in the region because they no longer need to spend a lot of time and other resources sampling and re-testing all products at the entry points. The study findings further indicated that 70% of the respondents (46% significantly, 21% very significantly and 3% exceedingly significantly) revealed that standards harmonization had resulted into reduced transactions cost as a result of reduced delays at the borders (as shown in the chart below).



5.3 Impact of EAS Harmonization on Improving Business Income

The evaluation findings indicated that as a result of the reduced delays at the borders and reduced cost of re-testing the products because of harmonization of the standards in the EAC, the business income had improved as a result of the savings attributed to producing and trading in products based on East African Standards. This is evidenced by 77% of the respondents that indicated that

trading in products based harmonized standards had improved their business income (54% significantly, 15% very significantly and 8% exceedingly significantly). The chart below shows the % responses indicating the extent of standards harmonization on improving business income.



5.4 Impact of Standards harmonization on Intra- and Extra-EAC Trade

Compliance with standards and market requirements are prerequisites for successful market access and for improving the competitiveness of local goods and exports in the EAC. The study noted that standards compliance were a vital element for the growth and strengthening of the EAC manufacturing industry which also facilitates and promotes trade and ultimately contributes to the GDP of the respective EAC Partner States.

5.4.1 Intra-EAC Trade Values of the Selected Sampled Products

The study results indicated that harmonization of standards in the region of the selected sampled products improved their competitiveness and market access that contributed to increment in the intra-EAC trade values of the selected sampled products from US\$291.2 million in 2010 to US\$343 million in 2014 which was an increment of 18%. Table 3 provides the summary of the intra-EAC trade values of the selected sampled products under this study. Kenya contributed the highest trade value in the intra-EAC trade. The detailed values of each selected sampled product is given in Annex 2.

Table 3: Overall Intra -EAC Trade of the Sampled Selected Products, US\$ '000' (2010-2014)

#	Country /Year	2010	2011	2012	2013	2014
1	Burundi	984	3,165	113	5,239	3,277
	% Increase based on 2010	-	222%	-89%	432%	233%
2	Kenya	199,093	242,301	239,105	207,073	206,008
	% Increase based on 2010	-	22%	20%	4%	3%
3	Rwanda	134	1,775	3,036	5,507	4,883

#	Country /Year	2010	2011	2012	2013	2014
	% Increase based on 2010	-	1225%	2166%	4010%	3544%
4	Tanzania	28,714	23,856	23,902	17,546	17,635
	% Increase based on 2010	-	(17%)	(17%)	(39%)	(39%)
5	Uganda	62,284	84,358	86,959	88,626	111,149
	% Increase based on 2010	-	35%	40%	42%	78%
6	Total Intra-EAC Trade (6 selected sampled products)	291,210	355,456	353,115	323,991	342,952
	% Increment Based on 2010	-	22%	21%	11%	18%

Source: ITC and National Bureaus of Statistics, EAC Trade Reports

5.4.2 Extra-EAC Trade Values of the Selected Sampled Products Trends

The study findings indicated that harmonization of standards of the selected sampled products in the region has also contributed to the increment in extra-EAC trade values from US\$851.6 million in 2010 to US\$ 950.8 million in 2014 which was an increment of 12%. Table 4 provides the extra EAC trade values of the sampled products under study. The study findings further indicated that the value of the products exported outside the EAC bring in more revenue than those traded within the EAC. The study attributed this impact to the fact the harmonized standards were based on international standards and best practices and hence the products were also able to meet the standards requirements and compete on markets outside the EAC. The detailed analysis of the values of each selected sampled product is provided in Annex 3 and Annex 4 the exports of the respective EAC Partner States to other EAC Partner States.

Table 4: Extra-EAC Trade Values of the Selected Sampled Products, US\$ '000' (2010-2014)

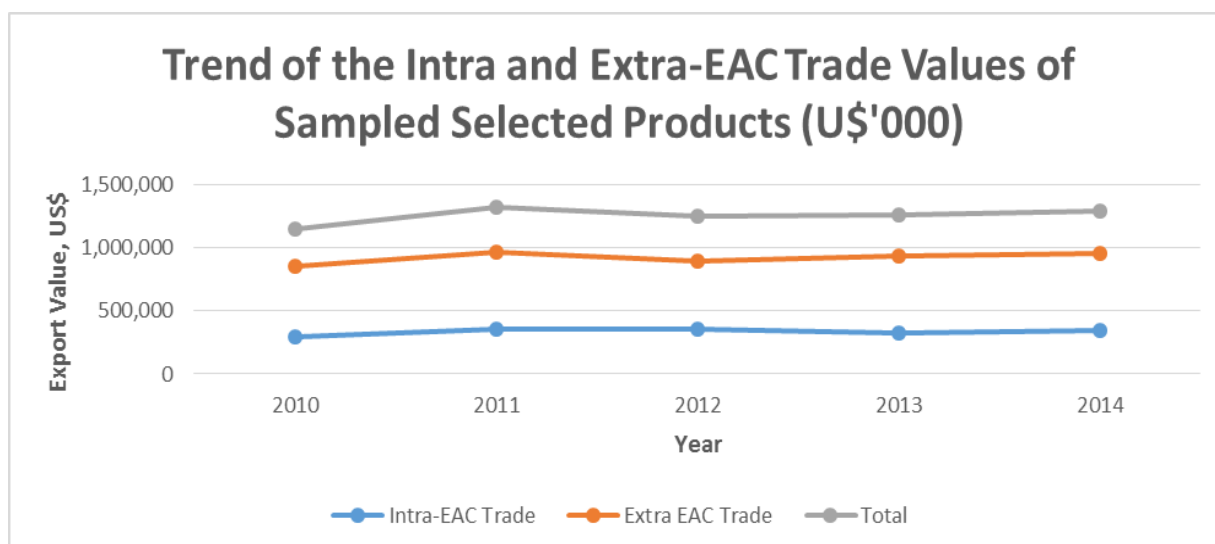
Country/Year	2010	2011	2012	2013	2014
Burundi	3,187	7,075	9,349	13,574	15,078
% Increase based on 2010	-	122%	193%	326%	373%
Kenya	387,512	451,236	443,821	386,727	348,209
% Increase based on 2010	-	16%	15%	0%	(10%)
Rwanda	5,849	4,907	16,437	31,626	24,748
% Increase based on 2010	-	(16%)	181%	441%	323%
Tanzania	194,320	186,675	171,553	173,893	225,480
% Increase based on 2010	-	(4%)	(12%)	(11%)	16%
Uganda	260,759	311,550	256,735	329,066	337,258
% Increase based on 2010	-	19%	(2%)	26%	29%
Total Extra EAC Trade (6 Selected Sampled Product)	851,627	961,443	897895	934,886	950,773
% Increment Based on 2010	-	13%	5%	10%	12%

