

**International Trade Support
Research and Evaluation**

Final Report for

Scottish Enterprise

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Executive Summary

Introduction and Background

In May 2019 the Scottish Government published the export growth plan, A Trading Nation (ATN), which sets out the scope and scale of the exporting opportunity available to Scottish business.

The plan sets a target of increasing exports to 25% of GDP by 2029 which will add around £3.5bn to GDP and will create around 17,500 more jobs.

Activities to meet this target are being delivered through a wide range of different services and products, by a number of public sector trade support partners and agencies across Scotland. Support to businesses is focussed on export growth from building awareness of the benefits of exporting, developing the skills and expertise to start exporting for the first time or to grow exporting sales in current and new markets.

Within A Trading Nation, there was commitment to develop a framework for the monitoring and evaluation of public sector export support.

This resulted in the development of a mixed methods research approach which has been jointly developed and agreed by Scottish Government, its partner agencies and Scottish Chambers of Commerce. The mixed methods approach for export support comprises the following research method:

1. Review of management information and business facing staff feedback
2. Survey of supported businesses
3. Data linking
4. Case studies

Each method will assess the benefits and impact of support and seek to identify “what works” in terms of support delivered” - overall results will be triangulated across the different research methods.

This commission relates to (1) A review of management information and business facing staff feedback and has been commissioned by Scottish Enterprise (SE) through its international arm Scottish Development International (SDI) and in partnership with Highland and Islands Enterprise (HIE) and the Scottish Chambers of Commerce (SCC).

The study had the following principal objectives:

- a quantitative evaluation of the outcomes and impact of different types of interventions and combination of interventions to provide an understanding of what works best either generally and/or within specific contexts
- a qualitative evaluation, based on direct feedback and learning from business facing staff to inform both the quantitative research and the development of future detailed client survey
- conclusions that will feed into and shape the current provision of support as well as future monitoring and evaluation

Business Facing Staff Consultation

67 one-to-one consultations¹ across SE/SDI (44), HIE (12), SCC (9) and Scottish Government (2) were undertaken, in addition to two focus groups focussing separately on early-stage and experienced exporters. One-to-one consultations were a mix of telephone interview (29) and online questionnaire (38).

Section 3 contains a detailed description of the outputs of the consultations. For most questions and topics there was a wide range of responses from consultees which have been documented (including the specific numbers of responses against each question). Therefore, the reader is encouraged to refer to Section 3 for this depth of detail gathered during the consultation process.

The main themes explored and high-level findings are:

¹While three interviews were attended by more than one person, individual reviews were recorded.

Barriers to exporting – resources/capacity were identified as the top barrier across all exporters. This was followed by skills and market intelligence for early-stage exporters and funding/investment for experienced exporters. Not surprisingly the biggest impact on barriers was Brexit, closely followed by COVID-19. In general, early-stage exporters were more affected.

Changing business support needs – the biggest change identified was the increasing need for technical advice/specialist expertise, linked to compliance, regulations and tariffs; predominately linked to Brexit. This was followed by the requirement to move toward virtual/online support; predominately driven by COVID-19; and the increased need for investment and funding – both to address the additional exporting costs associated with Brexit and COVID-19, as well as the more direct financial challenges experienced by businesses arising from the pandemic.

Impact of the changing global environment – not surprisingly Brexit, COVID-19 and Net Zero were all having extensive impact on the ability to export. Respondents were easily able to cite challenges, opportunities and future developments. Less respondents were able to comment on fair work/inclusive growth areas.

Export Growth Plan (EGP) – over half of respondents believed EGP is working well, noting it provides a clear structure/framework to support company prioritisation and segmentation. The focus on markets/sectors including a clear strategy/plan was also highlighted favourably. The strong focus on experienced businesses was viewed less favourably with respondents stating that this limits the ability to feed the funnel with new exporters; the lack of churn in companies and the lower additionality of support were also highlighted as problematic. Many thought that EGP still needed to evolve to address the changing global market conditions faced by exporters.

Current and pre-EGP support – the majority of respondents stated that support was different pre-EGP, with the highest proportion noting lack of current support for early-stage exporters being an issue. Others felt that export impact may have been worse without EGP due to the focus on experienced exporters. Some respondents believed that funding support was more intensive pre-EGP and there was a better level of service which suggests for some pre-EGP was more effective.

Mechanisms of trade support – the most effective mechanism was trade specialist support and the grants such as the International Recovery Programme (IRP). This was closely followed by market/technical support. Focus groups highlighted the Export Advisory Service as the most effective support and that its removal had multiple negative implications. The least effective was the lack of financial levers and the limited one-to-one/face-to-face advice available.

