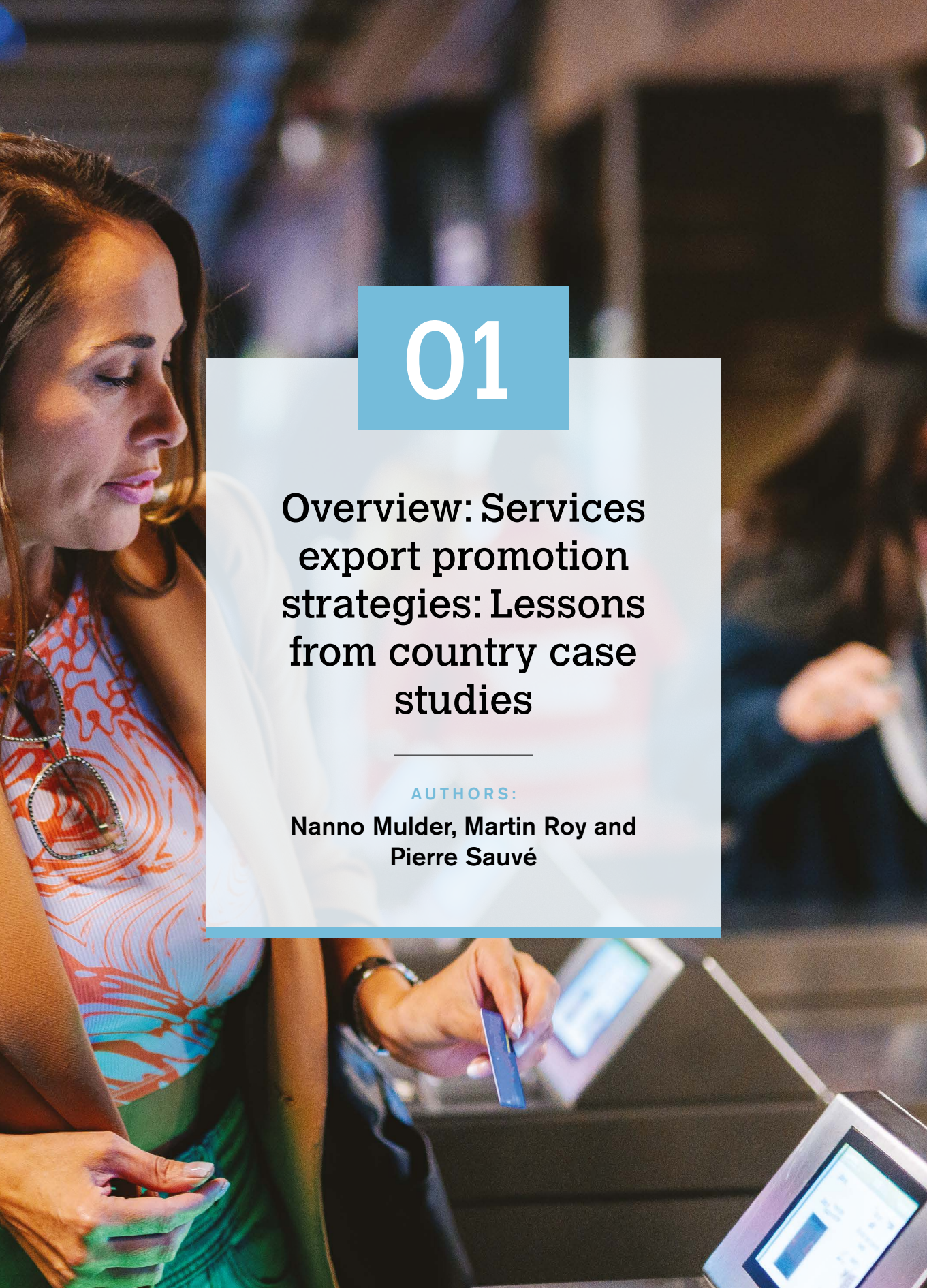




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Overview: Services export promotion strategies: Lessons from country case studies

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Introduction

Services are today widely acknowledged as central to growth and competitiveness. The sector supplies about two-thirds of global gross domestic product and half of global employment. Services have also been the most dynamic component of world trade, growing faster than goods over the past two decades. When measured in value-added terms, services account for over half of world trade, reflecting their importance as inputs into manufacturing and agriculture in addition to their direct tradability. Digitally delivered services have expanded especially rapidly since the mid-2000s, creating new opportunities for developing economies to diversify, integrate small and medium-sized enterprises (SMEs) into cross-border networks, build resilience and create high-value employment.

Developing economies now account for more than a third of world commercial services exports, up from 24 per cent in 2005. Countering long-standing export pessimism, developing economies recorded the fastest growth in commercial services exports during this period. Exports from least-developed countries have grown more than fourfold since 2005, while those of other developing economies have increased more than threefold, both well above the growth rate of developed economies. As emphasized by the World Trade Organization (WTO) and the World Bank (2023), the shift to a more services-centric world economy calls for a corresponding shift in policy attention to reap development benefits.

Export promotion efforts in many developing economies remain predominantly geared towards goods-producing activities despite the growing significance of services in global trade. This imbalance poses significant challenges, as most trade promotion organizations (TPOs) still rely on traditional instruments such as catalogues, trade fairs and logistics subsidies – tools mainly designed to support merchandise trade exports. Such instruments are not best suited to the often intangible, customized and relationship-based

nature of services trade. Support initiatives for services exporters often replicate, with minimal adaptation, the strategies and tools used for goods, leaving TPOs and business associations ill-equipped to address the specific characteristics and requirements of services export competitiveness.

Export promotion for services differs fundamentally from that for goods because of the distinctive characteristics of services and the way they are traded across borders. Services are often intangible and perishable, and as production and consumption mostly coincide, they are typically experienced rather than owned. Many services are heterogeneous and client-specific, with few that can be fully standardized (Edvardsson 2005; Gallouj and Weinstein, 1997; Klimkeit, Wang and Zhang, 2024). Earlier services export literature characterizes the sale of a service as a “promise to perform” rather than the transfer of a tangible product (APEC, 2004). Because buyers generally cannot inspect the service before purchase, suppliers must establish credibility and trust.

Earlier work on services export promotion also emphasizes the importance of reputation, referrals and professional networks in reducing buyers' uncertainty (APEC, 2004; Riddle, 2007). These credibility signals can therefore be more relevant to services promotion than product-oriented materials alone.

Because many services exporters are MSMEs with limited resources for international marketing, promotional policies should lower the costs of establishing credibility and reaching prospective clients. Practical support can include network participation, digital visibility, targeted market intelligence and institutional assistance (APEC, 2004; ITC, 2001).

A further dimension distinguishing services from goods trade lies in the diversity of delivery modes and the frequent need for factor mobility. Services cross borders not only through digital means or consumer travel but also via the temporary movement of professionals, foreign affiliates and

a host of investment linkages (WTO and World Bank, 2023). Consequently, the promotion toolbox for services must integrate both trade and investment facilitation, addressing complex regulatory barriers such as visa restrictions, recognition of qualifications, foreign equity limits, or licensing rules (ITC, 2001). This multidimensional nature of services trade calls for a whole-of-government approach that aligns export promotion with education, labour mobility, and innovation policies to enhance the visibility and credibility of national service suppliers.