Source: ITC and National Bureau of Statistics; EAC Trade Reports

5.4.3 Overall Trade Value Trends of the Selected Sampled Products

The study findings indicated that overall there was general increase in the trade value trend of the selected sampled products. The total export value (both intra and extra) increased to US\$1,293.7

million in 2014 from US\$1,142.8 million in 2010 which was 13% increment. The graph shows the trade trend of the sampled products.



5.5 Impact Assessment of Harmonized EAS on the Six Selected Sampled Products

Standards are a vital element in trade, because they help in business facilitation and access to markets. The study also noted that harmonization of standards in the EAC was a building block to a strong integrated EAC. The extent of the others impact of standards harmonization include:

- a) **Quality and Safety of the Products and Consumer Protection:** The study findings indicated that the EAC manufacturers based their products on the harmonized EAS which increased their conformance to quality standards, increased efficiency, reduced costs, and boosted sales of their products and services. The study further indicated that the harmonized standards were recognized and relevant in the region and that they were timely in protecting the consumers and the environment. The harmonized standards contributed to consumer confidence, protecting the health and safety of consumers at both the regional and international levels.
- b) **Revision of standards used by the NSBs:** In the EAC, standards are developed and adopted by the respective EAC Partner States through their respective NSBs and thereafter, these standards are implemented as national standards and produce benefits for the stakeholders that use them. As a result of the adoption of the EAS, some NSBs were having updated standards that are much more relevant to the industry.
- c) **Trade facilitation and reduction of standards related technical barriers to trade:** The standards harmonization have reduced the arbitrary product requirements that created unnecessary and unjustified technical barriers to trade that increased the cost of doing business. The study noted that harmonized standards prevent such non-tariff barriers to trade by harmonizing requirements in a manner that promote fair competition in the region. The study findings further indicated that implementation of harmonized EAS has significantly

contributed to the reduction of the unnecessary standards related TBTs in the EAC because all the EAC Partner States were using one uniform product standards across the region with an exception of Tanzania where Tanzania Food and Drug Authority (TFDA) had to retest food and cosmetics related products, if they are not registered with TFDA prior to importation into Tanzania. If the products were assessed for quality and registered by TFDA prior to importation, they would be imported to Tanzania without re-testing.

The study further noted that in the EAC, harmonized standards of the products that were considered in this study were significantly reducing the technical differences and barrier to trade that existed among the EAC Partner States. The harmonized standards have created and ensured compatibility, for example in terms of product measurements, labelling and other specification. By harmonizing and recognizing these standards in the EAC, this has reduced the technical barriers to trade and contributed to the reduced costs of doing business.

- d) **Competitiveness of the products:** In the EAC, trade is a basic economic activity that improves people's socio-economic livelihoods. To increase product competitiveness and regional economic growth, product quality is very vital. This is because standards drive trade by providing a signal of quality to consumers and trade partners. The companies dealing in products covered by the harmonized standards revealed that complying with harmonized standards contributed to their businesses' competitive edge by demonstrating to the market that their products were of high quality. The study further revealed that since the products were manufactured based on harmonized standards, their export potential had also been enhanced for both regional and international markets.

5.6 Adoption Rates of East African Standards by EAC Partner States

Prior to 2010, the adoption rates of EAS by the EAC Partner States were very low because of inadequate participation in the standards harmonization process by the EAC partner states and their respective stakeholders. This challenge was addressed by developing guidelines for the harmonization of EAS that ensured adequate participation of the key stakeholders.

In addition, the East African Standards Catalogue was reviewed and revised to provide for EAS and International Standards for adoption by the EAC Partner States. The revised Catalogue contained 366 EAS and 800 International Standards endorsed by East African Standards Committee for adoption by the EAC Partner States. Consequently the rate of adoption of EAS by the EAC Partner States had significantly improved. The study findings show that the adoption rates of the EAS that were harmonized from 2010 onwards with full participation of the key stakeholders had significantly increased. For instance, the study findings indicated that the adoption rates for the selected sampled products was 100% by all the EAC Partner States. Refer to annex 1 for more details on the level of adoption of the EAS standards for the selected sampled products.

