POLICY BRIEF

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Opening up Trade in Services

Opportunities and Gains for Developing Countries

Which sectors offer export success for developing countries?

What are the opportunities for intra-developing country trade?

Is export capacity enhanced by a well-developed domestic market?

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Introduction

Services, from health and education to telecommunications and transport, are becoming the single largest sector in many economies. Not only do they provide the bulk of employment and income in many countries, but in areas such as the financial or telecommunications sectors, services provide vital input for the production of other goods and services. So the efficiency of the services sector is crucial to the efficiency of the overall economy.

Trade in services is also growing. All developing countries have registered a considerable expansion of total services trade in recent years, although in many cases from low bases. And recent OECD work has shown that developing countries could stand to make significant gains from more open services trade, despite a general perception in much of the developing world that they will lose out if they open up to trade in services because their domestic service industries are inefficient and non-competitive. This Policy Brief draws on that work, which identifies concrete examples of developing country services exports in a wide range of sectors – such as audiovisual and cultural services, construction, business, computers, shipping and tourism – and investigates the economy-wide gains from services trade liberalisation. ■

Which sectors offer export success for developing countries?

While it is true that developed countries dominate services trade overall, developing countries are particularly successful in a number of sectors, such as audiovisual services, port and shipping services, construction services and health services (see Box 1).

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Box 1. **Successful export sectors for developing countries**

In **audiovisual services**, the international market provides the major source of earnings for the Indian film industry, with film exports growing from RS 2 billion in 1998 (198 titles) to RS 4.5 billion in 2000 (412 titles) and RS 5.25 billion in 2001. The US and Canada accounted for 30% each of total exports, followed by the UK at 25%. Thailand is also emerging as a player in the audiovisual industry, producing film, TV programmes, music and animation. ***Kantana Film and Commercial Production*** (*www.kantana.com*) provides production and post-production services for the TV and film industry, serving international clients such as 20th Century Fox, Warner Brothers and Lucasfilms. Kantana also undertakes joint film production with international companies, produces international TV commercials, music videos and documentaries and provides production support for international projects filming in Thailand.

In **port services**, a number of developing countries feature in the world's top 20 container terminals in terms of throughput, which between them account for 54.3% of total container shipping. And four of the top five are in developing countries (Singapore, Chinese Taipei, Korea and Hong Kong, China). Other developing countries in the top 20 include China (Shanghai), UAE (Dubai), Malaysia (Port Klang), Indonesia (Tanjung Priok) and the Philippines (Manila). ***International Container Terminal Services Inc.*** (*www.ictsi.com*) of the Philippines is involved in managing, operating and developing container ports and terminals worldwide. In addition to several ports in the Philippines, the company operates six terminals overseas, including in Brazil and Poland, and is looking to expand in Asia, the Middle East and the Americas.

In **construction** (classified internationally as a service), 51 of the world's top 150 companies in 2002, measured in terms of the amount of revenue generated outside their home market, were from developing countries. Of these, 24 were from China, six from Turkey and five from South Korea, while Brazil, Chinese Taipei and Lebanon each had two firms represented. Bulgaria, Egypt, former Yugoslav Republic of Macedonia, India, Israel, South Africa, United Arab Emirates and Hong Kong, China each had one firm.

Health services are a major export and source of foreign exchange for a number of developing countries. South Africa has become a major destination for patients seeking plastic surgery. In 1995-96, more than 25 000 foreign patients went to Cuba for treatment, generating an estimated USD 25 million in sales of health services. Clinics in Costa Rica report growing numbers of clients from the UK and Norway, as well as Canada and the US. Chile meanwhile receives upper-income and upper-middle income patients from Bolivia and Peru and to a lesser extent from Ecuador.

Developing countries also have a clear comparative advantage in labour-intensive services (construction services, data processing), including – in a growing number of areas – at the higher-skilled end of the chain. Technological advances in telecommunication and computer industries have allowed developing countries endowed with a well-educated and cost-competitive workforce to produce and export computer and related services worldwide. The spectacular Indian performance of the past 20 years is the most notable and documented case, but is far from being the only one (see Box 2).

