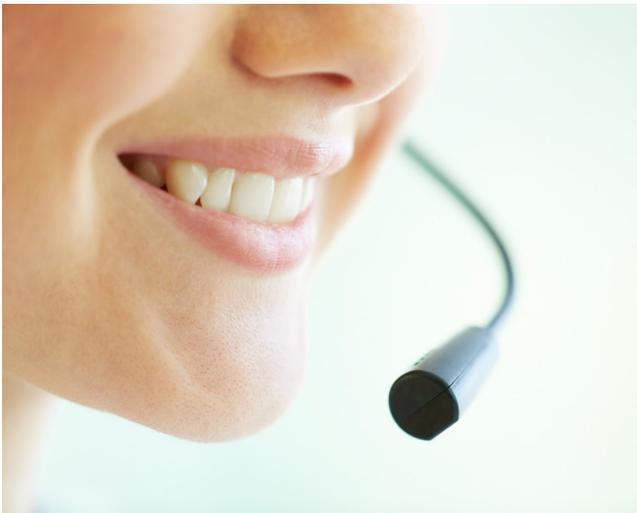


SUSTAINING COALITIONS OF SERVICES INDUSTRIES



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This practical guidebook forms part II of the ITC technical paper series on the Coalitions of Services Industries (CSIs). Part I of the series was titled *Creating Coalitions of Services Industries*.

This paper aims to assist new and growing services trade support institutions, specifically CSIs, in attracting members and helping them increase services exports through the elaboration of new member services offerings. It can be used to facilitate the public/private partnerships necessary to develop the services sector and provides guidance on identifying specific strategies to incorporate into CSI members' support programmes and developing strategies to improve support for the sector. This guidebook also contains bibliographical references (pp. 30-31).

Descriptors: **Trade in Services, Trade Support Institutions, Manuals.**

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Abbreviations

The following abbreviations are used:

AGM	Annual general meeting
APEC	Asia-Pacific Economic Cooperation
BOP	Balance of payments
BPO	Business process outsourcing
CPD	Continuing professional development
CRM	Customer relationship management
CSI	Coalition of services industries
GDP	Gross domestic product
ESF	European Services Forum
GATS	General Agreement on Trade in Services
GVC	Global value chain
ITC	International Trade Centre
MSME	Micro, small and medium-sized enterprise
OECD	Organisation for Economic Co-operation and Development
SME	Small and medium-sized enterprise
TISA	Trade in Services Agreement
TiVA	Trade in value added
TPO	Trade promotion organization
TSI	Trade support institution
WTO	World Trade Organization

Introduction

The global economy continues to evolve. The services sector leads this evolution.

Historically, economic growth and development were associated with the manufacturing sector. Services were considered non-transportable, non-tradable and non-scalable. Though the services sector was recognized for the supporting role it played to the manufacturing and agricultural sectors – for example, via transportation and financial services – it was not considered a driver of economic growth *per se*.

Conventional theories of growth through industrialization and the role of the services sector in economic development are, however, coming under increasing scrutiny. Tremendous advances in technology and communications – accessible for the most part across the world – in complement with increased liberalization of services are transforming the economic landscape.¹ Through the Internet and supporting technologies, practically all services have effectively become potentially tradable, supply and demand has become global, and the international competitiveness of services firms has, to some extent, been levelled.

In many developing countries today, services contribute more to gross domestic product (GDP) growth, job creation, foreign direct investment and poverty reduction than the manufacturing sector.

In 2012, the services sector accounted for 70% of global GDP, ranging from a GDP contribution of 49% in low-income countries to a contribution of 74% in high-income countries. These figures increased steadily over the past 30 years.²

- The services sector accounts for nearly half (44%) of global employment: 37% in developing economies and 74% in developed economies.³ Employment in services surpassed that of agriculture in 2001, and the gap between the two continues to grow. Technological changes have resulted in increased automation and more capital and skill-intensive positions, reducing the number of jobs in the manufacturing sector. The services sector has also become the largest provider of jobs for women.
- Services comprise 63% of the world's foreign direct investment inflows.⁴
- High growth in the services sector is correlated with high overall economic growth, and is more closely correlated with poverty reduction than growth in the agricultural and manufacturing sectors.
- New OECD-WTO Trade in Value added (TiVA) data show, however, that when measured in terms of value added, services contribute as much as 46% of global exports, as services are embodied in all primary and manufacturing exports.⁵

Despite these statistics, however, and despite the enormous export opportunities that the global services economy provides, the services sector is underperforming with respect to trade, particularly in developing countries and LDCs.

- In balance of payments (BOP) terms, the services sector directly accounts for only 20% of global trade (though trade in services is often not fully captured by statistics).
- In developing countries, services exports comprise only 14% of exports.
- The LDC group earns a 0.5% share in world commercial services exports. This compares with a 1% share of LDCs in total world trade.

¹ There are three billion Internet users worldwide, a third of whom live in developing countries. Mobile cellular penetration rates were 98% worldwide by the end of 2014, and 90% in developing countries. See International Telecommunication Union (2014). *The World in 2014: ICT Facts and Figures*. Available from www.itu.int/en/ITU-D/Statistics/Documents/facts/ICTFactsFigures2014-e.pdf.

² The World Bank (2013). *World Development Indicators Database*. Available from <http://data.worldbank.org/data-catalog/world-development-indicators>. Accessed 14 January 2015.

³ International Labour Organization (2012). *Global Employment Trends 2012: preventing a deeper jobs crisis*. Geneva. Available from www.ilo.org/global/research/global-reports/global-employment-trends/WCMS_171571/lang-en/index.htm.

⁴ United Nations Conference on Trade and Development (2014). *World Investment Reports*. Geneva. Available from <http://unctad.org/en/pages/diae/world%20investment%20report/wir-series.aspx>.

⁵ Organisation for Economic Co-Operation and Development (2014). *OECD-WTO Trade in Value Added (TiVA) Database*. Available from http://stats.oecd.org/Index.aspx?DataSetCode=TIVA_OECD_WTO. Accessed 10 January 2015. See also World Trade Organization (2015). 'Made in the World.' Available from www.wto.org/english/res_e/statist_e/miwi_e/miwi_e.htm.

The benefits of trade in services are extensive. Trade in services, for instance, generates jobs and foreign exchange; it lessens the impact of economic downturns and seasonality; it reduces the brain-drain phenomenon; and it enhances the competitiveness of businesses across all sectors.

The challenges for harnessing services trade, however, especially in developing countries, are also extensive. The sector is heterogeneous, complex and fragmented, which poses a challenge in communicating with stakeholders in the sector. On the whole, the services sector is poorly understood, which impedes government support and results in a less-than-ideal policy framework. Financing is difficult to secure, furthermore, as services firms typically lack traditional collateral. Services standards tend not to be recognized or accepted in target markets. Services firms, while technically competent, do not generally have access to the full set of skills required to export, such as marketing and research skills. These are but a few of the challenges.

The result of the above is that services providers in developing countries fall behind their international counterparts with respect to competitiveness, and that national economies are not achieving their full potential. Yet, for many developing nations, the future depends on their ability to develop and to profit from trade in services.

With every challenge, however, an opportunity presents itself.

To assist services sector stakeholders in tackling the challenge of services sector development, the International Trade Centre (ITC) – via its Trade in Services programme – has prepared this guide, *Sustaining Coalitions of Services Industries*.

This practical guidebook forms part II of the ITC technical paper series on the Coalitions of Services Industries (CSIs). Part I of the series was titled *Creating Coalitions of Services Industries*.

The technical paper series examines the role of CSIs in policy advocacy and facilitating services trade. It explores the purpose, membership, structure, operational approaches and activities of CSIs, and provides practical advice on how CSIs can help to improve the business climate for services entrepreneurs, expand membership and achieve sustainable development through enhanced member services offerings.

The ITC Trade in Services programme aims to increase the export of services from developing countries and transition economies. The programme offers substantive, customized technical assistance support to trade promotion organizations (TPOs); to regulators and policymakers leading policy formulation and trade negotiations; to trade support institutions (TSIs) engaged in advocacy, capacity-building and promotion of trade in services; and to enterprises involved in services export operations.

With these objectives in mind, this guide was developed to assist new and growing services trade support institutions – specifically, coalitions of services industries (CSIs) – to attract members and to support them in increasing services exports through the elaboration of new member services offerings. The language in this guide relates to this stakeholder group. For ease of reference, for instance, the target audience ‘services organizations’ will be referred to as ‘CSIs’.

This guide can, however, be used in a number of other ways.

