



NEXTRADE GROUP
World trade is changing. Are you?

2023 ACTIVITIES

OUR WHY: HELP OUR CLIENTS UNLOCK THE \$15 TRILLION OPPORTUNITY FOR FASTER, GREENER, AND MORE INCLUSIVE TRADE

Vision and Mission

- **Vision:** a world where trade flows frictionless and carbonless end-to-end, and where any business anywhere can grow through trade
- **Mission:** Enable trade through technology to accelerate economic growth and raise incomes around the world

What we work to promote

Illustrative areas of work

Ecommerce development

- SME ecommerce in goods and services
- Ecommerce ecosystems development
- Ecommerce policies and best practices
- Interoperability of digital payments and platforms

Trade facilitation through technology

- Smart ports and free trade zones
- Customs and border process digitization
- Paperless trade and digital standards for trade
- Digitization of tourism

Digital value chains and ecosystems

- Traceable agricultural value chains
- Digitized sustainable tourism value chains
- Procure-to-pay systems and supply chain finance
- Digital services and creative industry development

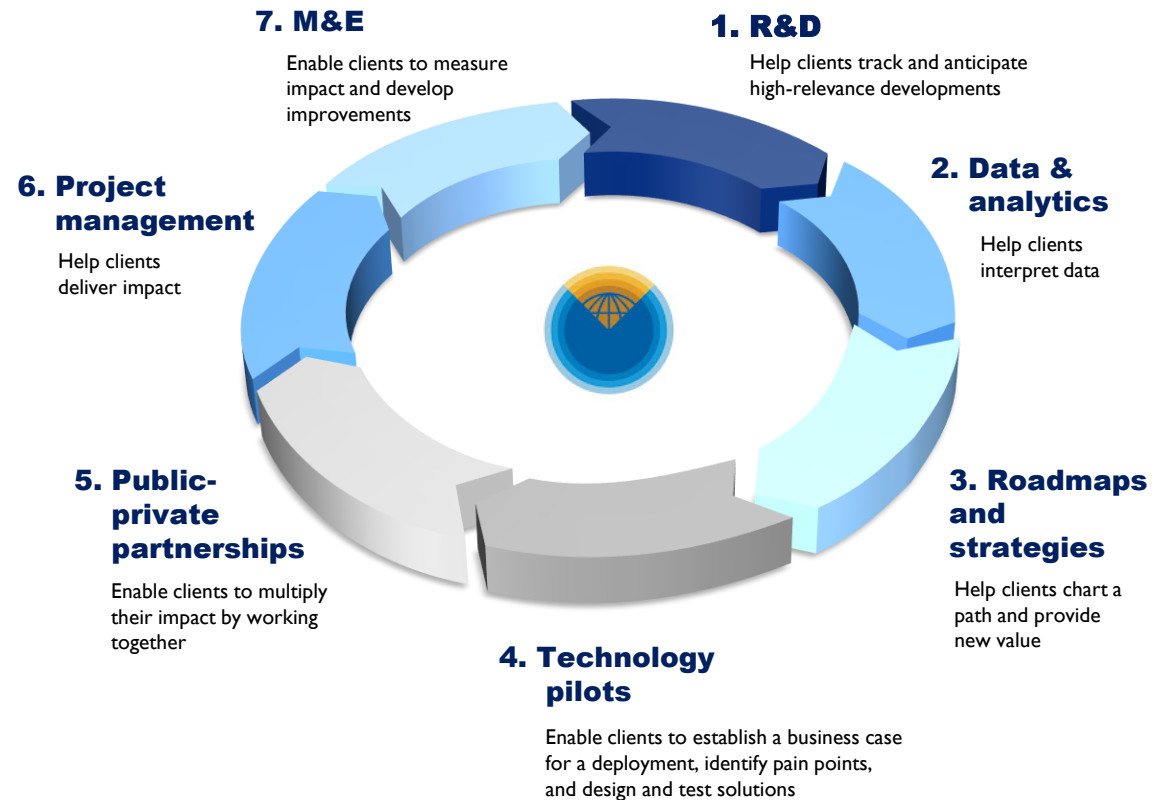
Green commerce

- Green ports, corridors, borders
- Greening of SME traders and supply chains
- Export markets for green goods and services
- Regenerative tourism and trade

Digital trade policy

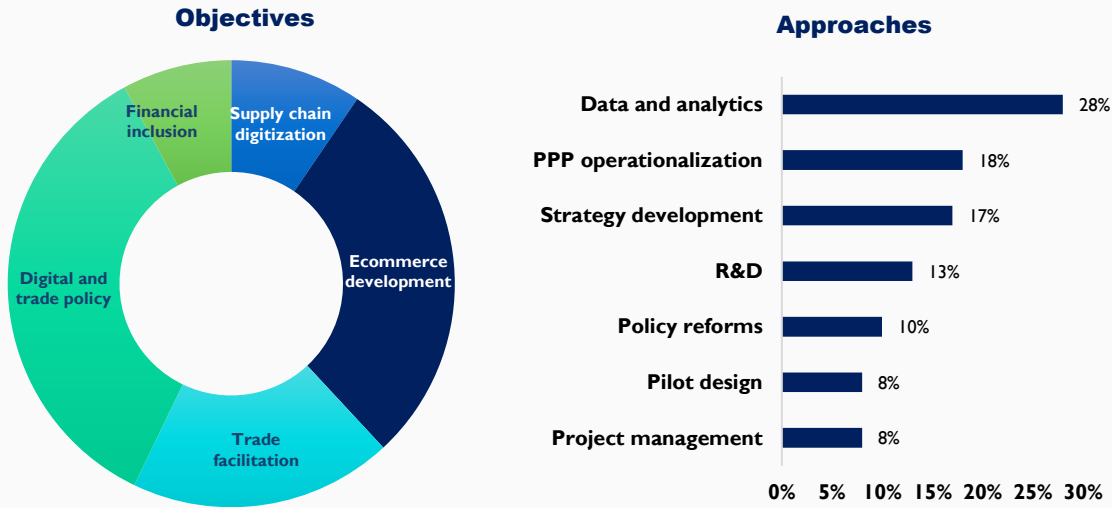
- Digital and trade policy mappings and indices, e.g. on data transfer, AI governance, cloud policy
- Policy impact assessments
- Policy advocacy and pilot development