The study further indicated that the high adoption rates of EAS in the region had contributed to increased co-operate between the NSBs in a number of areas of SQMT which consequently further contributed to coordinated import and export of products in the EAC.

However, since standards are demand driven and are very critical for trade as one of the market entry requirements, it is of great importance to harmonize standards for products where there is high demand for trade and also products that greatly contribute to the GDP of the respective EAC Partner States so as to keep the EAS and NSBs relevant to the business community.

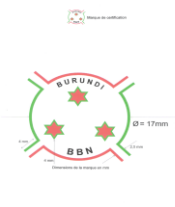




5.7 Assessment of Recognition of Quality Marks by Some Regulatory Agencies

Certification is a procedure by which a third party gives written assurance that a product, process or service conforms to specified requirements. Thus certification is a confirmation of compliance with the requirements. The study findings indicated that in the EAC, NSBs were the national bodies mandated to carry out third-party certification of products. Any manufacturer whose product is in conformity with the EAS may apply for product certification from the respective NSBs in the EAC Partner States.

The two main technical principles used for granting certification are: (a) Testing of a product to ensure conformity with the applicable standards; and (b) assessment of the manufacturer's quality control system according to specified conditions. The study further noted that the criteria for certification in the NSBs was to a great extent in accordance with the internationally acceptable best practices as stipulated in ISO/IEC 17065:2012; Conformity assessment — Requirements for bodies certifying products, processes and services. After assessment, successful manufacturers are given written assurance and authorization to use a quality mark on their product to demonstrate conformity to the standards. In some EAC Partner States certification is followed by surveillance at least once or twice a year.

The study also found that in the region, the NSBs have registered their respective certification marks as provided for in Article 24 of the SQMT Act. The NSBs have also notified the EAC Council of Ministers of the product certification marks within the jurisdiction of the respective Partner State including the design of the mark as required by the SQMT Act (Section 24) as shown in Table 5.

Table 5: Notified Certification Marks by the EAC Partner States

Burundi	Kenya	Rwanda	Tanzania	Uganda
				

The study noted that the NSBs in the EAC Partner States are recognizing as equal to their own, product certification marks awarded by national quality system institutions of other EAC Partner States. The study further found that the EAC Partner States had ensured that the administrative provisions relating to the use of product certification marks, meet certain requirements, for example: product certification marks were established and appropriately registered to confer protection similar to trademarks; and product certification marks were not identical to or so nearly resembling any trade mark registered under the trade mark law in the Partner State.

The findings of the study indicated that recognizing quality marks by the respective EAC Partner States was of paramount importance because it can either contribute to seamless trade flows or fail trade in the region. The challenge with TFDA was that it applied best practice defined under SPS Agreement which the business community trading in the TFDA regulated products had to comply with to access the Tanzania market. The products regulated by TFDA had to be assessed and registered if they comply with the requirements prior to importation in Tanzania to avoid being inconvenienced at the borders.

6. CHALLENGES OF STANDARDS HARMONIZATION IN THE EAC

- i) **Inadequate funding for standards harmonization:** Standards harmonization is an expensive venture that requires experts and key stakeholders to meet, deliberate and form consensus however, study findings indicated that standardization activities were not adequately funded both at national and regional levels.
- ii) **Inadequate data to support standards development and harmonization:** Standards development and harmonization require a good level of research and data to inform discussion during the whole harmonization process however, some EAC Partner States do not adequately research and prepare which makes the whole process lengthy and costly.
- iii) **Insufficient staffing:** The EAC Standards Office was understaffed and also the current human resources in some of the EAC standardization system (NSBs) were still insufficient to support and promptly respond to the standards needs of the ever changing business community.
- iv) **Inadequate participation of the private sector in the standards development and harmonization process:** The private sector do not adequately participate in regional standardization activities due to a number of factors that include limited financial and technological capacity to participate, and yet they are key stakeholders in standards implementation.
- v) **Appropriately numbering the adopted EAS:** Some EAC Partner States have adopted the EAS but have not appropriately changed the standards numbers and names as required to enhance traceability which cause confusion to the standards users.
- vi) **Low awareness on harmonised EAS:** There were low levels of public awareness on standardisation activities in the region especially by the SMEs. As a result, SMEs were not

fully aware of the EAS and yet they are key stakeholders in the process of standards development, harmonization and implementation.

7. CONCLUSION

Certification of products based on harmonized EAS was significantly contributing to trade facilitation in the EAC by reducing TBT and the standards related cost of doing business. In addition standards harmonization was contributing to the competitiveness of the products that were manufactured based on the EAS, at national, regional and international levels.

Evidence from the study findings indicated that standards related clearance time and cost at the borders had significantly reduced for products that were certified based on EAS and companies in the EAC were becoming more focused on to doing business across the regional borders by making investments, conducting trade and co-operating with business partners within and outside the EAC. The EAC Partner States had put the EAS in the spotlight more than in the past and every country was working towards protecting the health of consumers and environment, promoting trade and enhancing the competitiveness of local products for both the regional and international markets.