- TPOs and government line ministries responsible for promoting trade can work with TSIs to support services-sector development. The information provided in this guide can facilitate the public/private partnerships necessary for the development of the services sector.
- Existing TSIs, such as chambers of commerce and small business associations, can introduce new support offerings for their services-sector members.
- Services-sector associations can identify specific strategies to incorporate into their members’ support programmes.
- Services champions can develop strategies for improving support for the sector.

We are mindful that new services organizations in particular are likely to be resource scarce and, as such, may not be able to implement all the activities recommended in this guide. To begin with, all new and existing TSIs need to maximize resources by seeking supporters and delegating responsibilities. The activities described below are designed for services champions spearheading the establishment of a CSI, including CSI staff members and board members, supporting CSI committees, volunteers and student interns, sub-sector champions, government-appointed employees and partner organizations. Needless to say, the situation in each country will be unique.

Take small steps. Leverage strengths. Embrace the Internet and the multitude of tools it offers. Adopt innovative solutions. At all times, maintain a strategic perspective.

By implementing the initiatives outlined below, not only will services organizations be providing valuable assistance to a critical sector of the economy, but they will also succeed in enhancing value in membership, retaining and attracting members, generating revenue, developing important competencies and boosting credibility.

This document complements the recent ITC report, *Creating Coalitions of Service Industries* (2014). It is recommended that you read that document as well, which can be found in the ITC publication catalogue.⁶

The Trade in Services Unit of ITC is confident that your organization and its members will benefit greatly from the information presented in this guide. ITC welcomes your feedback and encourages you to share your successes with us, as well as your suggestions.

⁶ International Trade Centre (2014). *Creating Coalitions of Services Industries*. Geneva. Available from www.intracen.org/publication/Creating-Coalitions-of-Services-Industries/.

1. Understanding trade in services: trends, differences and challenges

Trends: the role of services in global value chains

The conventional understanding of the services sector no longer holds true. Stereotypical descriptions of the sector – that it is, for instance, non-tradable, non-transportable, non-scalable, low-innovation or low-skilled – have been undermined by the advent of the Internet and supporting technologies. Knowledge-intensive services can now be captured, stored, scaled up and readily traded across borders. The result is that final services outputs can now be differentiated into their intermediate parts, splintered into value chains, and imported and exported at low costs.

As a result of this new services framework, there have been significant changes in consumer and producer behaviour, resulting in the application of ever-increasing services inputs by manufacturing and agricultural companies. From product design and production to marketing and distribution, services constitute up to 80% of the business offer of some manufacturing companies.⁷ Services inputs are critical and affect the competitiveness of businesses across industry sectors. Businesses of all kinds now attempt to outsource business functions in which knowledge can be commoditized.

These services intermediates, known as ‘knowledge-intensive business services’, are the fastest growing component of world trade today.⁸

The result is that goods and services have become inextricably intertwined. In fact, in value-added terms, services accounted for 46% of world exports in 2008, well beyond the 20% trade in services figure typically highlighted in traditional export statistics.

Exporting services is different

While some basic principles of exporting hold for both goods and services, there are also many key differences, given the distinct ways in which goods and services firms do business.

Not only are the modes of supply different for services exports than for goods, for instance, but the extent of government intervention in services is also distinctly higher and the nature of the barriers to trade are also different, with domestic regulation impacting in particular on trade in services.

To place these differences in context, table 1 below compares the exporting and marketing of goods to that of services.

It should be noted, however, that given the current trend of services and manufacturing sectors towards increasing integration – also known as the ‘servicification’ of the manufacturing sector – these differences will diminish in some areas: in the area of ‘use of technology’, for instance, the difference between goods and services providers is increasingly negligible.⁹

⁷ Kommerskollegium Swedish National Board of Trade (2010). *At Your Service: the importance of services for manufacturing companies and possible trade policy implications*. Stockholm. Available from www.kommers.se/Documents/dokumentarkiv/publikationer/2010/skriftserien/report-2010-2-at-your-service.pdf.

⁸ UNCTAD (May 2013). Global Services Forum. Available from http://unctad.org/meetings/en/Presentation/gsf2013_S2PanelB_Stephenson_en.pdf.

⁹ ‘Servicification’ is a term coined by the Swedish Board of Trade to describe the growing realization that the manufacturing sector was largely made up of services activities. It is the development where ‘manufacturing firms buy and produce more services than before, but also the fact that firms sell and export more services as integrated or accompanying parts of their goods’. See Kommerskollegium Swedish National Board of Trade (2012). *Everybody Is In Services: the impact of servicification in manufacturing in trade and trade policy*. Stockholm. Available from www.kommers.se/Documents/dokumentarkiv/publikationer/2012/skriftserien/report-everybody-is-in-services.pdf.

Table 1. Distinctive factors of goods and services exports and marketing

FACTOR	GOODS	SERVICES
Information Needs		
Cultural factors	Product design and packaging	Interpersonal dynamics, gender, personal presentation
Local associations	Distributors, marketers	Membership in service industry associations
Local events	Trade shows	Conferences (as speaker), networking events
Media	Product advertising	Media coverage, magazine articles, blogs
Local partners	Production/distribution firms	Other services firms
Government procurement	Goods acquisition	Services contracts
Marketing your product or service		
Demonstrations	Sample product, specifications	Presentation of capabilities, qualifications, standards
Initial marketing	Sales representatives	Firm's principals: raise awareness, profile and credibility
Stages of marketing	Marketing your product and related services	Marketing value and solutions
Local market presence	Sales/distribution facility	Office or virtual office in target market, web presence
Marketing skills	Demonstrate product features	Networking, relationship marketing
Delivering your product or service		
Transportation	Products are shipped by air/sea/land	Services are sold over the Internet or customer/service provider travels
Technology	E-marketplace to show products	Essential for communication and timely delivery of services
Distribution	Importer/distributor	Local partner, services provider
Payment	On satisfactory delivery of product	May require guarantees, milestone payments

Source: Government of Canada Foreign Affairs and International Trade (1995). *Take a World View: Export Your Services*. Vancouver. Available from <http://publications.gc.ca/site/eng/50555/publication.html>

Challenges from the perspective of a services provider

Generally speaking, small and medium-sized enterprises (SMEs) in the services sector face unique challenges. These differences need to be considered and addressed in order to assist services providers in exporting successfully. The following list, while not exhaustive, outlines a few such challenges confronting services providers.

- Intangible offerings require services providers to focus on establishing credibility and developing relationships with potential clients. The result is that services are generally sold directly to a client rather than via an agent.
- Services providers are restricted by poor access to financing due to the intangibility of services and consequently the lack of traditional collateral that typically supports business loans. This is compounded by the fact that the lead-time for developing a new market can be protracted. Export efforts can therefore pose a significant financial strain on a services firm.

- Governments tend to focus support on the traditional manufacturing or agricultural sectors. This results in limited support for the services sector, including a lack of tailored incentives and an underdeveloped policy framework.
- Services providers may be limited by the size of their operations, and by limited financial and human resources. The principal of some services firms may therefore have to take an active role in marketing the firm and its services (and must develop the requisite skills to do so).
- Target markets may not recognize professional credentials. To compensate, firms will need to develop creative strategies in order to export to these markets, including offering outsourcing services and partnering.
- Many services firms attempt to enter new markets with inadequate preparation, as there are limited export-support programmes targeted at services providers. This will have a negative impact on the credibility of the services firm.
- There remains limited access to information on, or knowledge of, how to acquire relevant market information and intelligence available to services providers. The services sector is fluid and can change quickly, creating additional challenges with respect to timely market intelligence.
- There may also be cultural considerations preventing services providers from successfully exporting their services. Providers must be aware of cultural differences and adapt to the customs of the foreign culture to gain trust in new markets.
- Services providers must take into account the cost of air travel to target markets. The sale of services entails a higher 'face-to-face' component than the sale of goods. Similarly, the marketing and delivery of services often incurs high travel costs. Another related challenge is that services providers may require visas to travel to some countries.
- Services providers may have limited knowledge of market entry options, and of partnering in particular.
- Some services providers may be inhibited by weak proposal-drafting skills and a lack of experience.

Needs

Given the differences identified above, the services offered by services coalitions must be customized for SME members in the services sector. While there are many organizations in the world that support trade, there are significantly fewer supporting trade in services specifically. It is important not to supplant member offerings that have not been tailored for services providers into a CSI.

With every new member service considered, the differences and challenges noted above should be taken into consideration, and the appropriate solution established. Be mindful that wide services-sector exporting is a relatively new phenomenon. The solution that your members require may not yet exist. It may therefore be necessary to be innovative in the design of member services for services SMEs.

