



NEXTRADE GROUP
World trade is changing. Are you?

2024-25 ACTIVITIES

OUR WHY: ENABLE OUR CLIENTS UNLOCK THE \$40 TRILLION OPPORTUNITY IN TECHNOLOGY ADOPTION AND DIGITIZED TRADE

Vision and Mission

- **Vision:** A world where any business anywhere can grow through trade and technology and crossborder trade flows frictionless, end-to-end.
- **Mission:** Enable our clients to reach their goals to drive technology adoption and trade through world-class research, policy ideas, and partnerships.

What we work to promote

Digital trade policy

- SME ecommerce in goods and services
- Effects of trade in digital services
- Ecommerce ecosystems development
- Growth of regional and global digital value chains

Digital payments policy

- Interoperability of digital payments and platforms
- Simplifying and digitizing financial regulations impeding crossborder payments
- Promoting interaction of RTP systems and global payment networks

AI and tech policy

- Defining AI governance, policy for “trade in AI”
- Assessing impacts of digital competition policy
- Promoting interoperable digital identity
- Impacts of flexible online ads policies

Tradetech - trade facilitation through technology

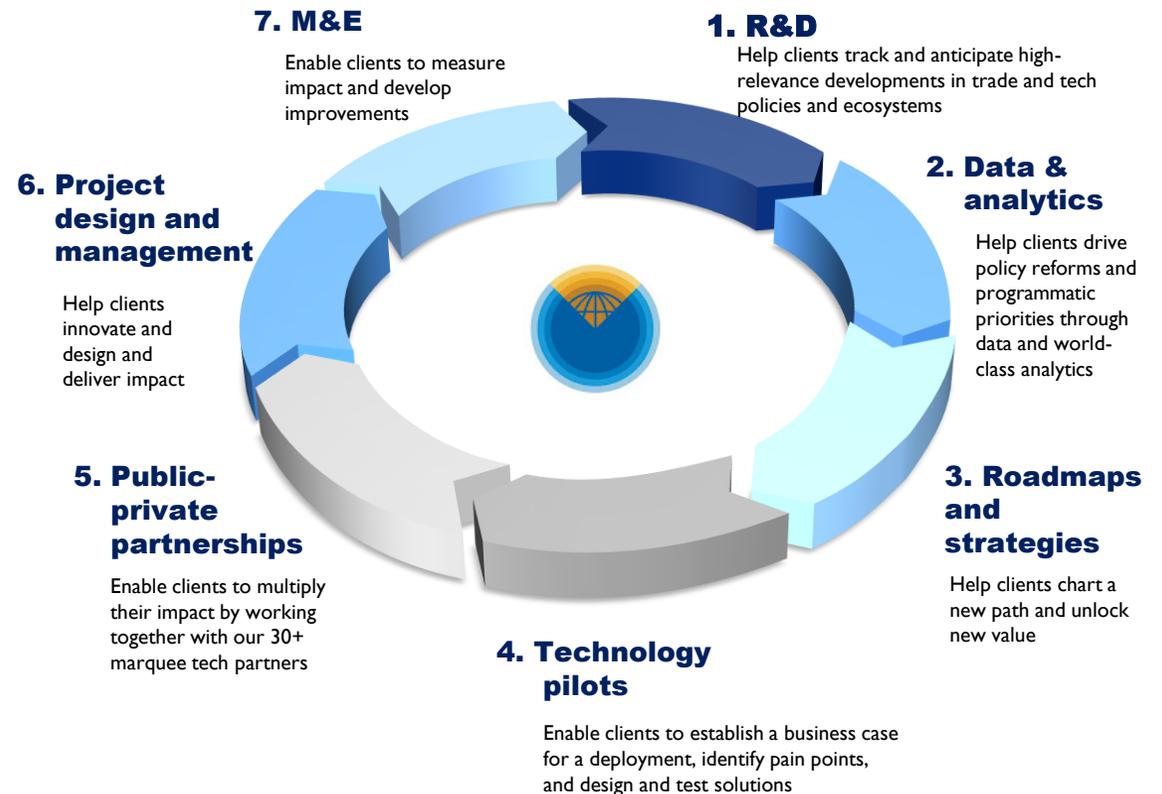
- Smart ports and digitized free trade zones
- Customs and border process digitization
- Paperless trade and digital standards for trade
- Procure-to-pay systems and supply chain finance

Ecommerce and tech ecosystems

- SME ecommerce development
- Digitized tourism value chains
- Digital services and creative industry development
- Promoting digital FDI in tech ecosystems

Illustrative areas of work

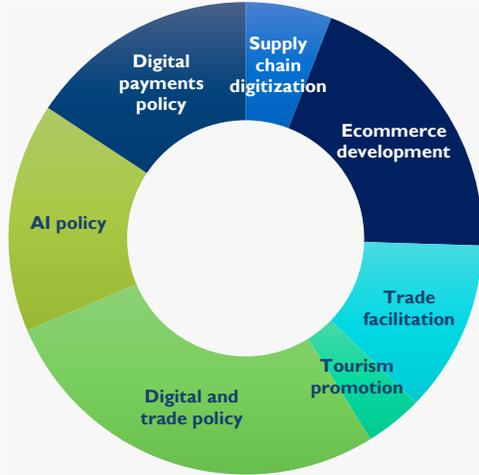
Nextrade Engine: “Full stack” solution to create value for our customers



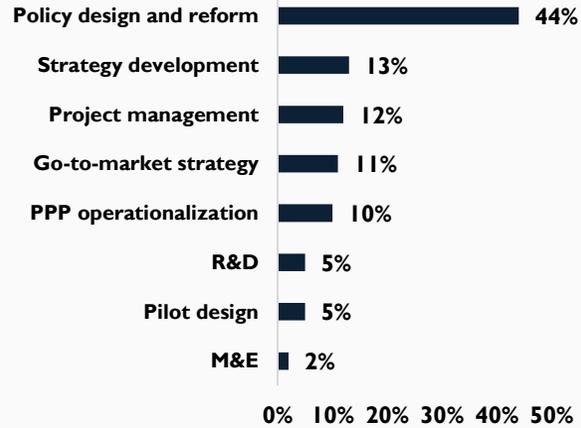
NEXTRADE 2024-25 IN NUMBERS

> 80 deliverables, with diverse approaches

Objectives, % of projects

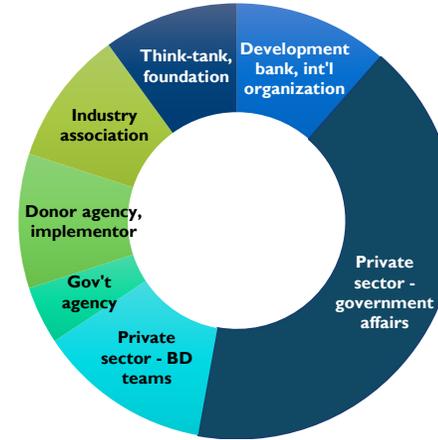


By practice areas



In 2025 we served our 58th customer, diversifying even further

Customers by sector



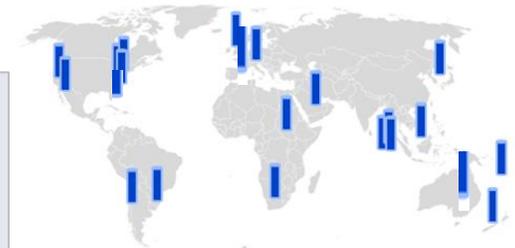
Repeat customers



Multiple repeats



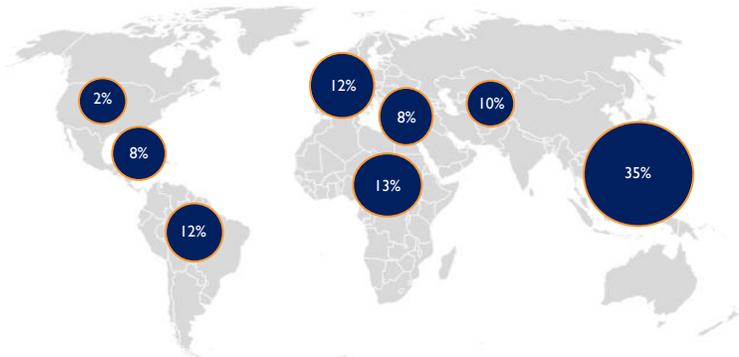
Customer locations



Customers highlight our:

- Rigor
- Responsiveness
- Relationships
- Innovative approaches
- Customer focus
- Customer service
- Efficient delivery
- Opening strategic opportunities for customers

Global footprint

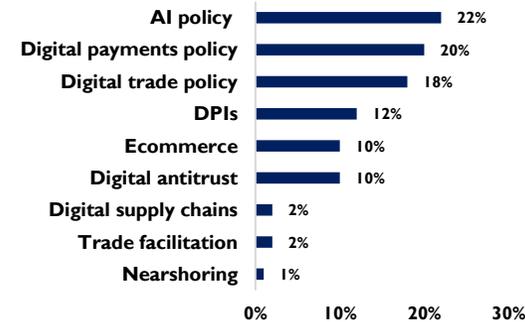


In 2024-25, we supported with our clients:

- ICT, economy, trade, and education policymakers
- Investment and export promotion agencies
- Customs agencies
- Destination management organizations
- SMEs seeking to use ecommerce, digitize, export

Types of polices and flows we promoted with our customers

Policies



Trade flows



NEXTRADE 2023-25 EXAMPLES OF WORK

1. Technology and digital trade policies, indices, dashboards

2. Strategy development

3. Tradetech

4. Public-private partnerships

5. Project design and implementation

1. 13 YEARS OF TECHNOLOGY AND DIGITAL TRADE POLICY WORK

In sum

- **20+ digital and trade policy indices**
- **120+ published studies and reports**
- **Over 100 policy analyses and roadmaps**
- **58 leading public and private sector clients**
- **190 countries covered**
- **Over 1,600 policymakers engaged in Nexttrade-hosted digital trade dialogues**
- **>100 speaking engagements, e.g. Davos, World Bank, IDB, UN, APEC, G20**

Examples of projects by digital trade verticals

- ### Digital trade in goods

 - Multiple data and analytics enable SME crossborder ecommerce policies in developing economies
 - Policy pilots to promote market access for online sellers
- ### Digital services trade

 - Multiple studies identifying the impacts of the ASEAN DEFA on digital trade
 - Assessing market access of Pacific Alliance digital services providers to support regional services negotiators
 - Flagship report on digital trade in LAC
- ### Freelancers and gig workers

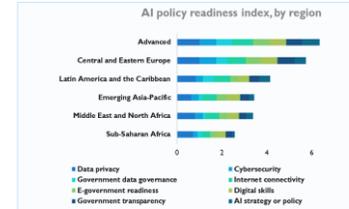
 - Global research agenda on empowering freelancers and creators
 - Analyzing the characteristics and export and import participation of developing country creators and influencers
- ### Creative industry

 - 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 of projects by policy issues

AI governance, skilling, and interoperability

- AI Policy Blueprint for Africa
- Africa AI Skilling Blueprint
- Analysis of EU's AI Act
- Agenda for "trade in AI" in the ASEAN
- AI readiness index across 190 countries



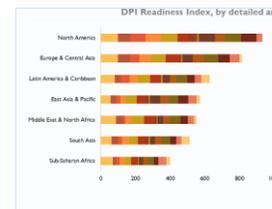
Crossborder digital payments policies

- Financial regulations' impact on crossborder payments globally
- Impact analysis of fast payment systems around the world
- Financial regulations impacting SMEs' crossborder ecommerce
- Payments interoperability in Central Asia and ASEAN



Digital public infrastructures

- Designing interoperable digital IDs
- 190-country DPI readiness index
- Playbook on ways RTPs and global payments networks can collaborate
- Playbook on national digital infrastructure policies



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



Antitrust in the digital era

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



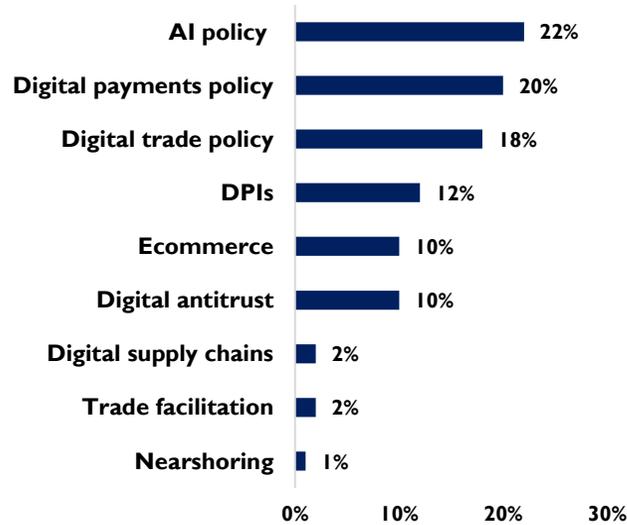
DIGITAL AND TRADE POLICY INDICES TO SUBSTANTIATE POLICY ADOPTION AND DESIGN

Policy indices we have developed	Supporters	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 MSME ecommerce	40 (2018) 52 (2021) 75 (2024)	75 policies in 12 domains	Digital infrastructure, data privacy and transfer, AI, Fintech, cybersecurity, consumer protection, copyright, paperless trade, digital payments, digital identity, ecommerce export promotion, MSME finance, MSME formalization
AI Policy Index for Africa		Africa	Adoption and use of AI	50	30 policies in 7 domains	AI-related innovation, skilling, R&D, responsible uses, risk-based policies; national data privacy and transfer, cybersecurity, AI governance, AI interoperability
Digital Payments Enablement Index		Global	Payments regulations on trade	30	11 policies across 4 pillars	Financial compliance, foreign exchange and capital controls, trade and customs documentation, digitization
Digital and Trade Policy Index		Central America	SME ecommerce development	5	60 policies in 12 domains	Digital infrastructure, data privacy and transfer, cybersecurity, copyright, paperless trade, digital payments, ecommerce export promotion, SME finance
AFCFTA Digital Protocol implementation index and dashboard		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
ASEAN DEFA Implementation Index and dashboard		Global	Readiness to comply with DEFA Digital Economy Framework Agreement	10	30 policies	Data privacy and transfer, cybersecurity, AI governance, AI interoperability
Digital competition policy tracker		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 DPIS; interoperability with card networks	190	15 policies	Data privacy and transfer, cybersecurity, AI governance, AI interoperability
Dashboard on personalization in Europe		Europe	Personalization of online services	27	6 policies, 15 laws, surveys with 10,000 consumers	Personalization, data, privacy, consumer protection, dark patterns
AI Policy Index for ASEAN		ASEAN	AI-driven growth for SMEs in ASEAN	10	10 policies	AI assurance framework, promotion of AI innovation, data flow to enhance AI adoption, comprehensive government strategy to promote cloud capacity, AI adoption strategy in public sector