At the same time, the Internet revolution has made it possible for a wide range of services to be provided electronically, a means of delivery which is increasingly important for developing countries. They are capturing a growing share of the world market for out-sourcing of services ranging from remote call centres to sophisticated software development. This can lead to cost savings for companies in the range of 30-35%, or up to 50% over the long term. The relatively low cost of highly skilled labour and improvements in telecommunications means that this is clearly an area for potential future growth. Additionally, out-sourcing can leverage existing service exports – as in the audiovisual sector, where countries with large film industries are also increasingly handling post-production for other films. To take advantage of out-sourcing opportunities, developing countries will need both modern, efficient telecommunications, and access to developed country markets to provide services cross-border. Out-sourcing and back office services covering computer and related, business, professional and financial services are key areas of export interest (see Box 2). ■

What are the opportunities for intra-developing country trade?

In some sectors, such as telecommunications, trade is primarily with neighbouring countries. In other sectors, regional markets are important and can act as a stepping stone to more global operations.

In **telecommunications,** many developing country companies engage in largely intra-regional trade. ***América Móvil*** (*www.americamovil.com*), the mobile unit of Mexico's former state monopoly and dominant telecommunications company ***Teléfonos de México***

Box 2. Case Studies

Computer and related services

Tata Consultancy Services (*www.tcs.com*), an Indian software company established in 1983 and headquartered in Mumbai, has more than 600 clients worldwide, several of them Fortune 500 companies. Exports for 2001-2002 were valued at RS 38 820 million (approximately USD 814 million) with markets including US, Canada, UK, continental Europe, Japan, West Asia, South East Asia, South Africa, Malaysia, Singapore, Hong Kong, China and Latin America. The company has also launched an operation in Uruguay to service Chile, Argentina, Brazil and Venezuela, as well as some parts of the US. Other operations are in Budapest, Melbourne, Toronto, Tokyo, Phoenix, Columbus, Guildford and New Jersey.

Equidata, SGV and ***Software Ventures***, three companies headquartered in the Philippines, are among the leading data-processing companies worldwide. Other examples include ***STA***, which has customers in the US and ***Omega Computer Corporation***, which is focused on the European market.

BML Istisharat (*www.istisharat.com*) from Lebanon is a recognised provider of Banking Insurance and ERP software products and services, with more than 60% of revenues derived from exports to the US, Western Europe and the Middle East and more than 300 clients worldwide.

Argentina, Brazil, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Ecuador, Mexico, Panama, Paraguay, Peru, Uruguay and Venezuela are all producers and exporters of software products and services. They have formed the ***Latin American Association of Companies of Technology and Información (ALETI)*** (*www.cusoft.org.uy)* to develop and promote their national software industries. More than 100 software development companies currently operate in Costa Rica, employing more than 1 000 professionals and exporting to countries in Latin America, the Caribbean, North America, South East Asia, Europe and Africa.

Outsourced services

India has generated USD 10 billion in exports of IT and business services and around 185 Fortune 500 companies have outsourced some part of their software requirement to Indian companies. ***Indosuez*** has been outsourcing activities to India for ten years, while international companies such as ***Hewlett-Packard, Motorola, PSI Datasystems, Texas Instruments, Verifone, Tata Information Systems and Infosys*** have all opened outlets in Bangalore.

Mexico is becoming a favourite IT and engineering outsourcing haven for US companies, while cheap telecommunications costs and an educated workforce make **San José (Costa Rica)** a thriving location for call centres targeting Spanish speaking consumers in the US and Europe. **Brazil's *New Work Station Telemarketing*** is a major global call centre. **Uruguay** is offering data processing services to foreign companies. Centres of excellence are being established in **Colombia** and **Venezuela** in support of international oil and gas companies.

The **Philippines, Poland, Hungary, Russia, Jamaica, China** and other developing and transition economies are also entering the market. **The Philippines** has developed into a prominent hub for shared financial and accounting services. Companies outsourcing to the Philippines include ***Caltex, P&G and Accenture*** while **AIG** is locating its back-office operations for the Asia-Pacific there.

