

National overview

*How 34 provinces and cities are turning
FTA commitments into results*



Global trade is becoming more fragmented as geopolitical tensions and strategic competition intensify. Yet regional trade agreements continue to expand: according to the WTO, **380 regional trade agreements, including FTAs, were in force as of December 2025**. Viet Nam has become deeply integrated into this network, having signed and implemented **17 FTAs with more than 60 partners worldwide**.

The report advances a central proposition: **FTA benefits do not arise automatically upon signature; they depend on the quality of implementation and the capacity to translate commitments into concrete competitive advantages**. Commitments Provincial implementation capacity is therefore a critical link between formal commitments and commercial outcomes—determining whether FTA opportunities ultimately translate into **orders, market share, and greater value added**.

Developed by the Ministry of Industry and Trade and Foreign Trade University, the FTA Index tracks how effectively provinces and cities translate FTA commitments into implementation. The 2025 edition is the first to measure progress against the 2024 baseline.

TEN FINDINGS THAT MATTER FOR POLICY

Each finding is anchored in the underlying data and cross-referenced to the relevant section and figure in the 2025 national report.

01 STRONG IMPLEMENTATION IS NOT CONFINED TO MAJOR ECONOMIC HUBS

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provinces and cities were rated “Good” or above, and **no province remained in the “Poor” category**. **Aggregated FTA Index score** ranged from **10.57–35.62** on a 40-point scale (mean: 21.66; median: 22.25). The leading group includes localities that are not among the largest economies, while most major economic hubs were rated “Fair” or below.

Section 4.1 • Table 7 • Figure 17

03 FTA AWARENESS IS BROAD—BUT OPERATIONAL KNOW-HOW REMAINS SHALLOW

21.6%

of businesses rated their FTA knowledge as “good” or “very good,” while **32.2%** chose only “basic” knowledge and **18.4%** reported “don’t know” at all. Small businesses had the highest rating of “don’t know” (**23.7%**); FDI enterprises showed the highest response of “well-understood” (**8.3%**).

Section 3.1.1 • Figure 1

05 GUIDANCE IS WEAKEST WHERE COMPLIANCE IS HARDEST

0.59

points was the largest gap between businesses’ understanding and the guidance received—for TBT, followed by environmental regulations (0.58) and SPS (0.57), compared with 0.39 for rules of origin. These were also the three areas rated most complex (**65.5% · 62.1% · 63.2%**) but receiving the least guidance (**30.4% · 29.4% · 28.3%**).

Section 3.2.1–3.2.3 • Table 3

HOW THE INDEX IS CONSTRUCTED

The Free Trade Agreement Implementation Performance Index (hereinafter the **FTA Performance Index** or **FTA Index**) is based on a nationwide survey of **4,066 enterprises** engaged in export and/or import activities in both 2023 and 2024. The sample was stratified by ownership type, sector aggregate (according to National Statistics Office’s industry classification), and import-export turnover (36 strata in total). Among surveyed enterprises, domestic private enterprises accounted for **65%**, FDI enterprises accounted for **32%** and state-owned enterprises for **3%**. By main product group, agricultural products accounted for **17.6%** and textiles and garments for **16.4%**, the two largest shares.

Survey results were consolidated into **31 indicators across four pillars** aligned with the task groups in the Government’s action plans for implementing new-generation FTAs: access to information (9 indicators), legal implementation (7 indicators), utilization of FTA preferences and business support (9 indicators), and sustainable development (6 indicators).

02 IMPLEMENTATION IS THE BOTTLENECK

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provinces fall into the **needs-improvement** group for the utilization and support pillar (6 high-performing, 15 above-average, and 2 average). FTA utilization and support needs vary least across provinces; the greatest variation lies in **businesses’ access to support policies**.

Section 3.3.6 • Section 3.4.5

04 MULTIPLE COMMUNICATION CHANNELS, BUT LIMITED BUSINESS REACH

17.6%

of businesses regularly attended FTA events, and only **15.3%** regularly visited government information portals; **29%** and **26%** did not use either channel at all. Forecast information was rated highly for reliability (**59.5%**) but lower for specificity (**51.6%**) and timeliness (**51.1%**).

Section 3.1.2–3.1.5 • Figure 2

06 POLICY ENGAGEMENT REMAINS EPISODIC

14.7%

of businesses frequently or very frequently commented on legal documents (score: 2.8/5), and **20.9%** regularly participated in training. Conversely, **35.4%** reported that government agencies responded regularly (3.1/5)—indicating an imbalanced two-way mechanism.

Section 3.2.5 • Figure 7

07 TARIFF PREFERENCES AND RULES OF ORIGIN ARE SUBSTANTIALLY UTILIZED

<15%

of businesses utilized non-tariff commitments (TBT, SPS, intellectual property, labor, and the environment), while **76.9%** had used tariff preferences and **72.3%** rules of origin. Trade facilitation reached **27.0%** and trade remedies **22.6%**.