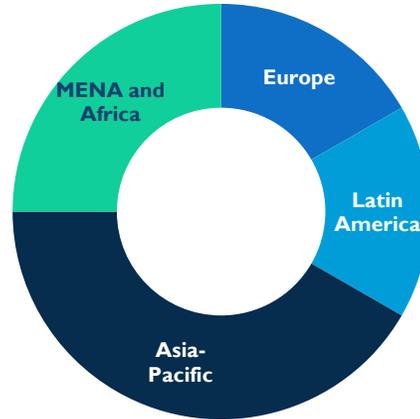
IN 2023-25, >100 POLICY ANALYTICS TO ENABLE CLIENTS TO DRIVE POLICY REFORMS

Selected projects on AI policy

Analytics portfolio



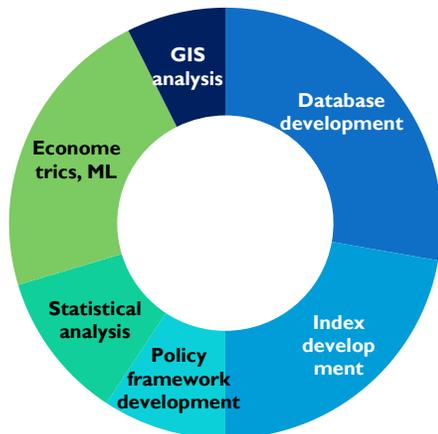
Regions of focus



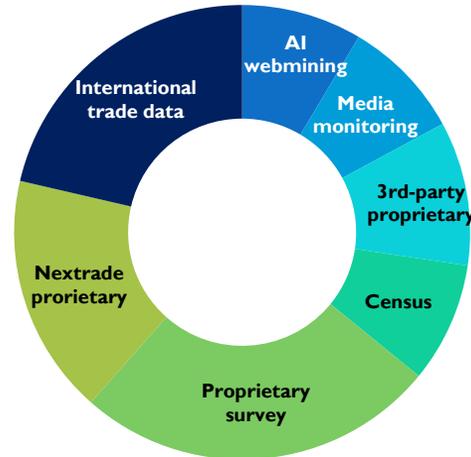
AI Policy Blueprint for Africa

In 2024-25, we worked with Google to develop an AI Policy Blueprint for Africa aimed to promote policies conducive to the adoption and use of AI. The Blueprint includes surveys with 2,000 African firms and students on their use of AI, analyzes of the adoption of 30 policies conducive to AI, and develops an AI readiness Index.

Techniques



Data sources



AI Pioneers: global mapping of emerging AI policy frameworks

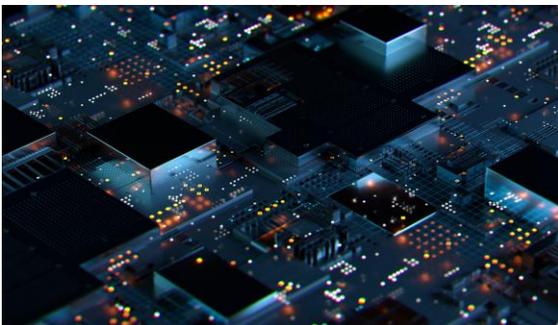
By now over 70 countries have adopted and operationalized an AI strategy. This study developed for Google in 2024 explores the various emerging AI policy frameworks in 25 countries and the extent to which they to promote and secure AI at scale and translate AI into economic growth and development.

AI Skilling Blueprint for Africa

In 2025, we worked with Google to develop an AI Skilling Blueprint to enable African governments issue national AI skilling plans. The Blueprint provides detailed strategies and actions for African governments to promote AI skills for Google AI Sprinter cohorts: AI Learners, AI Implementers, and AI innovators. The Blueprint outlines a unified strategy for the African Union and regional economic communities.



DEFINING AND IMPROVING DIGITAL POLICIES: SELECTED DIGITAL POLICY DATA AND ANALYTICS



Pioneering policies for “trade in AI”

AI is emerging not only as a driver of innovation and productivity, but also as a tradable asset. AI-driven startups export models, generative tools, and autonomous agents. AI solutions are also an indirect export, used in the production of manufacturing, agricultural, mining, and services exports. This 2025-26 study for the Asia-Pacific Foundation of Canada measures Canada’s trade in AI and develops policy options for Canada to drive its AI exports especially in the Indo-Pacific region.



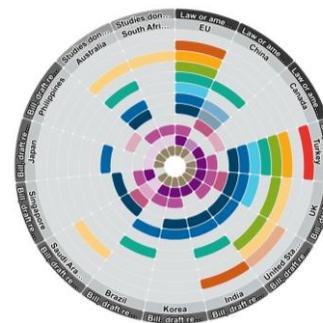
Toward better digital rules in the Asia-Pacific

This joint study by the Hinrich Foundation and Nextrade Group highlights how better digital regulations can boost economic growth – and how especially APAC region governments should improve their process of designing and considering digital regulations. The study puts forth a Model Regulatory Impact Assessment (RIA) for Digital Regulations and measures, through an analysis of over two dozen RIAs, APAC economies’ current application of the Model RIA, identifying areas for improvement.



Payments-related policies’ impacts on global e-commerce

Despite global progress on crossborder payments, SME importers face significant frictions when paying exporters. This 2025 study for Amazon identifies payments frictions experienced by over 3,000 SME importers and exporters and shows, through econometric work, how simpler, more digitized, and interoperable financial regulations on anti-money laundering and countering the financing of terrorism (AML/CFT), foreign exchange, and know your customer (KYC), among others, would unlock SMEs’ trade and e-commerce and boost incomes globally.



Tracking the adoption of new digital competition policies around the world

The EU’s Digital Markets Act (DMA) has propelled thinking around the world on digital competition policy. In 2024-25, we worked with CCIA, CSIS, and AWS alike on a global policy tracker and analyses to map and counter the spread of DMA-type regulations, engaging with think tanks and associations globally to chart path back to antitrust policies that put consumer welfare at the center.



Measuring implementation of the AfCFTA Digital Protocol

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 2023-24 we assessed with the eTrade Alliance African countries’ readiness to implement the AfCFTA Digital Protocol, developed a dashboard for AfCFTA implementation, and provided a governments and donors a roadmap for implementation.



Nextrade’s 2024-25 Digital and MSME e-commerce policy index

This Nextrade report and dashboard for the eTrade Alliance builds on our our digital policy and MSME e-commerce policy indices in 2018 and 2021, maps the adoption of 75 policies conducive to MSME e-commerce in 60 countries, most of them developing and emerging nations of Africa, Asia, Middle East, and Latin America. The index enables developing country policymakers to readily see where their country is vis-à-vis peers and priority reforms that are needed.

DIGITAL TRADE POLICY AROUND THE WORLD



Digital trade in LAC: flagship report forthcoming in 2026

This forthcoming flagship report, developed with the IADB, World Bank, and WTO in 2025, shows that digital services are the fastest growing part of Latin America and the Caribbean's trade, expanding over 450% since 2005 to reach \$80 billion in 2024. Yet the region still accounts for only 2% of global digital services exports, highlighting major untapped potential for growth and deeper regional digital integration.