The countries of the **Caribbean** are also major providers of back office services. ***Jamerican Associates*** is a Jamaican company specialising in data processing, servicing customers in New York, Toronto and London.

(Telmex), states that it has 30.7 million subscribers in Argentina, Colombia, Brazil, Ecuador, Guatemala and Mexico. South Africa's ***MTN*** (*www.mtn.co.za)* has operations in Cameroon, Rwanda, Swaziland, Uganda and Nigeria.

An Egyptian company, ***Orascom Telecom*** (*www.orascomtelecom.com/*), is the largest GSM network operator in the Middle East, Africa and Indian subcontinent, with 21 licenses in the region. Orascom Telecom manages GSM networks in a range of countries in the Middle East and Africa, including: Algeria, Chad, Republic of Congo, Benin, Burkina Faso, Burundi, Central African Republic, Cote d'Ivoire, Democratic Republic of Congo, Egypt, Gabon, Jordan, Niger, Pakistan, Syria, Togo, Tunisia, Uganda, Yemen, Zambia and Zimbabwe. Subsidiaries of ***Telekom Malaysia*** (*www.telekom.com.my*) provide mobile telecommunications services in Bangladesh, Cambodia and Sri Lanka; telecommunications and related services in the Republic of Guinea and telecommunications services in Malawi. Associate companies provide telecommunications and related services in Ghana, telecommunication services in South Africa, telecommunication and broadcasting services in Thailand and trunk land mobile radio services in Cambodia.

In **audiovisual services**, Egypt's ***Media Production City*** (*www.empc.com.eg/*) supplies much of the Arabic-speaking world with Egyptian soap operas and radio programmes.

Examples can also be found in **business services**. ***Consultoria Colombiana SA*** (*www.concol.com*) is a company of 400 employees from Bogotá offering business support and consulting services to infrastructure projects in the fields of energy, transport, environment and sanitation. Up to 25% of their services are sold to residents of Guatemala, Honduras, El Salvador, Costa Rica, Panama, Ecuador, Peru and Bolivia, while the company has engaged in a number of international joint ventures with companies from Canada, France, the Netherlands, Germany, Austria and the US.

Performance Management Consulting from Dakar (Senegal) is a consulting firm employing 40 people. With offices in Dakar, Ouagadougou and Paris, and new openings planned in Ivory Coast, Benin and Mali, the company services clients in West Africa, Mauritius, Rwanda and France. ***Teknosell*** is a small Kenyan firm exporting up to 20% of its services to Uganda and Tanzania and serving local branches of American and German multinationals. ■

Is export capacity enhanced by a well-developed domestic market?

In many sectors, **a strong domestic market** plays a key role as the platform for developing export capacity. This pattern is evident in telecommunications, audiovisual, retail, port and related services and higher education services – and even, in some cases, in e-commerce related sectors (the need for a domestic market is illustrated by the case of one exporter of e-commerce solutions who noted that it was hard to prove to foreign buyers that the e-solutions he had developed worked when there had been only a limited domestic market in which to test them).

Companies tend to follow a pattern: serving the domestic market first, and then once the critical size has been reached, taking steps to export regionally and/or to countries with strong historical links, such as a former colonial power. Finally, they may develop into a global player. Exceptions to this generalisation are ICT-enabled and related services where geography is less important, and tourism, where a company may aim immediately at global markets.

A number of companies from developing countries have become global leaders in **port and related services**. In many cases, as with companies from Singapore and Hong Kong, China, this has been built on the success of large domestic ports. ***PSA Corporation of Singapore*** (*www.psa.com*) currently operates the world's largest container trans-shipment hub in Singapore and participates in 14 port projects in eight other countries around the world, from Belgium to Yemen.

In the **television industry** in Latin America, large domestic operators have moved into a range of joint ventures and other partnerships throughout the region. With its television, radio, and publishing interests, ***Grupo Televisa*** (*www.televisa.com*) is number one in the Latin media world. The firm is Mexico's number one TV broadcaster, with four networks and more than 225 affiliated stations and has a 51% stake in cable joint venture Cablevisión and a 60% stake in Innova, which operates the SKY direct-to-home satellite system. A regional satellite-TV venture called ***Sky Latin America*** links Televisa with Rupert Murdoch's News Corp., Brazilian broadcaster Organizações Globo, and Liberty Media International in Englewood. Televisa has a 60% stake in Sky's Mexican unit. ■

Do regional, cultural and historical ties affect services exports?