Section 3.3.1 • Figure 9

09 GREEN READINESS LAGS; DIGITAL ADOPTION LACKS IMPACT

3.7–5.6%

of businesses “understand clearly and can implement” new sustainability requirements, while **33.5%** had never heard of CBAM and **25.6%** had never heard of EUDR. For digital transformation, the gap lies in effectiveness: **42.3%** can utilize some forms of e-commerce effectively, but using international platforms such as Alibaba, Amazon remained low at only **25.3%**.

Section 2.2 • Section 3.3.5 • Figure 13

08 LOCAL SUPPORT IS BROAD—BUT GEARED TO SHORT-TERM

58.2%

of businesses had accessed local FTA support programs; **41.8%** had never done so—the access rate was lowest among small businesses (**53.4%**). Demand centered on support that directly generates orders (62.1 • 58.8 • **56.7%**), while support for technology, human resources, and dispute resolution was below **20%**.

Section 3.3.3–3.3.4 • Figure 12

10 CAPABILITY GAPS PERSIST ACROSS ENTERPRISE GROUPS

16.1

percentage points was the gap in rules-of-origin utilization between medium enterprises (**79.6%**) and small enterprises (**63.5%**). Small businesses are disadvantaged from the start: **23.7%** had don't know of FTAs, **36.4%** did not attend events, and only **8.7%** accessed information portals regularly.

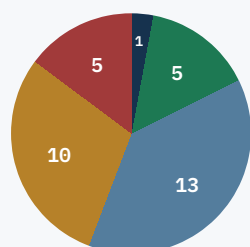
Section 3.1.1–3.1.5 • Section 3.3.1 • Section 3.4.2

01 Aggregated FTA Index 2025

Local support is broad—but geared to short-term — all 34 provinces and cities (0–40)

NATIONAL AVERAGE 21.66 • MEDIAN 22.25 • STANDARD DEVIATION 6.1

■ Excellent (1) ■ Good (5) ■ Fair (13) ■ Above average (10) ■ Average (5) ■ Poor: none



34 PROVINCES AND CITIES

Implementation capacity remains highly uneven. More than one-third of provinces and cities are classified in “Fair”; only six are in the leading group, while five remain in the bottom group. The distance between the strongest and weakest performers—35.62 versus 10.57, equivalent to **25.05 points**—shows that the performance gap remains very wide.

1 Hai Phong	35.62	18 Tay Ninh	21.86
2 Tuyen Quang	33.61	19 Hung Yen	21.16
3 Thanh Hoa	30.93	20 Lam Dong	20.66
4 Vinh Long	29.33	21 Dien Bien	19.38
5 Ca Mau	29.10	22 Gia Lai	18.37
6 Lai Chau	28.17	23 Ha Tinh	18.18
7 Thai Nguyen	26.72	24 Lao Cai	17.83
8 Nghe An	26.61	25 Quang Ninh	17.30
9 Ha Noi	25.39	26 Cao Bang	17.25
10 Dak Lak	24.57	27 Quang Ngai	16.11
11 Can Tho	24.30	28 Hue	15.55
12 Dong Nai	23.62	29 Lang Son	15.16
13 Ho Chi Minh City	23.41	30 Bac Ninh	14.29
14 Da Nang	23.20	31 Phu Tho	14.12
15 An Giang	23.19	32 Quang Tri	12.52
16 Dong Thap	23.13	33 Ninh Binh	12.49
17 Khanh Hoa	22.65	34 Son La	10.57

No province or city was rated “Poor” in 2025—a clear improvement. Hai Phong was the sole “Excellent” performer, while Tuyen Quang, Thanh Hoa, Vinh Long, Ca Mau, and Lai Chau entered the “Good” group.

The middle- and lower-performing groups include several **major economic centres**—Ha Noi, Ho Chi Minh City, Da Nang, and Quang Ninh. Despite their large concentrations of major exporters, these provinces continue to face gaps in FTA implementation. By contrast, smaller provinces such as Tuyen Quang, Lai Chau, and Vinh Long rank considerably higher. This contrast shows that **effective FTA implementation is not determined by economic scale alone**: local commitment, administrative capacity, and the quality of enterprise support can enable provinces at different levels of development to emerge as strong performers.

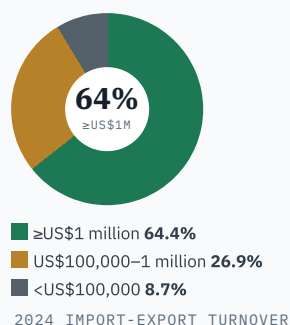
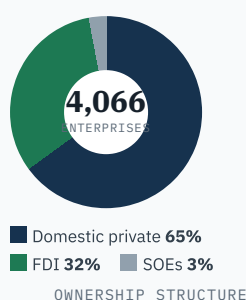
DISPERSION

