

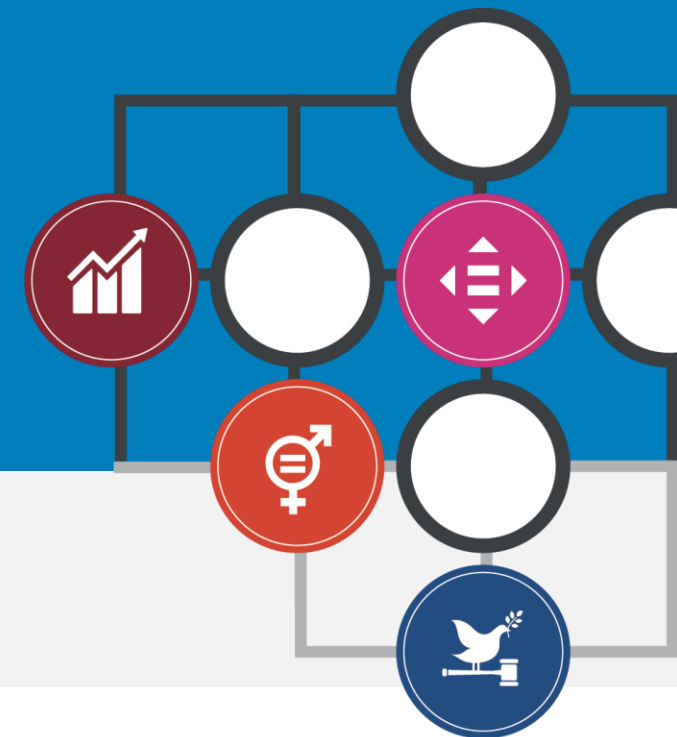
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ARAB COMPETITION FORUM

Baghdad, Iraq 28-29 May 2025



Shared Prosperity Dignified Life



Beyond Competition Enforcement: Market Studies as Catalysts for Inclusive Growth and Sustainable Development

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Why this conversation matters..



The Evolving Role of Market Studies



Traditional focus of market studies:

- Detecting **anti-competitive practices**,
- Identifying **structural or behavioural barriers to competition**.



Emerging Realities in Developing and Transitioning Economies:

Market failures often intersect with development challenges:

- Inequality,
- Access to essential services,
- Environmental degradation, and
- informality.



Modern competition policy must evolve to support whole-of-government objectives, including:

- Alignment with SDGs and national strategies,
- Green transitions, and
- Inclusive economic growth objectives.



Number of market studies by industry, 2023



Source: [OECD Competition Trends 2025](#)

Note: Market studies by industry were classified according to two-digit NAICS codes (for more details, see Figure 2.32 of OECD Competition Trends 2025). Data based on the 40 jurisdictions in the OECD CompStats database that provided detailed data on the industry of market study for 2023 or provided detailed information of market studies on their annual reports to the OECD.





From Market Failures to Policy Solutions..



A New Framework for Designing Market Studies:

Broadening the scope to leverage market studies for broader socio-economic and sustainable impact, by:

- Assessing how market dynamics affect access to essential goods and services,
- Analysing whether the market structure contributes to regional disparities, limiting development in rural or underserved areas,
- Considering environmental externalities and alignment with sustainability goals,



Example of a broader market study:

A market study on the cement or steel sector could examine not only pricing and entry barriers but also their carbon intensity, and whether competition fosters innovation in green technologies.



Enhancing the Impact of Market Studies..



Key Principles for Effective Policy Integration

Interdisciplinary Collaboration

Incorporating insights from other policy domains for **a holistic, multi-dimensional diagnostic, helping in:**

- 1- Identifying Structural barriers,
- 2- Highlight Complementary policies
- 3- Detect market power intertwined with regulatory or policy-induced distortions.

Collaborate with line ministries and regulatory bodies

Data & Stakeholder Engagement

Market studies can unlock inclusive impact when **built on robust data**, through:

- 1- Stakeholder engagement,
- 2- Participatory approaches,
- 3- Sector experts consultation.

Conduct Surveys, citizen participatory approach, and feedback channels

Design Holistic Reform

Targeted policy recommendations that align with **public interest goals:**

- 1- Remove unnecessary regulatory barriers,
- 2- Encourage inclusive and pro-competitive reforms,
- 3- Align recommendations with inclusive policy goals

E.g., Designing competition-compatible green industrial policies by promoting open access to renewable energy

Comprehensive Tools for Effective Market Studies..