The services offered by a CSI should also approach exporting in a holistic fashion, incorporating awareness building, capacity development, export promotion and advocacy support. If comprehensive services are not offered, success will invariably be limited.

Be sure to undertake a needs assessment of existing, new and potential members: needs are likely to vary from country to country depending both on the existing types of support offered by organizations and the government, and on the level of maturity of the domestic services sector. Be mindful that it may be difficult for services providers with no previous export experience to identify the full range of needs that would support exporting; international experience may need to be brought to bear on the problem.

2. A coalition of services industries: features and benefits

A services coalition is an organization of businesses and other stakeholders related to the services sector; it is effectively the services-sector equivalent of a chamber of commerce. While the stakeholders may have diverse interests, they nonetheless share one key interest in common: the development of the services sector. Although services coalitions fulfil a variety of functions, ultimately the objective of the organization is to enhance the international competitiveness of the services sector and to increase services exports.

Coalitions of services industries (CSIs) exist around the world. However, their function in developed and in developing countries differs according to context. In developed countries, CSIs typically focus on advocacy and raising the profile of the services sector. Their interventions are often focused on liberalization and other types of market-access changes necessary for increasing the market share of their members.

In developing countries, in contrast, CSIs have had to adopt a significantly larger role to become effective at lobbying for regulatory efficiency in the sector. Particularly in a legislative environment in which evidence-based policy is the ideal, advocacy cannot succeed without widespread awareness and capacity, and the accumulation of an evidence base.

While CSIs focus exclusively on the development of the services sector, they ideally do so in a holistic and strategic manner. World Bank research published in 2012 indicates that cooperation between services firms through a services industry association can favourably influence national policy, as well as international competitiveness and credibility in services.¹⁰

Activity

- A coalition of services industries

Objectives

- To establish a national services-sector driver

How to establish a CSI: 11 points for consideration

1. Undertake research. Examine CSIs from around the world and review best practices.¹¹ Note their objectives and their structure, including membership structure, the services offered and how the organizations are financed. In the absence of government support, prepare a proposal highlighting the benefits of a CSI and sharing international success stories.
2. Assess the willingness of the public sector to establish, and perhaps to support financially or otherwise contribute to, a CSI. Particularly in developing countries, coalitions tend to rely on financial and other in-kind support from the government, especially in the initial stages of development. CSIs from developing countries may not be able to charge members – typically micro, small and medium-sized enterprises (MSMEs) or industry associations – the high membership rates that coalitions from developed countries attract. Depending on the size, composition and maturity of the national services sector, CSIs may also find it difficult to support their own activities without external funding.

Given that CSIs offer valuable services to governments that would otherwise have to be outsourced or commissioned through consultancies or additional staff members, CSI champions are in a position to leverage governmental support. Any support from the government should not, however, be referred to as a ‘subsidy’ or ‘funding’ – this sets the wrong tone. Rather, the relation of a coalition to the government should be construed as that of an ‘on-call’ consulting agency that has the most experience vis-à-vis the services sector and the best whole-of-sector industry networks.

¹⁰ Goswami, Arti Grover, Aaditya Mattoo and Sebastián Sáez (2012). *Exporting Services: A Developing Country Perspective*. Available from <https://openknowledge.worldbank.org/handle/10986/2379>.

¹¹ See, for instance, Asia-Pacific Economic Cooperation (2004). *Supporting APEC SME Service Exporters: a handbook of best practices*. Available from http://c-nsc.org/download/coalition_resources/Supporting%20Service%20SMEs%20-%20APEC.pdf.

This distinction is vital, as it can help eliminate the ‘discretionary’ sentiments of public-sector funding.

Tip: Monitor all the services provided at the request of the government, or that the government would have to undertake internally in the absence of a coalition – examples might include services-sector consultations on trade negotiations, or policy reforms – and evaluate these services in an annual financial statement for submission to the government.

Government support for the services sector should not be delimited by financial or other in-kind support to the national CSI. A CSI requires an open and responsive government partner to achieve the mutual objective of securing services-sector development.

Consider institutionalizing the relationship between the CSI and the government. A close relationship will make future support more plausible, boost the credibility of the organization and improve the success of advocacy efforts. Consider, for example, inviting a representative from the public sector to serve on the board of directors in an *ex-officio* capacity. The nature of a CSI’s relationship with the government depends, of course, upon the nature of public/private dynamics in your country. It is essential that an institutionalized platform be created specifically for public/private dialogue on trade in services and services competitiveness.

Regardless of any support – financial or otherwise – extended by the government, it is vital that a CSI consider its sustainability and be founded on a solid business model. Membership fees and member services can provide ongoing sources of revenue to the organization.

Assess the willingness of the private sector to establish a coalition – which is, after all, a private sector, membership-based organization. Take into account the fact that public-sector support is itself unlikely to be forthcoming in the absence of some evidence of private-sector willingness and initiative.

3. Ideally, identify both a private and a public-sector champion. The role of these champions will be to generate support for the establishment of a coalition, including raising awareness on the importance of the services sector and, of course, the role of the coalition itself, and to generate financial support from corporate sponsors, government and private donors.
4. Establish a taskforce willing to donate time to the establishment of a coalition. This is a taskforce of ‘doers’. The taskforce should ideally comprise representatives from government, key trade associations (e.g. legal, accounting and engineering), large services companies, champions of national leading services sectors and business services sellers willing to donate services. Over time, these taskforce members will ideally serve as the founding board members of the new CSI.
5. Map your CSI conceptually. Determine a name, mission, objectives and core values. Determine membership categories and criteria. Prepare bylaws for the organization that will outline governance structures, voting procedures, membership categories and criteria. Determine the core activities of the coalition. Prepare a short-term action plan for the coalition.

All such planning must be done on a consultative basis, not only with the taskforce, but also with a gradually expanding group of stakeholders, for they are, of course, potential members.

While some coalitions are only composed of services firms, others are made up of services associations. Some coalitions are housed in chambers of commerce or national trade promotion organizations, and some are independent. Examine international models, reflect on your national circumstances and determine what will work best in your country.

6. Secure financial support. Prepare a funding proposal for the government and other funding institutions. This can include ‘seed funding’ to cover the initial steps required to pursue longer-term funding. Funding should at least cover financing for a manager and an assistant (both part-time if

necessary), and the funds or in-kind support necessary to undertake an aggressive public-relations campaign that should raise awareness about the role of the emerging coalition and build support for the organization.

Reach out to both public and private-sector actors, including large services firms operating in the country or region, the local government, bilateral and multilateral donors, private philanthropic bodies, and diaspora. Secure at least one year's funding before launching a robust work programme, to ensure the survival of the initiative.

7. Before launching the coalition, ensure that all procedures are formalized, paying particular attention to membership procedures. It is essential for the CSI to have a professional tone from the outset and not appear to be motivated by the ad hoc interests of the main drivers. Formalizing procedures in this way minimizes the possibility of partisan agendas monopolizing the CSI and bolsters the CSI's reputation for delivering as an organization.
8. Launch the coalition. Invite key public and private-sector leaders, national trade support institutions and the media. Secure high-profile public and private-sector speakers, including, for example, international speakers who can contribute their experience and voice support for the CSI.
9. Take the next steps. Convene a general meeting to ratify bylaws and to elect a board of directors. Incorporate the organization. Hire a professional staff. Ensure sound financial-management systems, and consider adopting a project-based accounting approach.
10. Monitor, evaluate and report. The coalition will be called on to defend its existence, especially if it relies on public funding. Be prepared to justify operations by continuously monitoring progress and accountability.
11. Reach out to international coalitions and coalition networks such as the Global Services Coalition and its members. The ITC Global Services Network provides one such means of doing so.¹²

Being aware of the potential impact that the establishment of a new CSI may have on stakeholders with a vested interest in the sector is an important strategy, both for repudiating potential criticism and for garnering widespread support. To this end, table 2 below surveys the potential impact that the establishment of a CSI may have on various stakeholders involved in the services sector.

¹² The European Services Forum (2014). Global Services Coalition. Available from www.esf.be/new/links/global-services-coalitions/.