6.1

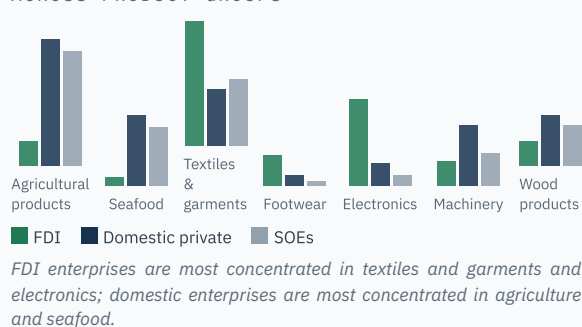
The absence of any province in the “Poor” category marks clear progress, but substantial performance disparities remain. Policy support should therefore be tailored to provincial needs: intensive implementation assistance for lower-performing provinces, targeted solutions for the middle group, and systematic replication of effective practices from leading provinces.

02 Sample overview

Sample profile



SHARE OF ENTERPRISES BY OWNERSHIP TYPE ACROSS PRODUCT GROUPS



Two key findings emerge from the survey. First, regarding **markets**, enterprises' import-export activities remain concentrated in ASEAN, Japan, South Korea, and China; the EU and the United States are also significant export markets. The Middle East, Africa, and Latin America remain largely untapped, indicating substantial room for market diversification that is constrained by the capability gaps reflected in the Index. Second, regarding **readiness**, enterprises are proactive in areas within their own control—most notably digital transformation—with **32.6%** already prepared or able to implement. Conversely, they are least ready for market regulations imposed by partner countries such as CBAM, EUDR, and supply chain due diligence (see Pillar D). Across all trends, the most common barrier is that enterprises “**do not understand clearly**” (over **35%**) rather than a lack of government support.

E-commerce & digital transformation — wide adoption, limited effectiveness

E-commerce awareness and participation are relatively strong: fewer than **5%** of enterprises are unaware of mainstream e-commerce applications and platforms. Adoption, however, has yet to deliver commensurate results. Only **20-30%** report that implementation is “very effective,” while around **20%** have adopted e-commerce without achieving effective results. The constraint is no longer awareness alone; enterprises also face gaps in operating capability, skills, logistics, payments, and effective platform use. For “other platforms,” **27%** remain unaware, pointing to a continuing information gap around emerging e-commerce channels and solutions.

Another positive signal is that businesses are more ready for digital transformation than for other trends: **21.5%** have prepared and **11.1%** are able to implement. These rates far exceed readiness for new regulations, where most businesses have only “heard of them.” Yet limited knowledge remains the most common barrier across all trends, at over **35%**. The report therefore recommends targeted enterprise support through digital awareness and skills training, guidance on selecting appropriate platforms, standardized direct-sales processes, and stronger connections to essential business support services.

03 Detailed analysis

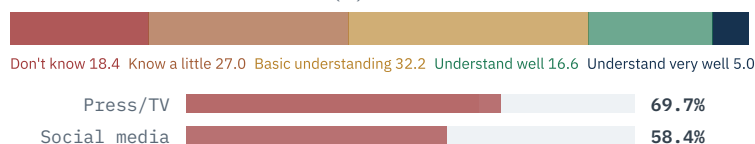
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PILLAR 1 • 9 INDICATORS

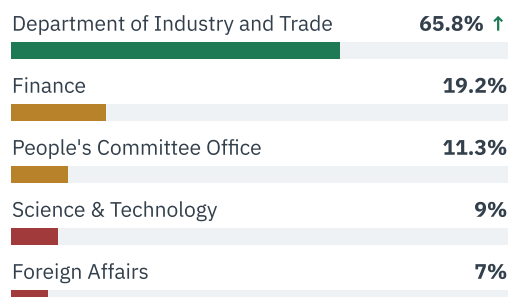
Access to FTA information

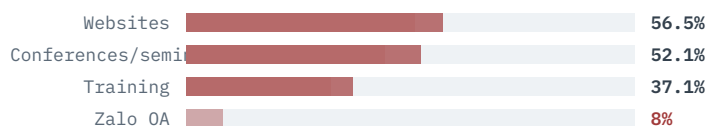
FTA communication has achieved relatively broad **coverage**, as only **18.4%** of businesses were unaware of FTAs. Yet knowledge has not gained **depth**: **32.2%** had only basic knowledge, while just **5%** rated themselves “understand very well.”

BUSINESS KNOWLEDGE OF FTAS (%)



DIFFERENCES IN REACH ACROSS AGENCIES





Mass media and widely used digital platforms remain the principal channels for disseminating FTA information. Press and television have the broadest reach among enterprises (**69.7%**), followed by social media (**58.4%**) and websites (**56.5%**). More specialized formats reach fewer enterprises, including conferences and seminars (**52.1%**) and training programs (**37.1%**). Small enterprises rely predominantly on mainstream channels—press, television, and websites—and participate less frequently in specialized activities than large enterprises.