How we create value for our customers: Nexttrade Engine

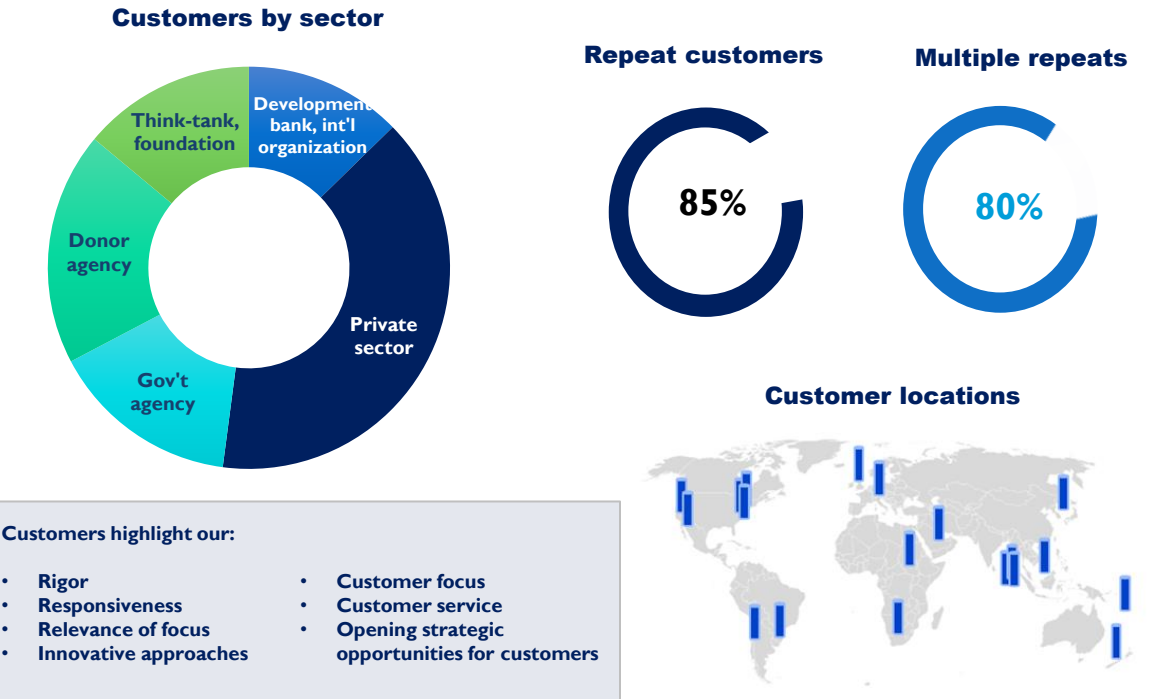


NEXTRADE 2023 IN NUMBERS

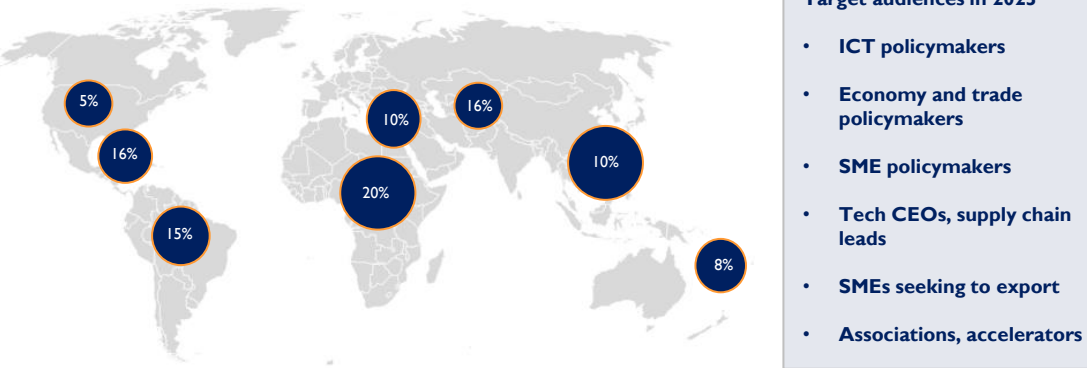
75 deliverables, with diverse approaches



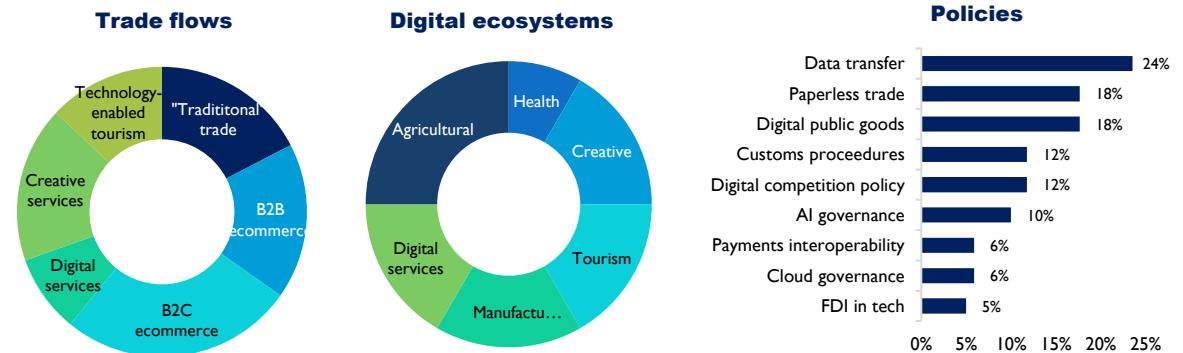
In 2023 we served our 53rd customer, diversifying further