8. RECOMMENDATIONS TO INFORM EABC ADVOCACY ON STANDARDS

- i) **The EABC should closely collaborate with the EAC and continue with the standardization activities in the region through the existing framework of the East African Standards Platform (EASP) as this will enhance coordinated participation of the private sector in the region.** Funding for standards development and harmonization is still inadequate both at national and regional levels and yet there was still a lot more standards to be harmonized and also to update and revise the EAS that were more than 5 years old to facilitate trade. It is therefore recommended that TMEA continues supporting the standards harmonization activities at regional levels through the existing framework of the East African Standards Platform to enhance trade.
- ii) **The EAC should continue with the peer assessment of the SQMT infrastructure in each of the EAC Partner States** with the objective of determining whether the exporting country fulfils the importing country's conformity assessment requirements. Thereafter, a formal mutual equivalence agreement should be signed to enhance trust and promote mutual recognition and acceptance of the conformity assessment certificates or marks to enhance trade. In addition, accreditation of conformity assessment services to ISO/IEC 17020, ISO/IEC 17021, ISO/IEC 17025, ISO/IEC 17065 should be supported to promote recognition of the services in the region. In addition, to foster mutual recognition and acceptance of the product certification by all the stakeholders across the region, the EAC should consider adoption of a single certification mark for the EAC region.
- iii) **EAC secretariat and EAC Partner States through their NSBs should increase the staffing levels appropriately:** Given the increasing demand for standards related activities and increased trade volumes from the business communities, the EAC Secretariat and NSBs should

provide for funds to increase the staffing levels appropriately to serve the public efficiently and effectively coordinate standards related activities and promote trade in the region.

- iv) **The EAC Secretariat should establish a Monitoring Mechanism of Adopted EAS by the EAC Partner States:** There should be a monitoring mechanism to ensure that the EAS that are adopted by each of the EAC Partner States are periodically reported to the East African Standards Committee. This will make the EAC Partners States through their NSBs more accountable in standards adoption in line with Article 15(1) of the EAC SQMT Act, that provides for adoption of the East African Standards within six months as a national standards and withdraw any existing national standards with similar scope and purpose.
- v) **The EAC Secretariat should Harmonize and Review the Standards for Products whose trade is impeded in the Region due to disparate standards in the EAC:** Standards developed and harmonized should be demand driven with priority on the most traded products in the region and products whose trade is impeded due to lack of harmonized standards. Some standard in the East African Standards Catalogue were more than 5 years and needed urgent review especially for the traded products. Harmonizing standards for products in the region promotes trade flows which greatly contribute to the GDP of the respective EAC Partner States. In addition, standards harmonization should also focus on areas of strategic importance in the region.
- vi) **EAC Regional Standards Office and NSBs should Embrace ICT Where Possible to Shorten the Time Taken to Harmonize Standards:** The process of standards development and harmonization goes through various stages of the technical committees, discussion and negotiations to reach consensus, and thus tends to be relatively lengthy. Therefore, the EAC regional standards office and the respective NSBs in the region should consider video conferencing for some meetings where possible to reduce on the time and cost of standards harmonization. In addition, the stakeholders should be supported to conduct research and collect data to support standards harmonization arguments as this will contribute to reducing the time taken to harmonize standards.
- vii) **Ensure Adequate Private Sector Participation in Regional Standardization Activities:** For standards to be relevant to the users mainly the private sector, they should be actively involved in regional standards harmonization activities. The participation by the private sector could be enhanced by raising awareness of the private sector on the importance of standards to ensure their engagement; and conducting a quantitative study on the economic benefits of standards and sharing the findings with stakeholders. The Private Sector involvement should be increased from the start of the process till publication of EAC harmonized standards through proposing new work item, carrying out research and providing relevant data on the standards under development, participation in Technical committee meetings, commenting on standards under public review and sponsoring of identified technical committee members to the meetings.

- viii) **Create Awareness on the Standardization activities and Harmonized Standards in the region:** The East African Standards Platform in collaboration with the NSBs should increase on level of awareness on standardisation activities and harmonised standards in the region. In addition, the Private Sector through the EAS should advocate to shorten the process for standards harmonization through adequate preparations for the meetings and use of ICT.
- ix) **The EAC Secretariat should fast-track the ratification of EAC SPS protocol** by Partner States to address issues regarding food safety regulations and harmonization of food safety controls to minimize on inconveniences to exporters to Tanzania.
- x) **To improve on funding for regional standardization activities, the EAC Secretariat and/or EABC should develop EAC Standardization Strategic Plan** in line with other EAC policies related to industry development and trade promotion, protection of health and safety as well as environmental protection and lobby donors and EAC Partner States to support the activities.
- xi) **Adopt Single Numbering of the adopted EAS to ensure traceability:** The EAC Partner States should embrace single numbering of the adopted EAS to ensure traceability of the standards.
- xii) **The NSBs should provide advance notification and adequate time whenever there changes in the standards specifications** to enable the private sector adjust to implement the standards.
- xiii) **The lengthy process of standards harmonisation should be shortened by declaring the East African Standards by the East African Standards Committee (EASC) and the Council of Ministers** notified as proposed in the East African Community Standardisation, Accreditation and Conformity assessment (SACA) Bill, 2016.

ANNEX 1: POSITION PAPER



EAST AFRICAN BUSINESS COUNCIL (EABC)

POSITION PAPER

ON

THE IMPACT ASSESSMENT OF THE EAST AFRICAN HARMONIZED STANDARDS ON THE BUSINESS COMMUNITY

OCTOBER, 2016

1. INTRODUCTION

The East African Community (EAC), is the regional inter-governmental organization of the Republics of Burundi, Kenya, Rwanda, Tanzania, Uganda and South Sudan that recently joined the community with its headquarters in Arusha, Tanzania with a total population of 168 million and GDP of US\$ 155.2 billion as of 2016. The East African Business Council (EABC) is the apex body of business associations of the Private Sector and Corporates from the five Partner states of the EAC and fosters the interests of the Private Sector in the integration process of the EAC with 54 associations and over one hundred corporate members in 2016.