Data Sources

Economic &
Analytical Tools

Legal and
Regulatory
Mapping

Peer countries
Benchmarking



Sourcing data from multiple channels and stakeholder engagement



Use both qualitative and quantitative tools



Legal and Regulatory mapping: Review of sector-specific laws and ministerial decrees



Regional Benchmarking: Comparing with peer countries

Tailoring Market Studies to National Contexts: Balancing Convergence and Flexibility



While cross-country coherence is important, national institutional capacity and legal systems must shape how studies are designed and enable flexibility based on each country's unique context

Why?



Institutional diversity shapes the scope and ambition of market studies,



Legal and regulatory frameworks vary in maturity and enforcement capability,



Development priorities differ (e.g., informality, green transition).

❖ Therefore..



Avoid one-size-fits-all methodologies,



Embed studies in national planning, budget, and governance systems.



Promote flexible and adaptable models for use by competition authorities, ministries, and sector regulators.

Empowering Policy through Market Studies: Promoting Fairness and Equitable Access in Egypt's Education Market



Overview

The Egyptian Competition Authority (ECA) launched a nationwide initiative for the entire education value chain - from paper production to the distribution of school books, uniforms, and supplies, **to**:

- Promote equitable market access,
- Reduce consumer costs, and
- Embed competition principles across the sector.

Why it matters

20% of the population



7.7% of total public spending
in fiscal year 23/24



12.5% of total
household spending



Competition concerns

Through ECA's investigations, it has identified that several schools engage in practices that restrict competition and the parents' freedom of choice, **violating**:

- Provisions of Article (8) ECL or Article (7) of ECL regarding vertical restraints, **depending on the facts of each case.**

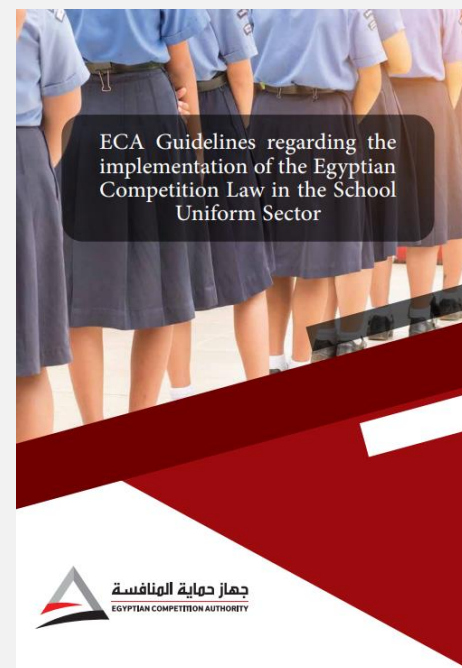




Empowering Policy through Market Studies: ECA Case Study

The Authority implemented a multi-pillar strategy to enhance the socioeconomic impact, focusing on:

- 1. Whole-government approach:** Coordinated efforts among government bodies,
- 2. Evidence-driven market monitoring:** Conducted surveys across 1,387 schools,
- 3. Multi-Stakeholder engagement:** Engaged public and private stakeholders,
- 4. Advocacy for pro-competitive policies:** Disseminated comprehensive guidelines, ministerial decrees and nationwide circulars,
- 5. Enhancing competition culture:** Launched initiatives to embed competition principles across the sector,
- 6. Lasting Socioeconomic Impact:** Produced estimated results of: \$1 billion in consumer savings over 5 years, a 30–50% increase in employment, elimination of bid rigging leading to a 21% reduction in government spending.



A Pathway to Sustainability and Economic Diversification: The Omani Market Study: A Forward-Looking Approach

Competition problems are clear:

- High market concentration,
- Barriers to entry,
- Import dependency,
- Regulatory challenges.