Global footprint



Types of flows and polices we promoted with our customers



NEXTRADE'S GROWING TEAM

What we bring to the table (years)

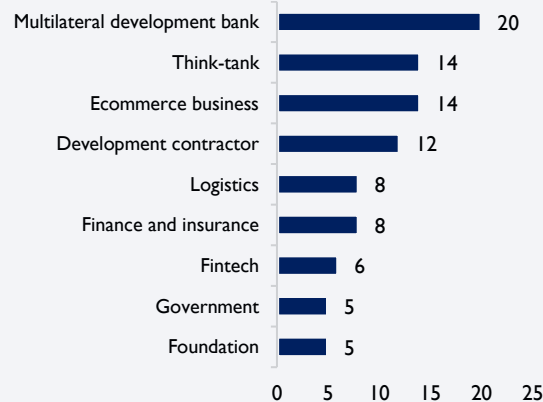
Issue Expertise



Capabilities



Experience



Who we are

Lead portfolios



Dr. Kati Suominen,
Founder and CEO

Research and project design lead
Past: Inter-American Development Bank, GMF, CSIS
PhD, University of California, San Diego, MBA, Wharton



Michael Poor,
Sr. Manager

Digital finance, digital payments, PPPs, partnership development
Past: AIG, Integro, tech consulting MA, UCSD



Shannon Gaffney,
Director

Trade policy, market systems, PPPs, project management
Past: U.S. ITC, DAI, Nathan, Resonance MA, Columbia

Manage projects



Erica Vambell
Senior Associate

Research and project management
Past: CMA CGM, Lendinghome BA, Virginia Tech



Jeanne Marasigan,
Manager

M&E, social / economic impact analytics
Past: Harder & Co MA, UCSD



Bonaly Phrasavath,
Senior Associate

Project management, data analytics, digital policy
Past: Center for Asia Pacific Strategy MA, UCSD

Deliver impact



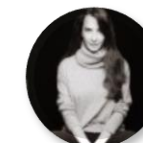
Fabian Staechelin,
Ecommerce Lead

SME ecommerce enablement,
Past: eBay, ITC MA, Graduate Institute, Geneva



Bassil Eid,
Ecommerce and Logistics Lead

SME ecommerce enablement, logistics
Past: DHL, eBay, FIATA
MBA, University of Ottawa



Lucy Lawrence,
Senior Technology Advisor

Tech ecosystems, and pilots, ecommerce development,
Past: eBay, Magneto BA, University of Houston

Advise



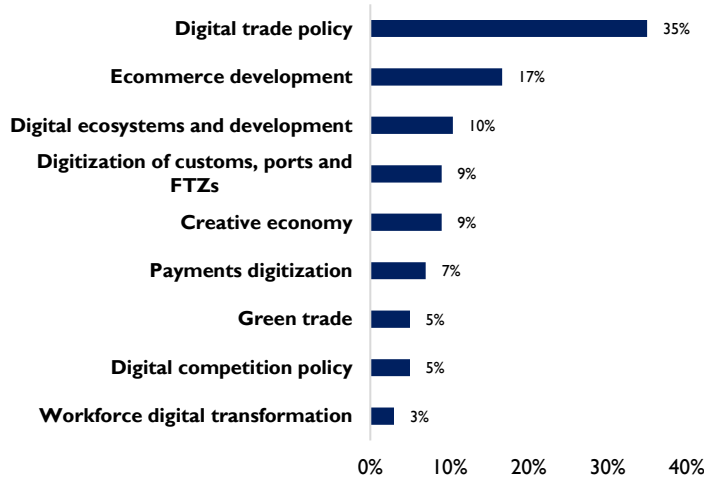
Dr. Antoni Esteveordal,
Senior Advisor

Trade policy, regional integration, trade facilitation; value chains
Past: Head of IDB Trade Department, Head of IDB Migration Initiative, WEF Agenda Council
PhD, Harvard

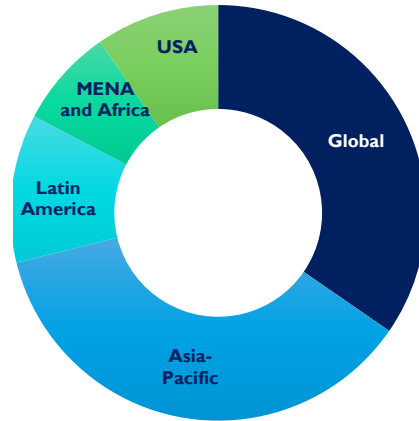
HIGHLIGHTS OF ACTIVITIES AND APPROACHES

IN 2023: 40+ DATA AND ANALYTICS PRODUCTS TO ENABLE CLIENTS TO DRIVE POLICY REFORMS

Analytics portfolio in 2023



Regions of focus



Indicative projects



APEC SME trade and resilience

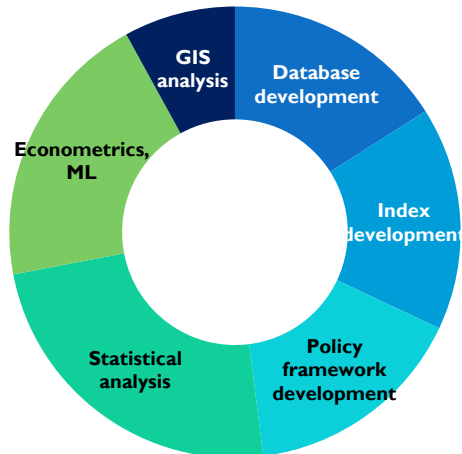
In 2023, we worked with UPS to operationalize a survey with 4,700 APEC region SMEs, in order to promote growth and resilience in the Asia-Pacific region through policies that facilitate trade, streamline businesses' trade compliance and fulfillment, and improve the quality of logistics services.