Canada's under-the-radar Digital trade opportunity

This 2025 report, co-authored with Danielle Goldfarb for the Asia-Pacific Foundation of Canada identifies digital and AI-enabled trade as Canada's fastest-growing export segment. The paper calls for Canada to place digital and AI-enabled trade at the core of its economic strategy by setting national targets, supporting exporters, aligning trade and tech policy, fostering digital adoption in traditional sectors, and modernizing trade agreements.



Japan's digital deficit debate: gains from digital services imports

This 2025 report challenges Japan's prevailing concerns about a "digital trade deficit," showing that digital services imports are essential for Japanese firms and startups' competitiveness, and that Japan's digital services exports have grown faster than imports in the past decade. In addition, the bulk of the digital services value-added in Japanese exports arises from domestic sources. The study calls for Japan to continue championing open digital trade policies to expand these gains.



Ecommerce in the Southern Cone

In 2023-24, we worked with the Inter-American Development Bank (IDB) to assess Southern Cone economies' intra- and extra-regional ecommerce in goods and services, using SMEs surveys and policy data to identify gaps in cross-border ecommerce, and develop policy, programmatic, and pilot ideas for the IADB and the Southern Cone governments to support regional firms' trade through ecommerce



Assessing Asia-Pacific digital trade agreements

This study prepared in 2024 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.



Measuring implementation of CPTPP ecommerce chapter

Digital trade agreements are proliferating – but their implementation has yet to be analyzed or tracked. In 2022 and 2024, 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.

ASEAN DIGITAL ECONOMY FRAMEWORK AGREEMENT (DEFA): OUR ONGOING SERIES



ASEAN economies' offensive interest in digital trade

In 2024-25, we partnered with AWS to analyze the trade and GDP gains of the ASEAN Digital Economy Framework Agreement (DEFA) and supported ASEAN Member States through capacity-building on its optimal design. Our first DEFA paper highlights the rising potential of digital services exports driven by regional providers, and their impact on job creation, business growth, and entrepreneurship across the region.



Study and dashboard on ASEAN economies' readiness for DEFA

This 2024 study and dashboard supported by the eTrade Alliance seeks to help the ASEAN Members on the design and implementation of the ASEAN DEFA. The paper and dashboard review the design of other Asia-Pacific digital trade agreements and chapters for good policies and practices, rigorously examine ASEAN economies' readiness to implement 20 hypothetical DEFA provisions, and provides a roadmap for monitoring the eventual agreement's implementation.



Interoperable payments in Southeast Asia through DEFA

This 2025 study, supported by Amazon, explores how the ASEAN DEFA could reduce cross-border payment frictions and unlock major trade gains for MSMEs in Southeast Asia. It shows that fragmented payment rules in ASEAN cost MSMEs up to \$20 billion in lost exports and 2.7 million jobs, recommending interoperability through payments license passporting, eased data transfer, harmonized standards, and a roadmap for an ASEAN Digital Payments Area.



Promoting "trade in AI" in Southeast Asia through DEFA

This study, supported by AWS, examines how the ASEAN DEFA can unlock up to \$1 trillion in GDP gains by 2030 through AI adoption across startups, MSMEs, and governments. It recommends DEFA provisions promote shared AI standards, sandboxes, and skills development, and that ASEAN governments draw on Singapore and Japan's pro-innovation and flexible AI policy frameworks.



Impact of data transfer, non-discriminatory treatment, moratorium on ASEAN digital trade and SMEs

This 2024 study helps ASEAN Members and stakeholders shape the DEFA to boost trade and digital trade, especially for SMEs. It examines the effects of key provisions such as cross-border data transfer, a moratorium on duties on electronic transmission, and nondiscriminatory treatment of digital imports.



DEFA's value-added to Asia-Pacific trade, including on AI

In this 2024 paper for the Hinrich Foundation, Nextrade looks at DEFA's value-added to the Asia-Pacific trade architecture by locking in gold-standard digital rules for data flows, electronic transmissions, and future-proofing cooperation on payments interoperability, and AI standards.

WORKSTREAM ON DESIGNS AND IMPACTS OF DIGITAL PUBLIC INFRASTRUCTURES (DPIS)



Digital public infrastructures: playbook for emerging market governments

Countries around the world have promoted digital payments and financial inclusion through various means, including through digital public infrastructures (DPI). Yet many countries have digitized their payments through private sector leadership. This Nextrade-developed Visa–CSIS Scholl Chair brief examines ten countries’ digital payments and transformation journeys, and creates a playbook for national digital transformation.



Digital public infrastructures: readiness index

In recent years, there has been growing discussion on “digital public infrastructures” (DPIs). This Nextrade research supported by Mastercard promotes dialogue on the fundamentals countries should have in place to successfully adopt, implement, and build on DPIs, creating a DPI readiness index.



Strengthening Southeast Asia’s Real-Time Payments

This study, developed by Nextrade Group with GFTN and the Visa Economic Empowerment Institute (VEEI) in 2025, shows how real-time payments (RTPs) are transforming daily transactions and expanding financial access across Southeast Asia, and how partnerships with private sector solutions could enable RTP networks to address concerns about fraud and security and enable cross-border payments and credit access pathways.



Supporting digital transformation and economic growth through interoperable digital identity

When designed with interoperability in mind, digital IDs enable secure, cross-border access to services and markets, accelerating economic growth and digital transformation. This 2025 Nextrade report for Visa explores models and policies that help countries build trusted, widely used interoperable digital ID systems.



Fast payment systems: structuring and measurement

In 2024 we worked with Mastercard to promote data-driven, policy-relevant discussion on the role of different types of RTPs in development and produced pioneering data on the impact of RTPs on digital payments use, access to finance, and participation in cross-border trade among consumers and SMEs.

ASSESSING THE IMPACTS AND SPREAD OF EU'S DIGITAL REGULATIONS



Brussels Effect: lessons for Asia from EU's digital regulations on startups and SMEs

This 2025 Nextrade-Digital Prosperity Asia report examines the EU's sweeping digital regulations, including the DMA, DORA, and AI Act, and their unintended consequences for startups, SMEs, and innovation. It highlights lessons for Asian policymakers, urging them not to copy-paste EU rules and instead pursue regulatory approaches that balance risk management with innovation and growth.



Impact of the DMA on 5,000 Consumers across the EU

In 2025, one year into the EU's Digital Markets Act, Nextrade Group survey of 5,000 Europeans, supported by CCIA Europe, finds that while digital services remain widely used, consumers report their online experiences are more cumbersome, less intuitive, and less personalized, offering insights to inform policymakers and businesses on the DMA's real-world impact



Survey and study on personalization in Europe in preparation for the Digital Fairness Act

This 2025 two-part survey and study supported by CCIA Europe explore how the upcoming Digital Fairness Act can balance protections against manipulative dark patterns with the benefits of personalization. The survey with 10,500 Europeans finds that consumers value personalization and are willing to pay more for fair and transparent services, while already punishing deceptive brands. The study of 15 other EU laws finds existing laws already cover many of the elements expected in the DFA, making a targeted approach to the DFA essential.



Measuring the impact of EU's digital 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, supported by CCIA and CSIS estimates these carious impacts. It was subsequently cited in a Congressional letter to the Biden Administration.

