**Terms of Reference for SSA consultant: Uruguay Case Study**

**TS4D Initiative: joint report on export promotion strategies in developing countries**

**1. Context**

At the 2024 Public Forum, the Director General launched the Trade in Services for Development (TS4D) Initiative with the World Bank. The TS4D initiative is an initial joint work program on services targeting developing and least developed countries. The aim is to mobilize resources in support of a solutions package to assist developing countries to better leverage trade in services for development. As announced at the Public Forum, one key component of the joint work program is the realization of a study on export promotion in services in developing countries.

The study will consist of a series of country case studies that will follow a similar structure. The objective is to provide more policy-relevant research on this understudied aspect and to distil best practices in the promotion of trade and investment in services. Only a handful of developing countries have to date fully integrated services in their export promotion and investment attraction efforts. The study will focus on certain developing countries that have put particular emphasis on the promotion of services exports. Lessons from those experiences would benefit other developing countries that want to diversify their exports through services and leverage services trade for their growth and development.

The contents of the draft publication would be presented and discussed at the global TS4D conference, which the Director General also announced at the Public Forum. The conference is to be held at end-November 2025.

This study will involve collaborations with other international organizations and development banks, in line with the spirit of the TS4D initiative and following up on discussions that DDG Hill has held with senior management of other organizations. In addition to the World Bank, UNECLAC will be co-publisher and will contribute a case study. The InterAmerican Development Bank and the Asian Development Bank are each financing the hiring of consultants for two case studies, while the African Development Bank are financing the hiring of a consultant for one case study.

**2. Objective of the assignment**

The consultant will prepare a case study on Uruguay's export promotion strategy on services in accordance with the attached Terms of Reference. This case study will form part of the joint study on export promotion on trade in services in developing countries.

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

**3. Key Responsibilities**

* Conduct desk research and interviews to assess the strategies and institutions for promoting services exports and attracting FDI in Uruguay.
* Analyse the role of public-private sector coordination in services export development.
* Identify challenges and best practices across key themes such as export promotion tools, investment attraction, and skills development.
* Draft a case study for Uruguay (approx. 10,000 words) including an executive summary, sectoral analysis, and actionable recommendations.
* Be available to present, remotely, the case study at the TS4D conference, as appropriate.
* Revise the chapter based on comments received from the WTO Secretariat, and, if relevant, any useful feedback received after the TS4D Global Conference in November 2025.
* Comply with the following timelines:
  + 15 May 2025: sharing of draft outline/abstract with the WTO Secretariat.
  + End July 2025: sharing first draft of the case study.
  + End September 2025: sharing of revised version, based on comments received from co-publishers before 1 September.
  + 15 December 2025: presentation of final version, revised if relevant after discussions at the Global TS4D conference at the end of November 2025.

**4. Qualifications and Experience**

* Advanced degree in economics, trade, international relations, or related field.
* At least 10 years of professional or academic experience in relation to trade, including with work experience and/or publications on trade in services.
* Strong analytical and writing skills, and a record of relevant publications.
* Be based in Uruguay and be familiar with the economics and institutional frameworks of Uruguay's trade policy.

**5. Scope of Work**

Each country case study (10K words) should contain an executive summary providing a brief overview of the chapter's key insights. It should cover the following general issues and may address the issues mentioned or others that are key to the services trade and FDI promotion efforts and strategies:

1. **Service exports and FDI dynamics over the past two decades**: Brief analysis of the service sector’s contribution to GDP, employment, foreign direct investment (FDI), and services trade. It will highlight the most significant service export segments and main destination markets. It will also present, in a table or box, a number of performance metrics driving export competitiveness in each country’s leading service sectors (institutions, skills, infrastructure, regulatory governance, etc.).
2. **Overall strategy and public-private sector coordination**: This section analyzes the presence of formal or informal strategies for service exports, including defined targets, monitoring mechanisms, and impact evaluation processes. It will also examine the existence of specialized government agencies and their coordination efforts with key industry associations, as well as local and international academic institutions. See also Alvarez and others, 2020.
3. **Service export promotion**, the analysis will include issues such as (see also APEC, 2024):
   * Dedicated institutions and teams for export promotion
   * Self-assessment tools for SMEs
   * Creation and regular update of business registries
   * Targeted training and coaching programs for companies
   * Trade missions, business matchmaking, supply chain integration
   * Promotion of global standards and benchmarks for competitiveness in services
   * Services-related fiscal incentives (e.g., the operation of dedicated free trade zones, double taxation agreements or tax recovery measures for service exporters to avoid paying taxes at home and in destination (origin) markets)
   * Award programs for service exporters
   * Targeting of niche markets
   * Special focus on women-led firms
4. **FDI attraction**, the analysis will include issues such as (see also ECLAC, 2024; and Garcia and others, 2021):
   * Dedicated specialized agency or department
   * Country branding
   * Free trade zones and other incentives
   * Market Intelligence
   * Services for the investors related to the arrival, retention and expansion of FDI (after care programs)
   * Coordination mechanisms with the private sector to focus on niche markets
   * Business linkages program or clusters
   * Dispute settlement mechanisms
   * Investment facilitation instruments
   * Promotion of outward FDI
5. **Skills development initiatives**: the analysis will include issues such as:
   * Strategies to promote digital and language skills in secondary and tertiary education and to foster STEM education
   * Specific initiatives to foster talent for the services export sector, including education and training programs tailored to services exporters, such as "Finishing schools"
   * Specific initiatives for female workers and entrepreneurs
   * Initiatives targeting the digital uptake of MSMEs
6. **Conclusions and recommendations**: Main findings of the country’s service export, FDI attraction strategies, and public policy recommendations.

This structured approach will ensure that the study provides both depth and comparability, enabling policymakers and stakeholders to draw practical lessons for advancing service exports in their respective contexts.

The case studies will not address other key aspects that impact export competitiveness analyzed by other studies, such as trade in services trade statistics, trade regulations that facilitate access to the home and export markets.

**6. Reporting and Supervision**

* The consultant will work under the supervision of Martin Roy, Counsellor in the Trade in Services and Investment Division, WTO.

**7. Terms and duration of contract**

* From April 2025 to December 2025, for an estimated total of 38 days of work at a fee of CHF 350 per day.

**8. Fee**

As full consideration for the services provided by the Subscriber under the terms of this Agreement, the WTO shall pay the consultant a fee of CHF13'300 upon satisfactory completion of the final draft chapter and compliance with all the timelines listed under 3. Payment is subject to the outputs being submitted on time and deemed satisfactory by the WTO.

**9. Work Modality**

The consultant is expected to work remotely, with updates and virtual meetings with the WTO Secretariat as appropriate.

**Additional provisions**

The WTO Secretariat and other co-publishers of the study will retain the intellectual property rights in relation to the paper produced by the consultant under this contract. The work produced under this contract may not be shared, circulated, published, or otherwise used without the explicit written permission of the WTO.