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Integrated support initiatives propel Chile's digital services export dynamics

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Abstract

Chile is among the Latin America and Caribbean (LAC) economies with the highest rate of growth of digitally delivered services exports over the past two decades (7.2 per cent per year on average compared to only 2.8 per cent for total commercial services exports). In addition to a stable macroeconomic environment, an open trading environment and a successful digital transformation, this high growth has also been facilitated by a coherent mix of governance, promotion and capacity building. Policy coordination has gradually improved since the early 2000s, culminating in 2016 with the establishment of the Public-Private Technical Committee for Services Exports, which coordinates around 20 public and private institutions and ensures continuity across government.

Export promotion has been paired with efforts to attract foreign direct investment (FDI). ProChile supports small and medium-sized enterprises (SMEs) in the tech and creative industries, while InvestChile works to attract several global leaders, including Google, Microsoft and Globant. Chile's export promotion model demonstrates strong continuity across administrations and an integrated ecosystem linking trade, investment, innovation and skills development. It combines sectoral branding initiatives such as "Chile, a Digital Country_" and "Learn Chile" with systematic monitoring and evaluation through customer relationship management (CRM) systems, surveys and annual road maps to refine programmes and ensure accountability.

Key points

Main elements of Chile's export promotion strategy:

- Increasing institutional coordination led by the Public-Private Technical Committee for Services Exports (2016), aligning around 20 public and private institutions coordinated by the Ministry of Finance.
- Coordination efforts of the Undersecretariat of International Economic Affairs (SUBREI), ProChile, InvestChile and the Economic Development Agency (CORFO) to link trade negotiations and agreements, export promotion, investment attraction and innovation.
- Comprehensive export promotion toolbox combining training, market intelligence, branding and financial co-funding for small and medium-sized enterprises (SMEs) which are mostly exporting.
- Emphasis on digitally delivered services, supported by free trade agreements (FTAs), the Digital Economic Partnership Agreement (DEPA), digital infrastructure (5G, data centres), and human-capital programmes such as Talento Digital para Chile.
- Public-private collaboration financed by Inter-American Development Bank (IDB) loans focusing on export promotion, digital talent and coordination.
- Over 700 creative-industry and 1,100 services firms supported annually by ProChile; export success rates above 30 per cent of the assisted firms.
- Attraction of 215 global tech and services foreign direct investment (FDI) projects (US\$ 5.4 billion); Chile hosts major firms such as Google, Microsoft and Globant.
- 30,000 people trained under Digital Talent for Chile; 68 per cent placed in formal employment; average income +47 per cent.

Challenges:

- Fragmentation among agencies before 2015 → resolved through the permanent Public-Private Technical Committee.
- Double taxation and customs registration gaps → resolved via electronic invoicing, VAT reform and double taxation agreements.
- Skills shortages and lack of standardized statistics → addressed through coordinated digital-talent and data-measurement initiatives.

Good practices:

- Continuity across administrations, ensuring sustained policy implementation.
- Integrated ecosystem approach combining trade, investment, innovation and skills.
- Sectoral branding (e.g., Ch113, a Digital Country_; Learn Chile) to strengthen country image.
- Monitoring and evaluation mechanisms using customer relationship management (CRM) systems, surveys and annual road maps to refine programmes and ensure accountability.

Main achievements and impacts:

- Digitally delivered services exports grew by 7.2 per cent annually over the past two decades, outpacing total services exports (2.8 per cent).

Introduction

Chile was the sixth-largest exporter in Latin America and the Caribbean of digitally delivered services in 2024. As a high-income economy with a population of nearly 20 million situated on South America's western coast, it provides a favourable macroeconomic environment for trade in services. Chile's time zone closely aligns with that of the United States East Coast, which serves as its primary market for digitally delivered services exports. The country stands out as a unique case of diversification in its services export basket. Over the past two decades, it has positioned itself as one of the regional hubs for digital, financial, creative, technological and digital infrastructure services.

This relative success is not accidental, but rather the result of institutional sophistication, key regulatory reforms, innovative promotional strategies and collective learning between public and private actors. This chapter reviews how various export promotion strategies have been increasingly coordinated with the private sector, enabling the country to emerge as a prominent regional exporter of services. It starts with reviewing the dynamics of steps taken to promote services exports and FDI inflows. The following section situates the country's services trade growth performance within the macroeconomic, regulatory and digital

context, emphasizing governance, competitiveness, infrastructure and trade agreements.

The chapter then details Chile's overall strategy and governance, focusing on the Public-Private Technical Committee for Services Exports and the roles of key institutions, such as the Ministry of Finance, the Undersecretariat of International Economic Affairs (SUBREI), ProChile and InvestChile. It provides an in-depth account of ProChile's institutional set-up, programmes and tools, including training, market intelligence, branding and support for SMEs and creative industries, followed by a review of beneficiaries and regional distribution.

Subsequent sections analyse policies for attracting FDI in the digitally delivered services export sector, the institutional evolution of InvestChile and available incentives, as well as skills development initiatives, such as Digital Talent for Chile (Talento Digital para Chile).

The chapter concludes with lessons for other economies, remaining challenges and policy recommendations, underlining the importance of coordination, continuity, human capital and diversification for sustaining Chile's position as a regional hub for digitally delivered services.

Services exports and FDI dynamics

The trajectory of Chile's total commercial services exports was marked by cycles of expansion, crisis and recovery over the 2005–2024 period (see Panel A of Figure 2.1). Following an initial term of sustained growth up until 2008, the sector was severely impacted by the 2009 global financial crisis but experienced a swift recovery in 2010 and 2011. However, from 2012 to 2019, the sector's exports stagnated. The COVID-19 pandemic in 2020 led to a historic decline of 34 per cent in total services exports. The years following the pandemic showed a remarkable recovery. The year 2021 was one of modest recovery (+8 per cent), followed by a rapid surge

in 2022 (reaching a record 43 per cent growth), and high growth rates in 2023 (19 per cent) and 2024 (16 per cent). This recent surge suggests that Chile has not only recovered from the global shock (especially in tourism) but is also finding new growth opportunities.

From 2005 to 2022, the absolute annual increase (or decrease) in imports was larger (smaller) than that in exports, resulting in a growing trade deficit in commercial services trade. However, the opposite occurred in 2023 and 2024. The renewed expansion of services exports began to close the gap with imports, as shown in Figure 2.1, Panel A.

Between 2005 and 2024, commercial services exports grew at a slower pace than goods exports, and the participation of services in total exports fell from 14 per cent to 10 per cent. In contrast, services imports grew slightly faster than goods imports, resulting in an increase in the share of the former, in total imports, from 20 per cent to 21 per cent. In parallel, the share of services exports in gross domestic product (GDP) decreased from 5 per cent to 4 per cent, while the share of services imports remained stable at around 6 per cent.

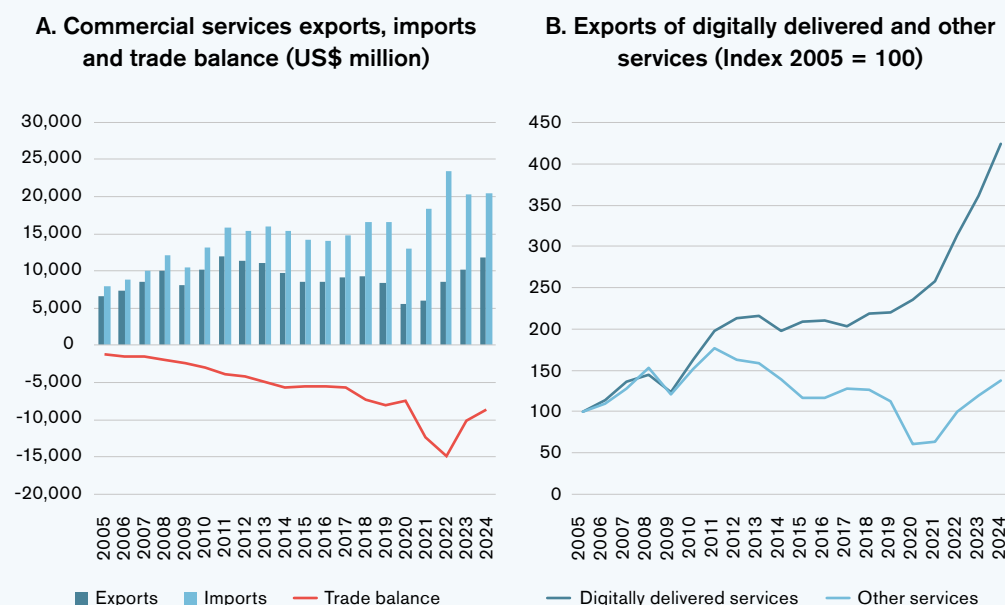
Exports of digitally delivered services grew much faster than those of “other” services (mainly comprising transport and travel services) (see Panel B of Figure 2.1) between 2005 and 2024. The former category expanded rapidly from 2009 to 2013 and from 2020 to 2024. Due to its faster growth, the share of digitally delivered services in total services exports increased from 13 per cent in 2005 to 32 per cent in 2024. This growth acceleration is partly attributable to the rapid

digitalization induced by the COVID-19 pandemic and the increase in demand for specialized services.² In contrast, exports of “other” services declined from 2011 to 2020, aggravated by the pandemic, and followed by a recovery.

Within Chile’s digitally delivered services exports, financial services and personal, cultural and recreational services grew the fastest during this period, together with computer and other business services (see Panel A of Figure 2.2). The dominance of other business services further increased between 2005 and 2024, alongside the growing contribution of financial and computer services. In contrast, the share of telecom services in exports fell (see Panel B of Figure 2.2).

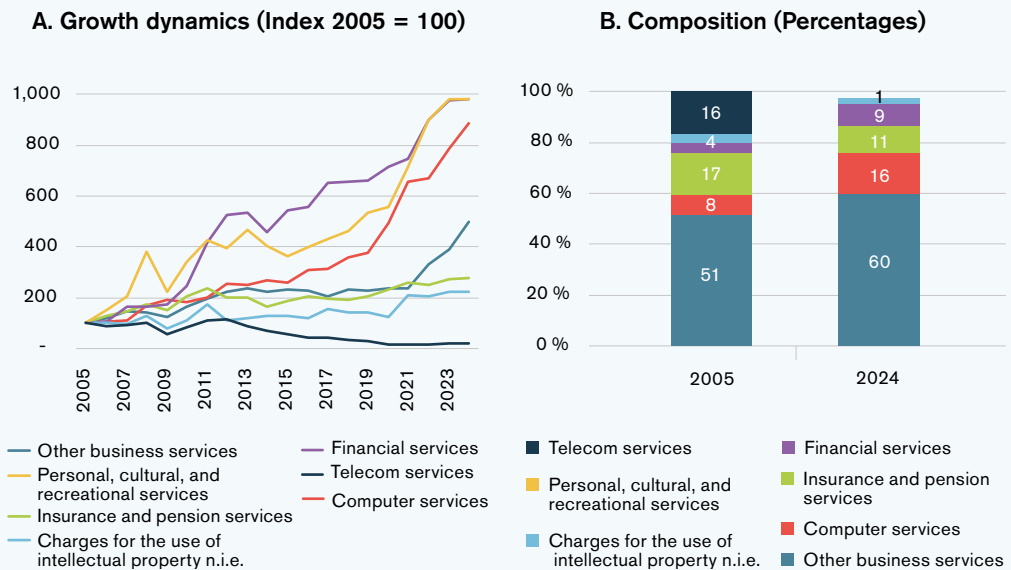
Chile’s exports of computer and business services have become increasingly concentrated in the United States, rising from 51 per cent in 2008 to approximately 66 per cent in 2024, while the share to Latin America and the Caribbean fell

Figure 2.1: Chile’s trade in commercial services, by category, 2005–2024



Source: Drawn up by the authors based on the World Trade Organization (WTO), Global Services Trade Data Hub, https://www.wto.org/english/res_e/statis_e/services_trade_data_hub_e.htm.