Agriculture & Environment <10%

*Specialized authorities responsible for agriculture and the environment, science and technology, and foreign affairs each reach fewer than **10% of enterprises**. FTA communication remains concentrated within the lead coordinating agency, while other relevant authorities continue to play only a limited role in providing information and practical guidance on sector-specific commitments.*

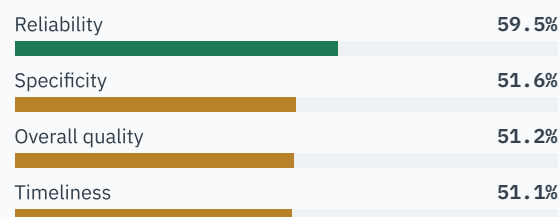
Gap in receiving strategic forecasting information

Strategic trade information has yet to reach enterprises broadly.

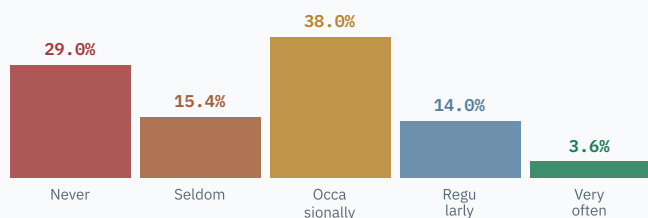
Only around one-third of enterprises (**31.8%**) regularly or very regularly receive import–export forecasts and strategic guidance from provincial authorities, while **11%** receive such information rarely and **18.4%** receive none at all. Access also varies considerably by enterprise size: nearly **37% of large enterprises** receive this information regularly—approximately twice the proportion among small and medium-sized enterprises (**23–27%**).

Quality of forecast information is rated above average, with reliability scoring highest. For overall quality, **47.2%** of businesses rated it “average,” while **51.2%** rated it “good” or “very good.” Reliability received the highest positive rating, at **59.5%**, above specificity (**51.6%**) and timeliness (**51.1%**). Businesses therefore place reasonable trust in official information, but remain less satisfied with its specificity and timeliness.

QUALITY OF FORECAST INFORMATION (% POSITIVE RATINGS)

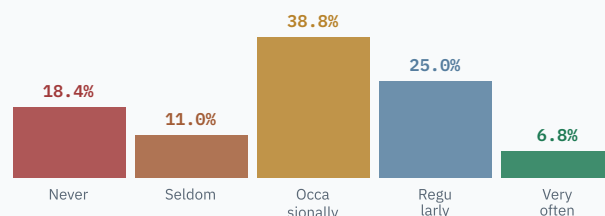


FREQUENCY OF PARTICIPATING IN FTA EVENTS (% ENTERPRISES)



Small enterprises: **36.4%** never attend; large enterprises: **20.5%** participated actively.

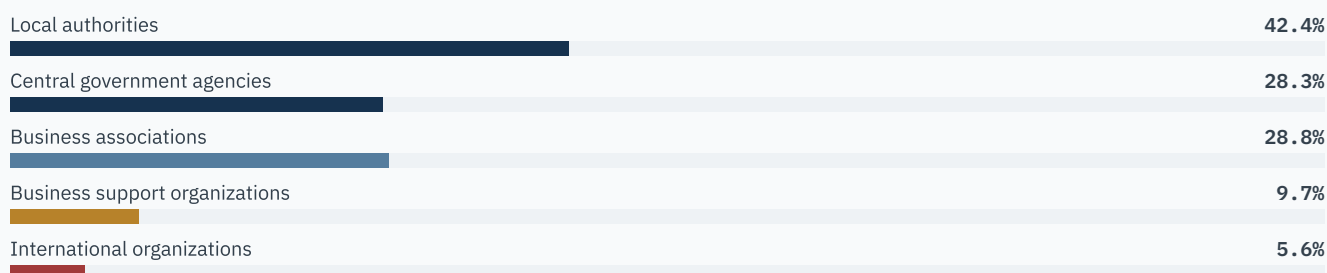
RECEIPT OF EXPORT FORECASTS & GUIDANCE (%)



Large enterprises: nearly **38%** access this information regularly; small, medium, and domestic private enterprises: **23–27%**.

Public agencies dominate event outreach

CHANNELS THROUGH WHICH BUSINESSES RECEIVING INFORMATION ABOUT FTA EVENTS (%)



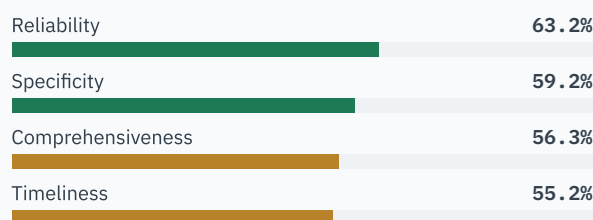
Public agencies account for **70.7%** of all referrals. Business associations and support organizations remain underused, limiting the reach of trusted, sector-specific intermediaries.

Online information portals—available but underused

Online information portals are the least-used information channel.