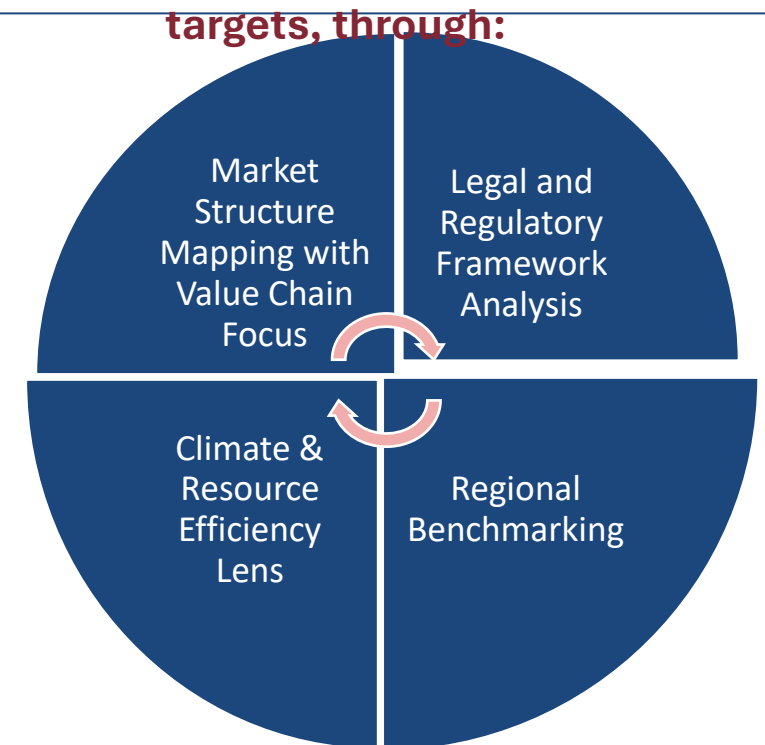
Leading to: Barriers to market entry limiting economic growth, negative impact on public infrastructure and housing, an energy-intensive economy, and missed green opportunities.

The market study of the building materials sector in Oman seeks to:

1. Support economic diversification beyond oil sector,
2. Enable a green transition in infrastructure and construction,
3. Align market regulation with national sustainability priorities.



A well-designed market study here could inform not just competition enforcement but also economic reforms and climate policy targets, through:



Market Studies: From Competition Enforcement to Broader Socioeconomic Impact



Key Takeaways & Way Forward

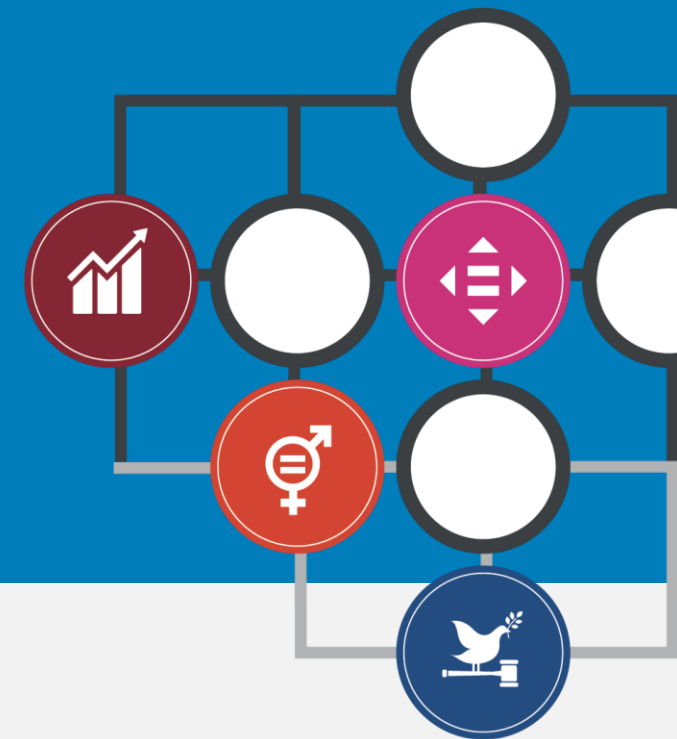
Market studies - designed with a broader lens through integrating competition with sustainability- are not just competition and advocacy diagnostic tools, but strategic instruments for inclusive economic growth.....How?

1. Forward-looking assessments of global evolution,
2. Integration with national development and climate strategies,
3. Monitoring and adaptive implementation,
4. Flexible methodologies adapted to institutional capacity,
5. Regional collaboration.

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Thank you!