Figure 2.2: Changes in composition of digitally delivered services exports, 2005–2024



Source: Drawn up by the authors based on the World Trade Organization (WTO), Global Services Trade Data Hub, https://www.wto.org/english/res_e/statis_e/services_trade_data_hub_e.htm.

sharply from roughly 40 per cent to 20 per cent (Central Bank of Chile, 2021) during this time.³

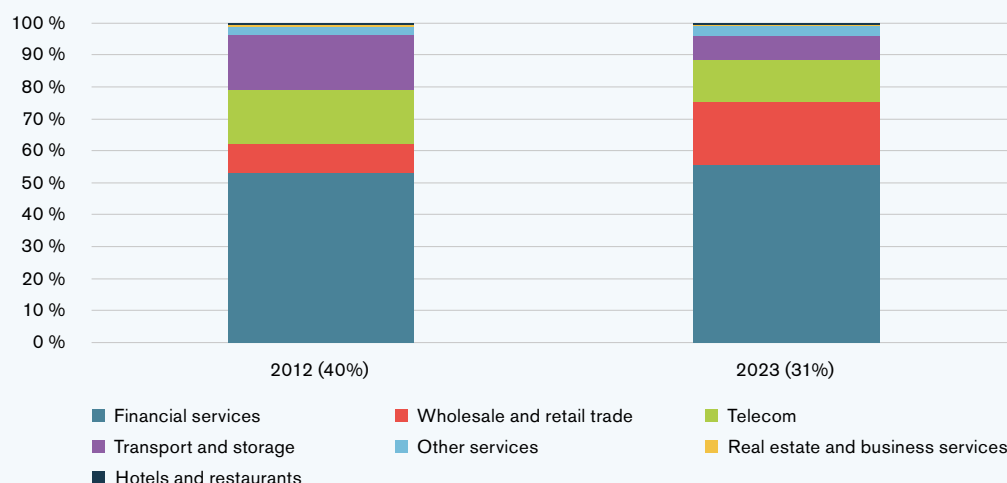
Chile has one of the highest ratios of inward FDI stock to GDP among the LAC economies. In 2024, inward FDI stock totaled US\$ 286 billion, equivalent to 87 per cent of GDP, a figure surpassing the share of other economies where FDI has been a key component of their productive development model, such as Costa Rica (71 per cent) or Uruguay (69 per cent) (ECLAC, 2025). Services accounted for 31 per cent of the inward FDI stock (excluding sectoral unassigned flows) in 2023, with the most significant shares in financial services, wholesale and retail trade, and telecommunications (see Figure 2.3).

According to data from InvestChile, in 2024 the country had 215 projects in global and technological services, valued at US\$ 5.4 billion, making it the third-largest sector in terms of value,

after energy and mining projects.⁴ These figures reflect high growth rates in comparison to 2017, when the country had only 25 technology projects, worth US\$ 1.5 billion.

More than 60 major companies in the digitally delivered services sector and digital business are established in Chile, and most of them have received support from InvestChile or prior programmes. In the digital infrastructure sector, companies such as Google, Microsoft, AWS, Oracle, Ascenty, Odata, EdgeConneX and Huawei have enhanced Chile's position as a regional digital hub, often through significant reinvestments since their arrival. Investments in software development centres also thrived, with companies such as Equifax, Globant, EPAM, TCS, Infosys, NTT Data, DXC Technology, Softtek, Softserve, Thoughtworks and Citi Group, which have operations serving regional and global clients (InvestChile, 2024).

Figure 2.3: Sectoral distribution of inward FDI stock in services, 2012 and 2023



Source: Drawn up by the authors based on Central Bank of Chile, <https://www.bcentral.cl/en/areas/statistics>.

Note: The percentages next to the years in the bar chart represent the share of services in the total FDI stock. Additionally, given the high level of aggregation of sector data in balance of payment statistics, FDI inflows or stock in digitally delivered services cannot be separately identified.

Macroeconomic, digital and regulatory context

Chile has increasingly sought to diversify its economy and reduce its dependence on traditional sectors, such as mining, by promoting investment in high-value, knowledge-intensive industries. Amongst these, the digitally delivered services sector – encompassing information technology, digital infrastructure, business process outsourcing and data services – has emerged as a strategic priority.

Over the past few decades, Chile has gradually developed a relatively favourable ecosystem for the growth and development of digitally delivered services production and exports. From 2005 to 2024, services value added grew faster than overall GDP (4 per cent versus 3 per cent per year on average). As a result, its share in total GDP increased from 52 per cent to 56 per cent. Employment in services also rose faster than total

employment during this period, increasing its total share from 64 per cent to 71 per cent (Central Bank of Chile, 2025). Among member states of the Organisation for Economic Co-operation and Development (OECD), Chile registered the third-highest growth rate of service sector productivity from 1995 to 2018 (World Bank and IFC, 2022).

The country consistently ranks among the top performers in Latin America across governance and competitiveness indicators, combining institutional and macroeconomic stability with policy continuity. Within Latin America, Chile ranks second in democratic governance (EIU, 2025), behind Uruguay, and first in economic freedom (Heritage Foundation, 2025). Macroeconomic indicators also support this position: Chile maintains investment-grade ratings, boasts one

of the highest GDP per capita levels in South America (approximately US\$ 16,710 in 2023) (World Bank, 2025), and managed to contain inflation at 4–5 per cent in 2024 (see Table 2.1).

A second enabling pillar is the rule of law and regulatory predictability. Chile is the second-least corrupt economy in Latin America according to Transparency International (2025), following Uruguay, and ranks second in the region for the rule of law (World Justice Project, 2024). These strong institutions, coupled with reliable protection of property rights, are highly valued by service exporters, especially in data-sensitive sectors.

The third and fourth pillars are talent and digital infrastructure. Chile ranks first in Latin America in workforce competitiveness (INSEAD 2025), highlighting its human capital and capacity to attract and retain skilled professionals. In terms of English, Chile is classified in the “moderate proficiency” band (EF, 2025), and trails some Caribbean and South American peers, such as Argentina and Uruguay.

In terms of infrastructure, Chile boasts the fastest broadband speed in Latin America (Ookla Research/Speedtest, 2025), with a fixed broadband download speed of 334 Mbps. Household internet access climbed from 70 per cent in 2015 to 96.5 per cent by early 2024. By 2025, internet penetration had reached 94 per cent, and mobile subscriptions numbered 30.7 million – approximately 155 per cent of the population.

The 5G coverage is the highest in Latin America (Telecom Advisory Services, 2024). Fibre-to-the-home accounts for over 71 per cent of fixed broadband. Chile has 28 operational data centres, with an additional 30 planned by 2028. Chile's National Data Center Plan – launched in December 2024 – aims to clarify regulation, foster decentralized and sustainable growth, coordinate multi-sector stakeholders, and deploy geospatial digital tools to guide infrastructure siting and environmental assessments (Chilean government, 2025).

Table 2.1: Key competitiveness and enabling environment indicators for global services, 2023–2025

Indicator	Institution	Year	Chile global rank	Chile score	Chile LAC rank	Relevance to global services
Democracy Index	Economist Intelligence Unit (EIU)	2024	29/167	7.83	2nd	Institutional stability, governance
Freedom in the World	Heritage Foundation	2025	—	73/100	2nd	Civil liberties and political rights
Corruption Perceptions Index	Transparency International	2024	32/180	63/100	2nd	Rule of law, business climate
WJP Rule of Law Index	World Justice Project (WJP)	2024	36/142	0.63	2nd	Legal certainty, institutional quality
Global Opportunity Index	Milken Institute	2025	—	—	1st	FDI attractiveness
Index of Economic Freedom	Heritage Foundation	2025	18/176	73.2	1st in Americas	Market openness, stability
GDP per capita (current US\$)	World Bank	2024	52/218	~16,710 US\$	2nd	Economic attractiveness

Table 2.1: Key competitiveness and enabling environment indicators for global services, 2023–2025 (cont.)

Indicator	Institution	Year	Chile global rank	Chile score	Chile LAC rank	Relevance to global services
Inflation (annual %)	World Bank/ National Statistics Institute	2024	80/218 (est.)	4.3–4.5%	4th	Macroeconomic stability
Credit rating	S&P/Moody's/ DBRS	2025	A	—	2nd	Macro attractiveness
Global Peace Index	Institute for Economics and Peace (IEP)	2024	55/163	1.78	3rd	Societal safety, stability
Legatum Prosperity Index	Prosperity Institute	2023	33/167	—	2nd	Quality of life, well-being
Global Economic Diversification Index	Mohammed Bin Rashid School of Government	2025	~65 /114	—	6th	Economic diversification
Global Talent Competitiveness Index	INSEAD	2025	39/135	—	1st	Workforce quality
International Property Rights Index	Property Rights Alliance	2024	28/125	—	2nd	Intellectual property rights protection, FDI appeal
Programme for International Student Assessment (PISA)	OECD	2022	44/81	52/81 (Maths), 37/81 (Reading) and 43/81 (Science)	1st	Academic skills
EF English Proficiency Index	EF	2025	54/123	Moderate	4th	Service delivery in English
Speedtest Global Index	Speedtest	July 2025	2/153	108 Mbps	1st	Digital access, real-time delivery
Global Services Location Index	Kearney	2023	27/78	—	4th	Offshore attractiveness
Global Innovation Index	World Intellectual Property Organization (WIPO)/ INSEAD	2025	51/139	—	1st	Innovation, offshore services

Source: Drawn up by the authors based on institutional reports (2023–2025) and the Uruguay case study “Uruguay’s approach to fostering modern services”.

Taken together, these four dimensions – macroeconomic and institutional stability, regulatory predictability and rule of law, a competitive workforce, and strong connectivity – create a highly favourable environment for the expansion of digitally delivered services in Chile. This positioning is reflected in Chile's presence in global benchmarks such as the Kearney Global Services Location Index (2023) and the Global Innovation Index (WIPO, 2025).

Chile also ranks among the world's most active economies in negotiating preferential trade agreements, with 35 of these covering 65 partner economies that represent 5.1 billion people and 88 per cent of global GDP. Nearly 30 of these agreements include dedicated chapters on trade in services, establishing rules and mechanisms to facilitate service flows, such as provisions for the temporary entry of businesspeople. About 13 agreements feature specific e-commerce and digital trade chapters, including the Digital Economic Partnership Agreement (DEPA), and cover almost 50 trading partners. These agreements address issues such as the free flow of data, prohibitions on forced server localization, and a moratorium on

customs duties for electronic transmissions. All reflect Chile's commitment to modern, rules-based digital commerce (Fundación Chilena del Pacífico y SUBREI (2025); SUBREI, 2025).

Lastly, Chile has signed 37 double taxation agreements (DTAs), which avoid double payment of taxes in the origin and destination countries when trading services. These tax agreements allow a variety of services, particularly digitally delivered services, to only be taxed locally. In other words, if the company has non-resident clients, the tax treatment is the same as that of a company serving clients resident in Chile. For service exporters and foreign investors, DTAs provide greater legal certainty, reduce tax burdens and improve competitiveness in international markets.