SMES IN ECOMMERCE AND DIGITAL TRADE



How Online Advertisement Propels SMEs' Revenues, Profitability, and Exports

This 2025 Nextrade Group and VECOM study shows how online advertising drives Vietnamese SMEs' revenue growth, profitability, and exports. Drawing on a survey of 1,060 SMEs, it finds that targeted online ads help SMEs acquire customers, expand into new markets, and accelerate cash conversion. The study calls for flexible online ads policies and SME training to unlock ads' growth gains for SMEs.



Impact of Industry 4.0 technologies for Asia-Pacific SMEs and supply chains

In 2025, we worked with Georgetown University and Economic Research Institute for ASEAN and East Asia (ERIA) to examine the role of industry 4.0 technologies in enabling Asia-Pacific firms and economies' in global value chains. The study includes surveys with 800 firms, trade and value chain data across 12 economies over the past 20 years, and several econometric analyses.



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.



Online ads' economic gains to Australian SMEs

This Nextrade Group 2025-26 study examines the impact of online ads to Australian SMEs and the economy – including firms' exports, profitability, and economic productivity.



Rise of MSME creators and influencers: opportunities and challenges for development

This 2024 paper delivered for the eTrade Alliance creates a typology of creators and assessing the platforms they leverage to sell their work, leveraging Visa-sponsored survey data on creators in 17 economies around the world, to understand creators' characteristics, performance, and challenges; and discussing emerging policy developments around the world that affect creators.



Research agenda on gig workers

In 2024, we provided the World Bank a data-driven, policy-relevant research agenda on ways in which digital services, especially provided by developing country gig workers, freelancers, creators, and small businesses, could promote growth and development in developing countries.

EXAMPLE OF HOW WE HELP OUR CLIENTS TO ASSESS AND IMPROVE POLICY

Payments-related policies' impacts on global ecommerce

In 2020, the G20 issued the Crossborder Payments Roadmap but results are still wanting and importer SMEs face frictions when paying exporters.

This 2025 Nextrade study supported by Amazon examines the causes of these frictions – rigid financial regulations that complicate SME importers' banking and payments to exporters.

The study creates a Payments Enablement Index in 30 economies, finds that a 10% improvement on the Index boosts trade by 3% and incomes by 0.6%-1.3%. A survey with 3,000 firms finds crossborder payment frictions increase SMEs' workloads and undercut SMEs' revenue and profit growth by 10-12%.

The study issues policy recommendations presented during 2025 to policymakers in three continents.



IN ACTION IN 2025: HIGHLIGHTS OF WHERE WE SPOKE TO IMPROVE TECH AND TRADE POLICY

AI policy at Africa AI Summit in Kigali



Cross border payments policy at Singapore Fintech Festival



Africa AI Skilling blueprint in Accra



Digital competition policy at APEC SOM I in Gyeongju



AI policy and digital regulations at APEC SOM III in Incheon



Interoperable payments at Point Zero Forum in Zurich



DPIs at WTO Public Forum in Geneva



Digital trade policy, ESCAP in Bangkok



Industry 4.0 with ERIA, Georgetown in Jakarta



AI policy at Singapore Economic Roundtable



CSI Summit in Washington, DC



Payments regulations at CSIS in Washington



Future of fast payment systems with Visa at Singapore Insights Forum



Trade facilitation for MSMEs at OAS, Washington



Crossborder payments policy at Singapore Insights Forum



Digital Fairness Act with CCIA in Brussels



Japan digital deficit in Tokyo



Brussels effect in Mumbai



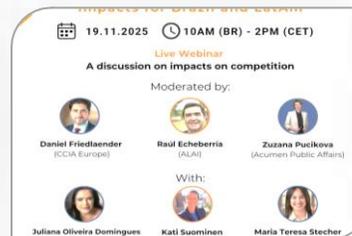
SME Finance Forum in Johannesburg



DMA's impacts, ICRIER, New Delhi



DMA's impacts, Brussels and Rio



Brussels effect in Seoul



AI and trade at WTO, Geneva



ASEAN DEFA provisions in Jakarta



IN ACTION IN 2024: HIGHLIGHTS OF WHERE WE SPOKE

AI in Africa at Wilton Park, UK



WTO Ministerial Conference in Abu Dhabi



ASEAN DEFA negotiations in Bangkok



Africa Business Forum in Lusaka



APEC Senior Officials' Meeting in Lima



Uzbekistan Textile Expo in Tashkent



WTO Public Forum in Geneva



Intergovernmental Group of Experts on Digital Economy in Geneva



ASEAN DEFA negotiations in Jakarta



MSMEs in ecommerce at OAS, Washington



Africa Tech Fest in Cape Town



Playbook for national payment and ID systems in Washington



Future of fast payment systems in Washington DC



Egypt customs modernization for ecommerce in Cairo



eCommerce Day Africa, Nairobi



DHL Go Trade Summit, Bonn



ESCAP digital trade in Asia-Pacific, Bangkok



CPTPP 2.0 dialogue on AI policy in Vancouver



Berne Union on future of world trade in Oslo



Africa AI policy blueprint at UNGA in New York



ASEAN digital trade at Hinrich Foundation in Singapore



Central Asian digital payments in Almaty



Scope 3 emissions in Asia-Pacific



Future of Asia-Pacific trade in Washington



NEXTRADE 2023-25 EXAMPLES OF WORK

1. Technology and digital trade policies, indices, dashboards

2. Strategy development

3. Tradetech

4. Public-private partnerships

5. Project design and implementation

2. DATA-DRIVEN STRATEGIES TO ENABLE OUR CUSTOMERS TO BETTER SERVICE THEIRS



Promoting LAC countries' readiness for nearshoring

Nextrade worked with IFC and World Bank to analyze the results of a survey with over 300 multinational companies on their plans to invest and nearshore in Latin American and Caribbean economies and advice LAC policymakers and World Bank Group on investments in infrastructure, skilling and greening to attract investment from nearshoring MNCs.



Promoting LAC SMEs' twin transition to benefit from nearshoring

Nextrade worked with the eTrade Alliance to survey 250 Mexican and Costa Rican B2B MSMEs on their readiness for selling into multinational value chains and meet lead firms' data sharing, cybersecurity, digital transformation, and sustainability mandates. We also mapped out 40 MNCs' sustainability requirements. The analytics support donors' projects in LAC region.



Promoting creative industries in developing countries

This study for the World Bank analyzes the composition, supply, and demand for talent, including gig workers, in the Korean creative industry, and the ways in which Korea's firms and the government cultivate talent for producing and distributing "K-Content". The study is part of a broader World Bank project to understand the success drivers of the Korean creative economy and cultivate developing country creative economies.



Accelerating European logistics through technology

Nextrade worked with a leading technology company to identify and size opportunities for the tech company to digitize European trucking, air, and rail businesses for a competitive edge. We sized six industry verticals using Eurostat and third-party data and mapped ecosystems and potential pilot opportunities.



Driving digital trade in Latin America through development lending

Nextrade is working with the Inter-American Development Bank (IADB) on a new analysis on digital trade in LAC, to promote the IADB's lending activities and technical assistance to bolstering LAC countries access to digital markets in goods and services. The report will be launched at the 2025 at the World Trade Organization (WTO).



FDI strategies for Kazakh Invest, Uzbek regional investment agencies

In 2024, Nextrade supported, with USAID FGI project, Kazakh Invest, Kazakhstan's investment promotion agency, to diversify foreign direct investment (FDI) into manufacturing, renewables, real estate and IT and use technology to targeted the right investors. Nextrade also supported the USAID BSP project in Uzbekistan with a two-day FDI workshop for regional investment promotion agencies.