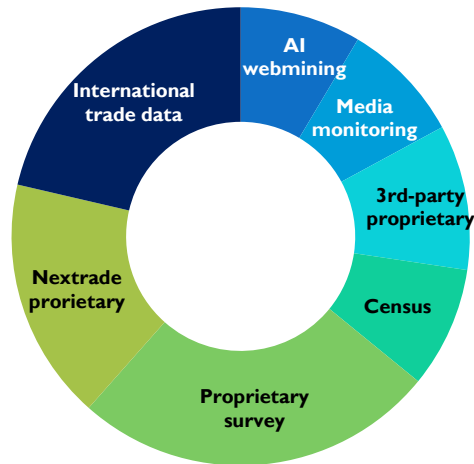
Measuring implementation of digital trade agreements

Digital trade agreements are proliferating – but their implementation has yet to be analyzed or tracked. In 2022, Nextrade pioneered a methodology for Google and AWS to monitor the implementation of digital trade agreements, piloting in the context of the CPTPP in the Asia-Pacific. The study was prepared again in 2023 for publication in early 2024.

Techniques



Data sources



Ecommerce in the Southern Cone

In 2023, we worked with the Inter-American Development Bank (IDB) to assess Southern Cone economies' intra- and extra-regional ecommerce in goods and services, identify gaps in cross-border ecommerce, and develop policy, programmatic, and pilot ideas for the IDB and the Southern Cone governments to support regional firms' trade through ecommerce.

SELECTED 2023 POLICY DATA AND ANALYTICS



Global digital policy framework



In 2022-23, we worked with the world's leading technology company on producing an index of the adoption of 70+ digital policies and regulations conducive to countries' competitiveness in the digital era. The first iteration was launched at UNGA 2023.



Measuring the impact of EU's competition policy



The EU's Digital Markets Act (DMA) can have dramatic implications especially on U.S. technology companies and their business customers in Europe and the United States as well as on transatlantic digital services trade. This study estimates these curious impacts. It was subsequently cited in a Congressional letter to the Biden Administration.



Digital trade and data transfer in APEC region



We have worked with the Visa Economic Empowerment Institute (VEEI) to drive research to optimize data privacy and data transfer regimes globally and performed in 2023 a study with more than 5,000 firms in nine APEC economies to assess SMEs' use of technology to engage in trade. The deliverables supported APEC Leaders in the San Francisco APEC Summit in crafting policies for small business success.



Policies to enable the smart trade revolution



Disruptive technologies are changing the way companies make, market, and move goods and services around the world. Also ports, free trade zones, customs, warehouses, highways, ships, and trucks are becoming smarter and more autonomous, alleviating the cost of moving goods, a leading impediment to trade. This study reviews the smart trade trend and considers a policy agenda to support the digitization of the global trade ecosystem.



Assessing Asia-Pacific digital trade agreements



This study prepared in 2023 supports the Asia Foundation's work to shape of debates on digital trade policy and integration in Asia. The study reviews the impacts and value-added of these agreements to the region's already elaborate network of trade agreements, what these agreements mean for the future of the region's digital trade, and how the regional digital trade agreement architecture could be improved.



Digital public infrastructures



In recent years, there has been growing discussion on "digital public infrastructures" (DPIs), or technological systems that are owned by government agencies and implemented at national scale. This extensive research promotes dialogue on the fundamentals countries should have in place to successfully adopt, implement, and build on DPIs, and the competition policy and business models in promoting DPIs.

A DECADE OF DIGITAL AND TRADE POLICY WORK

In sum

- **10 digital and trade policy indices**
- **80+ published studies and reports**
- **Over 100 policy analyses and roadmaps**
- **36 leading public and private sector clients**
- **190 countries covered**
- **Over 1,500 policymakers engaged in digital trade dialogues**
- **>100 speaking engagements, e.g. Davos, World Bank, IDB, UN, APEC, G20**

Examples by digital trade verticals

1

Digital trade and ecommerce in goods

- Multiple analyses to develop policies to enable SME crossborder ecommerce in developing economies (USAID, World Bank, IDB, ECLAC, UNCTAD, UPS, Fedex, Visa)
- Policy pilots to promote market access for online sellers (USAID)

2

Digital services trade

- Assessing market access of Pacific Alliance digital services providers to support regional services negotiators (World Bank)
- Identifying Asia-LAC digital services supply chains and key providers, and policies to bolster bilateral trade in B2B digital services (ESCAP)

3

Freelancers and creators

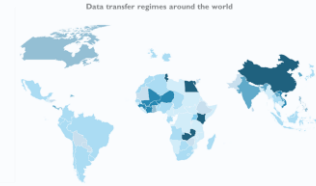
- Developing a global research agenda on empowering freelancers and creators (World Bank)
- Analyzing the characteristics and export and import participation of developing country creators and influencers (USAID, Visa, eTrade Alliance)

4

Creative industry

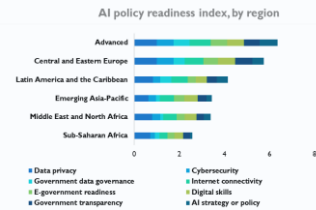
- Learning from Korea's creative industry policies to promote creative industries, talent and supply chains in Asia and Africa (World Bank)
- Policies to power Latin America's orange economy (IDB)

Examples by key topics



Data privacy and transfer policies

- Analytics for report for G7 on DFFT (Data Free Flow with Trust)
- Multiple analyses on data transfer rules around the world for technology company clients
- Mapping and impact analysis of 50 data transfer regimes in Africa for USAID eTrade Alliance



AI governance and interoperability

- Firm-level surveys on emerging market firms' AI use
- Analysis on the rise of AI-driven startups in 45 economies
- AI readiness index across 190 countries
- January 2024 analysis on impact of AI policy on trade