Chile's network of DTAs covers key trading partners in the Americas, Europe, Asia and Oceania, reflecting its strategy to deepen global economic integration. By fostering a more predictable and equitable tax environment, these agreements support the growth of Chile's services trade and its participation in global value chains (Chilean tax authorities, 2025).

Overall strategy and public-private sector coordination

Chile's strategy to promote digitally delivered services exports has evolved over the past two decades from a fragmented, goods-centred approach to a more integrated and forward-looking policy framework. This shift reflects the recognition that traditional incentive-based instruments are insufficient to foster competitiveness in knowledge-intensive activities. Instead, recent policies highlight the importance of governance mechanisms that facilitate collaboration, coordination and collective action among key public and private stakeholders. Section 3, above, examines how this strategy has taken shape in practice.

Main institutions

Five institutions form the main pillars of the strategy for export promotion and for attracting FDI for digitally delivered services. These are:

- **Ministry of Finance:** leads the Public-Private Technical Committee for Services Exports and oversees customs to promote their registration. It is also the counterpart of two loan operations with the IDB aimed at promoting this category of exports.
- **Undersecretariat for International Economic Relations (SUBREI),** formerly known as the **General Directorate of International**

Economic Relations (DIRECON): secures international market access for services providers by negotiating trade agreements that cover cross-border trade in services, investment and digital trade disciplines. These agreements reduce barriers to market entry, guarantee non-discriminatory treatment for Chilean firms, and establish regulatory cooperation frameworks, especially relevant for digital services where data flows, e-commerce and digital security standards are key. SUBREI also represents Chile in international forums where services and digital trade rules are shaped.

- **ProChile** (export promotion agency): supports services firms in their internationalization process. For digitally delivered services, this involves organizing trade missions, facilitating participation in international fairs, and providing market intelligence on emerging niche sectors such as fintech, healthtech and audiovisual services. ProChile also runs sector-specific branding initiatives to enhance visibility of Chile's services globally, while offering training and advisory services to help SMEs adapt to global standards and platforms for digital trade.
- **InvestChile:** in charge of attracting foreign direct investment in sectors that strengthen Chile's services ecosystem. This includes fostering investment in ICT infrastructure, global business services, creative industries,⁵ and innovation hubs. By connecting foreign investors with local partners and ensuring a favourable business climate, InvestChile helps position Chile as a regional hub for digitally delivered services.
- **Corfo** (economic development agency): plays a key role in the early innovation and scaling phases of services firms through financing, mentoring and ecosystem development. Its **Consolidate and Expand** programme helps high-impact companies strengthen their business models and implement export-oriented growth strategies. The **GoGlobal** programme, implemented in collaboration with ProChile, assists innovative startups to enter international markets through mentoring, soft-landing⁶ and networking opportunities. In parallel, Corfo also has some sectoral initiatives.

Public-private sector coordination

Over the past two decades, Chile has developed a model for effective public-private coordination in promoting services exports. The country transitioned from a fragmented framework – characterized by overlapping responsibilities, weak inter-agency and public-private cooperation, and the absence of an institutional voice for services exporters – towards an integrated ecosystem sustained by formal coordination mechanisms (IDB, 2024). This evolution illustrates the gradual development of institutional capacity building and coordination in an area that the export of goods has traditionally overshadowed.

During the 2000s, Chile developed a coordinated framework for promoting services exports that involved DIRECON, ProChile, Corfo and the Santiago Chamber of Commerce (CCS). The CCS created the Exporters Coalition to articulate the private sector's voice, serving as the first organized interlocutor with the government on trade in services. At the same time, DIRECON expanded Chile's network of free trade agreements and developed market access and regulatory frameworks for services, while ProChile focused on promoting services exports. Together, these institutions laid the groundwork for Chile's first integrated public-private mechanisms for service-export promotion, seeking to diversify the country's traditionally resource-based export structure.

A significant milestone was Corfo's Global Services Cluster (2006–2010) under the National Innovation Strategy for Competitiveness. The Committee of Ministers for Innovation appointed Corfo to coordinate public agencies and manage financial and methodological support for five priority clusters, one of which was global services. The Strategic Public-Private Council for Global Services, established in 2007, comprised representatives from Corfo, DIRECON, CCS, SOFOFA (Chilean Federation of Industry) and higher education institutions.

The cluster initiative yielded concrete results: between 2008 and 2009, over US\$ 14 million of subsidies were provided in implementing the Global Services Cluster initiatives, more than

20,000 new jobs were created, and over 60 global service centres were established, 37 of which were supported by Corfo's High-Technology Investment Attraction Programme. This strong coordination weakened after 2010, when the government of President Sebastián Piñera abandoned selective industrial policies in favour of horizontal, market-neutral measures. Corfo's cluster programme was subsequently dissolved, with its responsibilities transferred to sectoral ministries (Álvarez et al., 2021).

The need for institutional coordination resurged under the government of President Michelle Bachelet (2014–2018). Chile established the Public-Private Technical Committee for Services Exports under the Ministry of Finance, which was subsequently institutionalized by Supreme Decree in 2016. The Committee – co-led by SOFOFA and comprising DIRECON, Corfo, CCS and other public and private stakeholders – re-established coordination mechanisms and developed an agenda focused on tax reform, data collection and human capital development. The Ministry of Cultures, Arts and Heritage, National Training and Employment Service (SENCE) and the Ministry of Science and Technology also joined the Committee.

Its mandate extended beyond diagnostic functions, enabling participants to design solutions and collectively monitor their implementation. This horizontal mode of governance represented a departure from earlier patterns of shifting inter-agency responsibility. The Committee also became the principal vehicle for mobilizing external financing to support service sector development. It coordinated two major operations with the IDB.

The first, a US\$ 27 million loan (2018–2025), targeted institutional strengthening by improving coordination between Corfo, ProChile and InvestChile, while simultaneously supporting SME internationalization and human capital development, and attracting FDI. The second, a US\$ 15 million loan (2025–2027), seeks to consolidate these achievements, with a particular emphasis on digital talent training, enhanced export promotion and continued institutional coordination (IDB, 2024). These resources have

been instrumental in financing initiatives such as Digital Talent, the digitalization of customs and tax procedures, and the development of targeted sectoral promotion strategies.

The Committee's operational dynamics have also been notable. Meetings are convened monthly with structured agendas that combine technical updates, presentations by member institutions, progress reports from specialized subcommittees, and reviews of service export statistics provided by customs. Six subcommittees focus on taxation and customs, internationalization, indicators and statistics, the creative economy, human capital and digital talent, and innovation. These serve as technical forums for more detailed and technical discussions. While the Committee does not conduct formal impact evaluations, it engages in an annual process of strategic reflection through the updating of its road map, which tracks achievements, identifies pending tasks and establishes priorities for the subsequent year. This mechanism, although informal, provides a continuous process of evaluation and recalibration. As of 2025, 13 public institutions and six private entities were participating.⁷

Stakeholder interviews highlight that the subcommittees have achieved several significant outcomes, as outlined in Table 2.2. Another important achievement lies in the Committee's institutional persistence. By 2025, the Committee had convened more than 80 sessions, demonstrating a rare degree of continuity in a policy area often subject to fragmentation and political volatility (IDB, 2024). This durability has facilitated the accumulation of trust (Álvarez et al., 2021).

Beyond technical achievements, the Committee has also fostered a more profound cultural transformation. Institutions and stakeholders have increasingly perceived themselves as part of a unified ecosystem, rather than as siloed actors, a shift made possible by anchoring coordination in a backbone ministry with sufficient authority to mediate interests. The sustained participation across successive governments of more than 20 institutions per session has contributed to stability and continuity (Caceres, 2023). Other significant outcomes as highlighted by stakeholder interviews are outlined in Table 2.2.

Table 2.2: Main achievements of the Public-Private Technical Committee for Services Exports, 2016–2025

Subcommittee	Main achievement
Indicators	National Statistical Institute (NSI) Measurement Project – standardization of culture codes. This project harmonized statistical classifications to include cultural and creative industries. It also addressed the lack of gender-disaggregated indicators by supporting the SUBREI annual study on the contribution of women-led businesses to Chilean exports and fostering alliances with service providers.
Taxation and customs	Extension of customs classification to services to facilitate VAT refunds. Electronic export invoice – SICEX module – single window portal – services VAT law. Electronic export invoices have been mandatory and fully digital (Resolutions 113 and 120, 2019). The VAT Law on services helped prevent double taxation, and inconsistencies in tax responses were resolved (Resolution 2733). VAT refund extended to services exporters. Extension of the tax credit mechanism to services exporters.
Internationalization	Exporter manuals and updates – regional training and intellectual property (IP) – ENEXPRO. Manuals for service exporters were updated, alongside capacity-building workshops held in subnational capitals. Specific training on IP was incorporated into these workshops to strengthen exporters' knowledge base. Additionally, ENEXPRO fairs supported firms in accessing international markets.
Creative economy	State support matrix for creative economy – manual for creative services exports – interinstitutional and private sector coordination. Publication of a manual for exporters of creative services. Improved coordination across ministries (Ministry of Culture, Corfo, SUBREI). Closure of data gaps on the creative economy and aligning support tools with industry needs.
Human capital	1,000 programmer scholarships – English and digital talent scholarships. Corfo developed 1,000 training slots in English for exporters across subnational capitals. Complementary initiatives under “Digital Talent” offered scholarships to train programmers and digital professionals, directly addressing the skills gap that limited service exporters' competitiveness.
Gender gaps	The Gender Road Map for Services Exports is a 2023 initiative which aims to integrate gender equality into the country's services export sector. It seeks to increase women's participation in exports through four key actions: promoting women-led businesses, improving gender-disaggregated data, supporting women in science and technology, and mainstreaming gender equality across all institutions involved in services exports.

Source: Drawn up by the authors based on an interview with the Ministry of Finance.

Nevertheless, several challenges persist. These include scaling up SME internationalization, extending participation in the Public-Private Technical Committee to the Ministry of Education, improving the measurement of underreported export modes such as commercial presence abroad, and institutionalizing knowledge to reduce dependence on specific individuals. These challenges notwithstanding, the Chilean

case represents one of the most comprehensive and sustained examples of institutional development aimed at promoting services exports in Latin America. It demonstrates that the deliberate creation of platforms for dialogue, coordination and problem-solving can transform entrenched regulatory and institutional bottlenecks into drivers of growth and international competitiveness.

Export promotion of digitally delivered services

Institutional set-up and evolution

ProChile is the leading institution promoting the export of various types of services, primarily those that are digitally delivered. It was established in 1974 as the export promotion entity of the Chilean Ministry of Foreign Affairs. It is headquartered in Santiago and has 16 subnational offices across the country

(see Panel A of Figure 2.4), and a significant global presence with 54 commercial offices abroad, strategically located in North America, Europe, Asia and Latin America (see Panel B of Figure 2.4). In 2024, it had 583 employees, distributed between headquarters (338), offices across Chile (82), and abroad (163) (ProChile, 2025a).

Figure 2.4: ProChile offices across Chile and abroad, 2025

A. Across Chile (16 offices)



B. Across the world (+50 offices)



Source: ProChile (2025), *Estrategia sectorial*, Santiago.

Initially focused on promoting goods exports, ProChile opened a department dedicated to trade in services in 2004. This department primarily supported SMEs in key sectors, including construction services, engineering services, environmental services, health services, mining services, information and communications technology (ICT) services, tertiary education services and creative services (primarily audiovisual). From 2009 onward, there was a notable expansion of sector-specific brands focusing on architecture (Arquitectura de Chile), film (Cinema Chile), and universities (Learn Chile).