Table 2. Potential impact of establishing a CSI on various stakeholders

STAKEHOLDER	POTENTIAL IMPACT	IMPACT CHANNEL
Government	A more 'pro-services' government culture	Raise the profile of the national services sector, encouraging investment to enhance competitiveness, foreign exchange and contribution to growth and development
	Improved knowledge and responsiveness	Collect information and views from the private sector (e.g. data), and disseminate this across the private sector
	Better services policies	Act as an efficient interlocutor that can serve as a credible voice for the sector and help officials engage better with its members for mutual benefit (e.g. economic reforms, free trade agreements)
Trade Negotiators	Better-informed negotiating positions	Act as a platform from which information on private-sector positions and developmental needs on trade negotiations may be readily obtained
	Improved trust	Facilitate transparent consultation, which in turn leads to the incorporation of private-sector views in national positions
	Improved implementation	Assist in the simplification of technical trade information to ensure a better understanding at private-sector level
Industry Associations	Increased advocacy power	Improve advocacy leverage for services associations with governments and international agencies
	Higher-quality member services associations	Assist in establishing new associations and strengthen existing ones through administrative and developmental support, and by promoting high standards and best practice
	Promoting export-oriented services	Instruct services associations how to provide export-focused services to their own members
	Better-coordinated services strategies	Facilitate progress in areas where coordination is needed between different national sector associations
	Networking	Increase contact between national coalition members, and facilitate international contacts (e.g. on regional level)
Services Providers	Improved awareness of and representation for policy issues	Provide accessible, non-technical information (e.g. web platforms) on trade in services issues that can have an impact, either positively or negatively, on overall private-sector competitiveness
	Access to improved information on opportunities	Provide market information and export promotion activities, facilitate national and international networking opportunities, and help form strategic alliances
	Capacity-building activities	Provide training and support to enhance the competitiveness of the private sector
	Reputational benefits	Bolster services providers through association with a coalition, or initiatives such as awards programmes
Public	Improved awareness	Raise the profile of the services sector and related policy issues to build support and to ensure that the value and contribution of the sector is understood

Source: Hustler, Michelle and David Primack (2012). *Harnessing Services Trade for Development: a background and guide to service coalitions in Africa and the Caribbean*. Toronto: International Lawyers and Economists Against Poverty. Available from <http://c-nsc.org/resources/coalition-resources/>.

3. Structuring a support system: stakeholders and initiatives

The Introduction and Chapter 1 establish the importance of services to national economies in terms of GDP, employment, foreign direct investment and poverty reduction, and identify the vast opportunities that exist for services exporting, both for its own sake and as a component in global value chains (GVCs). Chapter 1 also identifies challenges related to the development of the sector, such as inadequate support from governments and TSIs.

This chapter proceeds to a consideration of how to structure a support system once a CSI has been established, and how to tackle the challenges outlined in Chapter 1. The first step a CSI champion or a CSI can take to improve this situation and to catalyze services-sector development is to plan.

In order to maximize resources, improve the success of the CSI's efforts and build credibility among services-sector stakeholders, it is necessary to approach member engagement strategically. To succeed, a new CSI will need a proactive team, an initial strategy, a work plan, commitment to its implementation and, of course, resources.

Activity

- Taskforce and work-plan development

Objectives

- To develop a taskforce that will focus on the provision of new services to services providers; and
- To articulate the case, and to outline the elements needed, for developing a services sector competitiveness roadmap, an initial strategy and a work plan

How to structure a support system

1. Educate yourself. Whether you are spearheading the establishment of a new CSI or are a member of a CSI board of directors or management team, it is important to educate yourself on the trends and best practices in services-sector development. This is a relatively new area, and your initial understanding of the sector may be weak. Investigate the differences between goods and services, the distinct ways in which they are traded and the types of support that may be required by services providers to boost services exports. Review the publications available on the ITC website. Many useful resources are available. Build your CSI network and monitor activities undertaken by CSIs across the world.
2. Identify champions from among your members or, if you have yet to establish a CSI, from among your peers. The role of the champions will be to provide feedback on initiatives and to raise awareness about and interest in these initiatives, both within and outside the organization. Champions should ideally be business leaders and services exporters.
3. Identify stakeholders. To support your organization's members effectively, your network will need to expand. Identify those who should ideally be involved in your efforts. Undertake a mapping of relevant TSIs, developmental organizations, industry association representatives, public-sector representatives and private-sector leaders. Involve them in the planning and development processes as appropriate. Studies have shown that actors involved in the planning phase of initiatives are more likely to become involved in the resulting projects.
4. Survey your membership. Assess your members' needs and challenges with respect to services exporting. This should be done on a regular – at least annual – basis.
5. Convene a planning committee. This committee should include board members, members of your organization and champions, as well as other important stakeholders identified above. It is useful, for instance, to have a public-sector representative on the planning committee to provide public-

sector feedback, to raise awareness and to support your organization's efforts at the public-sector level. Committee officers must have the time, and the enthusiasm, to commit to the initiative.

Tip: Where necessary, consider involving university students in trade, business or international development programmes to support the efforts of the planning committee. Students can undertake activities such as taking minutes, conducting surveys, organizing meetings, developing initial databases, conducting policy research, preparing press releases and other marketing material, and can generally support the efforts of the committee. In so doing, they can reduce the implementation burden and enable the committee to focus on strategy.

6. The planning committee's role at the outset will be to set priorities and to develop a work plan. For established CSIs, the planning committee's role will be to strengthen the CSI's services-sector development strategy. Use this guide to identify work-plan activities. Activities should ideally include research and analysis, communications, competitiveness-enhancing activities, services SME internationalization and advocacy, particularly with respect to the enabling regulatory environment for services exports operating in your country.

The work plan and strategy should include a list of resources required, as well as timelines for implementation and outlines of the roles and responsibilities of individual officers and members.

Be realistic from the outset about the resources at your disposal. Work-plan activities should be approached in an innovative and cost-effective fashion. Aim to generate funds from CSI activities. Focus in particular on those activities that will bring quick results while providing the highest impact. Your work plan might be broken down into phases to assist in the prioritization of activities.

7. Board members should approve the work plan and ensure that resources are available for its implementation.
8. Share the work plan with members. Solicit feedback, adjust accordingly and ensure buy-in.
9. Approach corporate sponsors to support the funding of specific elements of the work plan. Such elements might include, for example, services-exporting workshops in collaboration with sponsor X or a services week funded by sponsor Y.
10. Consider hosting a launch event. Invite all stakeholders, potential sponsors and the media, and inform them of your organization's new member offerings. Secure high-profile public and private-sector speakers. Use this occasion as an opportunity to highlight the importance of the services sector and trade in services. Prepare a media kit for the event.
11. Following the launch, the taskforce should continue to meet on a quarterly basis to review the efforts of the organization.

4. Research and analysis: supply side capabilities

The first concrete step a newly established CSI should take is to assess the state of the national services sector. Frequently, only limited statistics on the sector will be readily available. Statistical measurements of the sector's full contribution to GDP may well be inaccurate, while sub-sectoral data (beyond a few key and perhaps more readily measured sub-sectors, such as business process outsourcing (BPO), tourism and financial services) are likely to be non-existent. Overall, it is highly probable that there will be no holistic understanding or map of the sector for your consultation.

This lack of data is one of the major reasons the services sector is poorly understood and inadequately supported. Development strategies, after all, should ideally be based on solid, empirical data and research.

While it may not be possible to collect comprehensive information on this sector – given the absence of a cooperative and large-scale undertaking involving both the public and private sectors – CSIs can, with determination and effort, collect valuable data. While quantitative data are of course vital, do not overlook the importance of qualitative material, such as business stories and anecdotes, for building an evidence base for policy and regulatory advocacy purposes with government.

Becoming as familiar as possible with your national services sector will enable your organization to offer services that best meet your members' needs, and will provide your organization with a valuable niche offering – intimate knowledge of the services sector – that can be monetized going forward.

Activity

- Services-sector statistics and data collection

Objectives

- To undertake quantitative and qualitative data collection that will complement the official statistical collections and provide an improved understanding of the scope and size of the services sector, including sub-sectors;
- To assess the strengths and needs of the services sector with a view to developing relevant strategic interventions; and
- To gauge the strengths of services exporters and services sub-sectors.

How to undertake services-sector data collection

1. Establish a database of services providers. This is distinct from your members' database and should ideally encompass as much of the services sector as possible. This can be started using your country's business listing directory, such as the Yellow Pages, as well as the Internet and social media. Compile a listing of all industry associations. Seek member listings from the associations. Where possible, secure member listings from national TSIs. If public business registration records exist, secure these as well. Continue to build the database in a disciplined fashion – this is an ongoing exercise and requires constant updating.

Market the value of the database as a channel for collecting and disseminating information to services providers. Depending on the CSI's reputation and past successes, and on your own marketing efforts, services providers should actively seek inclusion in the database in order to access information and have a 'voice' in services-sector development.