Article 81 of the Treaty for Establishing EAC recognizes the significance of Standardization, Quality Assurance, Metrology and Testing (SQMT) in promotion of trade and investment and the Partner States undertook to evolve and apply a common policy for SQMT on goods and services produced and traded within the Community. The EAC SQMT Act (2006) provides for regional cooperation in the areas of SQMT and Section 24 of the SQMT Act, provides for declaration and acceptance of product certification marks issued by the National Standards Bodies (NSBs). Each EAC Partner State has an NSB responsible for implementation of standards at national level, namely: Kenya Bureau of Standards (KEBS) for Kenya; Rwanda Standards Board (RSB) for Rwanda; Tanzania Bureau of Standards (TBS) for Tanzania; Uganda National Bureau of Standards (UNBS) for Uganda and Burundi Bureau of Standards (BBN) for Burundi.

2. OBJECTIVE

The objective of this paper is to give a position on the impact the EAC harmonized standards based on six (6) amongst the 20 most traded products in the EAC region in terms of cost, time and trade values. The six products that were sampled and assessed were: Surface active agents, Alcoholic beverages, Steel and steel products, Edible fats and oils, Sugar confectionary and Fish and fish products.

3. BENEFITS OF STANDARDS HARMONISATION IN THE EAC

A standard is a document that provides requirements, specifications, guidelines or characteristics that can be used consistently to ensure that materials, products, processes and services are fit for their purpose. Standards contain important specifications for a product agreed to by a panel of experts, within a technical committee (TC) and other key stakeholders through consensus. The EAC standards are developed in accordance with the procedures approved and maintained by the East African Standards Committee (EASC). However, since standards are demand driven and are very critical for trade as one of the market entry requirements, it is of great importance to harmonize standards for products where there is high demand for trade and also products that greatly contribute to the GDP of the respective EAC Partner States.

Standards are recognized as being essential to helping the business community to be innovative, reduce business costs, improve quality and maintain competitiveness in local, regional and international marketplace. As the move towards a global economy becomes real, complying with standardization issues continue to be of critical importance to the survival and prosperity of businesses locally, regionally and internationally. Harmonization of standards in the EAC is of great importance because the Harmonized East African Standards make both qualitative and quantitative contributions to the region that are discussed in this paper.

3.1 INCREASE IN BOTH DOMESTIC AND EXTERNAL TRADE VALUES OF PRODUCTS

East African harmonized standards are based on international standards and best practices and hence the products manufactured based on these standards are able to compete on markets outside the EAC. It was evident from the selected sampled products that for the products where standards had been harmonized, the trade values had increased. For example, the total export value for sampled products increased to US\$ 1,293 million in 2014 from US\$1,142 million in 2010 which was 13% increment. Harmonization of standards in the region of the selected sampled products improved their competitiveness and market access also and contributed to increment in the intra-EAC trade values of the sampled products from US\$ 291.2 million in 2010 to US\$ 343 million in 2014 which was an increment of 18%. The harmonized East African Standards (EAS) also contributed to the increment in extra-EAC trade values from US\$ 851.6 million in 2010 to US\$ 950.8 million in 2014 which was an increment of 12%.

3.2 REDUCING TRANSACTION COSTS AND TIME

Notified quality marks and certificates of analysis that are based on EAS are recognized by the NSBs and the standards related clearance time at the borders for such products has on average reduced from 38 days before standards were harmonized to 0.5 days after standards harmonization because products are no longer being sampled for retesting which used to cause unnecessary standards related delays at the borders, thus time to clear goods by NSBs has reduced by 99% as a result of standards harmonization. As a result of the reduced delays, the border clearance cost reduced from US\$500 to negligible amounts. However, in Tanzania, the Tanzania Food and Drug Authority (TFDA) procedure of assessment for conformity of food products under importation is done prior to importation and involves submission of samples by the importer. The samples are tested and assessed for conformity with requirements. If they meet the requirements, a registration certificate is issued to the importer and can be presented at the boarder for clearance of consignments.

3.3 RECOGNITION OF QUALITY MARKS BY SOME REGULATORY AGENCIES

Any manufacturer whose product is in conformity with the EAS may apply for product certification from the respective NSBs in the region. After assessment, successful manufacturers are given written assurance and authorization to use a quality mark on their product to

demonstrate conformity. Recognizing quality marks by the respective EAC Partner States is of paramount importance because it can either contribute to seamless trade flows or fail trade in the region.

3.4 IMPROVED ADOPTION RATES OF EAST AFRICAN STANDARDS BY EAC PARTNER STATES

The adequate participation of all key stakeholders in the standards harmonization process has greatly increased their rate of adoption by the EAC Partner States. This was also enhanced by the review The East African Standards Catalogue updated in 2013 that categorised the standards into EAS and International Standards endorsed by East African Standards Committee for adoption by the EAC Partner States.