Combinations of support that help trade support – one quarter of consultation respondents highlighted strategy advice linked to an export action plan, closely followed by bespoke support with a focus on the traditional company journey.

Factors that make a difference to increased international trade – predominately focussed on access to market know-how/in-market expertise – provision of the right support at the right time. The right resources were the next most important factor.

Factors that make a difference to the export journey – focussed on the need for an on the ground presence and being agile and responsive to customer needs.

Effectiveness of the public sector trade support system in Scotland – most respondents acknowledged the comprehensive range of support available and that partnerships were now working more effectively. However, some also highlighted the cluttered landscape, potential for duplication and a need to improve partnership working. This was related to the number of delivery partners, the wide range of supports available and the number of access points to the support. Removal of EAS also led to a patchy service with some local authority areas providing support and others not.

Factors that influence the success of trade support – reiterated the need for a joined-up approach while including an online/digital presence. Focus groups noted the potential for duplication if new supports are introduced as many local authorities/regional partners are already developing programmes of export support.

Factors that are driven by or drive international trade – it was acknowledged that innovation and investment correlate well with internationalisation with most noting they are interlinked and feed off each other. Some felt innovation and investment were needed first, others believed international trade is the driver.

Gaps in the current provision – built on previous responses including funding, investment, incentives and advice and how to achieve Net Zero targets. Support to help demystify the implications of Brexit was noted for new and experienced exporters.

Key success factors for an effective trade support – focussed on a joined-up/cross agency collaboration to set objectives and goals with common frameworks and data sharing. They also noted the need for agile support linked to the company journey linked to earlier interventions.

Review of Management Information

Detailed management data and information from three financial years (2018/19, 2019/20 and 2020/21) from SE/SDI, HIE and SCC was collated and analysed.

SE/SDI Management Information Review – Key Findings

Activities

The SE/SDI management information dataset was built from projects which contributed to the 'Planned International Sales'² measure in the years reported as well as those receiving international support who did not contribute to the measure. For projects completed during the study period, 2,241 companies received 8,447 interventions consisting of 3,747 international projects³ resulting in £4,886,140,310 of planned international sales.

The number of projects (i.e. defined as one or more interventions all contributing to the same planned international sales figure) received by an individual company ranged from 1-13 with the majority receiving just one project (65%).

Just over half of projects (56%) are made up of just one intervention with a further 37% consisting of two interventions. 71 different interventions were recorded as delivered in the period, therefore for projects with more than one intervention there were multiple combinations of interventions.

Analysis

The 3,747⁴ projects delivered in the three year period were analysed to assess the number and types of interventions that may demonstrate links to planned international sales. Projects fell into two categories of projects: those with only one intervention (i.e. single intervention projects) and those with more than one intervention (i.e. multiple intervention projects).

For single intervention projects excluding outliers⁵, the top three international interventions were International Manager for Hire (£3.2m of planned international sales), followed by International Market Events (£2.4m) and International Specialist Engagement (£1.4m)

The top three non international interventions were Workplace Innovation Leadership Support and Digital Transformation (£2.2m of planned international sales) followed by Productivity Support (£2m).

²Note this is sales over three years

³A project is made up of one or more interventions all contributing to the same planned international sales figure. The main aim of support is helping businesses into new markets (geographic and/or with a new product) with the aim of securing exports as a result of support.

⁴Analysis has been done on an individual project level, therefore companies with multiple projects will have been reviewed on an individual project basis

⁵Planned sales ranged from £3.5m - £60m per project from large R&D Grant, International Scale Up Grant, Expert Support Energy Market and High Growth Ventures development. As they relate to 1 or 2 companies these are considered as outliers

Analysis of a sample⁶ of projects with more than one intervention contributing to the planned international sales measure showed the following interventions appeared most:

- International Specialist Engagement (65% of projects)
- International Market Events (40% of projects)
- International Access Support (37% of projects)
- Overseas Market Support (27% of projects)
- International Manager for Hire (23% of projects)
- SDI Field Office Support (13% of projects)

Table 1 shows the most common combinations of these interventions and their associated planned international sales. The majority of these interventions are targeted towards delivering new in-market activity rather than awareness raising or building capacity to start exporting or grow exports.