Companies moving beyond the domestic market often export first to countries with which there are regional, cultural or historical ties, or a common language. Diaspora populations also prove important in many sectors, from traditional medicine to audiovisual services. Indeed, real niche opportunities can be exploited where cultural and geographical elements can be used to successfully market a service. Examples include an agro-theme park in Colombia which now exports the concept both to other developing and developed countries, traditional healing services from a number of Asian countries and eco-tourism initiatives. Developed countries with historical and colonial links to certain developing countries could also represent a source of capital and credibility for exporters from these countries.

One variation on the "domestic-regional-global" pattern of developing country trade in services is where a developing country's export capacity in a particular service is developed by imports of that service. For example, while there is little evidence of indigenous developing country financial services firms exporting services, subsidiaries of developed country firms based in those countries are active in export

Box 3. **Company links, imports and exports**

Imports can lead to exports…

E-Serve International Ltd., formerly known as Citicorp Securities and Investments Ltd., started operations in India in 1992. It employs about 3 000 people and had export revenue of RS 1 947 million in 2002. E-Serve's clientele is global and includes Citigroup entities from several regions such as Asia, South Africa and Europe.

In **Latin America**, reinsurance firms are collaborating with providers of financial services and insurance firms to offer a range of competitive new products. One example is the formation of a strategic alliance of ***Swiss Reinsurance*** with ***Enhance*** and ***Banco Pactual SA*** (and its surety subsidiary in Brazil, ***Seguradora Brasileira de Fiancas SA***) which offers surety insurance and sophisticated credit-based products to underwrite privatisation programme and large infrastructure projects both in Brazil and other Latin American countries. In **Colombia**, the ***Compañía Central de Seguros SA*** of Bogotá is an insurance company employing over 260 people which works with reinsurers mainly coming from abroad (Mexico, Panama, US, Spain, Switzerland and Germany). Its international activity is very high (up to 75% of the total) [*OECD Survey*].

… and links create trade

In **Malaysia**, twinning programmes exist with foreign universities from the UK, US, Canada and Australia, enabling students to take degrees accredited by these countries in a lower-cost environment. These students are an important source of foreign exchange, and Malaysia is now a leading exporter of education. In 2000, about 26 000 foreign students from nearly 100 countries including Indonesia, China, India, West Asia and Africa studied in Malaysia.

The ***Marketing Society of Kenya (MSK)*** (*www.msk.co.ke*) has launched a co-operation agreement with London-based firm ***creativebrief***, to promote a new online service to the **Kenyan** communications industry. The **creativebrief** service will help promote Kenya by providing a global platform on which local Kenyan agencies and creative talent can display their credentials online, principally to leading multinational clients. Since its launch in October 2002, approximately 200 multi-national clients have become password holders, including Diageo, Unilever, British Airways, Ford, Pfizer, Kodak, Siemens, and Warner Brothers.

markets, both to the parent company's home country and to other countries, developed and developing (see Box 3). An OECD study under way on services trade liberalisation in South East European countries has found that one factor influencing banking sector performance is the level of foreign participation, which can bring improved skills and business practices. ■

What are the problems for exporters?

While developing countries have been successful in developing services exports in the areas described above, they appear to have been less so in areas such as energy and environmental services. This may be due to the large fixed costs of entering these sectors, the existing global presence of some very large companies or the lack of a policy or regulatory framework. Even in sectors where developing countries are exporting, they face a number of common problems. These include:

- *Lack of access to financing for export or business development.* Developing country services exports are often in areas where capital requirements are relatively low, or where there is the possibility to gain access to capital via international partnerships. A low level of income in the domestic market could make it difficult for companies to build up a sufficient client base at home to act as a platform for export.
- *Difficulty establishing credibility with international suppliers, particularly in high technology areas.* In some sectors, there is a continuing perception that developing country service suppliers are not as capable as those in developed countries, a perception that in some cases extends to developing countries' own home markets. This can result in a vicious circle: lack of credibility means fewer clients, fewer clients means few opportunities to demonstrate credibility. On the other hand, once a sector begins to establish a reputation in one country, its credibility and recognition are self-reinforcing and lead to the development of clusters of exporters. This has happened with ICT in India, data-processing in Barbados, and health in Cuba, for example. Problems with credibility can also be addressed in some instances by partnering with international companies.
- *Lack of access to reliable and inexpensive infrastructure.* Poor telecommunications services impact on out-sourcing or back office export potential, while a lack of reliable energy and transport raises costs for all service sectors. Poor infrastructure could also affect

the ability of a company to provide reliable service and thus exacerbate the credibility problem with clients (*e.g.*, some companies report losing foreign clients when slow or unreliable Internet linkages mean that services are not delivered in time).

- *Lack of access to a range of formal and informal networks and institutional facilities necessary for trade.* These include everything from a sound domestic legal environment for business, links to other exporters or export associations or to broader business networks. For services in particular, given the close linkages between service sectors, problems could arise for services companies with the lack of availability of supporting services in the home market. One consulting company in a developing country reported having to rely on overseas companies (often competitors) for important supporting services.

A number of these difficulties might be addressed via targeted technical assistance. While agriculture and manufacturing remain major components of their trade, a number of developing countries are successfully exporting a range of services both to developed and other developing countries. The potential for developing countries to expand their services exports – in particular via outsourcing and temporary movement of service suppliers – is clear. ■

What's so special about services?

The assumption behind most discussion of potential gains from services trade liberalisation is that countries gain from more open services trade in ways which are similar to trade liberalisation in goods. However, services have a number of distinctive features that need to be taken into account when discussing trade liberalisation and its impact on developing countries:

- **Movement of service suppliers.** Since many services, such as nursing, require physical proximity between producers and consumers, trade in them can involve the movement of the actual supplier, or indeed the consumer, an issue that does not arise in goods trade. A Philippine nurse offering her services temporarily in Japan has to go there; a French patient wanting medical treatment could decide to go to Thailand or Cuba to visit the required specialist; and a Kenyan law firm could establish an office in London. Indeed a major benefit of liberalising trade in services is improved mobility of people and capital.

- **The nature of barriers to services differs from barriers to goods.** Much of the discussion about liberalising trade in goods only affects foreign suppliers and focuses on progressively reducing the value of tariffs on imports. But measures affecting trade in services can apply to both local and foreign suppliers (*e.g.*, a restriction on the number of pharmacies per head of population applies to both foreign and domestic pharmacies). Services tend to be subject to all sorts of regulations, including to achieve important objectives of public interest**,** and not all regulations can be equated with barriers to trade. While barriers to the flow of goods are usually imposed at national borders, the removal of barriers to market access for service providers (such as in the case above of the restriction on the number of pharmacies) will open services markets to new local, as well as foreign, entrants; important gains from services liberalisation stem from increased domestic competition and efficiency of production.

- **The basis for measuring trade is different.** In certain service sectors, including telecommunications, banking and insurance services, cross-border trade is relatively minor. The main form of trade is commercial presence (*e.g.* a Thai insurance company opening sales offices in Hong Kong, China), which is generally not captured in conventional trade statistics.

- In discussing trade liberalisation in services and its impact on developing countries, the **form of liberalisation** should be carefully specified, more so than for goods. ■

What are the gains from services trade liberalisation?

It does not seem appropriate to single out any specific figure or range as representative of potential gains from services trade liberalisation because quantitative results vary on the basis of the estimated size and nature of initial trade barriers, theoretical frameworks, modelling techniques and datasets used. Nonetheless, gains from services liberalisation are found to exceed those from goods liberalisation, in some studies, by up to a factor of five.

The most innovative studies of the likely impact of liberalising trade in services recognise the specific features of services trade and include them in their calculations. But one thing that almost all studies suggest is that developing countries are likely to benefit significantly from trade services liberalisation.