3.5 OTHER BENEFITS ATTRIBUTED TO HARMONIZED EAS

- i) There is good compliance to standards reflected in the production of quality products, safety of the products and consumer protection because the EAC manufacturers base their products on the harmonized EAS
- ii) The NSBs were using revised standards as a result of the adoption of the EAS in that they are using much more relevant standards to the industry.
- iii) EAS have contributed to Trade facilitation and reduction of Standards Related Technical Barriers to Trade and also promoted fair competition in the region because one uniform standards is used for the same products.
- iv) To increase product competitiveness and regional economic growth, product quality is very vital. This is because standards drive trade by providing a signal of quality to consumers and trade partners. Products are manufactured based on harmonized standards, thus their export potential has also been enhanced for both regional and international markets.

4. CHALLENGES

Despite the benefits resulting from standards harmonization, there still exist challenges that include:

- i) Inadequate funding for standards harmonization since standards harmonization is an expensive venture that requires experts and key stakeholders to meet, deliberate and form consensus.
- ii) Inadequate researched data to inform standards harmonization: Standards development and harmonization require a good level of researched data to inform the whole process of harmonization however, there is inadequate data to support standards development and harmonization which results in the process taking long.
- iii) The EAC Standards Office is understaffed and also the the current human resources in some of the EAC standardization system (NSBs) are still insufficient to support and respond to the standards needs of the ever changing business community promptly.

- iv) There is inadequate participation of the private sector in the standards development and harmonization process and yet their participation and contributions are vital since they are the main standards users.
- v) There are low levels of public awareness on standardisation activities in the region especially by the SMEs.
- vi) Some standards in the East African Standards Catalogue are more than 5 years old and need urgent review especially for products that are most traded.
- vii) EAC Partner States do not appropriately number the adopted standards to ensure traceability of the standards.

4 RECOMMENDATION

For the EAC to continue benefiting from harmonization of EAC standards, the following is recommended that:

- i) The EABC should closely collaborate with the EAC and continue with the standardization activities in the region through the existing framework of the East African Standards Platform (EASP) as this will enhance coordinated participation of the private sector in the region.
- ii) The EAC should continue with the peer assessment of the SQMT infrastructure in each of the EAC Partner States to enhance trust and promote mutual recognition of the conformity assessment services in the region. In addition, accreditation of conformity assessment services to ISO/IEC 17020, ISO/IEC 17021, ISO/IEC 17025, ISO/IEC 17065 should be supported to promote recognition of the services in the region. In addition, to foster mutual recognition and acceptance of the product certification by all the stakeholders across the region, the EAC should consider adoption of a single certification mark for the EAC region. In addition, to foster mutual recognition and acceptance of the product certification by all the stakeholders across the region, the EAC should consider adoption of a single certification mark for the EAC region.
- iii) The EAC Secretariat and EAC Partner States through their NSBs should increase their staffing levels appropriately to effectively handle standardization activities.
- iv) The EAC Secretariat through the Standards office should establish a monitoring mechanism of adopted EAS by the EAC Partner States.
- v) The EAC Secretariat should harmonize and review the standards for products whose trade is impeded in the region due to disparate standards in the EAC.

- vi) The EAC regional standards office and NSBs should embrace ICT where possible to reduce the cost and the time taken to harmonize standards.
- vii) The NSBs in collaboration with the private sector should ensure that there is adequate private sector participation in regional standardization activities.
- viii) The East African Standards Platform (EASP) in collaboration with the NSBs should increase the level of awareness on the standardization activities and harmonized standards in the region.
- ix) The EAC Secretariat should fast-track the ratification of EAC SPS Protocol by EAC Partner States to address issues regarding food safety regulations and harmonization of food safety controls in the EAC.
- x) The EAC Secretariat and/or EABC should develop EAC Standardization Strategic Plan in line with other EAC policies related to industry development and trade promotion to improve on funding for regional standardization activities.
- xi) The NSBs should embrace single numbering of the adopted EAS to ensure traceability.
- xii) The NSBs should provide advance notification and adequate time whenever there changes in the standards specifications to enable the private sector adjust to implement the standards.
- xiii) The lengthy process of standards harmonisation should be shortened by declaring the East African Standards by the East African Standards Committee (EASC) and the Council of Ministers notified, as proposed in the East African Community Standardisation, Accreditation and Conformity assessment (SACA) Bill, 2016.

ANNEX 2: LEVEL OF ADOPTION OF EAS OF THE SELECTED SAMPLED PRODUCTS

	Product Sectors	Number and Title of relevant EAC standard and year	Burundi	Kenya	Rwanda	Tanzania	Uganda
1	Steel and its products	EAS 11:2013 Galvanised plain and corrugated steel sheets — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 108:2013. Steel sheet and strip, heavy thickness coils, carbon, hot-rolled — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 196:2013, High-strength low-alloy Carbon Steel for hot rolled sheet and cold rolled sheet — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 134: 2013. Cold rolled steel sections — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 135:2012. Steel wire products for fencing — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 468:2013. Pre-painted metal coated steel sheets and coils — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 108:2013 Steel Sheet and Strip, heavy thickness coils carbon, hot rolled	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 412-2:2013. Steel for the reinforcement of concrete — Part 2: Ribbed bars	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 412-1:2013. Steel for the reinforcement of concrete — Part 1: Plain bars	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 783: 2013 Stainless Teel Tanks – Specifications		Adopted	Adopted	Adopted	Adopted
2	Edible fats and oils	EAS 297:2013 Specification for Edible Soya bean Oil	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 299:2013 Specification for Edible Sunflower Oil	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 300:2013 Specification for Edible Groundnut Oil	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 301:2013 Specification for Edible Palm Oil	Adopted	Adopted	Adopted	Adopted	Adopted