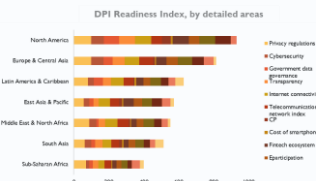
Fintech and digital payments regulation

- Analytics on digital payments interoperability challenges and their costs in Southeast Asia for USAID eTrade Alliance
- Study on state of crossborder payments and remittances and payments interoperability in Central Asia for U.S. Commerce Dept.
- Analysis of Fintech regulations in Central America for Cenpromype



Antitrust in the digital era

















- Analysis for European digital competition policy proposals
- Impact assessment on the EU's DMA on U.S. and EU economies, for CCIA and CSIS
- Ongoing analysis of the global spread of DMA-like rules and their impacts, for a leading association and three global tech companies



Digital public infrastructures

- Analysis on types, impacts of DPIs, readiness index for DPI adoption for USAID eTrade Alliance in 2023
- Multiple DPI-related analyses and typologies for leading U.S. technology companies 2023-24

DIGITAL AND TRADE POLICY INDICES TO SUBSTANTIATE POLICY ADOPTION AND DESIGN

Policy indices we have developed	Clients	Region	Measure policies conducive to:	Number of countries	Number of policy domains	Selected policy domains
Digital and Ecommerce Policy Index	 	Global, mostly emerging and developing economies	Crossborder SME ecommerce	40 (2018) 52 (2021) 75 (2024)	100 policies in 10 domains	Digital infrastructures, data privacy and transfer, cybersecurity, consumer protection, copyright, paperless trade, digital payments, digital identity, ecommerce export promotion, SME finance, SME formalization
Digital Policy Index		Central Asia	Digital and ecommerce development	5	66 policies in 12 domains	Digital infrastructures, data privacy and transfer, cybersecurity, consumer protection, copyright, Fintech, digital payments, paperless trade, AI governance, cloud governance, taxation
Digital and Trade Policy Index	  	Central America	SME ecommerce development	5	60 policies in 8 domains	Digital infrastructure, data privacy and transfer, cybersecurity, copyright, paperless trade, digital payments, ecommerce export promotion, SME finance
AFCFTA Digital Protocol readiness index	  	All Africa	Readiness to comply with AFCFTA Digital Protocol	50	20 policies	Data transfer, localization for computing facilities, duties on electronic transmissions, AI governance, consumer protection, cybersecurity, source code protection, paperless trade
CPTPP Implementation index	 	CPTPP economies	Compliance with CPTPP Ecommerce Chapter commitments	12	16 policies	Data transfer, server localization, duties on electronic transmissions, consumer protection, cybersecurity, source code protection, paperless trade, consumers' access to digital services, non-discrimination of digital products
AI Policy Index		Global	Use of AI	190	16 policies	Data privacy and transfer, cybersecurity, AI governance, AI interoperability
Digital competition policy index	 	Global	Nondiscriminatory digital competition policy enforcement	30	8 policies	Targeting of large technology companies, self-preferencing, killer acquisitions, data interoperability, interlinked services, fines for noncompliance
Digital public infrastructure index	 	Global	Adoption and operation of DPLs; interoperability with card networks	190	15 policies	Data privacy and transfer, cybersecurity, AI governance, AI interoperability

RECENT DATA-DRIVEN STRATEGIES TO ENABLE OUR CUSTOMERS TO BETTER SERVICE THEIRS



Central America ecommerce strategy



In 2019-22, we worked with U.S. State Department and Cenpromype to create national ecommerce plans in five Central American countries and a regional ecommerce strategy based on surveys and data analytics with altogether 4,000 MSMEs and 1,750 consumers and on an analysis of more than 40 policies conducive to ecommerce against global benchmarks.



Strategy to promote U.S. SMEs and green tech exports



In 2022-23, we worked with the Small Business Administration (SBA) to establish for the SBA the total addressable market of American exporters at national and state-levels, and developed three strategies for the SBA, to bolster SME export finance instruments, support America's green tech exporters, and enable women-led small businesses to export.



West Africa digital transformation



In 2022-23, we worked with the World Bank to develop diagnostics on digital transformation of over 1,100 SMEs and digital service providers in Africa and on the relationship between digital transformation and trade in services in West Africa, to support the Bank's strategy to enable digital trade in West Africa.



Global ecommerce development database



In 2018-22, we worked with the World Bank and the International Finance Corporation to build a global database covering 32 countries, to enable aid agencies and governments to identify the priority constraints to ecommerce and technology use in their countries and different firm segments, and to prioritize policies and programs for ecommerce and for the adoption of technologies.



Workforce digital transformation in Georgia



In 2022-23, we worked with DAI on the USAID Economic Security Program on the demand for and supply of employees for ecommerce-related fields in Georgia, and on developing a roadmap for Georgian employers to bring employees to the digital era and for workers to acquire requisite skills as firms and business functions digitize and as new jobs and tasks emerge. The work supported DAI's work in enabling Georgian firms and workforce's digital transformation.



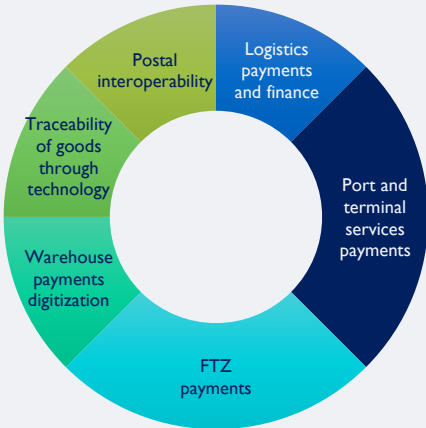
Roadmap to bolster ecommerce data in the Pacific