Most studies clearly indicate that the countries with the highest initial barriers to trade in services stand to gain the most from liberalisation. Studies also show that on average developing countries have more restrictive barriers than developed countries, regardless of the sector under analysis and the methodology used. Telecommunication, banking and financial sectors in particular are characterised by high barriers in developing countries and low barriers in developed countries, although there is a less clear breakdown in those sectors where developing countries have proven to be particularly successful (education, maritime, professional services and distribution).

Consequently, developing countries are expected to gain considerably from services liberalisation. Most of these gains in fact arise from liberalising the domestic service sector, not from seeking better access to foreign services markets. In the short and medium run, however, gains may be negatively affected by the adjustment costs of removing barriers and changing regulations. These are likely to be particularly burdensome for some developing economies.

Adjustment following trade liberalisation, while challenging, can be facilitated by the adoption of appropriate policy frameworks; and there is some evidence that adjustment costs may be lower for trade in services than for manufacturing. In this context, attention to the nature, pace and sequencing of liberalisation will be key to both managing adjustment and to ensuring that liberalisation is underpinned by sound regulatory frameworks. Equally, however, for many developing countries, the creation of appropriate regulatory frameworks for liberalisation – and the ability to enforce them – will require significant capacity building.

Studies that specifically include capital mobility, foreign direct investment (FDI) and temporary movement of labour in their calculations, as well as the recognition that the economy being studied is imperfectly competitive, show higher likely welfare (economic) gains from services trade liberalisation than studies that do not take account of these elements. Indeed, it seems that the likely increase in welfare gains shown when using these forecasting models need not come from liberalisation of service trade, *per se*, but from the assumed accompanying liberalisation of capital and labour markets.

The studies that explicitly treat FDI as a mode of service supply report that services trade liberalisation raises overall world income, but some countries experience small losses in national welfare. Welfare losses can potentially come from three sources. First, removal of restrictions on foreign investment in one country can attract capital away from other countries. Second, barriers to entry generate rents (for example, where reduced competition enables higher prices to be charged), some of which accrue to the owners of foreign capital. With liberalisation, these rents are eroded by competition, and thus countries that are important sources of FDI can lose out. Finally, there can be negative terms-of-trade effects, where import prices rise by more than export prices, resulting in a loss.

Studies that focus on the movement of people supplying services testify that this is a crucial mode of delivery for exporting countries. As with the studies analysing capital and labour market liberalisation and FDI, it seems that the assumed accompanying liberalisation of these markets is the main source of large gains.

Studies also show that the nature of the restrictions on trade determines the size of gains from liberalisation. When restrictions are rent-creating (for example, restrictions on competition such as limitations on the number of telecom providers, leading to increased prices) they raise prices above costs, creating rents for the incumbent producers. Liberalising rent-creating restrictions can lead to a large transfer of welfare from service providers to service users, and a relatively small net gain for the economy as a whole. By contrast, when restrictions are cost-increasing (*e.g.*, a prohibition on out-sourcing business services to lower-cost foreign service suppliers), they distort market conditions and are responsible for inefficient and costly modes of production. Identifying and then liberalising restrictions that raise costs can yield a gain to both the services providers and their downstream users, for a relatively large gain to the economy as a whole. Liberalising cost-increasing restrictions can provide a larger "bang for the buck". ■

For further information

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For further reading

- **Services Trade Liberalisation: Identifying Opportunities and Gains: Key Findings**, 2003, available at *www.oecd.org/ech/tradepolicy/services* under documentation/reports.
- **Project on Trade in Services in South Eastern Europe**, OECD 2003, *forthcoming* CD-ROM. Project financed by the Swedish International Development Agency (SIDA).
- **Services Trade Liberalisation: Identifying Opportunities and Gains**, OECD 2003, *forthcoming*.
- **Quantifying the Benefits of Liberalising Trade in Services**, OECD, 2003. ISBN 92-64-10043-1, € 32, 172 p.
- **Service Providers on the Move: Labour Mobility and the WTO General Agreement Trade in Services**, OECD Policy Brief, 2003.

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