Additionally, market opportunities in services tend to evolve rapidly, and the absence of copyright or patent protection for most services means market information can quickly become outdated. Unlike goods, services are rarely marketed through agents, such that service principals – who often focus on the technical aspects of design and delivery – must typically develop marketing expertise. Such traits can make it difficult for buyers to assess the quality of a service. And uncertainty impacts the strategies employed by TPOs and private business associations to promote services exports effectively. Buyers of services cannot inspect

samples; they must rely on credibility signals such as reputation, standards, references, and proven delivery capacity (ITC, 2022).

The effective development of services exports requires an integrated, specialized approach that links trade and investment promotion with other key drivers of competitiveness. Yet in many economies, such coordination remains limited. Efforts to attract foreign direct investment (FDI) – a vital mechanism for transferring knowledge from international markets to local suppliers – are often not aligned with or coordinated with services export promotion efforts.

Similarly, skills development programmes rarely reflect the specific needs of the services industry, and supportive tax frameworks or strong public-private partnerships are often lacking (see García, López and Ons, 2021; Álvarez, Mulder and Hernández, 2020; and Peña Capobianco, 2023). Moreover, while some economies encourage outward FDI, it remains concentrated in manufacturing, even though Mode 3 trade (commercial presence abroad) remains the dominant channel for international services trade.

Purpose and scope of the study

A lack of export development efforts specifically targeting services, or the simple replication of export promotion tools used for goods trade, can limit developing economies' capacity to take full advantage of the cross-border trade and investment opportunities arising in an increasingly service-centric global economy. The study of developing country experiences in boosting services exports is significantly under-researched. Based on a set of country case studies spanning diverse regions, national contexts and development levels, this publication fills an essential gap in the trade literature. It does so in a twofold manner: first, by synthesizing evidence on what works and what does not in promoting services exports; and second, by offering concrete lessons for developing economies seeking to design or adapt their export promotion systems in the sector.

The publication documents the export development strategies of selected services-exporting developing economies in Africa, Asia, Latin America and the Caribbean. The nine country case studies in this publication depict the trajectories of services export promotion followed by Chile, Costa Rica, Egypt, India, Jamaica, Malaysia, Mauritius, the Philippines and Uruguay.

The country case studies identify critical elements of these economies' support for services export development and advance actionable insights and recommendations to support services export capacity building, FDI attraction and skills upgrading in other developing economies.

The best practices and policy insights emerging from this publication can lend support to developing economies interested in designing or

reviewing their own export promotion strategies. It can also inform and guide the policy guidance and technical assistance provided by different international organizations and development banks in the context of the Trade in Services for Development Initiative.

This overview chapter distils key findings from the country case studies, highlights best practices, identifies pitfalls to avoid, and offers guidance for policymakers and institutions supplying technical assistance. The chapter concentrates on:

- Strategies and coordination frameworks within the public sector (institutional

design, mandates, governance) and with the private sector, academia and other civil society stakeholders.

- Services export promotion instruments (branding, market intelligence, readiness programmes, financing, matchmaking).
- Foreign direct investment attraction and aftercare.
- Skills development initiatives linked directly to export demand.
- Complementary policies (labour mobility, recognition, digital trust, diaspora engagement).

Strategy and coordination frameworks

A coherent national strategy and effective coordination among public and private actors are essential to sustain the growth of services exports. Economies showing sustained advances in this area – among them Chile, Costa Rica, India and Uruguay – demonstrate that well-defined institutional frameworks and long-term strategic visions enable export, investment, innovation and skills-related policies to reinforce one another rather than operate in isolation.

Within government, coordination across ministries and specialized agencies helps to align regulatory reforms, promotion instruments and human capital-enhancing initiatives around shared objectives. Equally

important is sound external stakeholder engagement with the private sector and other key civil society actors through permanent dialogue mechanisms, joint committees, and sectoral platforms that translate exporting needs into actionable policy responses. When public-private collaboration is backed by dedicated monitoring systems and clear accountability, continuity is built across political cycles and collective capacity is strengthened to respond to new market opportunities in modern, digitally delivered services. Box 1.1 highlights several best practices in services export promotion emanating from selected country case studies.

Promotion instruments for services: building and signalling credibility

Export promotion for services differs in essential ways from its goods counterpart because the “product” is typically intangible, customized and delivered through people and processes that the buyer cannot easily assess in advance. What is being sold, at the moment of contracting, is a promise to perform – to meet deadlines, uphold

confidentiality, respect data and intellectual property (IP), and deliver outcomes that are often complex to specify, measure and verify (APEC, 2004).

The most effective promotional instruments for services emerging from the country case studies are those that build credibility. Such

Box 1.1: Selected best practices on coordination and strategy from the case studies

Public-Private Technical Committee in Chile

Chile has adopted a model of structured public-private collaboration, anchored in its **Public-Private Technical Committee for Services Exports**, created in 2016 and coordinated by the Ministry of Finance. This Committee brings together ministries, ProChile, InvestChile and business associations to set strategic goals. ProChile has developed specialized sector teams for services and the creative economy, which use different support instruments. This allows for tailored approaches to creative, audiovisual and digital services exports. The country complements export promotion with investment attraction through InvestChile, integrates sectoral branding strategies (Ch113, Learn Chile), and relies on systematic monitoring and evaluation (customer relationship management systems, annual road maps, firm surveys) to refine programmes and ensure accountability.

Institutional clarity in Costa Rica

Costa Rica has provided a clear example of effective inter-agency coordination for more than two decades. The division of labour is distinct: COMEX handles trade policy, PROCOMER manages export promotion (and attracting FDI since 2023), and CINDE also focuses on attracting foreign investment (shared with PROCOMER since 2023). These institutions share common objectives and indicators, report jointly on progress and coordinate closely. This model has delivered sustained results: high reinvestment rates, diversified services exports, and credibility with foreign investors. The free trade zone (FTZ) regime, the “Essential Costa Rica” country brand, and explicit tools for knowledge-based services – such as

specialized talent development programmes and linkage initiatives – reinforce the clarity of the institutional architecture. Costa Rica’s Territorial Economic Strategy 2020–2050 also embeds knowledge-based services (KBS) as a long-term pillar.

Consolidation in Egypt

Egypt has taken steps to consolidate functions within the MCIT, and with the ITIDA as the main export promotion arm for ICT. This has reduced institutional fragmentation and enabled the government to pursue its broader “Digital Egypt” vision with greater strategic coherence. Egypt combines institutional consolidation with strong public-private engagement, talent development for multilingualism, investment in digital infrastructure, and consistent regulatory reforms (e-payments, data protection, licensing streamlining) to enhance ICT competitiveness.

Unified export and investment attraction agency in Jamaica

Jamaica has adapted its export promotion architecture in services around three pillars: tourism, global digital services, and film, animation, and music. The Jamaica Promotions Corporation (JAMPRO) combines export and investment promotion, operating programmes such as Export Max with firm-level performance indicators and mentoring. Sector branding leverages cultural strengths but anchors them in professional signals (studio credentials, delivery track records). Jamaica’s sector strategies combine fiscal incentives (a SEZ regime adapted to services), audiovisual rebates, talent development programmes, and strong cultural branding that links creative industries with digital services and tourism. The country also leverages demand-driven skills programmes and finance instruments to strengthen services for SMEs.