Institutional innovations followed, such as the creation of public-private committees (2015), dedicated units in the Ministry of Finance (2017), and support programmes with backing from the IDB in 2018. From 2016 onward, there was a strategic pivot towards digital transformation, marked by the launch of digital export platforms and brands like Chileservicios, GoGlobal and Global X. The timeline (see Figure 2.5) illustrates a shift from general export promotion towards targeted programmes and branding, institutional coordination and digital trade facilitation to strengthen Chile's position in global service markets (Frohmann, 2024; ProChile, 2025a).

Figure 2.5: Timeline of services export promotion in ProChile and beyond

2004	Creation of trade in services department
2009	Sector-specific service brands: architecture & cinema
2016	Public-Private Technical Committee for Service Exports
2016	New Chileservicios website and Mujer Exporta Programme
2017	First business matchmaking event ENEXPRO Services
2018	First IDB support programme for services exports
2019	Start of GoGlobal soft-landing programme
2021	Start of Global X programme
2023	New E-Commerce Exporta programme
2025	Start of second IDB support programme for services exports

Source: Developed and updated by the authors based on <https://www.subrei.gob.cl/ejes-de-trabajo/comercio-de-servicios/manual-de-servicios/experiencia-chilena-en-la-exportaci%C3%B3n-de-servicios>.

In recent years, ProChile has also prioritized the inclusion of underrepresented groups. In 2024, the agency supported 745 women-led businesses and 87 Indigenous-owned enterprises – 60 per cent of which successfully sold services abroad. ProChile also assisted 65 firms in e-commerce activities and 146 in sustainability-related actions (ProChile, 2025b). To achieve its goals, ProChile collaborates with multiple public institutions, including the Chilean economic development agency (Corfo), InvestChile, and Ministry of Cultures, Arts and Heritage; Ministry of Economy, Development and Tourism; Ministry of Finance; Ministry of Women and Gender Equality; as well as multiple science and business associations.⁸

As of 2025, two out of the four export promotion divisions in ProChile focused on services. The first division focuses on a broad range of services, including sector-focused digitally delivered services (agtech, biotech, edtech, fintech and healthtech), architecture, construction, engineering, clean energy and energy efficiency, logistics, smart city, water management, industry solutions, hydrogen, higher education services and inbound tourism. The second division focuses on the creative economy, covering animation, performing arts, visual arts, crafts, audiovisual, design, editorial, fashion, music, graphic and illustration, and video games (ProChile, 2025a).

ProChile supports business associations through funding, international promotion and strategic collaboration. Programmes such as the Services and Creative Industries Fund offer co-financing to associations, enabling them to participate in fairs, trade missions and advisory services. Associations gain exposure through collective stands and shared spaces at major global events. For their part, associations collaborate with ProChile in conducting sectoral analyses of the export sector, developing targeted export strategies, and prioritizing support instruments, such as participation in specific trade missions and international fairs.

ProChile documents the results of this collaboration in Annual Exportable Supply Profiles (Perfiles de Oferta Exportable, POEX) for various sectors. ProChile also fosters dialogue via Regional Export Councils and sectoral roundtables, enabling

coordination between exporters, associations and regulators. In addition, strategic agreements with associations such as ACTI (Chilean Association of Information Technology Companies) and Chiletec (Chilean Association of Technology Companies), strengthen the technology sector and boost ICT services exports. Finally, several business associations take part in the Civil Society Council, advising ProChile on service quality, inclusion and country image.

ProChile's programmes and tools

ProChile offers a comprehensive range of tools and programmes to promote exports of Chilean firms, mostly SMEs. These initiatives are strategically organized into three pillars: training, market intelligence, and export promotion. Table 2.3 reviews the main instruments under each category, their target groups, descriptions and the number of firms or individuals that benefited in 2024.

Training

To build and improve export capacity among Chilean businesses, ProChile has developed an integrated set of training programmes. These initiatives combine theoretical knowledge with hands-on support, aiming to enhance companies' abilities to manage international operations effectively. One key component is the Virtual Classroom (Aula Virtual), an online platform that delivers courses in international business management. It provides companies with flexible access to educational content developed by ProChile's network of experts. The Virtual Classroom empowers participants to strengthen both strategic and operational export competencies, supporting their transition from local actors to exporters. It offers several courses tailored to services exporters, focusing on topics such as the services export process, artificial intelligence, cross-border e-commerce, digital transformation and taxation in the services sector.

The Virtual Classroom platform is complemented by coaching activities for groups of up to 14 companies within the same sector and with similar levels of export readiness. Delivered in-person, online, or in hybrid formats, these sessions help

Table 2.3: ProChile tools, target group, description and number of beneficiaries

	Programme/tool	Target group	Description	Number of beneficiaries	
				Services	Creative economy
Training	Virtual classroom	Services SMEs seeking export training.	An online specialized training programme designed to enhance export skills.	1,840	
	Coaching	Up to 14 services SMEs with business plans.	Expert advice to improve international business plans with expert mentoring.	438	358
	Mentorships	Up to 12 services SMEs with expert mentoring.	Experts help to develop and improve international business plans.		
	Workshops and training cycles	Services SMEs refining export work plans.	Programme guides companies in creating or refining their international work plans.		
	Audiovisual material	Services firms needing training resources.	Support materials (including documents, tutorials, capsules, testimonials and videos) to complement training programmes.	No information	No information
Business Intelligence	Digital Knowledge Centre (CDC)	Services SMEs requiring market intelligence.	Platform consolidating market intelligence from ProChile's 50+ offices worldwide.	No information	No information
	Help Centre	Services exporters seeking guidance.	Digital services providing guidance, FAQs and assistance on export promotion tools.	122	45
	Sectoral and regional minutes	Services SMEs needing tailored insights.	Tailored sectoral and regional reports are produced on demand through ProChile's regional offices.	No information	No information
	Export Vision	Services firms seeking market strategies.	A tool offering market insights to support decision-making for internationalization.	No information	No information
	Chile Pro	Services exporters tracking competitiveness.	Ranking and competitiveness analysis of exports in global markets.	No information	No information
Export Promotion	Sectoral activities	Services SMEs seeking buyers.	Commercial activities include trade missions (TM), agendas, soft-landing (SL) and buyer programmes (BP) to strengthen export capacity.	TM: 174 Agendas: 361 SL: 134 BP: 21	TM: 115 Agendas: 145 SL: 17 BP: 5
	ENEXPRO	Services exporters connecting with clients.	Business matchmaking events connecting exporters with global importers.	314	70
	International fairs	Services firms showcasing abroad.	Participation of firms in major international fairs.	Visitor: 69 Exhibitor: 53	Visitor: 12 Exhibitor: 103
	GoGlobal	Scalable services startups going global, with focus on key markets.	Programme supporting internationalization of scalable, innovative firms through pre-internationalization and immersion stages.	35	0

Table 2.3: ProChile tools, target group, description and number of beneficiaries (cont.)

	Programme/tool	Target group	Description	Number of beneficiaries	
				Services	Creative economy
Export Promotion	ProChile Global X	Innovative services firms interested in exporting to Europe.	Platform accelerating exports of innovative firms to Europe with mentoring, networking and visibility.	9	0
	Sectoral and business competitions	Services firms applying for co-financing.	Competitive funds co-financing export promotion projects for sectors, associations or firms.	No information	No information
	Sectoral brands	Services associations building brands.	Programme financing creation and promotion of sectoral brands abroad to improve positioning.	19	4

Source: Drawn up by the authors based on materials and data provided by ProChile.

participants create or refine their internationalization plans. Guided by experienced mentors, companies collaboratively develop business strategies, culminating in a final evaluation that simulates a board-level review process.

Another complementary tool is the Mentorships (Mentorías) programme, which has supported up to 12 companies per cohort since 2023. This initiative focuses on addressing specific gaps in the export or internationalization process. Through up to five sessions, companies engage directly with one or more experts to receive customized guidance to help overcome obstacles to international growth. Further support is provided through short-term workshops and training cycles, which were developed after the COVID-19 pandemic to build or reinforce export-related capabilities. Workshops typically consist of a single session focused on a specific topic, whereas training cycles are composed of multiple sessions that cover interconnected subjects. These programmes provide flexible learning opportunities that are responsive to the evolving needs of various sectors.

To reinforce these training programmes, ProChile has in recent years developed audiovisual and written materials as supplementary resources. These include documents, video tutorials, testimonial clips, brief educational capsules, and recorded sessions, providing ongoing access to relevant knowledge and enhancing self-learning experience.

Business intelligence

ProChile provides business and market intelligence tailored to the needs of Chilean companies. These tools consolidate knowledge from domestic and international sources to offer timely insights and data-driven guidance. The Digital Knowledge Centre (Centro Digital de Conocimiento) is ProChile's central market intelligence platform, integrating publications, studies and insights generated by the institution and its network of 50+ offices worldwide. To assist companies in navigating these tools and understanding available services, ProChile offers a Help Centre (Centro de Ayuda). This user-support portal provides answers to frequently asked questions, offers guidance on how to apply for programmes, and clarifications on available resources. It plays a vital role in enabling companies to maximize the benefits of what ProChile has to offer.

Additionally, ProChile published a step-by-step guide to exporting services, SUBREI issued a guide to help services exporters benefit from free trade agreements (FTAs), and the CCS published a guide on taxation and regulatory aspects of services trade.⁹ ProChile has also published multiple studies on specific service sectors in various economies, public tenders in different markets, and sector- and country-specific studies, such as those on health (Bolivia), hospitality (Colombia), advertising (Germany), construction (Mexico) and biotechnology (United States). Event

reports, such as for Chile Week China, and the Chile Summit India 2024, also highlight education, audiovisual and ICT as emerging services export themes. As e-commerce plays a key enabling role across these sectors, additional studies focus on entering global marketplaces, optimizing digital marketing, and managing cross-border logistics or specific e-commerce markets (such as the Dominican Republic and Japan).

Companies can also request customized market information through Sectoral and Regional Briefs (*Minutas Sectoriales y Regionales*). These briefs are developed on request through ProChile's regional offices and provide focused analyses of specific sectors or geographical markets. By tailoring intelligence to business needs, this tool supports more precise and effective international strategies.

Chile Pro and Export Vision are market intelligence tools for internal use, meaning that each professional at ProChile can access them to advise companies. Export Vision is a planning instrument that identifies emerging global trends, new consumer behaviours and future opportunities. This tool helps companies anticipate changes in international demand and adjust their strategic planning accordingly. Chile Pro is a benchmarking tool that evaluates the competitiveness of Chile's export sectors through global rankings.

Trade support

Trade support is at the heart of ProChile's mission, aiming to help companies integrate into global markets. Through a diverse set of promotional tools, the institution supports companies to enter new markets, building relationships with international buyers, and increasing the visibility of Chilean products and services worldwide.

One of the central instruments is the suite of sectoral activities, which includes trade missions, commercial agendas, soft-landing programmes, and importer inbound missions. These activities are tailored to the specific needs of each sector, helping companies navigate the complexities of entering or consolidating their positions in foreign markets. They are often designed in collaboration with industry stakeholders to ensure alignment with sector priorities. In 2024, 14 export missions were organized for the services sector. Examples include

the Chile Summits (Europe and India), Chile Weeks (Brazil and China), the Chile–Mexico Business Forum with a focus on Latin America, and the 11th LAB4+ Entrepreneurship and Innovation Forum of the Pacific Alliance (ProChile, 2025b).