Table 1 – Average Planned International Sales per Project by Intervention Combination

Multiple Intervention combination	Average planned international sales per project
International Access Support & International Manager for Hire	£16.9m
International Market Events & International Specialist Engagement	£16.7m
International Market Events & International Specialist Engagement & SDI Field Office Support	£13.2m
International Access Support & Overseas Market Support	£10.2m
International Access Support & International Specialist Engagement & Overseas Market Support	£5.9m

The following factors were noted in relation to projects with higher levels of planned international sales:

- projects that received a mix of both advisory and financial support had significantly higher average planned sales
- projects lasting less than a year had the highest average planned international sales
- projects from companies with Export Growth Plan (EGP) status are more likely to make a significant contribution to planned export growth
- planned international sales were higher in companies in the non-SME than SME category
- projects of companies that had Direct Relationship Managed (DRM) status had more than double the average planned international sales compared to those that were Non Relationship Managed (NRM); DRM companies typically have had a wider range of SE support
- those receiving support to invest in Scotland had more than double the average planned international sales compared to those that did not

HIE Management Information Review – Key Findings

Activities

In addition to the SDI delivery in the Highlands and Islands, HIE has delivered a variety of both individual company or one-to-many interventions via dedicated trade resources to target increased trade and exporting activity and deliver against the International Sales measure.

From July 2015 to March 2021, HIE delivered the International Highlands and Islands programme (IHI) partly funded by the European Regional Development Fund (ERDF) with a focus on trade and export

⁶From 803 projects, the top 100 projects with the highest planned international sales values were analysed

growth. The programme offered awareness activities, trade workshops, one-to-one advisors in Food and Drink and Tourism, amongst others. In addition, HIE's Go Global offers funding to attend exhibitions, undertake market visits and prepare products for international markets

Analysis

862 companies have received 1,687 interventions delivered between 2015-2021, of which 142 companies received Go Global funding, resulting in £83,096,482 of planned international sales. The number of interventions received by companies ranged from 1 to 15 with the majority (62%) receiving just one.

The most frequently delivered interventions include market awareness, preparing to export, IHI Go Global and international action plan support. IHI Go Global was accessed by 142 companies across 170 interventions (36 companies accessed it more than once), resulting in £83,096,482 of planned international sales.

62% (88) of companies also received other interventions. On average, these companies accessed five interventions including IHI Go Global.

Inner Moray and Firth had more companies accessing the support than any other region. Over half of companies accessing support were from the food and drink and tourism sectors

SCC Management Information Review – Key Findings

618 companies attended Chamber missions. 128 attended multiple missions ranging from 2-8, with the average being 1.6.

There were 71 missions and 829 instances of mission support to companies in total over the three year period.

Overview of Management Information and Consultations Findings

In assessing "what works" the following common themes emerged from the consultations and management information analysis:

The importance of bespoke/one to one advice to companies

From the consultations, bespoke and tailored support through one-to-one interventions is highly valued, this is also borne out in the management information where one to one support both as a stand-alone single intervention and in combination with other interventions was linked to the higher value planned international sales outcomes.

The importance of access to market know-how/in-market expertise

Consultees highlighted the benefits of companies accessing market know-how and expertise, again, support focussed on these areas was linked to higher value international sales outcomes.

Exporting journeys may not be linear and require a flexible approach

Consultees highlighted strategy advice linked to an export action plan as being effective, closely followed by bespoke support. However, when looking at the management information a company journey was not always apparent, companies appeared to access the support they needed and when they needed it in a bespoke way.

With multiple combinations of support available to companies, identifying the most effective combinations of support in terms of "what works" will be highly dependent on what companies' particular needs were at the point of seeking support.

Background and Context

1.1 Background

The importance of exports to the Scottish economy is laid out in 'A Trading Nation – a plan for growing Scotland's exports (ATN)'⁷.

“Scotland is a trading nation with a long and proud exporting history. Without exporters, Scotland's economic growth would be poorer. Economic growth is critical to driving job opportunities and living standards as well as generating tax receipts for the Scottish Government essential for the delivery of the public services we value. It is for all these reasons that driving the internationalisation of the Scottish economy, and ramping up the value of exports, is so important”.

In May 2019 the Scottish Government published the export growth plan, A Trading Nation (ATN), which sets out the scope and scale of the exporting opportunity available to Scottish business. The plan sets a target of increasing exports to 25% of GDP by 2029 which will add around £3.5bn to GDP and will create around 17,500 more jobs.