	Product Sectors	Number and Title of relevant EAC standard and year	Burundi	Kenya	Rwanda	Tanzania	Uganda
		EAS 304:2013 Specification for Edible Corn Oil	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 769:2012, Fortified edible oils and fats — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
3	Alcoholic Beverages	EAS 61:2014, Opaque Beer and other fermented products — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 63:2014, Beer — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 109:2014, Portable Spirit — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 138:2014, Still Table Wines — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 139:2014, Fortified Wines— Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 141:2014, Whisky— Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 142:2014, Vodka — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 143:2014, Brandy — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 144:2014, Neutral Spirit — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 145:2014, Gins — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 146:2014, Rum — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
4	Surface active agents	EAS 31:2013, Laundry soap — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 186:2013, Toilet soap — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 127:2013, Powdered laundry detergents for household use — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 296:2011, Liquid household hand dishwashing and light duty detergent — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 383:2013, Synthetic organic liquid detergent for household use — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 766-1: 2013, Antibacterial toilet soap — Specification — Part 1: Solid	Adopted	Adopted	Adopted	Adopted	Adopted

	Product Sectors	Number and Title of relevant EAC standard and year	Burundi	Kenya	Rwanda	Tanzania	Uganda
		US EAS 766-2: 2013, Antibacterial toilet soap — Specification — Part 2: Liquid	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 295:2011, Sodium hypochlorite solutions for domestic use — Specification	Adopted	Adopted	Adopted	Adopted	Adopted
5	Fish and Fish Products	EAS 827: 2015, Fresh and Frozen whole fin Fish	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 830: 2015, Fresh sticks (fish fingers), fish portions and fish fillets-breaded or in batter	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 831: 2015, Frozen Fish fillet	Adopted	Adopted	Adopted	Adopted	Adopted
6	Sugar Confectionery e.g sweets	EAS 350: 2014, Hard-boiled Sweets	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 352: 2014, Chewing gum and bubble gum	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 349: 2014, Liquid glucose (glucose syrup)	Adopted	Adopted	Adopted	Adopted	Adopted
		EAS 820: 2014, Dextrose monohydrate (glucose powder)	Adopted	Adopted	Adopted	Adopted	Adopted
Level of Adoption			100% Adoption	100% Adoption	100% Adoption	100% Adoption	100% Adoption

Source: National Standards Bureau (NSBs)

ANNEX 3: TRENDS OF INTRA AND EXTRA-EAC VALUES OF THE SELECTED SAMPLED PRODUCTS (US\$ '000')

#	Selected Product Category	Exports to the EAC					Exports to the Rest of the World				
UGANDA											
		2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
1.	Iron, steel and its products	23,488	21,800	24,629	28,038	36,934	49,307	64,139	74,045	81,582	84,457
2.	Edible fats and oils	20,939	35,313	35,073	36,075	48,220	35,649	53,796	49,364	49,681	56,635
3.	Alcoholic Beverages	1,668	2,402	4,322	4,297	4,096	25,087	28,443	32,710	31,949	22,664
4.	Surface active agents	14,600	19,074	21,573	17,882	18,860	22,219	30,107	38,920	37,967	37,603
5.	Fish and Fish Products	1,235	5,522	1,051	1,409	2,566	126,835	133,376	60,160	125,270	134,790
6.	Sugar Confectionery e.g sweets	354	247	311	925	473	1,662	1,689	1,536	2,617	1,109
Subtotal		62,284	84,358	86,959	88,626	111,149	260,759	311,550	256,738	329,066	337,258
% Increment based on 2010		-	35%	40%	42%	78%	-	19%	(2%)	26%	29%
KENYA											
1.	Iron, steel and its products	63,932	76,497	64,358	72,695	68,244	100,086	125,504	105,964	109,703	92,962
2.	Edible fats and oils	24,544	30,601	27,815	17,912	11,419	34,115	44,867	35,403	21,589	12,053
3.	Alcoholic Beverages	26,109	34,053	33,891	21,634	23,749	53,065	50,018	127,793	62,978	60,776
4.	Surface active agents	46,346	56,096	61,725	50,212	51,418	94,244	127,221	58,910	96,874	90,044
5.	Fish and Fish Products	811	807	952	936		1,940	49,423	40,404	45,220	31,972
6.	Sugar Confectionery e.g sweets	37,351	44,247	50,364	43,684	49,238	56,579	63,222	70,531	61,804	38,447
Subtotal		199,093	242,301	239,105	207,073	206,008	387,512	451,236	443,821	386,727	348,209
% Increment based on 2010		-	22%	20%	4%	3%	-	16%	15%	0%	(10%)
BURUNDI											
1.	Iron, steel and its products	0	295	0	1,214	176	0	514	571	2,352	1,691
2.	Edible fats and oils	0	0	0	0	0	0	46	0	0	3
3.	Alcoholic Beverages	41	130	1	34	505	1,880	2,269	2,843	2,841	5,518
4.	Surface active agents	943	2,737	94	3,987	2,538	1307	4,243	5,900	8,213	7,659
5.	Fish and Fish Products	0	0	18	1	16	0	0	35	165	165
6.	Sugar Confectionery e.g sweets	0	3	0	3	42	0	3	0	3	42
Subtotal		984	3,165	113	5,239	3,277	3,187	7,075	9,349	13,574	15,078
% Increment based on 2010		-	222%	(89%)	432%	233%	-	122%	193%	326%	373%
RWANDA											
1.	Iron, steel and its products	106	757	1,796	823	275	1,418	1,136	4,147	3,796	10,063
2.	Edible fats and oils	0	0	62	3,069	3,526	28	43	2,214	7,664	9,412
3.	Alcoholic Beverages	11	963	1,113	907	804	1,880	3,458	8,921	18,032	1,827
4.	Surface active agents	15	41	45	557	214	172	167	457	1,309	1,829