One key initiative is ENEXPRO (*Encuentros de Negocios Exportadores*), launched in 2013, which is a sector-specific gathering to connect Chilean exporters with international buyers and importers to enable participants to receive logistical and strategic support from ProChile's national and international networks. In 2024, ProChile organized three ENEXPRO events to boost services and creative economy exports: ENEXPRO commercial attachés, ENEXPRO Global Solutions targeting services exports, and ENEXPRO Tech, focusing on technology-driven services – including fintech, edtech, agrotech and cybersecurity (ProChile, 2025b).

ProChile also enables companies to participate in international fairs, where they can present their products and services in national pavilions at high-profile events to raise the profile of what Chile has to offer and generate new business leads. Participation is open to both active exporters and those with export potential, depending on the event. In services, the focus is on technology-driven sectors, including fintech, healthtech, edtech, biotech and ICT, with participation in significant events such as London Tech Week, the BIO International Convention, the Latam FinTech Market and edtech missions across the Americas. In the creative economy, Chile plans to engage in leading book fairs, music and film markets, animation and video game festivals, including the Berlinale European Film Market, Annecy International Animation Film Festival, Jazzahead, and gamescom (ProChile, 2025b).

GoGlobal is a soft-landing programme led by ProChile in partnership with Corfo, designed to accelerate the internationalization of Chilean startups and scaleups with high global potential. Each year, around 48 companies are selected to begin a two-week online pre-internationalization stage, which provides training, mentoring and strategic guidance. This is followed by the immersion stage, where companies connect with the target ecosystem, both remotely and in person,

to gain access to tailored commercial agendas, specialized training and key business contacts, and receive support for client acquisition or fundraising. The programme's priority markets are Colombia, Mexico, Peru, Spain and the United States (Miami).

Meanwhile, the ProChile Global X programme focuses on supporting innovation-driven companies that aim to expand into European markets. This platform offers mentorship from industry experts, pitch sessions to potential partners, commercial guidance and opportunities for capital raising and networking. The 2023 portfolio showcased startups in artificial intelligence (AI), sustainability, healthcare, smart cities and renewable energy.

To provide financial support for promotion initiatives, ProChile administers sectoral and business contests (Concursos). The 2026 ProChile Services and Creative Economy Contest will target legal entities such as associations, cooperatives and foundations that represent the services sector. It supports innovative, high-impact export projects with co-financing of up to 25 million Chilean pesos (around US\$ 27,000).

Another key tool is the sectoral brands (Marcas Sectoriales) programme. Through a public contest, ProChile funds the creation and implementation of sector-specific brands that

contribute to Chile's overall image abroad. This initiative supports public-private collaboration in marketing, enabling sectors to gain international visibility and competitiveness. Each project develops a brand strategy designed to enter one or more international markets through a public-private partnership. This collaborative model leverages economies of scale to promote and position the sector abroad, aligning the brand's image with the values and attributes of the overarching country brand. Several brands were established in the services and creative economy sector (see Table 2.4) (Frohmann, 2024).

A horizontal programme to promote digital services exports is E-commerce Exporta. It provides a set of tools to help Chilean companies expand into international digital markets. It follows a step-by-step approach: "Measure Yourself" offers a self-assessment of digital maturity; "Train Yourself" delivers workshops, webinars and guides on e-commerce; "Connect" links firms with strategic partners such as marketplaces, logistics providers and accelerators; and "Land" helps identify the most suitable international marketplaces through a detailed directory. Together, these instruments support companies from initial assessment and training to building partnerships and reaching foreign customers (ProChile, 2025a).

Table 2.4: ProChile sectoral brands in services

Sector brand	Sector promoted	Year created	Website
Learn Chile	Higher education services	2012	https://www.learnchile.cl/
Shoot in Chile	Audiovisual production locations in Chile	2013	https://shootinchile.net/
SISMICA	Contemporary visual arts	2016	https://www.sismicachile.com
Ch113, a Digital Country_	Digital technologies and IT services	2017	https://chiledigitalcountry.com/
Chilean Animation	National animation	2017 (approximate)	https://www.chileananimation.com
Chiledoc	Documentary/non-fiction	2018	https://www.chiledoc.cl
Chilemúsica	Independent music industry	2019	https://www.chilemusica.com
CinemaChile	Cinema (fiction and series)	2009	https://www.cinemachile.cl

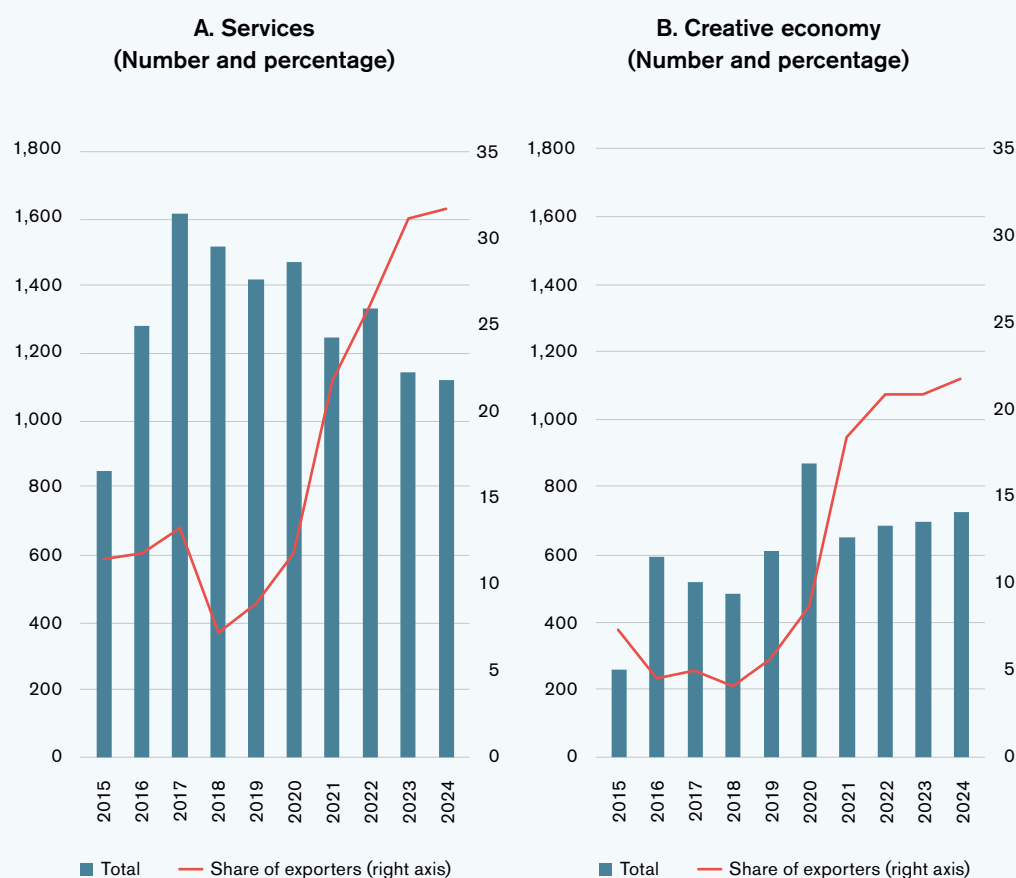
Source: Drawn up by the authors based on www.prochile.cl.

Beneficiaries of ProChile's export promotion activities

Over time, ProChile has expanded its role in internationalizing the country's service sectors. Although the number of supported firms increased rapidly from 2015 to 2017, it fluctuated afterwards. However, the proportion engaged in exports has grown consistently, signaling progress in export capacity building. In services (see Panel A of Figure 2.6), the number of supported firms peaked around 2017–2018 at more than 1,600,

before gradually declining to around 1,100 in 2024. Despite this decline in absolute numbers, the share of assisted firms that effectively became exporters increased sharply after 2019, rising from below 10 per cent to more than 30 per cent by 2024, suggesting a shift towards a greater export orientation among beneficiaries. In the creative economy (see Panel B of Figure 2.6), the total number of beneficiaries increased steadily from 258 in 2015 to 728 in 2024, while the share of exporters also rose markedly, from around 5 per cent in 2019 to more than 20 per cent by 2024.

Figure 2.6: Number of beneficiaries in services and creative economy sectors, 2015–2024

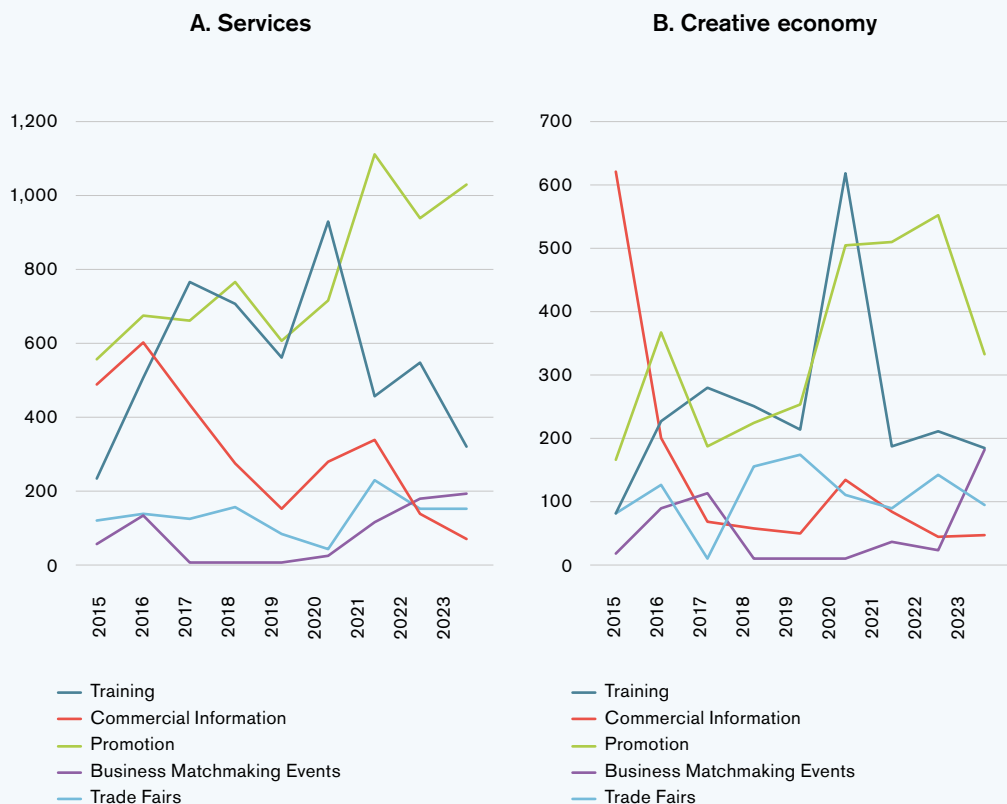


Source: Drawn up by the authors based on data from ProChile.

Overall, ProChile's support profile shows clear contrasts between the services and creative economy sectors, with promotion standing out as the dominant type of support in both, but with greater scale and continuity in services (see Figure 2.7). In the services sector, promotion and training form the main pillars: promotion rose steadily after 2017, peaking in 2020 and remaining high through 2023, while training also registered notable peaks, particularly in 2016 and 2020. By contrast, the creative economy exhibits more volatile patterns, with promotion leading but showing sharper rises and falls – especially in 2019 and 2022 – and training appearing more sporadically.

Commercial information declined steeply in both the services and creative economy sectors after 2016, suggesting a strategic shift away from informational assistance towards more proactive forms of support. Business matchmaking events and trade fairs remained secondary in both sectors but showed modest recovery after 2020, reflecting renewed post-pandemic engagement. Overall, services benefited from a broader and more consistent set of interventions, while creative economy support was more intermittent and project-based, reflecting different levels of institutional maturity in ProChile's sectoral strategies.