The database could also provide the basis for the development of a services directory or sub-sectoral directories. This would, in turn, further motivate services firms to enlist, given the benefits of heightened marketing exposure that the directory would offer, especially in potential client markets.

It is also important to consider the implementation of a customer relationship management (CRM) system, otherwise referred to as a constituent relationship management system. The database of services providers is likely to become large and complex, so a good CRM system is vital for managing this information and for your organization's relationship with services providers and stakeholders. The system records sound profiles and descriptions of other actors' interactions with the coalition in a harmonized database – in other words, it records who is engaging with you, and on what terms. This information will enable your CSI to communicate more effectively, targeting the right people, with the right message, through the right channel. There are many CRM solutions available online; [Zoho](#) and [SalesForce](#) are two examples, but spend time investigating which would best serve your organization.

2. To be effective, the database will require information besides company names and contact details. With free online web applications, CSI officers can develop a detailed database with minimal financial resources or time commitment. A few examples are listed below. Consider engaging interns or university students to assist with this effort.

Detailed information collected on the services sector facilitates a more nuanced understanding of the sector and enables the CSI – as well as other stakeholders, such as governments and funding institutions – to provide more tailored support. With consent, detailed information can also be 'on-provided' by the CSI to the government, investors, consultants, researchers and so forth, offering a potential source of income for your organization. This process might seem resource-intensive, but it provides the initial material required to secure the funding necessary for the development of a more thorough, professional analysis of the services sector.

Through surveys disseminated among database members and your CSI membership, collate the following information: company profiles, including the number of employees, length of time in business, services offerings, standards and qualifications; export activities, including current markets, markets of interest and modes of export; challenges, such as business and export constraints; members' specific needs; and suggested recommendations, both for your organization with respect to member services and for the government with respect to policies, procedures and incentives. As flagged above, surveys should solicit both qualitative and quantitative data, which can be collated in your CRM system.

Rather than trying to collect this data through a single survey, it is best to aggregate information collected over time and through multiple surveys. Begin with a survey of your members, establishing in-depth company and export profiles. Update the information annually; consider making survey completion a criterion of membership renewal.

Brief surveys can be circulated to the wider services sector every other month. Consider using an online survey tool to facilitate the survey process. Again, there are many free, online tools to facilitate this process, and it is important that you research which best caters to your specific needs. [Survey Monkey](#), an online tool that integrates many CRM systems for data attribution, is one example among many. Greater brand awareness is one indirect benefit that your CSI will derive from regular, sector-wide surveys. Such assessments reinforce the name and the role of the CSI among sector members, and promote CSI credibility among potential members.

The database should ultimately provide a profile of the national services sector, including active services providers, data on services exporters (such as markets of interest and challenges) and an indication of sector-specific needs.

3. Seek to involve other industry associations in the collection of information from their members (see Chapter 5). As flagged above, survey completion can be a criterion of annual membership renewal.
4. Meet with the governing board or president of other key industry associations, including services sub-sector associations, and conduct a survey tailored to those industry and professional associations. This face-to-face interaction will result both in dialogue and in a better understanding of the challenges and opportunities that the whole sector faces.

5. To encourage further participation in surveys, show a gesture of good will by sharing general results of the review and any action points your organization undertook in response to these findings. The CSI will build trust through reciprocity, and database members are therefore likely to be more willing to share information in the future.
6. Sensitize services providers to the importance of trade in services data for the development of the sector, and encourage them to be forthcoming in the provision of this information.
7. Your organization probably will not have the resources or expertise to collect comprehensive statistics on the performance of the services sector and sub-sectors. Having developed a large services database and cultivated relationships with services providers, however, your organization will be better placed to facilitate the collection of this information by the national statistics office or department, demonstrating the organization's value.
8. Organize services-sector consultations, where services issues – such as trade-policy proposals and trade-negotiation strategies – can be presented and discussed. These consultations can be organized in collaboration with all services-sector stakeholders – including services providers, governments, TPOs, TSIs, educational institutions and so forth – and should be held on a regular basis, for instance twice a year. Again, where possible, record information at these events for entry into your services database.
9. Collect all existing reports related to the services sector, including export strategies, sector studies and market briefs. This information will likely be spread out across national and even international organizations, so be prepared for collation to involve a lengthy research process. Make all public reports available through your organization's website, and publish brief summaries with each report so information can easily be accessed.
10. The information in the database will form the basis of a national services-sector strategy.
11. The database will serve as a services-sector baseline, through which changes can be measured over time. Save evolving versions of the database rather than saving older database information.

Fledgling CSIs may have scarce resources. If regularly undertaken, however, brief surveys – using the right software, in conjunction with student or volunteer resources – should not pose a significant burden. The information acquired will prove to be a valuable resource for your organization.

5. Raising awareness: from information to action

In general, trade in services is not well understood. This is the result of several factors.

First, due in part to the intangibility of services, collecting services data is difficult. Typically, data on trade in services are limited, a difficulty that is particularly relevant for developing countries and transition economies. This lack of information inhibits effective support and prevents sound, evidence-based policy.

Second, the services sector is heterogeneous. It comprises many sub-sectors, each with its own intrinsic needs and complications. The World Trade Organization (WTO) Services Sectoral Classification List, for instance – known as W/120 – is a services classification system that has been used to structure the commitments of WTO members in negotiations. However, this classification has 140 categories.

A further barrier to a more nuanced understanding is that services negotiations are technically complex, conducted through trade-specific terminology that is not readily understood outside the realm of trade specialists and economists. Unfortunately, information on trade in services drafted for a general audience is limited.

Finally, services markets tend to be fluid and can change quickly with the introduction of a new competitor or technology, or a new services offering. Market intelligence is accordingly difficult to acquire, and tends to be costly.

The lack of understanding about the services sector and trade in services is largely responsible for the scepticism surrounding benefits of services exporting. As a result, businesses fail to take advantage of growing global trade in services opportunities, and governments fail to create a business environment that encourages and supports services trade.

Despite these barriers, progress in increasing awareness of the services sector – such as, for instance, through the work of the ITC's Trade in Services Unit – has been considerable. Therefore, these challenges should also be viewed as opportunities for growth.

One of the most pressing activities that your CSI should undertake to combat these challenges is to raise awareness about the opportunities and benefits that the services sector can contribute to your country. A positive public-awareness campaign of this nature will generate interest both in your organization and in its member offerings. Greater interest in the efforts of your CSI is likely to produce stronger support for the development of the services sector from a range of stakeholders. As discussed in chapter 4, capitalize on the momentum gained for the sector by substantiating success stories with data collated in your database.

Activity

- Trade-in-services public-awareness campaign

Objectives

- To promote the importance of the services sector and trade in services, and to encourage governments and other stakeholders to support the development of the sector;
- To create awareness of the potential of services exporting, and to encourage your organization's members to export; and
- To establish credibility for the national services sector, which will result in increased export and inward investment opportunities.

How to undertake a trade-in-services campaign

1. Develop a communications plan. Important factors to consider are: your key messages; your target audiences; the types of information to be shared; the most effective communication vehicles; and the resources at your disposal.

- Key messages: create compelling messages that will motivate your target audience. You are ultimately endeavouring to encourage services exports, so be positive and persuasive.

Explain what services exporting is, and highlight regions and sub-sectors where it is already happening successfully. Be aware that many services exports are in fact not recognized as such. Exports related to the tourism sector, for instance, or to health and wellness services, and services sold over the Internet, such as translation or graphic-design services, are routinely miscategorized.

Publish inspiring statistics on the size of the services sector and its contribution to employment and foreign-exchange earnings on your website and social media accounts. Statistics can be found through international agencies, such as the OECD-WTO trade in value added database, or traditional balance of payments data.

Highlight the potential of services exporting by showcasing success stories in your country and in countries of comparable resources and demographics, and by providing trade-in-services opportunities.

Emphasize the benefits of services exporting to the national economy.

- Target audience: your target audience might include, for instance, members and potential members, the government and government-sponsored organizations, non-governmental organizations, the general public, strategic partners, local and international development organizations, and the national and regional media.

Recognize that different types of information will motivate the respective target audiences. While trade-in-services opportunities might interest your members, government officials will be more interested in trade-in-services data.

- Types of information: share as many types of information as you have access to, including statistics, CSI news and success stories, trade news and information, recent trends, sector-specific information, local and international services exporting examples, services events, and funding opportunities for trade and business.

Keep your information interesting by providing a compelling mix of facts, statistics, opinions, controversy, research papers, and succinct 'Did You Know?' type pieces.