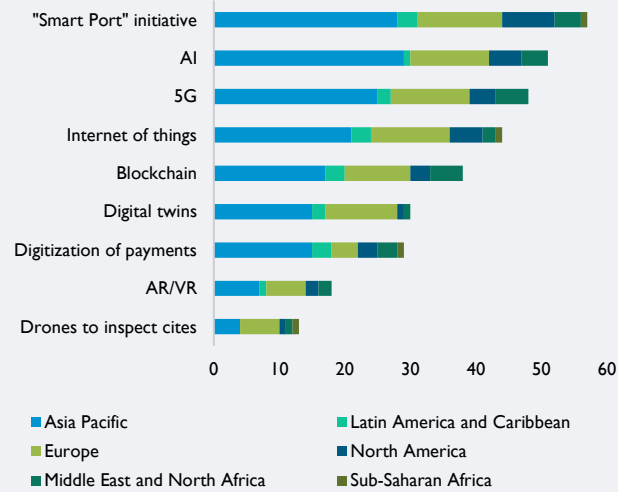
In 2023, we worked with the Pacific Island Forum Secretariat to develop a strategy to bolster the indicators available in the Pacific Ecommerce Portal, in support of the 2021 Pacific Ecommerce Strategy. Nexttrade identified over 50 indicators in key areas such as digital skills, ICT connectivity, logistics, and digital payments, and created a strategy for PIFS to harness comparative data and data visualizations to enable regional policymakers to identify gaps and opportunities.

TECHNOLOGY PILOTS TO FACILITATE TRADE AND DIGITIZE TRANSACTIONS IN TRADE HUBS

What we solve for



Industry 4.0 adoption in trade ecosystem via Nextrade SMARTrade data



Source: Nextrade Group.



Smart port strategy

In 2020, we developed a global smart ports strategy for the world's leading technology company, to promote throughput through the interoperability of players and digitization of payments and finance in leading ports in the Americas, MENA, Europe and South Asia.



FTZ digitization in MENA

Nextrade is in 2023-24 developing a digital payments and finance pilot for a set of free trade zones in the MENA region with a leading donor organization and global technology companies.



Digital trade corridors through postal service interoperability

Nextrade is in 2023-24 developing an interoperability pilot for postal services with a leading technology company in four countries to facilitate SME ecommerce logistics, with a leading technology company and a local logistic technology firm and Fintech.



FTZ digitization in LAC



In 2022, we assessed pain points, develop business case, and defined pilots to digitize of flows, payments and financing and promote traceability for a leading free trade zone and a global technology company and its partners.



Central America digital tourism



We are working with a leading technology company, the national tourism institute, and the postal operator in Costa Rica to develop and pilot use cases to enable digitized tourism payments and online ordering in the region's tourism sector, and assess the business case for the stakeholders.

MULTIPLYING CLIENTS' IMPACT THROUGH PUBLIC-PRIVATE PARTNERSHIPS: NEXTRADE PROPRIETARY PPP ENGINE AND FLAGSHIP PPPs

Alliance for eTrade Development



- To enable developing country SMEs to sell online
- Built by Nextrade, launched in 2017, scaled by Nextrade in 2019
- 13 leading corporate partners
- \$29M in total
- 45+ projects around the world
- >40,000 farmers and SMEs and >900 policymakers impacted



Prosper Africa Tech for Trade Alliance

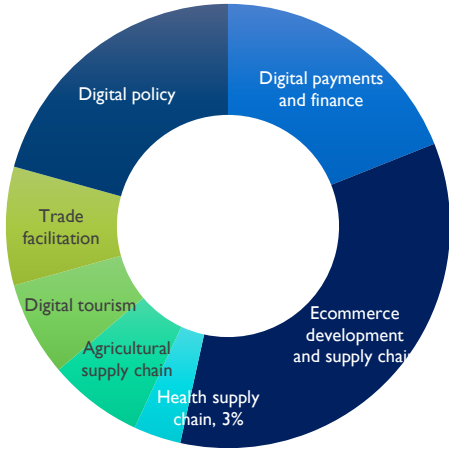


- To enable Africa's trade through U.S. technology
- Built by Nextrade in 2020-22, launched in 2023 with the support of USAID and Prosper Africa
- 20 leading corporate partners
- First projects launched in 2023 to bring U.S. technology to solve for frictions in Africa's agricultural and healthcare value chains, promote U.S. exports to Africa
- In 2024, looking to support further projects and Demo Days and Startup Days, to connect U.S. tech companies with African businesses and government agencies

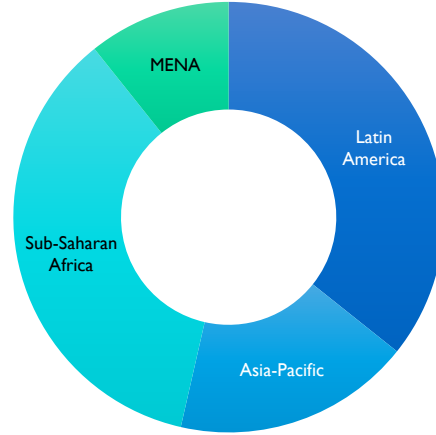


TWO DOZEN PUBLIC-PRIVATE PARTNERSHIP PROJECTS PREPARED FOR LAUNCH IN 2023

What we optimize with partners



Regions of focus



Kenya SME ecommerce development portfolio



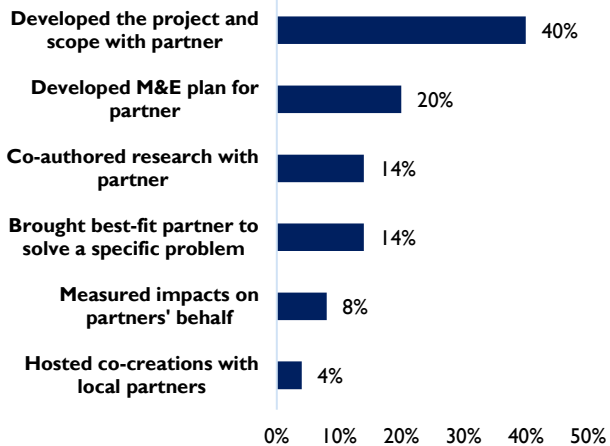
In 2022-23, Nextrade developed and operationalized a comprehensive portfolio of eight interventions to promote SME ecommerce and access to finance in Kenya with a dozen eTrade Alliance members (such as Google, DHL, and African Talent Company) and Kenyan government agencies and associations, for the next three years.