Box 1.1: Selected best practices on coordination and strategy from the case studies (cont.)

Councils in the Philippines

The Philippines demonstrates the power of councils that bring industry and government together. The IT-BPM Council aligns public policies with the evolving needs of the BPM industry. Together with the Department of Information and Communications Technology (DICT) and the PEZA, the Council develops road maps, sets skills standards, and ensures that promotion strategies remain relevant to sectoral dynamics. Export promotion is reinforced by fiscal incentives, SEZs, alignment of training with global qualification frameworks, national skills mapping and strong participation in international business process outsourcing (BPO)/IT fairs.

Integrated approach in Uruguay

The Uruguay XXI initiative operates as a single window that integrates export promotion, investment attraction and aftercare. Exporters and investors alike can access support without navigating multiple bureaucracies. The agency also plays a critical role in data collection and monitoring and evaluation, regularly publishing reinvestment rates and investor satisfaction surveys. Uruguay's predictability and coordination have proven central to its reputation as a reliable services exporter. Uruguay's approach builds on long-standing macroeconomic stability, high-quality digital infrastructure (91 per cent fibre coverage), sector-specific training ("Finishing Schools"), free trade zones and software regimes, and early private-sector leadership.

instruments translate a country's image, talents, professionalism and reliability into legible signals that address a buyer's legitimate due diligence concerns. Export promotion instruments must build confidence in a supplier's ability to deliver reliably.

In practice, this means that branding and market intelligence must be evidence-rich rather than slogan-heavy; that "export readiness" must involve hands-on coaching on proposals, pricing and services contracts; that finance must price and underwrite intangible investments like certifications; and that monitoring and evaluation must track conversion (from lead to contract) and stickiness (from initial sale to repeat business). The case studies provide clear illustrations of how these instruments work when tailored to services, and why they are prone to failure when they imitate the logic of merchandise trade promotion.

The case studies show that the most effective instruments are those that translate skills,

professionalism and reliability into signals that buyers recognize and trust. They also reveal pitfalls when instruments are copied from goods promotion without adaptation.

Branding, country reputation and evidence-rich positioning

Across successful service-exporting economies, branding has evolved far beyond visual identity into an evidence-based instrument of competitiveness. A strong national or sector brand translates institutional credibility, quality assurance and business performance into verifiable signals that reduce buyer risk and enhance transactional trust across borders. In the context of globally traded services, where transactions often involve intangible outputs and multiple delivery modes subject to complex regulations, credibility becomes a decisive factor in sustaining market access. Buyers seek reassurance that service providers can deliver consistent quality, adhere to ethical and sustainability standards, and comply with international norms.

Therefore, branding serves as a mechanism for signaling reliability and differentiating capabilities in markets where reputation substitutes physical inspection. It also integrates data-driven validation: performance metrics and certification systems, whilst transparent eligibility criteria ensure that the brand embodies measurable standards rather than aspirational claims. Over time, evidence-rich branding can create reputational capital that benefits all accredited firms, lowers information asymmetries and costs, and enhances the country's overall perceived value in global value chains.

Costa Rica demonstrates what it means to turn a national brand into a due diligence asset. "Essential Costa Rica" is not merely a logo or colour palette. It functions as a quality assurance scheme with eligibility criteria around excellence, sustainability and innovation. Services firms that carry the brand must document internal processes, ensure customer satisfaction and show continuous improvement. In export promotion events, the brand enables PROCOMER and CINDE to showcase a curated portfolio of vetted firms, rather than a disorganized collection of business cards.

Buyers who have worked with a branded Costa Rican firm transfer some of the trust they gained from that encounter to subsequent encounters, lowering search costs for all parties. This is particularly important in shared services, cybersecurity and engineering, where a weak link can pose significant reputational and financial risks to the client. Costa Rica's experience suggests that a brand becomes powerful in services promotion terms when it codifies expectations and screens entrants, not when it merely broadcasts virtues.

Uruguay has followed a complementary path: the brand is the country's predictability – rule of law, early digitalization and a public administration that delivers on time. Uruguay XXI's external messaging leans heavily on comparative indicators (digital government rankings, IP protection, contract enforcement times) and on case narratives of firms that scaled from small mandates to global roles. For software and fintech buyers, the promise is not low cost but low friction: easy

incorporation, reliable contracts, bilingual teams, seamless payments, and public agencies that respond to emails. The lesson is that branding for services must translate institutional properties into client benefits that reduce a buyer's perceived risks.

Chile demonstrates how sector brands can evolve from marketing tools into credibility platforms to support export diversification. ProChile's portfolio – spanning Ch113, a Digital Country_, Learn Chile, CinemaChile, Chilemúsica and Arquitectura de Chile – translates the country's reliability and creative capacity into recognizable quality signals across global markets.

Each brand combines promotion with governance: participating firms must meet professional, sustainability and innovation standards aligned with the national image strategy. Rather than generic campaigns, these brands serve as collective reputational assets that enable Chile to present curated ecosystems – whether in IT, higher education, or the audiovisual industries – anchored in public-private collaboration. They convey a consistent message of professionalism, technological sophistication and trustworthiness, reducing buyers' perceived risks and positioning Chile as a dependable partner in digitally delivered and creative services.

Jamaica's JAMPRO shows how to blend sector branding with cultural cachet. In audiovisual services – animation, music production, post-production – Jamaica leverages a global reputation for creativity but does so carefully. The pitch to studios and platforms combines cultural identity with professional markers such as studio certifications, producer guild memberships and delivery track records. The tourism brand serves as a platform, but the services brand provides the operational proof studios require.

Mauritius has embraced explicit branding in higher education and knowledge services. The Economic Development Board (EDB) promotes the island as a bilingual, politically stable and multicultural study destination under the "Study in Mauritius" campaign. This initiative, supported by scholarships, international partnerships and the adoption of rigorous quality assurance standards,

seeks to position Mauritius as a regional education hub for Africa and Asia. The branding effort combines international marketing with institutional credibility, projecting the country as a secure, high-quality environment for learning and research-based investment.

Market intelligence as a platform, not a brochure

Where goods promotion often relies on broad market briefs and price lists, services promotion must contend with granular buyer requirements: the software stacks used by target clients, procurement pathways and vendor prequalification rules, certifications that unlock gated requests for proposals (RFPs), the typical deal sizes and payment terms by niche sector, and the legal clauses (on data processing, IP ownership, warranty) that cause contracts to stall.

Uruguay XXI's CRM-driven approach is noteworthy because market intelligence is looped back into pipeline management: for each targeted vertical, staff track which firms have the requisite stack and certifications, which have references in regulated industries, which can staff a project in two time zones, and which can deliver services in multiple languages. Instead of publishing a report and moving on, the agency uses intelligence to compose export cohorts that are genuinely pre-qualified for a specific buyer set.