- Communication vehicles: be sure to feature trade-in-services information, national success stories and opportunities on your website. Circulate monthly e-newsletters to your members. Utilize social media as a platform for discussing trade-in-services issues with your members. Negotiate the establishment of a monthly newspaper column on trade in services with your local newspaper. Host regular workshops on the topic. Offer to speak at services events, such as industry association annual general meetings, for instance, or at meetings held by local volunteer and community service groups, such as Rotary, Lions Clubs or Kiwanis.

Communication need not be expensive. Develop your information technology skills and familiarize yourself with web applications that can assist you in achieving your goals. Drag-and-drop website development tools such as Weebly or Wix enable individuals with even a basic level of computer literacy to develop a website free of charge. Other examples are available online. Social media, including Facebook and Twitter, among other platforms, similarly provide low-cost solutions to communication needs. Free, professional e-mail marketing can also be conducted through online applications such as, for instance,

[MailChimp](#) or [Campaign Monitor](#). As with all online tools, do your research to determine which will best cater for your needs; the ITC does not advise on or endorse any particular resource or platform.

Videos provide an effective vehicle for information dissemination and consumption. If your organization has creative, tech-savvy staff, consider developing a video. Many high-quality free or inexpensive tools that are available online can enable your organization to develop a video for posting on your website. If your country has a government television station, explore the possibility of the station airing the videos.

2. Keep it simple and clear. The abundance of information available on the Internet competes for your target audiences' interest. Keep your messages short. Use infographics, where possible, and pay attention to the design element of your messages. Avoid excessive trade jargon, and explain complicated trade issues in everyday language.
3. Include a 'call to action' in your communications: what should the target audience do next, and how can it acquire additional information?
4. Support investment-attraction efforts through awareness building. Establish a partnership with the national investment agency. Ensure that information on the range and quality of services is communicated to possible investors and promoted via the investment agency's website and publications.
5. Spread the word. Encourage other national entities to share trade in services information. Facilitate this process by providing these entities with core messages for promotion. Consider targeting the websites of key governmental ministries – the ministries of trade, commerce and foreign affairs, for instance – as well as other national TSIs and TPOs, trade officers stationed abroad, official government speeches, in-flight magazines, diaspora networks and participants on inbound trade missions.

Develop a trade-in-services media kit that provides general information on trends and statistics about the international and national services sectors. Keep this media kit current and circulate it on an annual basis.

6. Consistency is key. Trade-in-services information should be circulated on a predictable and regular basis. 'Start-and-stop messaging' will not generate the support required, so plan your campaign and communications timetable ahead, and ensure you adhere to it.
7. Prioritize communication efforts. Focus on effective dialogue with CSI members before opening up communication with the general public. Similarly, concentrate your efforts nationally before engaging internationally. To this end, maximize the available resources.
8. Monitor trends. Follow trade-in-services happenings by setting [Google alerts](#), for instance, or by using social media monitoring tools. [HootSuite](#) or [Social Mention](#) are two social media dashboard options, and many more are available online.
9. In some instances, your CSI may need to engage in defensive action. Monitor your own online and public reputation, and counter any negative media – particularly negative information in the international media related to your national services sector – with a positive and well-informed public-relations strategy.
10. Host a services week. This event could comprise workshops, networking events, a trade show element and sector-specific activities. The issuing ceremony of a services awards initiative (discussed below) could feature during such a promotional services week. Where possible, ensure strong media coverage of the event. This will, of course, depend on the freedom of press available in your country. Whatever the situation, endeavour to build a constructive relationship with the national press.

11. Create an awards programme recognizing export success. To keep expenses down, the programme can be held primarily online. To generate interest and to promote discussion on trade in services, allow a 'people's choice' element of the programme, where voting can be held on social media platforms. The winners and their achievements should be well publicized.

Award categories might include best services innovation, services-export success, market-entry success and best first-time exporter.

12. Many countries host successful manufacturing expos. Speak with the organizers and negotiate a focus on services providers. The organizers may be willing to consider establishing a services section at the expo, or to collaborate with your organization to develop a new services-specific trade-promotion event. When seeking cooperation of this sort, emphasize that services are embedded in goods exports.
13. Develop a directory of services firms. The directory should outline services offerings and be available not only on your own website, but also on other key sites such as the national ministry of trade, for instance, or the national investment agency.
14. Evaluate your communications efforts. Many online communications tools have built-in reporting mechanisms. Endeavour to assess the impact of your communication efforts. Determine what did and didn't work, and continue to improve.

6. Enhancing competitiveness: SME skills upgrading

By enhancing the competitiveness of services providers, CSIs can increase services exports, improve value chains, augment inward investment and, eventually, foster a positive international reputation for quality services on a national and sectoral basis.

Successful, internationally competitive services SMEs tend to be highly competent in three key areas: they offer services of a high standard, possess general business and entrepreneurial skills, and have developed services-exporting skills, including an understanding of knowledge-intensive industries. While a talented web developer, musician or physician, for example, may be technically excellent, their business will be unlikely to succeed domestically, let alone internationally, without equivalent expertise in business and export skills.

In developing export-focused, competitiveness-enhancing services for your members, your CSI should consider the three key areas listed above.

Activity

- SME services skills-upgrading programme

Objectives

- To enhance the international competitiveness of services providers through efforts that support the improved quality of services and the development of both business and export skills

How to develop a services SME skills-upgrading programme

1. Collect information. Identify your members' export interests, experience, training needs and qualifications through tailored membership surveys. Undertake research and determine the internationally recognized, sector-specific best practices with regard to qualifications, and any market-driven standards that might affect your operations. Audit the standards of your members against the international standards and ascertain where gaps exist. These gaps, along with the other information derived from the membership surveys, present training opportunities.

It may be necessary to commission research on the strengths and needs of the services sector to develop a solid understanding of the status of the sector and the priority sub-sectors.

Work with your association members both to gather and to disseminate the information that your organization has collected on sub-sectoral specific international benchmarks.

2. If your organization is well equipped, as some of the more developed CSIs are, rent your training room to your sub-sectoral association members and encourage them to conduct training sessions with their members.
3. Host shared services events. Hire business-support professionals, such as marketing consultants, attorneys, accountants and information technology consultants to offer guidance and advice to members during a comprehensive event held on a quarterly basis; picture a business 'open house' type of activity. If resources permit, ensure your members can consult with these professionals for a reduced fee.
4. Establish an entrepreneurial club through which like-minded businesses can meet in an informal setting to discuss business best practices and challenges, build networks and create alliances. Alternatively, establish an online entrepreneurship forum on your organization's website.
5. Host shared, continuing professional development (CPD) training sessions. It is not unusual for services providers from developing countries to have to travel abroad to undertake CPD or certification courses. If a critical mass of your members is interested the same training, it may be

cheaper to commission the trainer to conduct the session locally. This reduces both the time and cost of participant travel, and participants can share trainer expenses.

Ensure that the skills and qualifications for this training adhere to international standards in order to maximize the opportunities that the training can create.

6. Ensure that your members are aware of any capacity-building workshops being held by other national business-support groups. Consult with TPOs and TSIs about their training programmes so you can identify any gaps between the needs of your members and the workshops offered. Cooperate with these organizations to fill any generic gaps across both goods and services firms. Ensure that any training provided through other business associations is appropriately tailored for services firms and services exports; topics might include business planning and strategy, effective communications, marketing, networking, contracting, proposal writing, time management, effective presentations, negotiations, intellectual property, leadership, innovation, value adding and value chains.
7. Host services-exporting workshops (these can be half or full-day sessions). Consider how and when to reach your membership to deliver services-exporting and business workshops. Occasions to reach members might include sector-specific events such as the feature workshop of your Annual General Meeting (AGM) or the AGMs of interested members, during the preparation for trade shows or trade missions, or on a predictable and regular basis.

Consider hosting services-exporting workshops on, for instance, understanding trade in services, assessing export readiness, developing export and marketing plans, market research and intelligence, assessing market-entry options and exploring export strategies.

Review the resources available from the [ITC publication catalogue](#). Many useful resources are also available on the website of coalitions of services industries around the world; see, for example, the [Caribbean Network of Service Coalitions](#).¹³

8. Offer online coaching services to help members develop export plans and become services exporters. Tailored support will likely result in higher levels of success, the stories of which can in turn be shared with members to encourage export interest and uptake of your organization's services.
9. Launch a public-awareness campaign that highlights services quality. Many services sub-sectors in developing countries are unregulated, and consumers frequently seek out the lowest-priced services. The combination of these two factors often results in low-quality services unfit for the international market.