Only **15.3%** of enterprises access them regularly, while **59%** do so irregularly and **26%** do not use them at all. The gap by enterprise size is pronounced: regular access stands at just **8.7%** among small enterprises, compared with **21.7%** among large enterprises and **22.4%** among FDI enterprises. Among enterprises that access these portals, assessments of content quality are relatively positive. Nevertheless, **35.9–43.2%** still rate the information as merely “average,” indicating that the principal areas for improvement are **timeliness and responsiveness to enterprises' practical needs**.

QUALITY OF ONLINE INFORMATION PORTALS (% POSITIVE RATINGS)



03 • LEGAL IMPLEMENTATION – PILLAR 2/4

B

PILLAR 2 • 7 INDICATORS

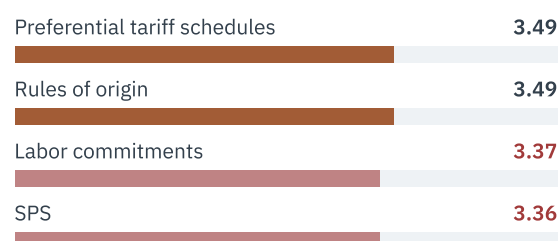
Implementation of legal regulations

Enterprises are **generally aware** of FTA commitments but continue to struggle with technically complex regulations. Understanding is strongest for preferential tariff schedules and rules of origin, both scoring **3.49/5**, and weakest for SPS (**3.36/5**) and labor regulations (**3.37/5**).

Differences across enterprise groups become more pronounced when actual exposure is considered. FDI enterprises record the highest shares reporting that they “understand clearly and have been affected” by preferential tariffs (**24.8%**) and rules of origin (**28.6%**). Domestic private enterprises, by contrast, are more affected by **TBT** and SPS measures than FDI enterprises. The size gap is particularly marked for labor regulations: only **7%** of small enterprises both understand these regulations clearly and have been affected, compared with **11.4%** of medium-sized enterprises and **15.3%** of large enterprises.

Guidance from local authorities remains **too infrequent and uneven**. Guidance-frequency scores range from 2.37 to 3.10/5. For many commitments, about **33.9–36.9%** of businesses report receiving guidance only “occasionally,” while the share receiving it “very regularly” ranges from just 4.2 to **10.0%**.

UNDERSTANDING OF LEGAL DOCUMENTS IMPLEMENTING FTA COMMITMENTS (5-POINT SCALE)

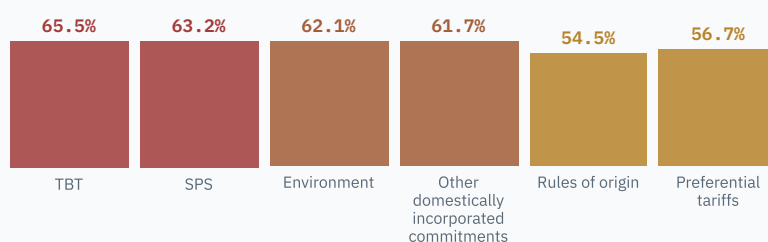


SELF-LEARNING GAP: UNDERSTANDING – GUIDANCE RECEIVED



Across all nine areas, regulatory complexity exceeds the guidance available. The shortfall is greatest in technical fields, pushing enterprises to rely on fragmented or informal sources of advice.

Perceived complexity of regulatory compliance



Businesses consider compliance with FTA-implementing regulations relatively complex, particularly technical and specialized regulations. TBT is rated the most complex area, with **65.5%** of businesses rating it “complex” or above, followed by SPS (**63.2%**) and environmental regulations (**62.1%**). By average score, intellectual property also falls within the high-complexity group. Labor regulations, rules of origin, and preferential tariff schedules are rated less complex than other areas, but cannot be considered easy to implement.

Participation in policymaking remains limited

Frequently/very frequently comment on legal documents	14.7%
Rarely/occasionally comment	71.6%
Score for channels receiving and responding to comments	2.76/5
Frequency of participation in commenting — Occasionally	58.1%

Policy engagement remains largely one-way. Among the **58.1%** of businesses that provided feedback on guidance activities by government agencies, only **14.7%** regularly commented on legal documents. The mechanism for receiving and responding to business feedback also received the lowest score among all criteria, at just 2.76/5. Operational evidence from enterprises is therefore not feeding into policy design quickly or systematically enough.

Guidance focuses on familiar regulations

Compared to the perceived complexity, the findings reveal a clear mismatch: the three areas considered most complex—**TBT, SPS, and environmental regulations**—are also among those receiving the least guidance. By contrast, **rules of origin and preferential tariff schedules** are commitments in which businesses have the highest level of understanding (**3.49/5 each**) and those most frequently covered by guidance. Among small and non-state enterprises, nearly **20%** report that they rarely receive guidance on **SPS, TBT, intellectual property, and trade remedies**.