Egypt's ITIDA illustrates the same logic at scale. As demand for outsourcing and freelancing has accelerated, market intelligence has focused on platform dynamics (rates, skills shortages by category, rejection reasons and client satisfaction scores) and on destination-market rules (onboarding, tax documentation and data rules). The resulting guidance to firms is practical, covering key areas such as which badges to earn on platforms, how to pitch a portfolio, how to evidence security practices in a shortlisting call, and how to move from micro-gigs to framework agreements.

One key lesson emerging from the case studies is that market intelligence becomes a true production input only when it directly

upgrades what firms do at the moment of sale – helping them adjust concrete behaviours such as how they present credentials, respond to client requirements, structure their offer, or meet compliance expectations during the transaction itself.

Export readiness and capability upgrading: coaching and certifications

The experience of the nine reviewed economies' services export promotion strategies suggests that "generic export training" yields limited returns. What moves the needle is hands-on coaching centred on the concrete sales artefacts and process discipline that international buyers expect. This includes capability statements that describe measurable outcomes rather than lists of activities, and proposals that price risk appropriately rather than rely on flat-rate estimates. It also involves SLAs that operationalize availability, incident response, and penalties – that is, documents that spell out exactly how many hours per day a system or team must be available; how quickly the provider must acknowledge, investigate and resolve incidents; and what financial or service credits apply if the provider fails to meet those commitments.

In parallel, strong project-governance explain escalation, change control and acceptance criteria: they set out how problems move from basic support to higher technical or managerial levels (escalation), how any requested change in deadlines is evaluated and approved (change control), and what objective checks must be satisfied before deliverables are considered complete and accepted (acceptance criteria). Across the case studies, the economies that make these elements teachable and coach firms to apply them in real transactions are those whose SMEs become credible, low-risk partners for international clients.

Chile's pilots for services SMEs are instructive precisely because they de-emphasized general lectures and emphasized shop-floor consulting: mentors sat with firms to rewrite proposals, role-play buyer calls, and map certifications to target RFPs.

Several Chilean animation and digital studios began winning export contracts only once their “creative” offering was paired with a delivery system that international studios recognized and trusted: structured time-boxed sprints (short, fixed-duration work cycles with predefined outputs), named leads (explicit assignment of responsibility to a specific producer, technical director, or project manager), formal asset-handover protocols for delivering files and documentation, and clear evidence of IP hygiene (procedures ensuring that all artwork, code, music and effects are either original, properly licensed, or rights-cleared, and that version control systems document authorship). By adopting these professional delivery practices, Chilean firms reduced perceived execution risk and signalled that they could meet the production standards of global buyers.

Jamaica’s Export Max goes further by building accountability into readiness. Participating firms commit to quarterly milestones – rebuilding websites to match buyer expectations; securing at least one international certification; assembling a client reference pack; completing a round of dubbed demos; passing a data-protection audit – with mentors assigned and progress reviewed against firm-level KPIs. The programme’s impact rests on the marriage of aspiration and measurement: creative and tourism-adjacent firms are encouraged to export, but only those who demonstrate operational discipline continue to receive intensive support.

Egypt’s Export-IT programme provides a cash rebate on the value-added of ICT exports – that is, a direct financial refund calculated as a percentage of the domestic content that Egyptian firms generate when delivering services to foreign clients. By returning part of this value in cash, the programme effectively lowers the upfront costs firms must incur to compete internationally.

These costs often include investments in international standards and certifications (such as information-security or service-management standards), business-development efforts to convince sceptical clients, legal work to adapt domestic contracts to international norms, and participation in global outsourcing and freelancing

platforms, where firms must build a visible track record and obtain early verification or trust badges. When the main barrier to exporting is partly financial rather than technical, such rebates materially shorten the payback period on these credibility-building investments and accelerate the ramp-up to export.

In the Philippines, the TESDA competency standards are a macro-level readiness instrument because they make the workforce legible to foreign buyers. When a procurement officer at a North American bank reads a CV that references TESDA’s standards or a BPM quality framework, the mental translation required to evaluate talent is smaller. The client can assume a baseline, which speeds up shortlisting and reduces training costs. It is telling that several large BPM firms in Manila treat TESDA certification as a signal in their screening processes; the national standard thus becomes an export-enabling asset.

Buyer intermediation and deal flow: from missions to curated matchmaking

The weakest instrument in services promotion, across economies and over time, has been the generic trade mission. An exhibition space of booths and leaflets can work for products one can touch; it rarely yields contracts for cybersecurity audits or animation pipelines. The practical alternative is curated matchmaking, where every business-to-business (B2B) meeting is pre-qualified on both sides: the buyer has a defined scope and budget; the seller meets capability thresholds; the meeting is framed around a concrete work package and follow-up steps.

Uruguay XXI’s practice of convening micro-cohorts – four to eight firms that meet a specific buyer profile – and matching them to a shortlist of prospects derived from CRM data has led to higher conversion rates and lower “no-show” rates. Meetings are deliberately short, with an insistence on a post-meeting artifact (a mini proposal, a pilot plan, a compliance checklist). In creative industries, where cultural fit matters, Jamaica’s JAMPRO has experimented with screen-and-scene formats:

curated screenings of short reels to targeted commissioning editors, followed immediately by timed one-to-one meetings. Firms are coached to present referenceable work; editors are briefed on what is realistically on offer; and rights issues are discussed in the room to avoid delays in the process later.

Mauritius's virtual missions during and after the COVID pandemic showed the advantages of remote curation for professional services. Because travel costs were not a binding constraint, the agency could invest in profiling: long pre-calls to determine buyer needs, document checklists to verify supplier readiness, and structured agendas that ended with a "go/no-go" on pilots. Several Mauritian legal and consulting firms used this model to secure their first cross-border retainers, which then produced the case references that their branding lacked.

Finance for intangibles: de-risking the first sale

In services, what separates a business-ready firm from a contract-winning one is often a stack of intangible assets – certifications, security audits, quality management documentation, a polished demo environment, a travel budget to visit a key client, and a polished website – that banks do not readily collateralize. This is why the most catalytic financial instruments in the cases studied are micro-targeted to the moments when credibility is gained or lost.

Uruguay's Finishing Schools are often described as a skills programme. Still, from the vantage point of an exporter, they are a balance-sheet instrument. The State takes 50–70 per cent of the training expense off the books if the programme is co-designed with employers and yields placements. The firm, in return, promises to export or to anchor an export-intensive team domestically. The result is that training, which would otherwise be a risky up-front cost, becomes a co-investment with clear export logic.

Costa Rica's reimbursement schemes for standards and training operate on the same principle. By underwriting the audit and certification step, the State effectively buys firms a

ticket into gated RFPs. Once inside the gate, the firm can win on merit. Jamaica's micro-grants for festival participation in film and music recognize that a single screened work can "unlock" a commissioning relationship; the grant is small, the ensuing contract potentially much larger.

More experimental are revenue-based finance pilots. For services SMEs with volatile but scalable revenue, a fixed-payment loan is often misaligned with cash flows. Instruments that take a modest share of export receipts for a limited period, instead of a fixed instalment, appear better matched to services risk profiles. The lesson for TPOs is not to become banks but rather to partner with financiers to design products around the credibility hurdles affecting specific sectors.