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



Central America ecommerce strategy

In 2019-24, we worked with Cenpromype and U.S. State Department to create national ecommerce plans in five Central American countries and a regional ecommerce strategy based on surveys and data analytics with altogether 5,700 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 U.S. 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 2018-23, 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

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 2023-24, 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.

CREATING STRATEGIES TO ENABLE WOMEN-LED FIRMS IN THE DIGITAL ECONOMY



Promoting women-led firms' use of ecommerce in Central America

This 2024 study for Cenpromype and U.S. State Department, building on our 2010 and 2022 studies, surveys how women-led firms in Central America are using ecommerce, exporting, and responding to online harassment ecommerce growth into women-led firms' growth and exports. The analysis covers surveys with 1,400 firms and 22 regional and national SME organizations, trade data on over 120 product categories, analytics on market access challenges such as green mandated and traceability requirements, and policy recommendations on how Cenpromype, regional governments, and SICA organizations can promote women-led firms' growth, digitization and exports.



Supporting women-led startups in the APEC region

Women-led startups are growing in number in the APEC region. However, there is to date very little quantitative and qualitative data on women entrepreneurs' participation and leadership in APEC economies' startups.

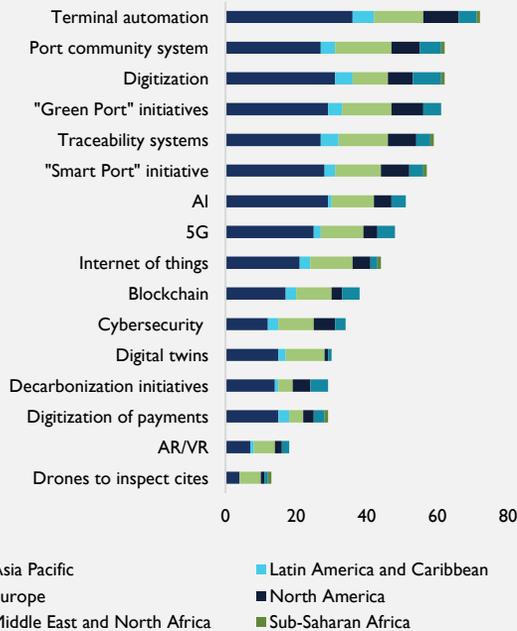
Using census data across 21 APEC economies, survey data, interviews, and policy analysis of laws, law proposals, and government procurement policies, women startup programs, and agencies for women's affairs, this study delivered to the APEC Secretariat in 2024 analyzes the prevalence and challenges of women entrepreneurs in APEC region startups, both as employees and especially as founders and leaders, and analyzes policies and best practices to promote women's entrepreneurship in the APEC region.

IN THE NEXT – PROPRIETARY DATA TO HELP CLIENTS IDENTIFY CHALLENGES, DEVELOP SOLUTIONS

SMARTrade™

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

Digitization use cases in maritime ports

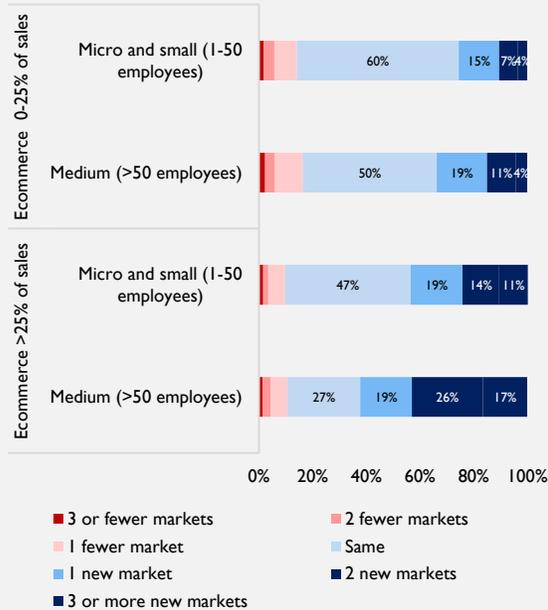


Source: Nextrade Group.

E-exporters

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

Ecommerce sellers and export diversification

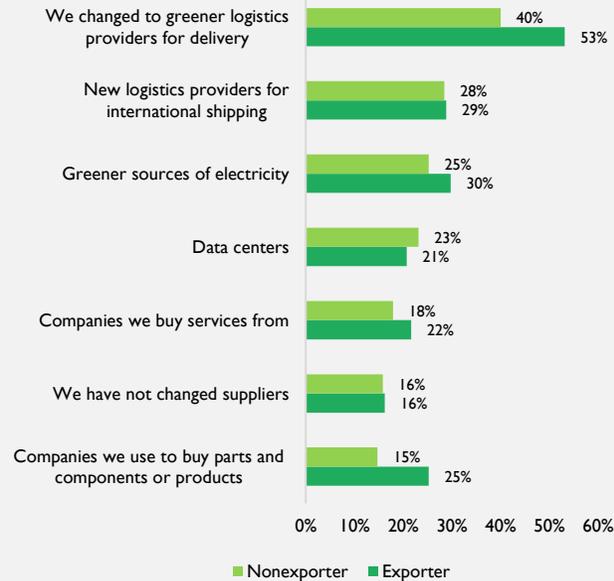


Source: Nextrade Group.

Carbonless Commerce™

Driving net zero trade through carbon measurement, mitigation and management

Greening strategies of export-driven firms

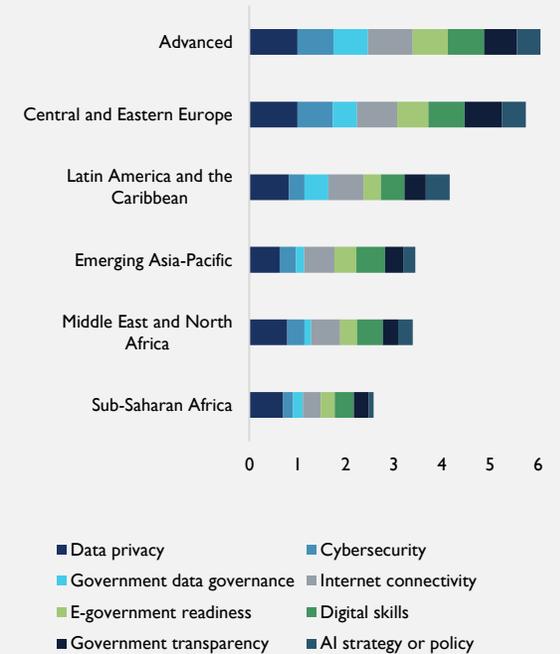


Source: Nextrade Group.

AI Readiness Index™

Data to anticipate AI policy changes and challenges, ideating improvements

Global AI policy readiness index



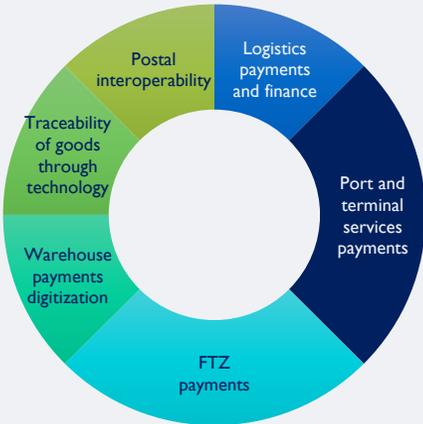
Source: Nextrade Group.