The quality of the services sector is an important determinant of the quality and productivity of all sectors, including manufacturing, agriculture, mining and the wider services sector. Encouraging businesses to adopt high-quality business-development services in their own companies nurtures cycles of excellence, because in doing so, these businesses improve the quality of their own services offerings.

Initiate and facilitate efforts at both the governmental and professional self-regulatory level to ensure compliance with services standards.

¹³ The Caribbean Network of Service Coalitions (2014). Available from <http://c-nsc.org/>.

7. Services SME internationalization: outreach and strategies

Exporting is a process. This process begins with the development of internationally competitive services offerings, is reinforced by a well-conceptualized export strategy, is supported by export-promotion activities, and ultimately results in successful and sustainable export efforts by CSI members. Your organization should seek to offer services that will appeal to members throughout their export process.

Dissuade your members from engaging in market-penetration activities prematurely, that is, before they have achieved an appropriate level of export readiness. This is important for capitalizing on the resources that you and your members have invested in export-promotion activities, and for preserving both their reputation and the reputation of your country as a supplier of high-quality services.

A range of export-promotion services is necessary for success. Your organization should play an active role in providing the required services, in collaboration with the national TPO. Traditional export-promotion activities – such as trade missions and trade shows – alone will not suffice. Such activities must be tailored to the specific needs of services SMEs.

Activity

- Services SME internationalization programme

Objectives

- To support export-ready services firms in successfully penetrating new markets;
- To provide a range of support services for first-time and seasoned exporters alike; and
- To build the capacity of services firms to consistently and sustainably engage export markets.

How to develop a services export-promotion programme

1. Develop an export-readiness assessment and encourage potential exporters to undertake the assessment.¹⁴
2. Networks are critical to services exporters. Consider your members' target markets – this information can be identified through member surveys as discussed above – and then work on building relevant networks that will ultimately support their export efforts. Your network might include, for example: the diaspora; counterpart organizations abroad; expatriates and other foreign residents in your country; citizens who have studied abroad; returning nationals; embassies; and consulates. Add this network to your mailing lists, and invite them to your organization's networking events and other activities.
3. National networks are also important. Strategic alliances, clusters and consortia can be critical to successful services exporting. Host networking events on a regular basis among complementary services sub-sectors, and across all services sectors.

Your organization is likely to have wide and intimate knowledge of your national business community. Use this information to your advantage by referring complementary member firms to each other.

Further support the establishment of clusters by organizing regular stakeholder meetings, and support planning and development efforts.

¹⁴ Hustler, Michelle (2013). *Strategies for Service Exporters: are you export ready?* Available from http://c-nsc.org/download/strategies_series/GIZ%20AYER%20booklet%28web%293.pdf.

4. Stay abreast of the latest networking trends and best practices for professionals, and share this information with your members through private member newsletters or blogs.
5. Collect and undertake market research and market intelligence. Prepare market and country briefs. ITC has an extensive [e-library](#), including a listing of useful market-research links. Recognize that services markets are fluid; specific market-research results might need to be verified immediately prior to market penetration efforts.
6. Work with your networks and trade officers abroad to identify export opportunities. List these opportunities on a members-only section of your website.
7. Assist trade officers abroad in better supporting your members. Communicate with them your needs and the needs of your members.
8. Encourage your members to meet with delegates on inbound trade missions, in order to discuss strategic alliances.
9. In collaboration with the national investment agency, provide networking opportunities between your members and potential investors. Ensure that potential investors have access to a national services directory (see Chapter 4).
10. Conduct study tours to target markets and undertake on-the-ground market research. Assess opportunities, gauge competition and take heed of market standards and cultural differences in conducting business. Meet with national TPOs and other relevant TSIs to discuss alliances.
11. Carry out sector-specific and multi-sector trade missions to target markets.
12. Conduct trade missions to development banks, advocating services SME financing needs.
13. Use online [conferencing tools](#) to host virtual networking events and virtual trade missions.
14. Develop an online partner database and discussion forum for members. Provide a company profile, identify their partnership needs, seek partners in the database and establish appointments with potential partners.
15. Promote the establishment of strategic alliances into global value chains (GVCs) as a services-exporting strategy through awareness-building efforts on the topic.
16. Regularly follow up with members engaging in market-penetration activities. Take note of any barriers to trade, and inform your national ministry of trade and trade negotiators of these barriers.

8. Government regulations: advice and guidance

Governments traditionally tend to prioritize the manufacturing and agricultural sectors. There are many reasons for this, including the limited understanding of the services sector – reflective of the lack of services data – addressed earlier in this guide, as well as the historical, political and habitual connections to the manufacturing and agricultural sectors and the key players therein.

Governments should, however, play a critical role in the development of the services sector. The scope for government leadership includes negotiating improved market access, creating an enabling regulatory and legislative environment, and providing export-promotion support such as incentives, infrastructure development and education.

The role of any CSI – be it in a developing or a developed country – is to petition the government to take the initiative in these areas. To support members fully, a CSI must cooperate with the government, serving as an interlocutor between the government and the private sector, sharing and collecting information, and advocating on behalf of the two.

Meaningful services-sector development requires the removal of domestic regulatory and other impediments to competitiveness to boost productivity. Significant impediments might include domestic restrictions on foreign investments and acquisitions, prohibitive taxation, discrimination in licensing, restrictions on the repatriation of earnings and a lack of legal recourse. Recent World Bank research has shown that these impediments can reduce the expected value of sectoral foreign investment in highly regulated countries by US\$ 2.2 billion over a seven-year period, compared to more open countries.¹⁵

A priority task for CSIs should therefore be to lobby the government to remove these impediments to boost productivity.

To this end, CSIs are integral to the establishment of public/private dialogue mechanisms through which private and public-sector actors can meet to discuss key business issues and private-sector constraints, and to establish priorities for sector development. This mechanism – be it a council, an association or a working group – can institutionalize the relationship between CSIs and private services providers, on the one hand, and the government on the other, providing a platform for designing and implementing actions to improve competitiveness. Public/private dialogue champions, much like CSI champions, can facilitate the smooth operation of the mechanism. They should be drawn from both sectors, have the political and technical credibility to generate support, and be committed to championing the reforms, both regulatory and otherwise, necessary for boosting services competitiveness.

Activity

- Enhancing government relations

Objectives

- To institutionalize the relationship between a CSI and the government;
- To encourage the government to support services-sector development; and
- To cooperate with the government towards services-sector development.

How to enhance government relations

1. Collaborate with the government to include services in national competitiveness road-mapping exercises and lobby for the drafting of an export-development strategy.

¹⁵ Borchert, Ingo, Batshur Gootliz and Aaditya Mattoo (2012). Policy Barriers to International Trade in Services: evidence from a new database. Policy Research Working Paper, Vol.1. Washington, D.C.: World Bank. Available from http://econ.worldbank.org/external/default/main?pagePK=64165259&theSitePK=469372&piPK=64165421&menuPK=64166093&entit yID=000158349_20120628132350.

2. Support the government in building awareness of the importance, and in boosting the credibility, of the sector (see Chapter 4). Governments should promote the capabilities of the sector to potential investors.
3. Document the barriers to trade experienced by CSI members and the wider services sector – data may be gathered through surveys – and provide this information to governments so they can work with trade negotiators to mitigate barriers. See, for instance, a 2012 World Bank database on policy impediments to international trade in services.¹⁶ In addition to the impediments listed above, further barriers to trade in services may include:
 - Non-recognition of qualifications;
 - Restrictions on foreign participation in the market (including public procurement);
 - Nationality requirements and costs associated with accreditation procedures;
 - Restrictions on visas and work permits; and
 - Registration and certification, including transparency in procedures.
4. Provide the government with position papers on trade in services matters, including current trade negotiations. The plurilateral Trade in Services Agreement (TISA), for instance, which is being negotiated among more than 50 countries and covers 70% of global trade in services, is likely to influence future multilateral trade negotiations.¹⁷
5. Organize services-sector consultations in partnership with the government in order to provide input into trade negotiations, trade policies and incentives. The government should have a clear understanding of the services sector's position on all matters related to the sector.
6. Petition the government to allocate an ongoing budget to support services-sector development. Help to show the government a return on investments, including the generation of foreign exchange, through the collection and presentation of useful trade information such as data, statistics and success stories.
7. Inform the government of the key services sub-sectors in which your country is particularly competitive, and lobby for the liberalization of these areas at the multilateral level (i.e. WTO General Agreement on Trade in Services (GATS)).

Equally, work with the government to identify the human resources and skills required for an internationally competitive services sector, and support the development of these skills.