Mexico agriculture and tourism value chains

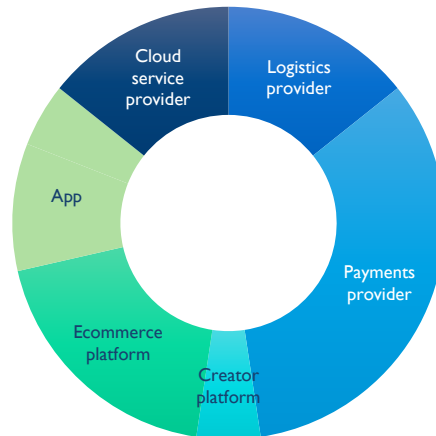


At the end of 2022, Nextrade used our proprietary PPP engine in the USAID Mexico SURGES project to identify and bring best-fit technology providers to solve for market failures in coffee, cocoa, honey, and tourism value chains in Southern Mexico. Partners such as Mastercard, Google, Mercado Libre, and traceability technology firms have signed on.

Our diverse approaches



Partner company types






















Central America ecommerce and digital ecosystem development



Nextrade worked in 2023 with the eTrade Alliance partners to develop four projects aimed to enable ecommerce development and digitization of supply chains in El Salvador, Guatemala, and Honduras, holding a co-creating workshop with Alliance and local partners and USAID Missions in Guatemala in December, with projects to be launched in 2024.

DELIVERING DIGITAL TRADE DEVELOPMENT IMPACTS FOR DONORS, FROM POLICY TO SMES

		Purpose	Nextrade role	Mix of approaches
eTrade Alliance	 	<ul style="list-style-type: none"> • Enable developing country SMEs to sell and export using ecommerce 	<ul style="list-style-type: none"> • PPP, USAID + 13 members • Nextrade conceptualized and convened alliance in 2017 and grew it in 2019 and again in 2023 • Manage all research, project development, M&E, Ideate programs with partners 	
Prosper Africa Tech for Trade	 	<ul style="list-style-type: none"> • Enable Africa's trade through U.S. technology 	<ul style="list-style-type: none"> • PPP, Prosper Africa and USAID + 20 members • Nextrade conceptualized and convened the alliance in 2020-22 • Manage all project development, events, M&E, research and data • Ideate programs with partners 	
Egypt TRADE	 	<ul style="list-style-type: none"> • Promote Egyptian SMEs exports 	<ul style="list-style-type: none"> • Pioneer public-private dialogues on ecommerce • Design ecommerce ecosystem app to support export councils • Enable B2B ecommerce sales, working with SMEs • Enable digitization of free trade zones with private sector partners 	
Mexico SURGES	 	<ul style="list-style-type: none"> • Promote sustainable agricultural and tourism value chains in Southern Mexico 	<ul style="list-style-type: none"> • Identify best-fit technology solutions providers to address market failures in the value chains • Operationalize PPPs with providers • Ideate project-wide pilots bringing together multiple technology companies and capabilities 	
Central Asia FGI	 	<ul style="list-style-type: none"> • Promoting private sector development in Central Asia 	<ul style="list-style-type: none"> • Develop data-driven national and regional ecommerce roadmaps to support governments • Promote ecommerce ecosystem • Enable B2B ecommerce sales, working with SMEs 	
MENA WeFi	  	<ul style="list-style-type: none"> • Enable women-led firms' ecommerce in Jordan, Egypt, and Morocco 	<ul style="list-style-type: none"> • Build strategy for intervention through data with women-led firms • Select trainers and carry out training of trainers that train target firms • Recruiting global tech companies to support activity 	



NEXTRADE IN THE NEXT – DATA-DRIVEN INITIATIVES TO HELP CLIENTS ANTICIPATE TRENDS, DEVELOP SOLUTIONS

SMARTrade™

Actionable data to promote technology adoption in ports, FTZs, logistics, customs