NEXTRADE 2023-24 EXAMPLES OF WORK

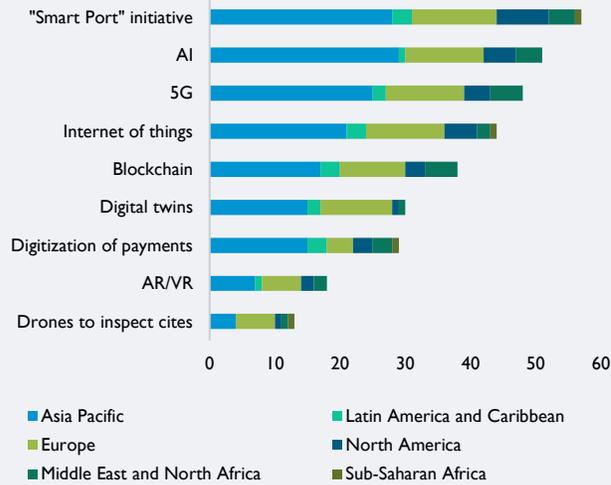
- 1. Technology and digital trade policies, indices, dashboards**
- 2. Strategy development**
- 3. Tradetech**
- 4. Public-private partnerships**
- 5. Project design and implementation**

3. TRADETECH – GO-TO-MARKET STRATEGIES TO DIGITIZE TRANSACTIONS IN WORLD’S TRADE HUBS

What we solve for



Industry 4.0 adoption in trade ecosystem via Nextrade SMARTrade data



Source: Nextrade Group.



Smart port strategy

A bedrock of our work to bring technology to fuel trade is our smart ports strategy, initially developed for a leading global 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.



Customs pre-arrival in MENA

Nextrade has worked with USAID Egypt TRADE to develop recommendations to enhance Egypt's ecommerce customs clearance capabilities, with the aim of expanding exports through data-sharing and risk management systems for parcels.



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

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 worked in 2023-24 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.

NEXTRADE 2023-25 EXAMPLES OF WORK

- 1. Technology and digital trade policies, indices, dashboards**
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4. FLAGSHIP PUBLIC-PRIVATE PARTNERSHIPS TO POOL RESOURCES FOR TRADE

Alliance for eTrade Development



- To enable developing country SMEs to sell online
- Built by Nextrade, operated 2017-25
- 14 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

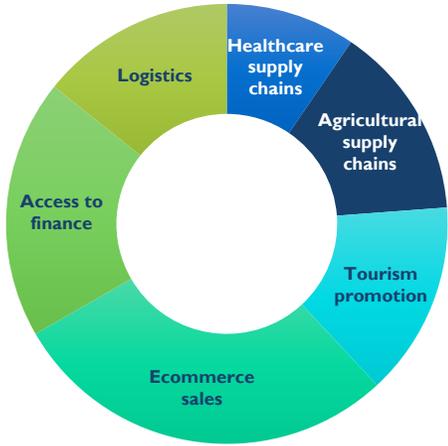


- To enable Africa's trade through U.S. technology
- Built by Nextrade in 2020-22, ran in 2023-25
- 20 leading corporate partners
- First projects launched in 2023-24 to bring U.S. technology to solve for frictions in Africa's agricultural and healthcare value chains, promote U.S. exports to Africa
- In 2024, new call for proposals to connect U.S. tech companies with African businesses

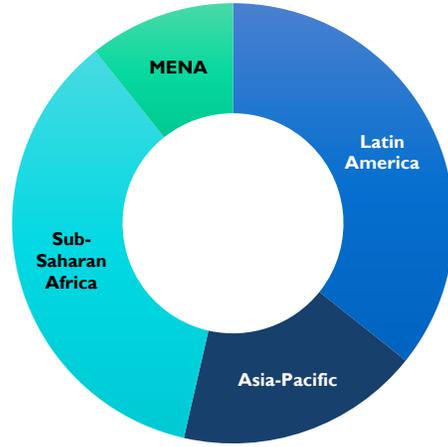


30+ PUBLIC-PRIVATE PARTNERSHIP PROJECTS

What we optimize with partners



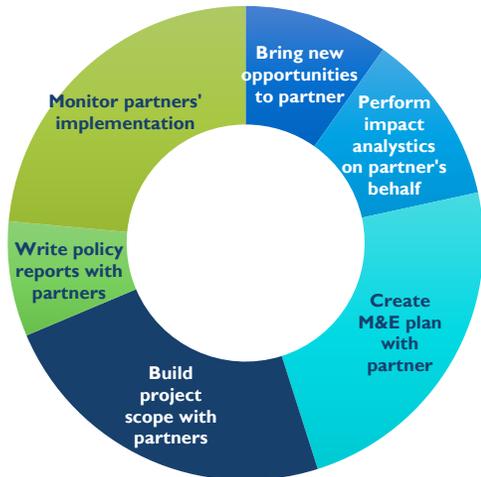
Regions of focus



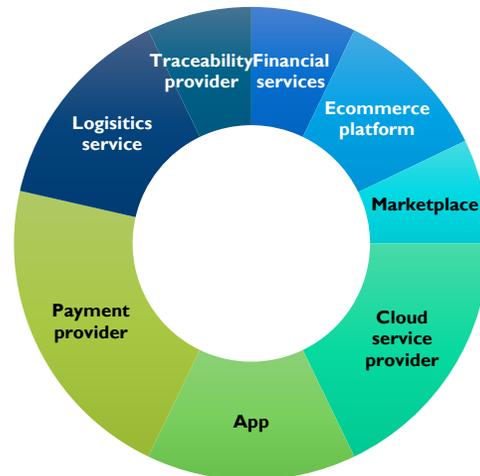
Launching the next call for proposal for Africa Tech for Trade Alliance

In 2024, Nextrade-created Prosper Africa Tech for Trade Alliance launched a new Call for Applications, aiming to collaborate with organizations that can drive impactful digital solutions to enhance trade and ecommerce across Africa in partnership with Tech for Trade Alliance partners. Over 140 proposals were received, with selected project set to launch in 2025.

How we support our tech company partners



Partner company types



IBM's AI-driven medicine traceability system in Southern Africa

Nextrade worked in the Prosper Africa Tech for Trade Alliance with IBM Consulting, IBM Watson AI, and the National Association of Boards of Pharmacy (NABP) to launch Pulse by NABP™ in South Africa. Pulse will connect U.S. and global pharmaceutical companies like Pfizer and Roche with African distributors and pharmacies in this emerging market, enabling better communication between trading partners and traceability of medications.



Mastercard-Alerzo financing solution for FMCG SMEs in Nigeria

Nextrade created with Mastercard, Alerzo, a leading Nigerian B2B e-commerce company, and the USAID eTrade Alliance financial solutions to 10,000 Nigerian MSMEs, helping them to use digital payments and offering comprehensive business management solutions, such as Mastercard's Tap to Pay, QR codes, Pay-By-Link, and Payment Gateway Services.

TWO DOZEN PUBLIC-PRIVATE PARTNERSHIP PROJECTS PREPARED FOR LAUNCH IN 2023-24



Kenya SME ecommerce development portfolio

In 2022-24, Nextrade developed and operationalized a comprehensive portfolio of eight interventions to promote SME ecommerce and access to finance in Kenya with a dozen eTrade and Tech for Trade Alliance members (such as Google, DHL, Hellotractor, Brighter Monday Kenya, African Center for Advanced Technologies, and African Talent Company) and Kenyan government agencies and associations, for the next three years.