Malaysia stands out for its financing instruments that help SMEs overcome credibility and market access barriers. The Market Development Grant reimburses firms for eligible international promotion activities, such as participation in trade fairs, business missions, and export training. Complementing this, the Services Export Fund covers costs related to feasibility studies, tender documentation and certifications. These schemes address the "first sale" problem by reducing the upfront costs of securing export contracts.

The Malaysia Digital Economy Corporation (MDEC) further supports digital firms with specialized programmes that connect Malaysian ICT and creative companies to overseas buyers, while the Professional Services Development Fund encourages upgrading of professional standards. These instruments resemble the reimbursement and mentoring schemes found in Costa Rica and Jamaica but are distinctive in their scale and focus on services.

Standards, privacy and digital trust as trade tools¹

For many categories of services – software maintenance in finance, healthcare data analytics, legal process outsourcing – the binding constraint is not the lack of buyers but the lack of trust. A foreign client cannot allow a supplier to access production data without clear assurances of robust governance, privacy and security

frameworks. This is why Chile's and Egypt's support for ISO/IEC audits is not a bureaucratic flourish but a market access tool. Firms that pass ISO 27001 (information security) or ISO 27701 (privacy) audits can show a buyer that controls exist, that incidents are recorded, and that remediation has a workflow. When paired with sector-specific badges (HITRUST – Health Information Trust Alliance – in health, PCI DSS – Payment Card Industry Data Security Standard – in payments), the combination acts like a visa attesting to reliability for sensitive projects.

The same logic applies at the national level. Uruguay's early investment in digital government – secure digital IDs, e-signatures, interoperable registries – created a demonstration effect. If firms in Montevideo are accustomed to robust digital interactions with the State, they likely possess the competence and habits that foreign clients demand.

Public procurement and demonstration effects

Several country case studies highlight the catalytic role of domestic procurement as a springboard to exporting services. India's expansion of e-procurement and the presence of large domestic buyers (banks, telecoms, public agencies) created a home market where SMEs could build references and practice delivery at scale. Once a firm has delivered a cloud migration for a state utility, it can deploy much the same in Dubai or Dublin. The Philippines exhibits a similar dynamic in BPM: multinationals located in PEZA parks serve as both buyers and references for local suppliers, who then leverage those references to secure offshore work.

Promotion agencies, however, need to tread carefully: substituting for procurement reforms by “forcing” awards to SMEs can backfire if performance suffers. The point is not to direct contracts but to open the channel – standardized RFPs, fast payments for small suppliers and reverse pitches where public buyers explain upcoming needs. In Chile, sector teams that liaise with public buyers have learned to translate procurement pipelines into readiness road maps for SMEs: which standards to acquire this year, which subcontracting opportunities are realistic,

and which integration skills will be demanded in the next budget cycle.

Diaspora networks as trusted connectors rather than cheerleaders

Jamaica and Mauritius illustrate how diaspora engagement moves beyond symbolism when it is tied to deal origination and mentoring. JAMPRO's work with diaspora producer networks in North America has yielded concrete introductions that bypass the “cold start” penalty, which first-time exporters all too often face. But the most effective configurations are those in which diaspora mentors co-design the pitch: rewriting a deck to match US studio expectations; flagging red-flag clauses in a work-for-hire agreement; and rehearsing a pricing conversation so that a Jamaican firm does not underquote. The diaspora, in this view, is a specialized salesforce that understands the context of both sides of a services transaction.

Mauritius's experience with returnee incentives tells a different story: encouraging skilled Mauritians abroad to establish boutique service firms at home increases the local stock of international delivery habits – contracting discipline, strengthened data-protection reflexes, stronger client communication rhythm – all of which tend to spill over through labour mobility and subcontracting. Promotion programmes that treat these firms as key players can create positive examples for a broader range of SMEs.

Measurement, attribution and the discipline of follow-through

If credibility is the currency of services trade, follow-through is how it accrues interest. The nine country case studies converge on a simple operational truth: promotion agencies that focus solely on activity numbers (events hosted, meetings held, number of firms supported) rarely get lasting results, while those that track pipeline mechanics (lead quality, conversion rates, time from first contact to signed contract, repeat-purchase ratios) can improve their instruments. Costa Rica's PROCOMER is

exemplary in this respect: it publishes dashboards that make staff accountable for conversion, not just outreach. Uruguay XXI likewise treats reinvestment rates as a barometer of ecosystem health. If investors expand mandates locally, it implies that procurement, skills and regulatory support are working together.

Egypt's ITIDA shows how measurement disciplines scale in a fast-growing sector. Reimbursement schemes are contingent on documented outcomes, and SME cohorts are revisited at 6 and 12 months to determine which support instruments have generated revenue gains. Jamaica's Export Max uses firm-level KPI contracts, which are unusual for a creative-industries context. It is precisely the lack of such discipline in many creative sectors that keeps them stuck in a grant cycle with weak export outcomes. Across economies, the lesson is the same: services promotion requires an industrial policy approach to sales operations within the public sector – clear funnels, named account managers, CRM notes that guide action, and reviews that refine the next cohort.

What does not work: export promotion pitfalls to avoid

The downsides depicted in the country case studies are highly instructive for understanding what does not work in export promotion. Repurposed goods-export tools – generic pavilions, broad trade missions, catalogues and mass emails to “potential buyers” – rarely generate service contracts. Several economies, including Jamaica, Mauritius, and early-stage Costa Rica, relied heavily on these instruments in the initial phases of their services strategies. They generated visibility but few conversions: firms reported returning from missions with “contacts, not clients” and little understanding of why meetings failed to advance. The result was a cycle of activity without impact and growing scepticism from SMEs, who perceived that the same few firms benefited from repeated participation while the broader ecosystem saw little change.

Fragmented mandates and overlapping promotion roles also appear across the cases. Before Chile created its Public-Private Technical Committee on

Services Exports, agencies responsible for trade, investment, statistics and skills operated with limited coordination. India's services-promotion landscape remains similarly complex, with multiple councils and ministries interacting unevenly with exporters. Mauritius's earlier architecture required consolidation into the EDB precisely to eliminate duplication. In these contexts, buyers and investors faced mixed messages, inconsistent follow-up and uncertainty about who owned the relationship. In high-trust services sectors where reliability and clarity are paramount, this fragmentation undermined credibility and slowed export growth.

Weak follow-through and insufficient aftercare are also common pitfalls. The case studies highlight that many promotion agencies historically focused on “first contact” – introductions at fairs or inclusion in a directory – without tracking whether those leads matured into negotiations. Before the introduction of CRM systems and sectoral teams, Chile struggled with this: firms received contacts but lacked the coaching needed to refine proposals, prepare for technical vetting, or meet compliance requirements. Uruguay and Costa Rica also learned that without structured post-event follow-up – B2B matchmaking, diagnostic support, proposal reviews – initial buyer interest dissipates. The absence of systematic aftercare meant that events created noise, not pipelines.

A fourth pitfall concerns thin or performative measurement, where agencies count activities rather than outcomes. Several economies reported that early services-promotion efforts were justified by the number of missions, firms “attended,” or participants trained, rather than the number of contracts signed, capabilities upgraded, or firms graduating into new markets. In Jamaica, for example, firms were often included in missions even if they did not meet buyer-readiness thresholds, because success was measured by participation rather than conversion. In Chile, the lack of unified data systems prevented the evaluation of the effectiveness of export promotion efforts, making it challenging to redesign tools or discontinue low-impact activities. When metrics focus on visibility rather than behaviour change,

ineffective programmes become entrenched, and pressure for reform weakens.