RECEIVING GUIDANCE REGULARLY/VERY REGULARLY, BY REGULATION TYPE (%)

Rules of origin	38.9%
Preferential tariff schedules	35.9%
TBT	30.4%
Environment	29.4%
SPS	28.3%
Other domestically incorporated regulations	21.0%

Support remains concentrated on tariffs and rules of origin. For other domestically incorporated commitments, **36.4%** of enterprises receive no guidance—leaving major non-tariff opportunities and risks unaddressed.

03 • DETAILED ANALYSIS — PILLAR 3/4

C

PILLAR 3 • 9 INDICATORS

FTA utilization & support to enhance competitiveness

Among FTA commitments, enterprises make greatest use of **tariff preferences** and **rules of origin**, at **76.9%** and **72.3%**, respectively. Utilization of other commitments remains substantially lower: **trade facilitation** reaches **27.0%**, while **trade remedies** stand at **22.6%**. Fewer than **15%** of enterprises utilize commitments relating to **intellectual property, TBT, SPS, labor, or the environment**.

76.9%

of businesses reported using tariff preferences

72.3%

of businesses reported using rules of origin

<15%

used TBT, SPS, or intellectual-property commitments

REASONS FOR NOT UTILIZING FTA PREFERENCES

Difficulties in finding partners in FTA markets	40.6%
Lack of information on FTA markets	40.1%
Insufficient understanding of commitments	34.3%
Lack of government support	4.5%

The principal barriers facing enterprises relate to market access and information, rather than the institutional environment. Almost no enterprises identify insufficient government support as a major constraint.

UTILIZATION BY MODE OF OPERATION

Enterprises primarily utilize FTAs through **core trading activities**: combined exporting and importing (**53.0%**), export processing (**44.5%**), and goods imports (**30.2%**). Utilization through supporting services—such as logistics, intermediary services, and trade procedures—remains considerably lower, at **21.6%**. Medium-sized and FDI enterprises show the strongest utilization across core activities. However, reliance on import-export support services remains limited across all enterprise sizes and ownership groups.

FTA UTILIZATION BY MODE OF OPERATION (% ENTERPRISES)

Both exports & imports	53.0%
Export processing and goods exports	44.5%
Goods imports	30.2%
Import-export support (logistics, procedures)	21.6%
Other activities	1.0%

Medium enterprises utilize FTAs most flexibly: **59.0%** select both exports and imports and **48.1%** select export processing and goods exports, above large enterprises (**52.7%** / **45.3%**) and small enterprises (**49.5%** / **38.4%**).

Necessity of developing support programs

1 DEMAND

Necessary

Most businesses consider support activities necessary.

2 ACCESS

Uneven

Activities favor large enterprises and are often accessed only at particular times.

3 EFFECTIVENESS

35.6%

of small enterprises report improved trade performance after receiving trade-promotion support.

4 PRIORITY

62.1%

FTA procedural support and other forms of assistance that can directly generate orders (**62.1%** / **58.8%** / **56.7%**).

PROGRAMS RANKED AS PRIORITIES (% ENTERPRISES)

Support for FTA-related administrative procedures	62.1%
Training on rules of origin & FTA procedures	58.8%
FTA trade promotion	56.7%

Enterprises prioritize support that can convert directly into orders: export assistance, practical training on rules of origin and procedures, and trade promotion. FDI enterprises report the strongest demand for procedural training (**66.9%**), while domestic private enterprises place greater priority on capital and credit support, reflecting persistent financing constraints. FDI and medium enterprises rate support quality most positively, whereas small enterprises report smaller trade gains after program participation. Partner-matching, technology, human-resource development, and dispute-resolution programs generally receive lower priority and relatively weak ratings.

Coverage of support policies and gaps across enterprise types

ACCESS TO FTA SUPPORT PROGRAMS, BY SIZE (%)

Medium enterprises	62.0%
Large enterprises	58.3%
Small enterprises	53.4%

Full sample: **58.2%** accessed support; **41.8%** never did.

Among enterprises that have accessed support, assessments remain concentrated at the **“average” level (44–52%**, depending on the policy area). The three programs most directly linked to import-export activities—**trade promotion, assistance with FTA procedures, and training**—receive combined “effective” and “very effective” ratings of approximately **50% or more**. By contrast, programs supporting **business linkages, technology adoption, branding, and access to credit** are generally rated only average.

Utilization of tariff preferences is relatively similar across groups, ranging from **74.7–79.0%** by trade size and reaching **78.7%** among FDI enterprises. The gap is concentrated in rules of origin: small enterprises reach only **63.5%**, which is **16.1 percentage points below medium enterprises**.