Figure 2.7: ProChile – number of non-unique beneficiaries in services and creative economy sectors by type of support, 2015–2023



Source: Drawn up by the authors based on data from ProChile.

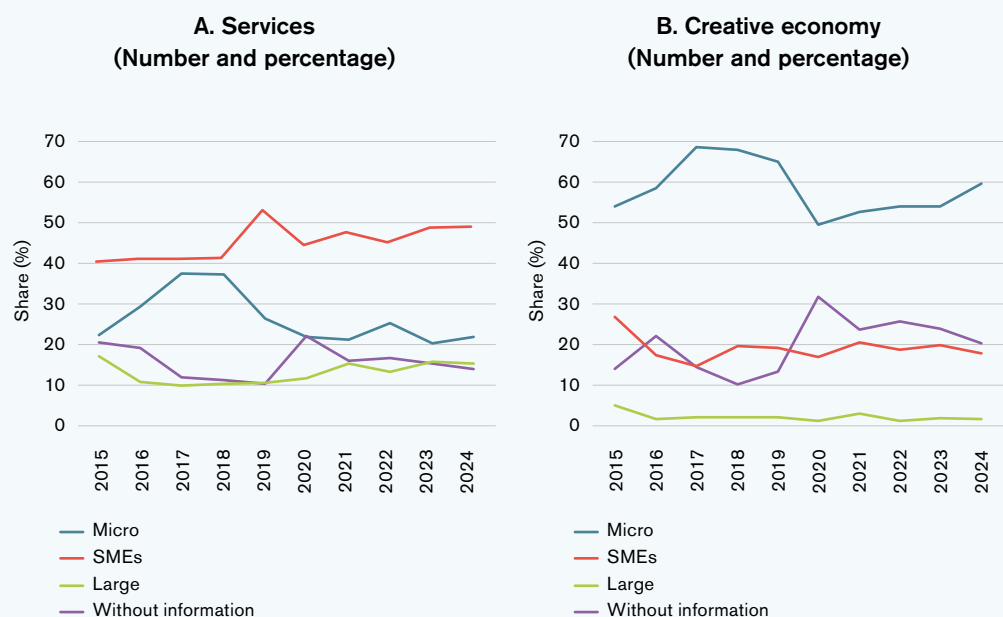
Over the past decade, ProChile has increasingly focused its export promotion programmes on smaller firms. In services (see Panel A of Figure 2.8), SMEs grew steadily to almost half of the firms supported. At the same time, micro-enterprises, which had experienced strong growth until 2018, declined but remained the second-largest group. Large firms held only a minor and stable share, as these require less support. In the creative economy sector (see Panel B of Figure 2.8), micro-enterprises dominated throughout the period, often accounting for more than 60 per cent of beneficiaries. SMEs, on the other hand, accounted for a smaller but relatively stable portion, while large firms remained marginal.

ProChile concentrates its support in a few strategic sectors and a broad coverage of niche activities in

services and the creative economy (see Figure 2.9). In services, most beneficiary firms are clustered in “Other services” (40 per cent) and in technology applied to agriculture, biotechnology, education, finance and health (35 per cent), while more minor but significant shares are found in logistics solutions (10 per cent) and inbound tourism (6 per cent). Additional niche activities, such as higher education services, architecture and engineering, energy efficiency, clean energy, and smart city solutions, receive more limited but still notable backing.

In the creative economy, support is more evenly distributed across subsectors: fashion (14 per cent), handicrafts (13 per cent), publishing (13 per cent) and audiovisual services (13 per cent), followed closely by music (12 per cent), design (7 per cent) and video games (7 per cent). Other fields, such

Figure 2.8: ProChile – size distribution of beneficiary services and creative economy firms, 2015–2024



Source: Drawn up by the authors based on data from ProChile.

Note: In Chile, micro-enterprises are firms with annual sales below US\$ 100,000, SMEs are those with sales between US\$ 100,000 and US\$ 4.2 million, and large enterprises those with sales above US\$ 4.2 million (based on May 2026 exchange rates).

Figure 2.9: ProChile – sectoral distribution of beneficiary services and creative economy firms, 2024 (%)



Source: Drawn up by the authors based on data from ProChile.

as the visual arts, animation, performing arts, storytelling, make up smaller shares, highlighting the diversity of the industries included.¹⁰

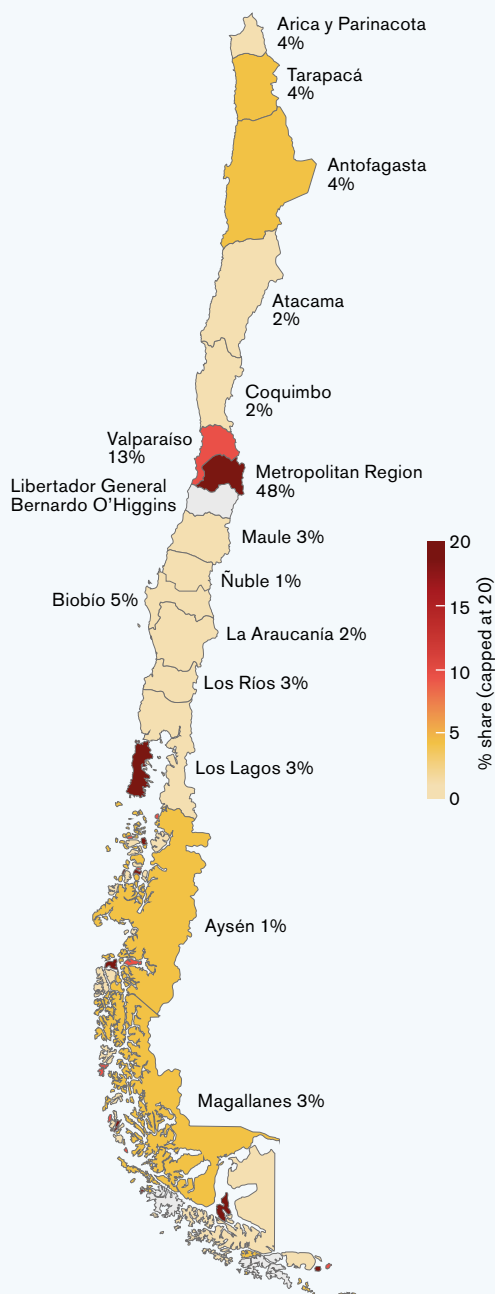
The majority of ProChile beneficiaries are from the Metropolitan Region, where more than one-third of the population is concentrated. Still, firms in other parts of the country also participate to a lesser degree, ensuring that businesses across the country gain access to internationalization opportunities. Figure 2.10 shows that nearly half of the supported firms are concentrated in Santiago, reflecting the capital's role as the central hub of economic and export activity. At the same time, firms in other regions have also received significant benefits: Valparaíso (13 per cent), Biobío (5 per cent), Los Lagos (3 per cent) and Maule (3 per cent) stand out, while northern regions such as Arica y Parinacota, Tarapacá and Antofagasta each account for around 4 per cent. Smaller shares are also present in Coquimbo, La Araucanía, Magallanes and other southern regions.

Over the past decade, there has been a progressive diversification of support beyond Santiago, with certain northern and southern regions strengthening their role in both sectors. In services, the Metropolitan Region continues to dominate, accounting for 40–53 per cent of beneficiaries, but regions such as Biobío, Los Lagos and Maule show a gradual increase in participation. In the creative economy, the Metropolitan Region's share declined slightly from almost 48 per cent in 2015 to around 46 per cent in 2024, while regions like Arica y Parinacota and Valparaíso expanded their share, reflecting a more balanced geographical distribution over time.

ProChile's evaluation framework integrates macro-level accountability with micro-level learning from exporters. At the institutional level, both the Budget Directorate (DIPRES) and ProChile conduct annual evaluations under Chile's results-based budgeting system, though linking short-term activities (like trade missions) to long-term export growth remains a challenge.

At the programme level, ProChile utilizes CRM systems, surveys and qualitative tools – such as focus groups and post-event feedback – to track exporter participation, satisfaction and needs, identifying areas for improvement, including

Figure 2.10: ProChile – geographical distribution of beneficiary firms, 2024



Source: Drawn up by the authors based on data from ProChile.

training on taxation, sustainability and digital marketing. For instance, the 2022 ENEXPRO evaluation highlighted exporters' appreciation of international networking, as well as their demand for stronger regulatory capacity building. ProChile's 2025 agenda prioritized strengthening data systems, deepening results-based management, and expanding impact evaluations to enhance transparency, accountability and institutional trust (ProChile, 2025a).

Collaboration with Corfo

Corfo, in collaboration with ProChile, promotes services exports by strengthening the early innovation and scaling phases of firms through financing, mentoring and sectoral ecosystem development. Its Consolidate and Expand Innovation programme supports companies

seeking national or international scaling, including validation and packaging of new products or services for target markets (ChileAtiende, 2024). In parallel, GoGlobal in offering a soft-landing platform, prepares innovative startups for foreign markets through training, mentoring and immersion programmes in key destinations, including Colombia, Mexico, Spain and the United States (ProChile, 2025c).

Sectorally, Corfo's "Transforma" platform underpins high-value service industries. Transforma Turismo is a public-private alliance led by Corfo that promotes innovation, digital transformation and sustainability in tourism, while Chilecreativo – also part of Corfo's Transforma programme – aims to boost the internationalization of creative industries (Chilecreativo, 2023; Transforma Turismo, 2023).

Policies for attracting FDI in digitally delivered services

For more than two decades, Chile has implemented a comprehensive strategy to attract FDI in the digitally delivered services sector, leveraging its institutional capacity, legal certainty and advanced digital infrastructure. From the outset, efforts were oriented towards attracting companies capable of providing services for export and the results show that foreign-invested companies had the largest share of digitally delivered services exports by 2019 (last year with available data, InvestChile 2021).

In the early 2000s, the high-tech investment attraction programme, created by Corfo, offered subsidies to foreign companies that produced or made intensive use of ICT. The aim of the programme was to diversify the productive structure and to establish Chile as a regional hub for the export of technological services. It targeted export-oriented large companies and investment projects in new technologies.

The programme offered seven types of subsidies available to companies that undertook investments

equal to or greater than US\$ 500,000. Amongst these, the two most commonly utilized were subsidies for investment in immobilized fixed assets; and grants for human capital development (Agosin, 2009). Although its budget was modest, the programme marked a significant shift in Chile's economic policy orientation after a long period in which sectoral neutrality in incentives had been the norm. Between 2000 and 2007, 31 companies started activities and obtained support of the programme (Agosin, 2009). By 2011, after supporting the establishment of several world-class technology firms, the programme was discontinued.

An important milestone followed in 2016 with the creation of InvestChile, a specialized public agency dedicated to promoting FDI, replacing the former Foreign Investment Committee. Unlike its predecessor, InvestChile explicitly prioritized technological services for export – then referred to as "technological services" – as one of its key target industries. This decision aligned the agency's strategy with the government's broader

agenda for productive development, led by the Ministry of Economy, Development and Tourism, which sought to advance productivity, innovation and growth. Such coherence between FDI promotion and national development strategies is widely recognized as essential to ensuring effective and lasting industrial policy (ECLAC, 2024 and 2025).