Finally, missing or weak buyer-readiness filters undermine trust. Across the cases, buyers repeatedly signalled that they need curated lists of firms that meet technical, governance and compliance standards, not open rosters. Costa Rica responded by transforming the Essential Costa Rica country brand into a quasi-due diligence filter that screens firms for excellence, sustainability and innovation. Uruguay XXI adopted a project-portfolio approach with deeper profiling of firms' capabilities. In contrast, economies without such filters struggled: firms were presented to buyers despite lacking basic artefacts such as capability statements, delivery methodologies, or

information security procedures. This damaged the agency's credibility and reduced buyers' willingness to engage with national delegations.

These pitfalls share a common thread: export promotion fails when it prioritizes activity over accountability, visibility over trust, and events over buyer-centred support. Economies that overcame these traps – Chile, Costa Rica and Uruguay most prominently – did so by replacing generic events with targeted intelligence, structured follow-up, integrated governance and outcome-focused measurement. Their experience shows that in services, competitiveness comes not from doing more promotion, but from doing the right things – reliably, consistently and with clear evidence of impact.

Investment attraction and aftercare: from entry mandates to ecosystem anchors

FDI serves not only as a leading mode of service delivery but also as a catalyst for enhancing export capacity. Investment attraction and retention efforts are a key contributor to export promotion strategies. When a multinational enterprise establishes a delivery centre, a software lab, or a creative studio in a developing economy, it achieves two objectives simultaneously: it exports services, and it seeds skills, practices and linkages that local firms can later leverage. The challenge for policymakers is that investment attraction in services is no longer a matter of cheap labour or fiscal holidays. Buyers of services are looking for trust environments: pools of talent that can deliver at scale, legal systems that respect contracts and protect data, and public agencies that respond with agility and predictability.

Beyond tax holidays: talent, trust and timeliness

The country case studies illustrate ongoing shifts in the logic of attraction. In the early 2000s, the Philippines competed for BPM investments primarily on the basis of low labour costs and

generous fiscal incentives in PEZA zones. By the 2010s, investors were demanding more: standardized occupational skills, predictable telecommunications infrastructure and evidence that local managers could guarantee 24-hour global delivery. TESDA competency frameworks, PEZA's efficient permitting, and DICT's expansion of bandwidth became as crucial as the tax incentives themselves. In short, the "value proposition" had migrated from fiscal generosity to ecosystem credibility.

Costa Rica presents the clearest case of such a transition. CINDE has deliberately marketed Costa Rica not as a low-cost location but as a reliable partner for complex services. When investors ask about cost arbitrage, CINDE points instead to multilingual talent, a dense network of deep trade agreements worldwide, and the Essential Costa Rica brand as evidence of quality. The result has been a portfolio of high-value investments in engineering services, life sciences and cybersecurity, not just call centres. By setting expectations at the outset, Costa Rica avoided the trap of hosting footloose investors who leave when wage differentials narrow.

Uruguay XXI also exemplifies this reorientation. It rarely emphasizes tax advantages; instead, it trumpets Uruguay's strong track record in the rule of law, early adoption of digital signatures and predictable institutions. Investors in software and fintech often cite the ease of doing business with Uruguayan authorities as a decisive factor in their locational decisions. Such credibility has enabled Uruguay to attract smaller but higher-quality investors willing to expand their mandates over time.

Like the Philippines and Costa Rica, Malaysia has successfully attracted multinational corporations in business services, ICT and logistics. Its Principal Hub scheme provides tax incentives for companies establishing regional headquarters in Malaysia. At the same time, the Global Trading Centre framework encourages firms to use Malaysia as a base for international services operations. But beyond incentives, Malaysia's Investment Development Authority and the Malaysia Digital Economy Corporation (MDEC) have emphasized ecosystem development, providing modern digital infrastructure, regulatory clarity, and talent pools to ensure firms remain and expand their mandates. Aftercare remains uneven, but there are notable efforts to facilitate reinvestment, particularly in the MSC cluster and new data centre projects. Malaysia's trajectory shows both the benefits of targeted incentives and the importance of complementing them with strong aftercare and ecosystem policies.

Aftercare as a primary function

If investment attraction and facilitation represent critical first steps, aftercare is what transforms an initial mandate into durable relationships. Too many economies focus on ribbon-cutting ceremonies but neglect the day-to-day support that keeps investors anchored. The case studies confirm that aftercare is where services investment promotion agencies earn their reputation.

CINDE in Costa Rica assigns account managers to large investors, functioning much like a corporate relationship manager in banking. These account managers maintain regular contacts, anticipate problems and act as problem-solvers with government agencies. Reinvestment is

therefore high: multinationals that arrive with one function (say, back-office finance) often expand into higher-value roles, such as analytics and research and development. Costa Rica's ability to secure such mandate expansions is not the result of luck but of systematic efforts to deliver aftercare.

Uruguay XXI follows a similar model, embedding aftercare in its organizational DNA. It conducts regular investor satisfaction surveys and tracks reinvestment rates as a key performance indicator. When investors report regulatory bottlenecks or skills shortages, Uruguay XXI convenes public-private working groups to resolve them. The presence of these mechanisms signals to both current and prospective investors that Uruguay is a reliable long-term partner.

The Philippines has also institutionalized aftercare through its PEZA. Firms located in IT parks benefit not only from initial fiscal incentives but also from ongoing facilitation services, including expedited permits, clear and simplified tax administration, and a regulatory environment adapted to global services delivery. While PEZA has faced criticism for being slow to adapt to the digital era, it remains a cornerstone of the Philippines' ability to retain and grow BPM investments.

Pitfalls in investment promotion

The case studies usefully highlight what does not work in investment promotion. First, overreliance on tax incentives creates vulnerability and diminishing returns. Mauritius, Costa Rica and Uruguay have all used generous tax regimes and free-zone frameworks to attract FDI in services. In Mauritius, successive waves of fiscal incentives – EPZ and Freeport regimes, a flat corporate tax, no capital gains tax, and multiple tax holidays – were central to positioning the country as a regional hub. Costa Rica and Uruguay similarly rely on structured tax exemptions in their FTZs and investment-promotion laws.

But the case studies warn that this model is exposed on two fronts. In Costa Rica, potential changes to international tax rules are explicitly flagged as a risk, underscoring the need to deepen investment in human capital so that

competitiveness rests on skills and ecosystem quality rather than on tax considerations alone. In Uruguay, recent reforms to the free zone regime were required to align with the Organisation for Economic Co-operation and Development Base Erosion and Profit Shifting principles, reminding policymakers that incentive regimes must be continuously adjusted to remain credible and compliant. Across these cases, the underlying lesson is that tax incentives can be part of the toolbox, but investment promotion that leans too heavily on them without parallel efforts in skills, infrastructure and regulatory quality becomes increasingly fragile.