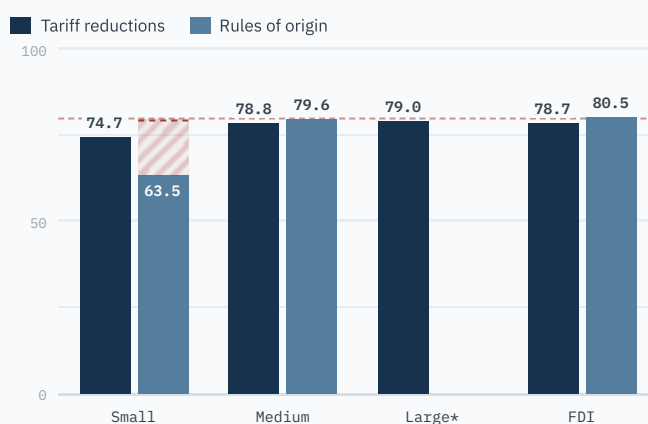
Small enterprises are also the only group that utilizes rules of origin less than tariff preferences; in all three other groups, rules-of-origin utilization is higher. This is the clearest technical bottleneck in FTA utilization among small enterprises.

ACCESS TO FTA SUPPORT PROGRAMS, BY OWNERSHIP (%)

State-owned enterprises	63.2%
FDI enterprises	61.1%
Non-state enterprises	57.4%

Small and domestic private enterprises have the highest rates of never accessing support.

UTILIZATION OF 2 CORE COMMITMENTS (% ENTERPRISES)



Red dashed line: medium-enterprise rate of 79.6% · hatched area: 16.1 pp gap

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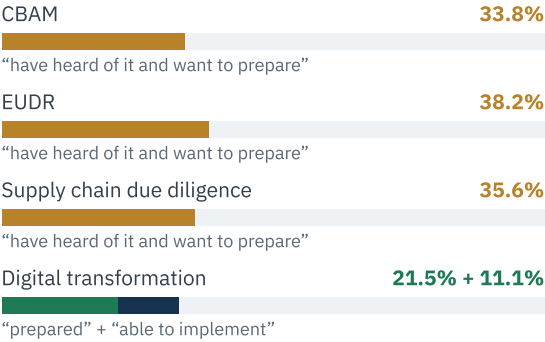
PILLAR 4 · 6 INDICATORS

Sustainable development

Enterprise understanding of sustainable development remains limited. Only **18.5%** of enterprises fully understand FTA environmental commitments, while **17.7%** fully understand labor commitments. Awareness is even weaker for newer requirements: only **7.5–9.1%** fully understand the **Supply Chain Due Diligence Directive (SCDDD)**, **circular-economy requirements**, and the **Carbon Border Adjustment Mechanism (CBAM)**. Across every area, more than half of enterprises remain unaware or lack a clear understanding, revealing a particularly wide knowledge gap for new and technically complex regulations.

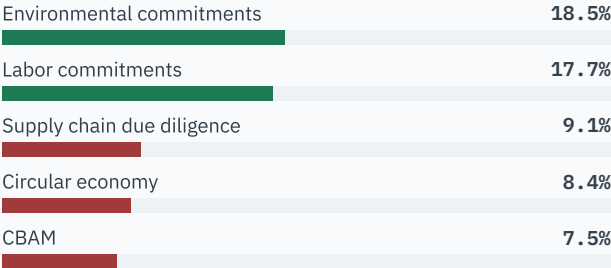
Enterprises nevertheless recognize that compliance with sustainability requirements in importing markets can create **commercial opportunities while increasing cost pressures**. The proportion rating compliance as “important” or “very important” reaches **72.2% for identifying business partners**, **70.5% for securing contracts**, and approximately **67% for brand development**. Sustainability compliance is therefore increasingly viewed not merely as a regulatory obligation, but as a condition for strengthening credibility, accessing partners, and maintaining trade relationships.

READINESS FOR NEW GREEN REGULATIONS



Understanding of sustainability: traditional requirements and new-generation regulations

“FULL AND CLEAR UNDERSTANDING” (% ENTERPRISES)



Business understanding varies markedly with when regulations were introduced and applied. For labor and environmental commitments, which have been included in FTAs since they were signed, the share of businesses with full understanding is about **18–19%**. For new market requirements, by contrast, the share is only **7–9%**. For CBAM specifically, **22.6%** of businesses are completely unaware of it.

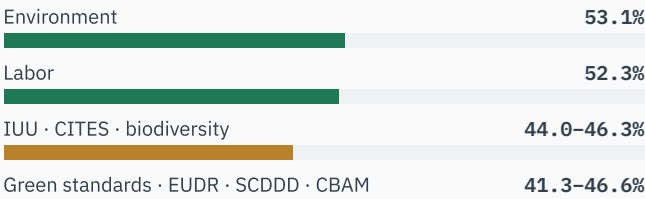
From awareness to preparation: a large gap remains

ALREADY COMPLIED WITH SUSTAINABLE DEVELOPMENT REQUIREMENTS (% ENTERPRISES)



For labor and environmental requirements, **42–43%** enterprises remain unprepared or have only an initial idea; for new requirements, the unprepared share is generally **30–38%**.

LOCAL SUPPORT RATED “EFFECTIVE” (% ENTERPRISES)



For new regulations, **16.0–19.1%** enterprises report receiving no support—a rate that rises to **21–22%** among small enterprises.