Today, the selection of priority industries is coordinated with the Committee of Ministers, which has identified six strategic work areas, including “Positioning Chile as a Latin American hub for the export of services.” The agency’s priorities are defined by the Committee composed of eight Chilean ministries, which establishes strategic guidelines in accordance with the policy priorities of each administration.

InvestChile operates with a relatively small team of professionals who provide specialized, no-cost services to potential investors throughout the investment cycle. By 2025, the team comprised 56 public officials – 58 per cent women, five nationalities – which included five industry specialists based primarily in Santiago, supported by investment commissioners posted in seven key international destinations: Canada, France, Germany, Italy, Japan, Kingdom of Saudi Arabia and the United States.

The support provided to foreign companies aims to reduce uncertainty in the decision-making process and to guide investment choices, aiming them towards Chile. Rather than substituting for the market intelligence that firms often acquire from private consultants, these services operate as a complementary source of information. Their distinct value lies in being delivered by professionals embedded within public institutions, who possess both a more realistic understanding of local conditions and the capacity to formulate context-specific solutions. This institutional positioning and the connections these professionals maintain with different levels of government enable them to address regulatory or operational obstacles more effectively and in ways that external advisors are less able to replicate.

As noted, InvestChile assists foreign companies throughout the entire investment cycle, offering a broad set of free and specialized services

that range from the early prospecting stage to reinvestment (see Table 2.5). At the outset, the agency provides in-depth market intelligence, including sectoral opportunities, business climate data, legal and tax frameworks, and detailed cost estimates, thereby reducing information asymmetries for potential investors.

During the pre-investment and landing phases, it actively supports project implementation through tailored agendas with public and private stakeholders, site visits and sector-specific as well as legal guidance, while also assisting firms in accessing public incentive programmes. Once projects are established, InvestChile maintains a permanent aftercare service that facilitates expansion and reinvestment by addressing regulatory bottlenecks, engaging in policy advocacy, and connecting companies with networks that foster value-added activities and sustainable initiatives.

These services are made available to all firms, irrespective of their industry. According to InvestChile’s experience, global services companies generally request ad hoc information services with a focus on human talent. Among these requests are the availability and cost of labour for their projects (primarily IT profiles); information on public or public-private programmes related to training and reskilling of human capital in IT competencies; information on hiring subsidies; talent attraction services (such as fast-track visa processing); and meetings set up with relevant ecosystem stakeholders.

InvestChile works with a portfolio of projects which meets the following criteria: the company must have expressed an intention to explore Chile as an investment destination; the agency must have direct interaction with the company’s project team; and the agency must provide direct follow-up and/or services to the investment project. As of December 2024, the Agency manages a record investment portfolio comprising 474 projects, representing a total committed capital of US\$ 56.2 billion. Of these, 215 projects correspond to the global services sector, accounting for US\$ 5.4 billion – equivalent to 9.6 per cent of the total portfolio value. Due to the labour-intensive nature of global services, these projects generated

Table 2.5: InvestChile's services provided by investment stage

Prospection	Knowledge and information ▪ FDI statistics and business opportunities ▪ Market highlights ▪ Legal and tax advice ▪ Information on set-up costs ▪ Portfolios of public projects and tenders
Pre-investment	Promotion and advice ▪ Meetings with public and private stakeholders ▪ Agendas for investor delegations ▪ Investment roadshows, conferences and workshops ▪ Investment incentives and special programmes
Landing	Guidance and access ▪ Expert sector advice in different languages ▪ Legal advice on setting up ▪ Contact with key stakeholders and site visits ▪ Assistance in applying for incentives and government programmes ▪ Incorporation into the support network for projects outside the Santiago Metropolitan Region
Reinvestment	Ongoing support ▪ Help with project development for established businesses ▪ Investment environment and climate management (policy advocacy) ▪ Free e-consulting to resolve concerns ▪ Support for obtaining an investor visa ▪ Follow-up of unforeseen events and management with public agencies ▪ Media management ▪ Advice on value-added and sustainable development initiatives ▪ Contact with public and private partners to foster synergies and cooperation

Source: InvestChile (2026).

8,325 jobs, representing 39 per cent of total employment associated with the portfolio in 2024. Moreover, since 2017 the share of projects in global services has been growing, from 25 in 2017 – 26 per cent of the total portfolio – to 215 in 2024 – 45 per cent of the portfolio.

The relevance attributed to investment in global services is grounded in InvestChile's understanding that the country possesses specific comparative advantages. These include a qualified pool of human capital, high levels of digital connectivity – comparable in some indicators to those of the United States – as well as the trade agreements previously described. Together, these features provide Chile with a competitive edge in attracting investment. According to InvestChile officials, such characteristics tend to be decisive in determining investment location, often carrying greater weight than sectoral programmes or tax incentives.

Nowadays, Chile's digitally delivered services sector benefits from few direct financial incentives for inward FDI, in contrast to several Latin American and Caribbean economies that offer special economic zones or preferential tax regimes. Instead, Chile's approach relies primarily on its structural competitive advantages and on the proactive efforts of InvestChile to attract new investors and encourage reinvestment. A summary of available incentives is presented in Table 2.6.

Some features may have contributed to the success of the current Chilean strategy. First, the promotion of the digitally enabled services sector is incorporated within a general policy framework which has three desired outcomes: growth, transformation and impact (InvestChile, 2025). InvestChile aims to foster growth and contribute to the United Nations Sustainable Development Goals. Regarding transformation, the goal is to

Table 2.6: FDI incentives for digitally enabled services firms in Chile

Incentive	Description
Value Added Tax (VAT) refund	Income from services exports, including hosting and data processing services, is eligible for benefits such as VAT exemptions and recovery.
Tax incentive for training	Companies are allowed an annual income tax deduction for training expenses in SENCE-approved training activities. The annual maximum deduction equals 1 per cent of the company's annual payroll budget.
R&D tax incentive programme (R&D Law)	Companies that actively participate in research and development (R&D) certified by Chile's Economic Development Agency (Corfo) are eligible for tax benefits.
VAT exemption on capital goods imports	Capital goods imported for research and technological development projects valued at US\$ 5 million or more are exempt from import duties and VAT.
Government co-funding programme - IFI Tech	IFI Tech targets the digitally enabled services and technology industry, offering government co-funding for qualifying projects. Companies can access direct co-funding of up to 30 per cent of the resources committed in the first two years of project implementation, with a maximum government contribution of US\$ 5 million. Chile's regional governments administer IFI Tech. Each project undergoes a rigorous case-by-case analysis, and the programme requires a minimum investment per applicant of US\$ 2 million.
Corporate immigration support	For foreign companies seeking to bring in key personnel, InvestChile facilitates the immigration process through its simplified sponsorship letter programme.

Source: Drawn up by the authors.

develop local capabilities in research, development and innovation, and diversify and upgrade its production and export basket. Finally, the aim is to create permanent and higher-skilled jobs and integrate local firms into global value chains. In this sense, the agency's work has a clear and shared goal across all sectors, aligning with the country's development objectives, which helps identify the type of investors they aim to attract.

Second, InvestChile makes a deliberate effort to articulate its efforts with other public, private and academic agencies involved in supporting the development of the digitally enabled services industry. Among these, are the Public-Private Technical Committee for Services Exports (analysed earlier in this chapter); a programme financed by the IDB for the promotion of the digitally enabled services sector, co-implemented with Corfo, ProChile, SENCE, the Ministry of Cultures, Arts and Heritage, and the Ministry of

Science, Technology, Knowledge and Innovation (MinCiencia); the National Data Centre Plan (2024–2030), an initiative led by MinCiencia, in collaboration with other ministries and the private sector; and the National Financial Inclusion Strategy, led by the Ministry of Finance, where a key pillar is the development of the fintech ecosystem. This coordination contributes to a stronger ecosystem, enabling programmes to be adjusted to better serve the goals of the country and its firms, which is key to attracting foreign companies.

Third, the promotion of digitally enabled services and the digital economy have been a State policy. In this sense, since 2016, the government has prioritized the promotion of investments in digitally enabled services and the digital economy, alongside political changes. This continuity provides certainty and is fundamental for decision-making among transnational companies.

Finally, the agency has a highly professional and talented team that works with a clear and specific goal: promoting FDI. This strong focus has

enabled them to deliver high-quality consulting and support services to both new and established investors through aftercare.

Skills development initiatives

Local talent has emerged as a key factor underpinning Chile's ability to integrate into the modern global services market. Despite specific gaps in language skills – particularly in English – and in some specialized IT positions, the country's human capital is generally well-balanced. It possesses the capacities required to meet the demands of this highly competitive market.

Chile has a diversified supply of tertiary (university and technical-vocational) education and labour training services, which have been increasingly adapted to the needs of services exporters. Its higher education system encompasses a total of 134 institutions. Universities, which award both professional and technical degrees, account for 43 per cent of the system. Professional institutes provide non-academic degrees (25 per cent), while technical training centres focus on specialized technical qualifications (32 per cent). This range of options supports varied educational pathways and helps ensure a highly skilled workforce for Chile's future (InvestChile, 2024).

A specific labour training programme was created to address the needs of the digital sector – especially the digitally delivered services segment – known as Talento Digital para Chile (Digital Talent for Chile). This project is part of a broader labour reconversion effort aimed at adapting to the changing global context and the new requirements of the labour market. It is an initiative showcasing innovation and sustained collaboration, providing more people with access to learning opportunities for higher-level digital skills that enhance their employability. By articulating the efforts of State institutions, private enterprises and training organizations, Talento Digital has positioned itself as a strategic policy instrument for accelerating Chile's transition towards a knowledge-based

economy and strengthening its participation in global digital value chains (Fundación Chile and Fundación Kodea, 2023).

This programme emerged in 2019 as a flagship public-private initiative aimed at addressing the structural challenges posed by digital transformation in the labour market. The programme seeks to address the country's persistent digital skills gap, enhance employability and facilitate labour reconversion for diverse groups, including women, unemployed individuals and workers from vulnerable socio-economic backgrounds, particularly outside the capital, to decentralize human talent.

The initiative is grounded in five interrelated objectives. First, it prepares the national workforce to address the demands and disruptions associated with the digital economy. Second, it establishes linkages between enterprises and training institutions to ensure that human capital training corresponds to market demand. Third, it incorporates training mechanisms, certification and job intermediation designed to improve labour market matching. Fourth, it provides both upskilling and reskilling opportunities, thereby serving individuals with prior training in information technologies as well as those entering the sector for the first time. Finally, it prioritizes inclusivity, explicitly targeting women and disadvantaged groups to facilitate their labour reintegration.

The programme's governance reflects a complex coalition of public and private actors, including the Ministry of Finance, Ministry of Labour, Ministry of Science, Corfo, SENCE, InvestChile, SOFOFA, ACTI, Confederation of Industry and Commerce, Fundación Chile, Fundación Kodea and the IDB (Talento Digital para Chile, 2025). Table 2.7 presents a list of implemented activities.

Table 2.7: Activities of Talento Digital para Chile that have been implemented

Activity	Description
Bootcamps	Short-cycle intensive programmes of three to six months (400–480 hours) covering programming (Full Stack Java, Python, JavaScript, Front-End, Mobile Development), UX/UI design, cloud architecture, data science, DevOps, cybersecurity, and digital entrepreneurship (Fundación Chile and Fundación Kodea, 2023).
Employability module	A 36-hour transversal component designed to strengthen workplace adaptation, job search strategies and professional communication skills (Neilson, Egaña and Humphries, 2024).
Scholarships	More than 30,000 scholarships were managed between 2019 and 2025, selected from a pool of over 180,000 applicants (Talento Digital para Chile, 2025).
Labour intermediation	A network of more than 350 partner firms supports graduates' insertion into the labour market through the Semillero de Talentos (Talent Incubator) (Fundación Chile and Fundación Kodea, 2023).
Focus on vulnerable groups	Approximately 36% of graduates are women, and many participants originate from households classified within the 80% most vulnerable strata (OECD, 2021).
Continuous demand assessment	Training curricula are co-designed with firms to ensure alignment with evolving needs, such as cybersecurity and sector-specific data analysis (Neilson, Egaña and Humphries, 2024).