Second, fragmented mandates and weak coordination can confuse investors and dilute impact. Several case studies point to the costs of institutional complexity. In India, there is no single nodal body for services, and the Services Export Promotion Council operates with limited resources and overlapping responsibilities vis-à-vis multiple ministries. This fragmentation reduces its visibility among exporters and constrains its ability to shape a coherent services-export narrative. In Mauritius, the EDB serves as the main investment and trade promotion agency, but the case study notes a need for stronger institutional coherence and a high-level coordination platform to align the EDB with sectoral ministries around a shared strategy and KPIs.

By contrast, Egypt's ICT experience shows the benefits of consolidation: the establishment of MCIT and ITIDA as central anchors for ICT policy and promotion has given investors a clear entry point and more consistent messaging. Taken together, these examples suggest that dispersion of mandates without robust coordination mechanisms is a recurring pitfall in investment promotion.

Third, weak linkages with domestic firms limit spillovers and can turn investment promotion into a quasi-enclave activity. Costa Rica has been highly successful in attracting FDI in knowledge-based services and shows evidence of positive spillovers to some local providers, yet the case study explicitly notes that the country has struggled to scale up

KBS exports by domestic firms. Outcomes for local SMEs have fallen short of expectations, pointing to the need for stronger local capability-building and entrepreneurship support.

In Mauritius, the EDB responds to investors on a case-by-case basis, providing information on local partners, but the case highlights the absence of a more systematic matchmaking platform and structured follow-up to connect foreign investors to local suppliers. Without deliberate linkage programmes – such as supplier development, joint innovation projects, or structured matchmaking – FDI in services risks remaining an enclave centred on a limited group of large, often foreign, firms.

A fourth pitfall is treating market access as self-executing. Mauritius has secured market access for services through the Common Market for Eastern and Southern Africa (COMESA), the Southern African Development Community, the African Continental Free Trade Area and multiple free trade agreements, yet the case notes that services exports under these agreements have not progressed as expected. The problem is not a lack of treaties but a lack of domestic and external sensitization: many services suppliers are not fully aware of the opportunities or procedural requirements for using these agreements. This underscores that investment and export promotion must actively translate agreements into usable opportunities – through market intelligence, guidance and targeted promotion – rather than assume that legal access will automatically generate flows.

Finally, generic promotion without a clear project pipeline reduces effectiveness. In Mauritius, traditional tools such as roadshows and generic investment-climate messaging are still used, but the case study recommends moving towards a more project-based approach: identifying priority sectors, designing bankable projects, and selling these to investors. This shift would require recalibrating EDB skills towards project development and impact monitoring. Similar messages appear in Costa Rica and Uruguay, where the most effective promotion strategies combine a strong macro-narrative (“stable,

rules-based, skilled”) with concrete sector propositions and, in Uruguay’s case, aftercare and reinvestment support embedded in Uruguay XXI.

Across the nine case studies, the common thread is that investment promotion underperforms

when it relies on generic slogans, fragmented institutions and tax sweeteners, and succeeds when it is coordinated, project-oriented and explicitly designed to generate linkages and learning for domestic firms.

Skills development: talent as strategy

If investment attraction is the spark, skills development is the fuel that sustains services exports. Unlike goods exports, which rely on physical assets and logistics, services exports depend overwhelmingly on people: their education, technical competencies, communication skills, emotional intelligence and cultural fluency. Every case study, without exception, emphasizes the centrality of skills to the success of exporting services. The most successful economies treat skills as an export promotion instrument.

Malaysia has recognized the critical importance of skills to its services exports. The Skills and Technical Enhancement Programme (STEP) and talent facilitation initiatives led by MDEC and TalentCorp aim to align graduates with industry needs in ICT, finance and business services. The MyDigital Blueprint also emphasizes digital literacy and advanced digital skills as key enablers of export growth. Compared to Uruguay’s Finishing Schools and the Philippines’ TESDA, Malaysia’s programmes are more centrally designed but still emphasize industry inputs. STEP, for example, funds training courses developed jointly with employers, helping to address gaps in specialized ICT and financial services skills. Like Mauritius, Malaysia also highlights inclusion, promoting women’s participation in ICT through scholarships and capacity-building programmes specifically tailored to market segments where female employment predominates and/or offers significant inclusiveness prospects.

Employer-led, co-financed models

Uruguay’s Finishing Schools programme exemplifies a best practice in skills alignment. Instead of offering generic training courses, the programme requires firms to co-design curricula with training providers. The government then reimburses a large share of the costs if measurable outcomes, such as job placements or exports, are achieved. This model ensures that training is demand-driven and that firms have a financial stake in the quality of the training they produce. Importantly, the programme is open not just to large multinational firms but also to SMEs, allowing them to build specialized teams for export projects.

Costa Rica has institutionalized similar partnerships through its National Training Institute (INA) and through direct collaboration with universities. When multinationals signal demand for specific skills – such as cybersecurity analysts or biomedical engineers – training programmes are rapidly deployed. The alignment between CINDE, INA and universities ensures that talent pipelines are synchronized with investment promotion efforts.

National standards as global signals

The Philippines demonstrates how national competency standards can serve as markers of international credibility. TESDA’s frameworks for BPM roles – such as customer service, finance and accounting, and IT support – are recognized by global firms. Employers abroad know what it means when a Filipino applicant cites a TESDA

certification, which reduces their due-diligence burden. The standards thus operate as an export-enabling instrument rather than just a domestic training policy.

Egypt has taken a similar path with its Digital Pioneers initiative. The programme trains thousands of young graduates in data analytics, cloud computing and artificial intelligence (AI), with curricula co-developed by international technology partners. Certificates are issued jointly, which enhances their credibility with foreign clients. Graduates are often directly linked to outsourcing contracts or platform work, shortening the path from training to export.

Inclusivity and broadening the talent pool

Mauritius has innovated by targeting underrepresented groups, particularly women, in enlarging the country's talent pool. Its women-focused ICT scholarships aim to diversify the talent base and ensure that services exports benefit from the broadest possible pool of skilled workers. By coupling scholarships with mentorship and internship programmes, Mauritius not only trains women but also integrates them into export-oriented roles. Such inclusivity serves both an economic and reputational function: global clients increasingly value diversity in supplier teams.

Jamaica has experimented with programmes to integrate creative professionals into the country's export economy. Training in intellectual property management, digital marketing, and production standards is combined with mentorship from diaspora professionals. While challenges remain – particularly in financing – these programmes highlight the importance of equipping creative workers with the business and contractual skills required for success in global markets.

Pitfalls in skills policy

The case studies also highlight several recurring pitfalls in skills-upgrading practices. The first is the supply-driven trap, in which governments launch large training schemes without ensuring tight

linkages to employer demand. While this problem is widely recognized in global skills debates, the country cases illustrate that skills initiatives only gain export traction when employers help shape curricula and validate competencies, as seen in Costa Rica's Pay-for-Results approach and Uruguay's Finishing Schools model.

A second pitfall is institutional fragmentation. Several economies have struggled when multiple ministries or agencies run overlapping ICT or services-skills programmes, diluting effectiveness. The Egypt case shows the opposite trajectory: coordination improved once MCIT and its affiliated bodies (ITIDA, Information Technology Institute) became the central anchor for digital skills and export support, demonstrating the value of consolidation and a single point of accountability.