Compliance pressure is already present, but preparedness has not kept pace. Labor and environmental requirements have the clearest effects, with **43.4%** and **43.7%** of businesses rating them “affecting” and around **23–24%** rating the effects “large” or “very large”; for SCDDD, CBAM, and the circular economy, the share reporting “very large” effects is only **3–5%**. On costs, **67.4%** of businesses view additional costs as “important” or “very important”—market opportunities therefore come with substantial resource pressure.

A Access to FTA information

- **Overall**, performance across the 34 provinces varies considerably, with overall mean scores ranging from 1.70 to 3.02 on a 5-point scale.
- **By pillar**, businesses rate guidance quality relatively positively and consistently across provinces.
- **Across provinces**, even the high-scoring group does not perform consistently across every area. A common pattern is that information is rated fairly well once businesses gain access, but it is not disseminated broadly or regularly.
- Implementation and engagement show the clearest weaknesses and disparities: guidance, training participation, and enterprise feedback remain generally limited and vary considerably across provinces.

B Implementation of legal regulations

- **Overall**, performance across the 34 provinces varies clearly, with overall mean scores ranging from 2.54 to 4.32 on a 5-point scale.
- **By pillar**, businesses rate guidance quality relatively positively and consistently across provinces. Perceptions of regulatory complexity also vary less than other areas.
- Government agencies' recording and consideration of feedback is rated more positively than businesses' actual participation in commenting, although performance is still uneven.
- Differences across provinces are more apparent in regularity and implementation capacity than in the quality of guidance that businesses have accessed.

C FTA preference utilization & business support

- **Overall**, most provinces have established support activities, but coordination and depth remain limited.
- **By pillar**, FTA utilization and business support needs vary least across provinces, indicating that demand for and interest in FTAs have become relatively widespread.
- **Across provinces**, the high-performing group achieves more consistent results in policy access, support effectiveness, and trade promotion.
- Differences across provinces lie mainly in implementation capacity and the ability to bring support policies to businesses, rather than in business interest or demand for FTA utilization.

D Sustainable development

- **Overall**, variation across the 34 provinces is moderate but more concentrated in business awareness and compliance readiness.
- **By pillar**, businesses across provinces generally place high and consistent value on sustainable-development compliance for accessing and maintaining markets.
- Across provinces, the high-performing group shows a more balanced profile across awareness, readiness, and business support.
- Recognition is rising, but readiness is not: a wide gap persists between the importance enterprises attach to compliance, the support delivered, and their capacity to act.

04 Seven priorities for implementation

Seven priorities from Section 5.2 of the 2025 national report to strengthen local delivery and help enterprises convert FTA commitments into commercial results.



Use the Index to target support

A PROVINCIAL DIAGNOSTIC TOOL

1

Use the FTA Index to help each province identify **strengths, bottlenecks, and priorities**; design tailored support packages for each group, prioritize technical assistance where implementation capacity remains weak, and scale effective models.



Shift from information to hands-on implementation

ADVANCED TRAINING

2

Tailor content **by product group, market, and experience**; prioritize rules of origin, procedures for claiming FTA preferences, and technical regulations. Replace one-way information materials with case-based advisory services and hands-on guidance, supported by user-friendly tools drawing on official data.



Build one coordinated delivery system

IMPROVE THE EFFECTIVENESS OF ACCESS CHANNELS

3

Clarify roles between lead agencies and specialist authorities responsible for **tax, customs, technical standards, quarantine, intellectual property, labor, and the environment**. Build a shared document repository, a train-the-trainer pool, an expert network, and a process for receiving, resolving, and responding to business concerns.



Target the binding constraints

MEASURE BUSINESS OUTCOMES

4

Maintain priority for **market information, partner matching, trade promotion, origin, and procedures**; while increasing support for non-tariff commitments. Rebalance immediate needs and foundational capabilities in technology, human resources, branding, and legal support—measure performance by access and problem resolution, not the number of activities.



Segment support by enterprise need

AVOID ONE-SIZE-FITS-ALL

5

For small businesses, address both content and delivery methods and strengthen the role of industry associations. Businesses that export or are preparing to export need deeper support on market standards, origin, and certification. Segment businesses by **product group, target market, export experience, and type of barrier**, not only by size and ownership type.



Turn sustainability awareness into readiness

CBAM · EUDR · ESG · SCDD

6

Move from introducing concepts to helping businesses **determine applicable requirements and concrete preparation steps**. Make guidance sector-specific: affected entities, data to collect, requirements to meet, and available support providers.



Make digital adoption deliver market access

OPERATIONAL EFFECTIVENESS, NOT PARTICIPATION COUNTS

7

Focus on **practical performance on international digital and e-commerce platforms** rather than simply increasing the number of participating businesses: select appropriate markets and platforms, manage online stores, build brands, and protect intellectual property. Assess performance by sustained activity, business connections, and market access.



STRATEGIC SHIFT

The next frontier is capability: coordinated, accountable and sector-specific implementation across all 34 provinces and cities.