Source: Drawn up by the authors.

The evidence suggests that Talento Digital has generated substantial benefits for the digitally delivered services export sectors. National statistics and external evaluations indicate that 77 per cent of graduates achieve positive post-programme outcomes, including formal employment, self-employment, entrepreneurship, or continued studies (Talento Digital para Chile, 2025). Moreover, approximately 68 per cent of graduates secure formal employment within six months of completing the programme, and average income levels increase by 47 per cent relative to their pre-programme earnings (Fundación Chile and Fundación Kodea, 2023).

The programme has had a pronounced impact on women, who constitute 36 per cent of graduates, thereby contributing to gender equality in technology sectors where women have historically been underrepresented (OECD, 2021).

Internationally, the initiative was recognized by

the OECD in its 2021 *Economic Survey of Chile* as an effective response to the human capital challenges of digitalization, and domestically, it received the Avonni Award for Innovation in 2023, in the education category.

The government also has specific initiatives aimed at increasing the digital uptake of micro, small and medium enterprises. One example is the “Digitalize Your SME” (<https://www.digitalizatupyme.cl>) platform. This offers a range of resources, including diagnostic tools to assess digital maturity, access to digital solutions, and training programmes to enhance digital skills. It aims to empower SMEs by guiding them in implementing digital technologies, improving their online presence, and optimizing their business processes through digital means. By leveraging these resources, Chilean SMEs can enhance their competitiveness and adapt to the evolving digital economy.

Conclusions and recommendations

Chile's experience offers valuable insights into the role of institutional coordination, strategic continuity and targeted policy frameworks. The deliberate alignment of national development goals with sector-specific promotion strategies has not only enhanced Chile's competitiveness but also positioned the country as a regional leader in digital transformation. As global competition intensifies and technological change accelerates, policymakers, industry leaders and academic institutions must build on these foundations. Continued investment in innovation, talent development and cross-sector collaboration will be essential to sustain momentum and ensure that Chile remains at the forefront of inclusive and knowledge-driven economic growth within Latin America.

Lessons for other economies

This section presents the key findings on Chile's services exports and strategies to attract FDI, along with policy recommendations. Some of the key findings are:

- **An extensive network of FTAs partially addresses the challenge of market access:** Chile has developed a vast network of trade agreements, most of which include chapters on services trade and, increasingly, on e-commerce and digital trade. It is also a founding member of the DEPA, a pioneering agreement on digital trade.
- **Institutional coordination addresses the challenge of ineffective isolated policies:** The Public-Private Technical Committee for Services Exports, created in 2016, demonstrates a structured form of coordination both among public institutions and between the public and private sectors.
- **Institutional continuity solves the challenges of erratic policies from one government to another:** Sustaining policy priorities for services exports and attracting FDI across successive administrations has created stability for firms and investors. Other

economies can replicate this by insulating strategies from political shifts.

- **A strategic use of investment promotion addresses the weakness of generalized promotion:** The establishment of InvestChile as a specialized, professional agency with a clear mandate has contributed to positioning Chile as a regional hub. Economies seeking to attract FDI can benefit from creating similar agencies staffed with skilled teams.
- **Specific human capital initiatives partly address the issue of labour market shortages for digitally delivered services exporters:** Programmes such as Talento Digital para Chile show the effectiveness of combining training, certification and labour intermediation, particularly when co-designed with industry. Linking skills development to export promotion can be decisive.
- **Branding enhances visibility which helps overcome the issue of lack of country and sector reputation:** Sectoral and country branding initiatives (e.g., Ch113, a Digital Country_, Learn Chile, CinemaChile) have raised the profile of Chilean services worldwide. A coordinated branding strategy can strengthen the international presence of other economies' service sectors.
- **A comprehensive ecosystem approach helps address the missing elements across the core pillars required for export promotion:** Chile illustrates the value of aligning trade agreements, tax incentives, digital infrastructure and promotional tools within a single, coherent strategy. This integrated approach prevents fragmentation and magnifies impact.

Remaining challenges

Despite progress, Chile also faces several challenges that may hold lessons for other economies:

- **Gaps in institutional coverage:** The Public-Private Technical Committee for

Services Exports could expand participation to include additional institutions, such as the Ministry of Education, to better align training and skills development with export needs.

- **Weak statistical coverage:** The customs services exports database is limited in its reach. Greater collaboration with the Internal Revenue Service and business associations is needed to encourage firms to register transactions.
- **Persistent skills gaps:** Even with initiatives like Talento Digital, demand for advanced digital and language skills outpaces supply, especially in science, technology, engineering

and mathematics, as well as in English. This limits the scalability of services exports.

- **Geographic concentration of exporters:** Most exporters and skilled talent remain concentrated in Santiago, leaving regions underrepresented and restricting inclusive national growth.
- **Data and evaluation limitations:** Monitoring systems capture only part of services export flows and evaluations of promotional programmes are scarce. This hinders evidence-based policymaking and reduces accountability.

Endnotes

- 1 The authors thank Javier Meneses for statistical support, InvestChile and ProChile for providing data, and the interviewees for their insights. The views are those of the authors only and may not coincide with those of ECLAC and/or its member states.
- 2 Part of this growth acceleration may also be attributed to a 2022 tax reform (Law No. 21,420), which significantly broadened the sectoral coverage of the value-added tax (VAT). Before this reform, VAT applied only to a restricted set of activities. As of 1 January 2023, all services became subject to VAT unless specifically exempt (e.g., health, education and public passenger transport) (Winter Salgado, 2022). Exporters can claim a refund of this tax, but they must have their service registered with the National Customs Service and use the formal tax procedures (e.g., an export invoice and Form 3600). These steps have tightened registration and compliance for services exports and are expected to improve statistical visibility. According to some experts interviewed for this research, this reporting requirement may have revealed previously unreported or underreported export flows of modern services.
- 3 No official data is available on the geographical breakdown of other types of digitally delivered services. Chile's customs authority has also published a detailed database of monthly service export declarations since 2018, covering 329 service categories and destination economies. However, this dataset represents only about one-quarter of the total services exports reported in the 2024 Balance of Payments, thereby limiting its analytical usefulness (Central Bank of Chile, 2021; Fernandez Stark, Bamber and Couto, 2021).
- 4 Global Services include all services produced in a country to be used abroad. They include the following categories: business process outsourcing (BPO); information technology outsourcing (ITO); knowledge process outsourcing (KPO); and intellectual property outsourcing (IPO). See [informe-preliminar-ied-eng-pdf-2023.pdf](#).
- 5 Creative industries include activities that have their origin in creativity, skills and talent, and involve working in the production of video games, audiovisual, music, publishing, design, performing arts and other creative content industries. See <https://www.prochile.gob.cl/en/export-sectors/creative-industries>.
- 6 Soft-landing programmes are support services for companies to establish operations in a new market smoothly by providing help with office space, mentoring and/or regulatory guidance.
- 7 Public institutions include the Ministry of Finance, Internal Revenue Service, National Customs Service, Undersecretariat for International Economic Relations, ProChile, Ministry of Economy, Development and Tourism, Corfo (Economic Development Agency), InvestChile, INAPI (National Institute of Industrial Property), Ministry of Cultures, Arts and Heritage, National Training and Employment Service (SENCE), Central Bank of Chile, and the National Statistics Institute (INE). Private and associative organizations include SOFOFA (Chilean Federation of Industry), the Santiago Chamber of Commerce, Chiletec (Chilean Association of Information Technology Companies), the Association of Architecture Firms, the Association of Consulting Engineering Companies of Chile, and Fundación Chile – Digital Talent.
- 8 These include 21 in the service sector: ACESOL (Chilean Solar Energy Association), ACERA (Chilean Association for Renewable Energies and Storage), AGETECH (Agritech Business Association), ALOG Chile (Chilean Logistics Association), AIC (Chilean Association of Consulting Engineers), ANESCO Chile (National Association of Energy Efficiency Companies), AOA (Association of Architectural Offices of Chile), APLOG (Association of Logistics Professionals), Asociación Climatech Chile (Climatech Association), CChC (Chilean Chamber of Construction), CENS (National Centre for Health Information Systems), Chiletec (Chilean Association of Information Technology Companies), CNC (National Chamber of Commerce, Services and Tourism of Chile), Conecta Logística (Logistics Connection programme), EmBIO International (Biotechnology

Cluster), FinteChile (Chilean Fintech Association), InsurteChile (Chilean Insurtech Association), MITI (Chilean Industrial Technology Association), ProconTech (Productivity and Construction Technology programme), Santiago Smart City, and SOFOFA Hub (Federation of Chilean Industry Hub).

In the creative economy sector, ProChile collaborates with ADG (Association of Graphic Designers of Chile), AGAC (Association of Contemporary Art Galleries), Animachi (Chilean Animation Association), APCT (Association of Film and TV Producers of Chile), APSP Chile (Association of Sound Production Professionals of Chile), Cámara Chilena del Libro (Chilean Chamber of Books), CCDoc (Chilean Documentary Corporation), ChileCómics (Chile Comics), Chile Diseño (Chile Design), CNGC (Chilean Graphic Novel Cooperative), Cooperativa Gráfica Chilena (Chilean Graphic Arts Cooperative), Corporación del Libro y la Lectura (Corporation for Books and Reading), Editores de Chile (Publishers Association of Chile), Fundación FilmoCorto (FilmoCorto Foundation), Fundación Santiago Off (Santiago Off Foundation), Fundación Teatro a Mil (Teatro a Mil Foundation), IME (Electronic Music Industry of Chile), IMICHILE (Independent Music Industry of Chile), IMUVA (Music Industry of Valparaíso), La Furia (La Furia Publishers Cooperative), Moda Chile (Fashion Designers Association of Chile), Mustach (Music Tech Association Chile), Te Veo (Chilean Cinema Network) and VG Chile (Video Games Chile) (ProChile, 2025b).

- 9 For more details, see ProChile, *Step by step services export guide* (Spanish only) <https://cdc.prochile.cl/wp-content/uploads/2023/01/MANUAL-DE-SERVICIOS-3-1.pdf>; SUBREI (2021) *Manual on services export and the benefits of free trade agreements* (Spanish only) <https://cdc.prochile.cl/wp-content/uploads/2021/09/Manual-Exportacion-de-Servicios-y-aprovechamiento-de-tratados-de-libre-comercio-2021.pdf>. The latter of these two publications covers definitions and relevance of services in international trade; Chile's legal, tax and administrative framework for exporting services; how free trade agreements address services (including classifications, commitments and specific sectors); the benefits Chile has obtained under its FTAs; and a practical "matrix of classification" tool to help exporters identify applicable treaty provisions. Additionally, the CCS published a further guide in 2021, *Manual for the services exporter: regulatory and tax aspects* (in Spanish only) <https://www.hacienda.cl/areas-de-trabajo/finanzas-internacionales/exportacion-de-servicios-globales/documentos/manual-para-el-exportador-de-servicios>.
- 10 Although fashion and handicrafts are not service sectors, they are part of the creative economy cluster and cannot be separated from the rest.

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Interviews

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