REPORT ON THE IMPACT ASSESSMENT OF THE EAST AFRICAN HARMONIZED STANDARDS ON THE BUSINESS COMMUNITY

#	Selected Product Category	Exports to the EAC					Exports to the Rest of the World				
5.	Fish and Fish Products	2	12	12	18	21	2,351	90	499	418	1,181
6.	Sugar Confectionery e.g sweets	0	2	8	133	43	0	13	199	407	436
Subtotal		134	1,775	3,036	5,507	4,883	5,849	4,907	16,437	31,626	24,748
% Increment based on 2010		-	1225%	2166%	4010%	3544%	-	(16%)	181%	441%	323%
TANZANIA											
1.	Iron, steel and its products	10,309	11,773	8,051	4,605	3,648	18,855	26,841	21,977	20,471	16,484
2.	Edible fats and oils	934	112	240	648	4,908	12,657	8,226	10,140	5,249	13,092
3.	Alcoholic Beverages	5,258	4,178	5,777	5,300	5,155	10,729	4,468	6,529	5,602	5,771
4.	Surface active agents	1,910	2,122	2,091	1,313	790	18,433	19,159	20,780	19,702	18,634
5.	Fish and Fish Products	10,288	5,573	7,668	4,543	2,964	133,177	127,635	111,917	121,509	171,135
6.	Sugar Confectionery e.g sweets	16	99	75	1,137	170	469	346	210	1,360	364
Subtotal		28,715	23,857	23,902	17,546	17,635	190,320	186,675	171,553	173,893	225,480
% Increment based on 2010		-	(17)	(17%)	(39%)	(39%)	-	(4%)	(12%)	(11%)	16%
Grand Total		291,210	355,456	353,115	323,991	342,952	851,627	961,443	897,895	934,886	950,773
% Increment based on 2010		-	22%	21%	11%	18%	-	13%	5%	10%	12%

Source: ITC, EAC Trade Reports and National Statistics Bureaus

ANNEX 4: EXPORTS OF THE RESPECTIVE EAC PARTNER STATES OF THE SELECTED SAMPLED PRODUCTS

4.1 BURUNDI EXPORTS OF SAMPLED PRODUCTS TO THE EAC PARTNER STATES					
Burundi Exported to	Values in US Dollar thousand				
	2010	2011	2012	2013	2014
Kenya	0	0	0	0	0
Rwanda	838	3,092	0	5,158	2,522
Tanzania	128	57	113	81	743
Uganda	18	16	0	0	12
Total	984	3,165	113	5,239	3,277
4.2 KENYA EXPORTS OF SAMPLED PRODUCTS TO THE EAC PARTNER STATES					
Kenya Exported to	Values in US Dollar thousand				
	2010	2011	2012	2013	2014
Burundi	20,760	18,815	15,141	12,796	13,118
Rwanda	15,078	22,904	25,639	22,533	23,261
Tanzania	84,034	98,183	105,524	86,529	75,206
Uganda	79,921	102,399	95,535	88,147	94,946
Total	199,793	242,301	241,839	201,005	206,531
4.3 RWANDA EXPORTS OF SAMPLED PRODUCTS TO THE EAC PARTNER STATES					
Rwanda Exported to	Values in US Dollar thousand				
	2010	2011	2012	2013	2014
Burundi	126	1,224	2,310	1,361	860
Kenya	0	296	318	557	48
Tanzania	0	23		1,153	3,708
Uganda	8	235	355	2,514	348
Total	134	1,778	2,983	5,585	4,964
4.4 TANZANIA EXPORTS OF SAMPLED PRODUCTS TO THE EAC PARTNER STATES					
Tanzania Exported to	Values in US Dollar thousand				
	2010	2011	2012	2013	2014
Burundi	3,670	2,779	2,141	2,189	6,598
Kenya	13,430	13,162	12,862	10,360	8,270
Rwanda	9,839	5,821	6,434	3,949	1,257
Uganda	3,846	2,396	2,466	1,158	1,510
Total	30,785	24,158	23,903	17,656	17,635
4.5 UGANDA EXPORTS OF SAMPLED PRODUCTS TO THE EAC PARTNER STATES					
Uganda Exported to	Values in US Dollar thousand				
	2010	2011	2012	2013	2014
Burundi	10,360	12,354	12,607	12,058	11,627
Kenya	2,416	9,139	3,377	8,178	4,939
Rwanda	38,851	56,985	59,362	58,465	80,255
Tanzania	10,188	11,255	13,872	9,925	14,328
Total	61,815	89,733	89,218	88,626	111,149

ANNEX 5: PERSONS CONTACTED

#	COUNTRY	INSTITUTION	NAME OF PERSON CONTACTED & POSITION	CONTACT DETAILS
1.	Burundi	Savonor S.A.	Rama K Pandey, Managing Director	Tel:+25776336502 E-mail: rama.pandey@savonor.com
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ANNEX 6: REFERENCES

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