Ecuador ecommerce development with a local platforms, regional bank, eTrade Alliance partner

Nextrade worked in 2024 with the eTrade Alliance partner eCommerce Institute, Latin America's Banco Pichincha, and Ecuadorian ecommerce platform Pardux to enable Banco Pichinchas's women-led SME clients to start to sell online. This builds on our SME ecommerce capacity-buildings and ecommerce policy dialogue with the government of Ecuador.



Mexico agriculture and tourism value chains

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, in partnership with such companies as Mastercard, Google, and TripAdvisor.



Central America ecommerce and digital ecosystem development with eCommerce Institute, Nidux

Nextrade worked in 2024 with eTrade Alliance partners to launch three projects aimed to enable Central American firms use ecommerce platforms and marketplaces to sell their products in the intra-regional and international markets.



Uzbekistan tourism promotion through PPPs

In 2023-24, Nextrade supported the USAID BSP project in Uzbekistan in promoting Uzbekistan's textile export and visibility of its tourism destinations, including with leading global travel platforms and payment providers.



Bringing healthcare to East African women with Kasha

In 2023-24, Nextrade supported Kasha in supplying FMCGs, pharmaceuticals, and women's healthcare products to retail pharmacies, clinics, hospital, and direct to customers in East Africa. Under the Africa Tech for Trade Alliance, Kasha expanded its agent network to engage more retail channels and access more consumers in rural areas, and offered stock financing and training for B2B buyers to grow their product offerings.

PPP EXAMPLE – ETRADE AND TECH FOR TRADE ALLIANCE 2024 AFRICA PORTFOLIO

	DIGITAL TRADE ENABLING ENVIRONMENT		TECHNOLOGY SOLUTIONS				MSME DIGITAL SKILLS TRAINING & CAPACITY BUILDING		
Partner			 						 Bootcamp program
Focus	AfCFTA Digital Protocol dialogues with policymakers	Ecommerce ecosystem development	B2B logistics & digital financial services for MSMEs	Pharmaceutical supply chain traceability	Healthcare products t East Africans	Enabling farmers access tractors for lease	GoTrade: Export & Trade Logistics	Youth digital skilling for job opportunities & online sales	SME business training & digital selling
Activity	Workshop series for African policymakers and AMCHAMs on the implementation of the AfCFTA for digital protocols; MSME-facing workshops planned for 2025.	Industry event showcasing and promoting Africa's ecommerce ecosystem & key stakeholders; hosted in 2023 and 2024 in Kenya.	B2B logistics & supply chain management platform for MSMEs in Nigeria's FMCG sector, combined with Mastercard's DFS for full suite of solutions. Target adoption of platform DFS such as digital payments and credit by 10,000 MSMEs; 1,000 MSMEs to receive training on digital and financial literacy.	Pulse by NABP™ connects US and global pharmaceutical companies like Pfizer and Roche with African distributors and pharmacies in South Africa, enabling better communication between trading partners and enabling traceability of medications.	The Kasha Digital Retail and Last Mile Distribution Platform Project plans to support, test, and measure the effectiveness of incorporating a digital logistics and retail platform into an underserved sector to underserved populations.	The project expands Hello Tractor's booking agent network in Kenya and Nigeria, while enabling its ability to scale its booking agents process by digitalizing booking agent training and onboarding activities.	Training a select group of African MSMEs with established businesses to gain proficiency in export logistics and foreign ecommerce sales 1:1 mentoring with global business school fellows and logistics professionals	Training 1,000 Kenyan youth and female entrepreneurs in digital business skills, online sales and ecommerce platform onboarding Training informed by digital skills gap analysis; program is enhanced by regular stakeholder engagement	Training 2,000 Kenyan MSMEs in basic business competencies and ecommerce to increase sales and grow their businesses/ Support for business growth by creating online presence through onboarding on Google Business Profiles



USAID
FROM THE AMERICAN PEOPLE



NEXTRADE 2023-25 EXAMPLES OF WORK

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4. DELIVERING 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 + 14 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 Manage all project development, M&E, research Ideate programs with partners 	
Egypt TRADE		<ul style="list-style-type: none"> Promote Egyptian B2B SME exports through ecommerce, AI, digital marketing, freight forwarding 	<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 	
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 	
Uzbekistan BSP		<ul style="list-style-type: none"> Enable Uzbek tourism providers and textile producers to export 	<ul style="list-style-type: none"> Build strategy for PPPs in tourism with tourism association Promote export promotion agency's capabilities to help SMEs Promote textile sellers 	
ACCELERATE Western Balkans		<ul style="list-style-type: none"> Promote digitization of Western Balkans and Caucasus trade and 	<ul style="list-style-type: none"> Develop and operationalize projects to fuel trade through technology Promote EU accessions 	



EXAMPLES OF NEXTRADE ECOMMERCE DEVELOPMENT APPROACHES IN DONOR PROGRAMS



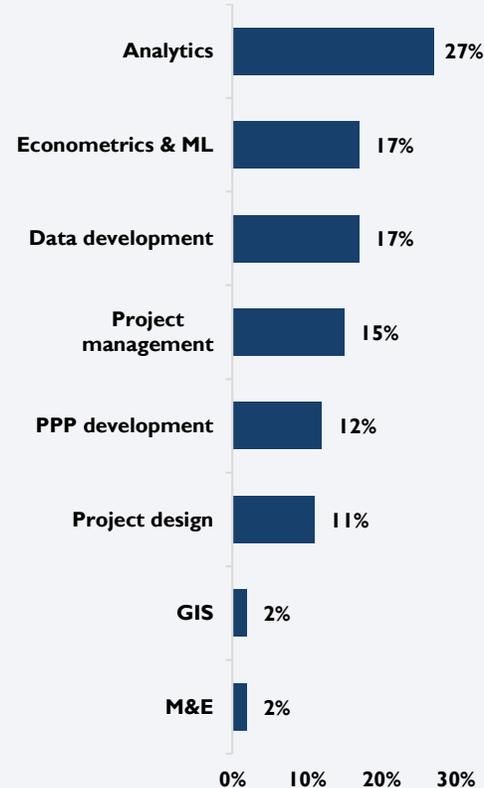
NEXTRADE TEAM

What we bring to the table (years)

Team experience in years



Capabilities in years



Who we are

Leda research and analytics



Dr. Kati Suominen, Founder and CEO

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



Bonaly Phrasavath, Senior Associate

Research, data analytics, digital policy
MA, UCSD

Manage operations



Sarah Fakhry, Director

Economic growth, trade policy, PPPs, project management
Past: Chemonics, Palladium MA, Columbia



Shannon Gaffney, Director

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

Deliver and measure impact



Fabian Staechelin, Ecommerce Lead

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



Bassil Eid, Ecommerce and Logistics Lead

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

Provide expertise



Steven Pope, Senior Advisor

Customs policy, VAT, tax reform, trade facilitation
Past head of the DHL GoTrade initiative.
Senior leadership roles at Trade & Investment Commission, IMF, HM Treasury



Dr. Antoni Estevadeordal, Senior Advisor

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



Lucy Lawrence, Senior tech and Ecommerce Lead

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

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. **Excellence in everything: If there is a way to do it better even if it is harder and takes longer, we do it**
6. **Our first questions are what needs to be done and what we can give, the last question is what do we get**
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**