E-exporters

SMEs' digital transformation and use of ecommerce and technologies for trade

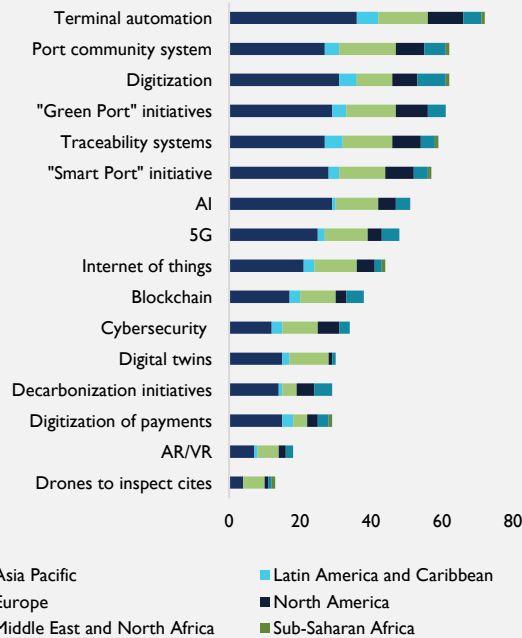
Carbonless Commerce™

Driving net zero trade through carbon measurement, mitigation and management

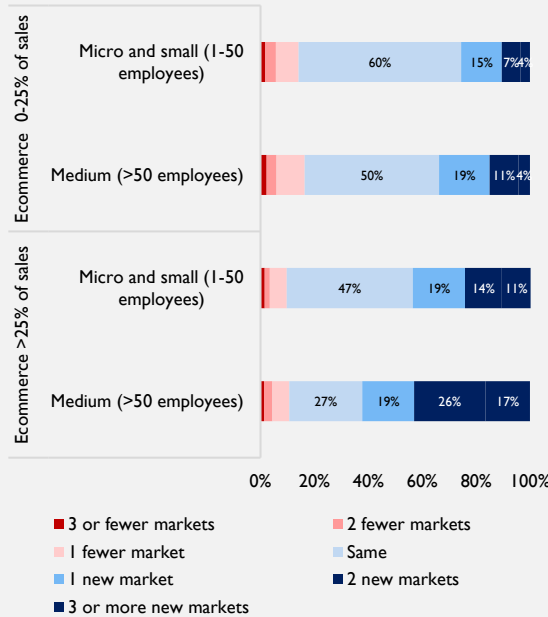
Digital Trade Policy Pulse™

Data to anticipate digital policy changes and challenges, ideating improvements

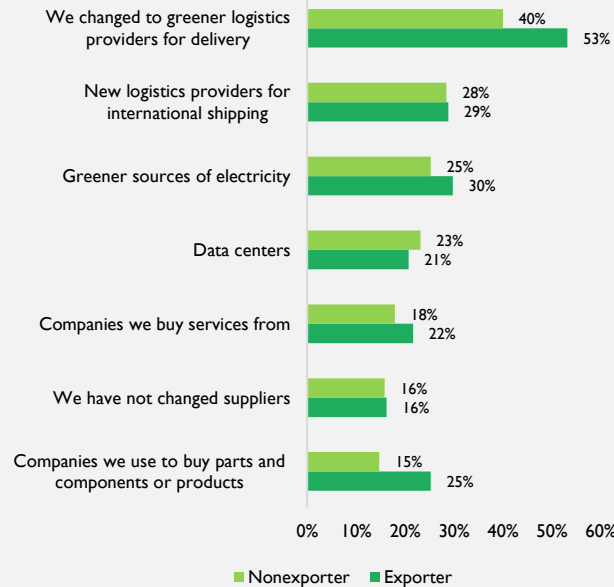
Digitization use cases in maritime ports



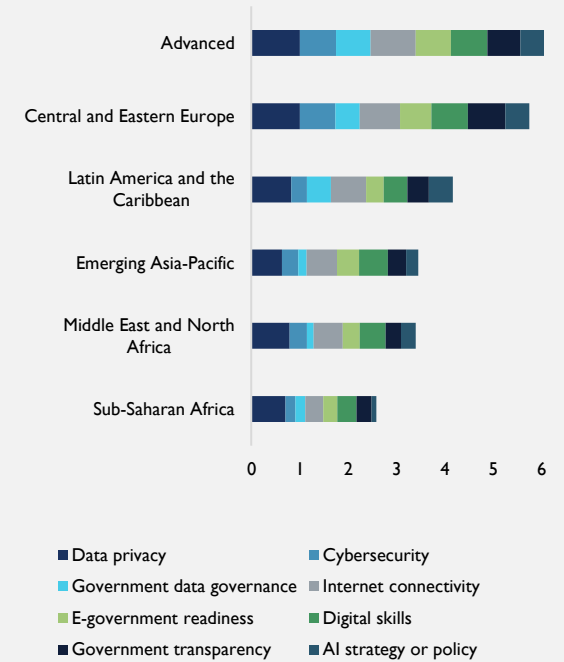
Ecommerce sellers and export diversification



Greening strategies of export-driven firms



Global AI policy readiness index



Source: Nextrade Group.

Source: Nextrade Group.

Source: Nextrade Group.

Source: Nextrade Group.

IN ACTION IN 2023: HIGHLIGHTS OF ENGAGEMENTS

APEC CEO Summit, San Francisco



APEC Senior Officials' Meeting, Seattle



AFCFTA Business Forum, Cape Town



CABEL Innovation Forum on digital tourism, Tegucigalpa



World Bank trade in services, Washington



DHL GoTrade Summit, Bonn



Cocreation with USAID and eTrade Alliance, Guatemala



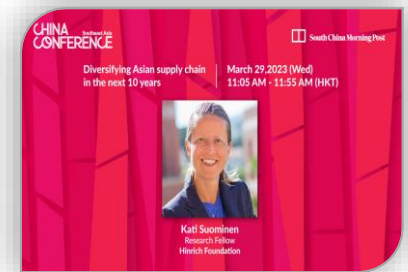
Africa Tech for Trade Alliance launch, Washington



Hinrich Foundation-SIIA Roundtable on digital trade, Singapore



China Conference on supply chains, Singapore



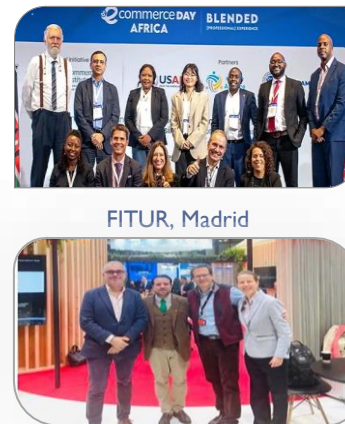
WTO high-level forum on services, Geneva



ESG Fundación Chilena, Santiago



eCommerce Day Africa, Nairobi



ESCAP-ECLAC Digital trade rules Bangkok, Santiago



eTrade Alliance Evidence Summit in Washington



OUR VALUES

1. **Our clients are why there is a "we"**
2. **Success is a returning customer**
3. **We do not compete - we create**
4. **Our returns are equal to our service**
5. **Our first questions are what needs to be done and what can we give, the last question is what we get**
6. **Excellence in everything: If there is a way to do it better even if it is harder and takes longer, we do it**
7. **Process with our clients is as important as the product**
8. **Execution is gold - ideas are platinum**
9. **We are only as good as our latest project**
10. **There is no substitute for integrity and hard work**