A third pitfall is short-termism in training design. Programmes that focus only on entry-level roles risk locking economies into lower-value segments. The Philippines illustrates this challenge: after two decades of strength in voice-based BPM, the industry now needs to expand into higher-value knowledge process outsourcing, analytics and AI-related services. The case study notes that TESDA and universities must continue updating their standards and curricula to align with this shift.

A fourth pitfall is insufficient alignment with industry-recognized credentials. Several cases – including Jamaica, Malaysia and Mauritius – show that training expands most effectively when tied to certifications or micro-credentials that foreign clients recognize (cloud platforms, cybersecurity, animation pipelines, agile methods). The pitfall arises not from these economies themselves, but from broader experience: certifications only improve export competitiveness when they map to specific buyer requirements, not when treated as generic add-ons.

A fifth pitfall concerns territorial concentration. Even strong services ecosystems exhibit significant geographic imbalances. In Costa Rica, the case study highlights the persistent concentration of modern services in the Greater Metropolitan Area and the difficulty of building KBS capability in secondary regions due to talent shortages. In Uruguay, most export-oriented services firms

supported by Uruguay XXI are still located in Montevideo, despite growing outreach to other departments. The lesson is that without a deliberate territorial lens, skills and services-export capabilities can cluster narrowly, limiting inclusive growth.

A final pitfall is the lack of structured pathways for progression. The cases from Chile, India, Mauritius and the Philippines all highlight the need for mid-career deepening – architects, leads, product managers – not only junior roles.

Without mechanisms for workers to advance into supervisory and specialist positions, ecosystems struggle to move into higher-value segments, and firms face persistent shortages of senior talent.

Together, these pitfalls point to a common conclusion: skills upgrading supports services exports only when programmes are demand-driven, internationally recognizable, territorially inclusive, and designed to build not just entry-level workers but full career pathways.

Complementary policies: creating an enabling environment

Beyond export promotion instruments, attracting FDI and targeted skills development, several complementary policies shape whether services exporters can access foreign markets and compete effectively. These policies often fall outside the remit of trade promotion organizations, yet they are nonetheless critical for creating an enabling export environment.

A key first concern is the quality of the trade policy environment. For example, Malaysia has complemented its promotion instruments with policies that enhance the overall enabling environment for services exports. The country's DFTZ, launched in 2017, facilitates e-commerce by simplifying customs and logistics for cross-border online trade. The government has also promoted Malaysia as a regional data hub, supporting investments in data centres and cloud infrastructure. Similarly, Chile and Costa Rica have leveraged the global reach of their preferential trade and investment ties to attract foreign anchor firms in priority services sectors.

Labour mobility and professional recognition also rank among the most significant complementary policies. Many services depend on the temporary movement of professionals across borders – engineers supervising projects, consultants advising clients and creatives working on-site. Some economies, such as India, have secured commitments on professional mobility in their

trade agreements, but significant hurdles remain, including visa restrictions, labour-market certification schemes, and the (lack of) recognition of professional qualifications. Mauritius has pursued bilateral accords to facilitate the mobility of its skilled professionals, though take-up has remained limited to date. In the Caribbean, Jamaica has worked through the Caribbean Community to promote the mutual recognition of creative industry qualifications, but progress has been slow and uneven.

These examples illustrate that while legal frameworks matter, the real challenge lies in implementation and in addressing the administrative barriers that prevent commitments from being fully utilized. In the professional services sector, Malaysia actively participates in the Association of Southeast Asian Nations Mutual Recognition Arrangements, which facilitate the mobility of engineers, architects and accountants. Rising worldwide concerns about the risks of illegal migration weigh on prospects for significant advances in labour mobility, even when such movement is temporary and circular. Instruments other than trade agreements, particularly bilateral labour-management agreements, may offer more promising pathways for labour mobility than commitments embodied in trade agreements, whose more rigid, permanently binding nature can prove challenging.

Digital trust and regulatory credibility also play an increasingly important role, given the dizzying growth of digitally delivered services. Services buyers expect (personal) data protection, cybersecurity safeguards and enforceable contracts. Uruguay has established itself as a trusted partner through strong digital governance, including a national e-ID system and legally recognized e-signatures. Egypt introduced a new data protection law to reassure clients in ICT outsourcing. Chile has updated its privacy and e-signature frameworks and enacted a new data protection law in 2024, addressing weaknesses in the country's enforcement regime. Malaysia, too, has invested in digital trust through its data centre strategy and cybersecurity policies, positioning itself as a regional hub for secure data transactions. These measures demonstrate how regulatory upgrades can serve as competitive assets in services exports.

Diaspora engagement is another area where complementary efforts can generate important dividends. Migrants and expatriates often act as bridges to overseas markets, particularly in services where trust and personal networks matter. The country case studies suggest that diaspora initiatives are most effective when they are linked to specific deals and

mentoring arrangements, rather than limited to symbolic engagements.

Finally, public procurement can act as a launchpad for services exporters. Delivering for demanding domestic clients provides references that are valued in international markets. India's e-procurement platform allowed SMEs to gain credibility by supplying government agencies. In the Philippines, SMEs established credibility by serving multinational firms within the country's special economic zones. Chile leveraged public broadcasting contracts to help creative firms build portfolios that facilitated their subsequent internationalization. With close to half of global civilian procurement consisting of services, securing enlarged access to foreign procurement markets, a task that trade agreements can readily tackle, represents another potential means of boosting services exports.

Taken together, these complementary policies show that success in services exports depends not only on promotion tools but also on a wider ecosystem of enabling measures. Mobility frameworks, digital trust, diaspora engagement and procurement policies can all tip the balance between services exporters being perceived as high-risk, or as credible and competitive players in global markets.

Concluding remarks

Export promotion in services is still in its infancy. Most developing economies are only beginning to adapt institutions and instruments to the realities of intangible, customized and trust-based trade, elements that characterize many cross-border transactions in services markets. The nine country case studies featured in this publication constitute a laboratory of policy experimentation. The case studies reveal how some economies have built sophisticated systems of branding, aftercare and training, while others are just starting to consolidate mandates and adopt or update promotion instruments.

The overarching message is that services export promotion is not an add-on to goods trade promotion. It requires distinct strategies, instruments and mindsets. Developing economies that recognize this and act early can secure durable, expanded access to regional and global markets, diversify their economies, create high-value jobs, and promote more inclusive labour market outcomes. Those that cling to goods-oriented models risk missing one of the most dynamic drivers of development in the 21st century.

Endnotes

- 1 In the context of Chilean exporters of digitally delivered services – software, SaaS, BPO, fintech and professional services transmitted across borders – ISO/IEC audits are systematic third-party evaluations that verify whether the company's information security management system meets the requirements of standards like ISO/IEC 27001. Because these exports involve handling client data, source code and confidential information across jurisdictions, the audits provide the objective, independent evidence that foreign clients and platforms demand to onboard suppliers, pass procurement reviews, and sustain long-term contracts. Conducted periodically by accredited certification bodies, they confirm that risks are identified, controls are proportional, and the system is continuously improved – turning information security compliance into a competitive credential for accessing global digital services markets (DNV, 2026).

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