8. Lobby the government to advertise all public-procurement contracts through an online platform, and encourage your members to bid for services contracts. This is an important exercise, as the processes involved in pursuing contracts and working with the national government can assist these services providers later in pursuing government contracts in comparable export markets.
9. Encourage the government to address monopolies in the telecommunications sector. Given that almost every aspect of modern business and work practice has been saturated with information and communication technologies, a healthy telecommunications sector is vital to trade competitiveness. Indeed, the links between Internet penetration and services competitiveness are increasingly recognized in trade-policy recommendations.¹⁸ Governments should make certain that the fees and access speeds of telecommunications (Internet) are globally competitive.

¹⁶ Borchert, Ingo, Batshur Gootliz and Aaditya Mattoo (2012). *Ibid.* 45.

¹⁷ Coalition of Services Industries (2015). Trade in Services Agreement (TISA). Available from <https://servicescoalition.org/negotiations/trade-in-services-agreement>.

¹⁸ Freund, Caroline and Diana Weinhold (2002). *The Internet and International Trade in Services*. Available from <http://eprints.ucl.ac.uk/18140/1/18140.pdf>.

10. Lobby the government to ensure equal treatment for services providers, farmers and manufacturers, including the support received from TPOs, incentives and tax legislation. Governments should ensure that the requirements for accessing support are relevant to services providers.
11. Lobby the government to ensure adequate access to work permits, where necessary, to enable services firms to secure the appropriately qualified human resources.
12. Call for incentives for the ongoing training of employees. Encourage the adoption of entrepreneurship, innovation and core business and marketing skills in national primary and secondary school curricula.
13. Support the establishment of research centres for the services sector at local universities and in government agencies. This will encourage recommendations for the development of the sector as well as innovation.
14. Lobby alongside sub-sectoral services associations to ensure that standards in all services sub-sectors are appropriately regulated and enforced.

9. Drivers of competitiveness in services

Seven major drivers exert a determining influence over services competitiveness. These drivers, listed below, draw on recent firm-level evidence emerging from CSIs participating in the global services network, detailed business survey results from a 2012 study undertaken by the Asia-Pacific Economic Cooperation (APEC) Business Advisory Council and empirical results from a range of developing country services-export case studies recently undertaken by the World Bank.

1. Human capital: talent, education, skills, ideas, culture of customer focus;
2. Investment in intangible assets: corporate intellectual property (including business methodologies) and supportive environments for innovation;
3. Enabling digital and other infrastructure;
4. High-quality institutions and efficient domestic regulation;
5. Connectedness with international markets: trade and investment reform, standards, mutual recognition;
6. Organized services business advocacy and public/private stakeholder consultation; and
7. Deliberate national policy focus.

This list of drivers indicates that both governments and businesses can do a lot to enhance the opportunities for services exports. However, the strategies available to the policymaker in the public sector will necessarily differ from those available to services champions from the private sector.

An effective CSI should petition governments to prioritize as many drivers for competitiveness listed above as possible. Lobby the government to review trade policy and, ideally, to remove all regulatory and other barriers to competitive trade at the domestic regulatory level, as discussed in the previous chapter.

Activity

- Advocating for an enabling environment for competitiveness in services

Objectives

- To lobby for meaningful government support in promoting an enabling environment for services, including progressive policy and regulatory measures; and
- To ensure a level playing field for services SMEs.

How to lobby for regulatory best-practice benchmarking for services competitiveness

1. Collect information on best practices in services regulation among other services-exporting countries.
2. Participate in bilateral visits to CSIs or public/private dialogue mechanisms in neighbouring countries in order to share experience on regulatory practices.
3. Encourage the government to support public/private dialogue mechanisms in order to identify barriers to international competitiveness in services sectors.
4. Invite public sector and governmental participation in dialogue mechanisms with private sector and regulatory stakeholders.
5. Draft services-industry competitiveness roadmaps.
6. Encourage the government to draft a national strategy on services that includes regulatory and legislative reform for the promotion of trade in services.

10. Building hubs of services excellence

There is relatively little literature, and effectively no public-policy tools, available on how to expand a services industry or a hub of services excellence. Similarly, little has been published on how to train, attract and retain services skill sets, or on how to facilitate services innovation, collaboration and customer orientation.

Activity

- Developing hubs of services excellence.

Objectives

- To foster the domestic conditions that will enable local industry to attract global work onshore in the targeted sector;
- In so doing, to avoid the dangers typically associated with 'picking winners'; and
- To capitalize on the reduction of domestic regulatory impediments to local industry export success.

How to build a hub of services excellence

Building a services industry hub is about facilitating the clustering of services activities to create centres of specialized knowledge and expertise. This provides the momentum to assist other firms in the same sector. Clustering helps build a culture for innovation, which is critical for attracting global clients.

Building a services hub requires ensuring that the whole supply chain can operate effectively from within and through the hub; removing barriers to trade is therefore vital. The idea is that a hub will attract all players, and that the centre will thrive and expand by encouraging the highest value-added activities.

In people-driven services activities, creating hubs involves nurturing relationships. Attracting the most innovative expertise is crucial, because services industry reputations ultimately depend upon the quality of human capital. CSIs should encourage governments to assist as much as possible in this process.

In an education-services hub, for example, the ultimate goal of the centre is not only to advertise, sell, distribute and manage knowledge, but also to create new knowledge. The location of this specific activity is often a function of the quality of life, a culture of creativity and would also depend on regulation, as well as taxation and incentives. Further examples of hubs of services excellence might include a financial-services hub, a logistics centre, a cultural and creative city, or a medical-tourism hub.

The key ingredients for attracting a successful cluster of services providers into a hub include:

- Education and training, including vocational training;
- Digital infrastructure;
- Fast, reliable and affordable telecommunications links;
- Efficient regulation, e.g. a regulatory one-stop shop;
- Fast-tracking of inward investment proposals;
- Opportunities for collaboration between services firms and academic institutions so innovation can take place;
- Access to finance and possibly financial incentives; and
- Possible provision of some physical infrastructure space.

Creating a CSI: How ITC can help

Difficulties in measuring services data and overcoming entrenched governmental preference for traditional manufacturing and agricultural sectors, as well as a general lack of awareness about international trade in services, contribute to the sub-optimal uptake of the opportunities for growth that the services sector can provide SMEs in developing countries and transition economies.

The ITC Services Programme is designed to bridge this gap between the sector's potential and current practice. To this end, ITC generates and disseminates services-related trade intelligence aimed at the various stakeholders – including SMEs, trade support organizations and governments – focused on improving services competitiveness and advocating for increased trade in services.

To complement the trade intelligence and sector-specific information such as that outlined in this document, ITC provides practical training modules for CSI officers and other private-sector representatives to help current and potential exporters understand the factors driving competitiveness within the services sector. CSI champions can access trade intelligence and training modules on services exporting through the ITC website.¹⁹

Of particular relevance to private stakeholders interested in developing a CSI is a recent ITC training module, *Creating Coalitions of Services Industries*.²⁰ Written by Linda Schmid, International Trade and Development Adviser at Trade in Services International, this training module aims to assist SMEs, TSIs and TPOs by addressing important questions about the structure, purpose and operations of CSIs, particularly in developing countries and transition economies. This training module also includes an up-to-date bibliography with further resources – including technical papers, reports, press releases, websites and databases – on CSIs and trade in services. It is available at <http://www.intracen.org/uploadedFiles/intracenorg/Content/Publications/Creating%20Coalitions%20of%20Services%20Industries%20-%20final%20Low-res.pdf>. Further information for public sector officials is available online.²¹

ITC also provides technical assistance within certain industries – responding to demand from client countries – of particular significance or growing importance. The Services Programme focuses primarily on three clusters of services industries, namely tourism, transport/logistics/distribution, and information technology and information technology-enabled business services. For further information, please contact the ITC Trade in Services Unit through the details on the website.

Additional information on CSIs and trade in services may be found on official CSI and partner organization websites, including, for instance, the European Services Forum (ESF) and the Caribbean Coalition of Service Industries. For details, please consult the bibliography below.

¹⁹ International Trade Centre (2015). Publications catalogue. Available from www.intracen.org/itc/publications/.

²⁰ International Trade Centre (2014). *Creating Coalitions of Services Industries*. Geneva. Available from www.intracen.org/publication/Creating-Coalitions-of-Services-Industries/.

²¹ See, for instance, Aryada, Estella and Mark Hellyer (June 2013). Enhancing Services Trade: the role of government. Discussion Paper Number 15. London: Commonwealth Secretariat. Available from http://c-nsc.org/download/trade_in_services/Enhancing%20Services%20Trade-The%20Role%20of%20Government.pdf.

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