Actions identified to meet this target are being delivered through a wide range of different services and products, by a number of public sector trade support partners and agencies across Scotland, in three broad thematic areas, summarised as the A-C-E model:

- **Awareness and ambition** – raising awareness and building ambition by providing businesses with information on markets and the exporting process through training programmes and events, knowledge sharing using overseas teams and local specialists and market and sector reports.
- **Capacity and capability** – developing capacity and capability with tailored support in strategy, finance, contacts and market intelligence, and technical advice on taxation, logistics and export documentation.
- **Exploitation and expansion** – supporting businesses to expand into new markets and to exploit new opportunities by attending overseas exhibitions, trade missions, engagement activities with importers, distributors and potential overseas partners. Incubation and soft landing services are also available at this stage.

To support the EGP, smart segmentation of businesses is advised, based on their distinct characteristics, with a focused plan of support tailored to each of the five segments.



⁷ [498601_SCT0720815048-001%284%2920200703104759.pdf \(www.gov.scot\)](#)

The **top 100 performing exporters** are typically global businesses that are unlikely to need export support services but may require “economic diplomacy” support in the form of political intelligence, introductions and advice to exploit opportunities in new markets. They will be encouraged to mentor other firms and their insight will be used to seek to understand their requirements, in particular where they can be supported to further embed their supply chains in Scotland or to consider further investment.

Solid performers, which are predominately SMEs, may have limited internal resources and are likely to need a blend of intensive export support services and, where needed, economic diplomacy interventions.

Sleeping giants are businesses which have a solid performance of selling into the Scottish or UK markets, in sectors where their products are likely to be in demand internationally and are of a scale where they have the management bandwidth to support export activity. As fledgling exporters they will need access to business support services to grow their business, innovate their products and when a strong opportunity arises, access to export support. They can be provided with focused mentoring support.

Global by birth are typically small businesses in sectors which, by their nature, are global in outlook, for example, in the technology or creative sectors. These businesses need to be treated differently as they are often internationally focused from the outset. They will often already be on enterprise agency scale-up programmes. Given this, they should have access to enterprise agency business support services and export support services as needed.

Potential performers refers to the majority of businesses that are already exporting, or aspire to, but typically at a smaller scale. For these businesses existing support services are in place to grow their business, supplemented by export support services (most likely delivered by partners such as Chambers of Commerce) delivered in a “one to many” format such as workshops and (self-help) digital services. The Local Export Partnership pilots led by Chambers of Commerce, with regional partners, including local authorities, is undergoing evaluation and the results of that will feed into development of future export support services for these businesses.

1.2 Evaluation objectives

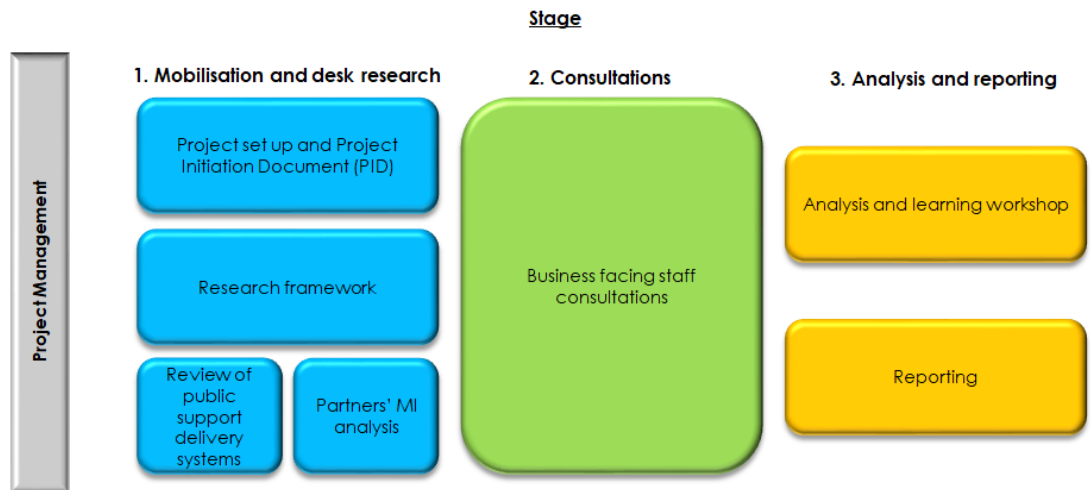
Scottish Enterprise (SE) through its international arm Scottish Development International (SDI) and in partnership with Highland and Islands Enterprise (HIE) and the Scottish Chambers of Commerce (SCC) commissioned an evaluation of their international trade support. Specific objectives include:

- a detailed landscape and baseline of public trade support delivered by partners, identifying and taking into account the different contexts in which they operate
- a quantitative evaluation of the outcomes and impact of different types of interventions and combination of interventions to provide an understanding of what works best either generally and/or within specific contexts
- a qualitative evaluation, based on direct feedback and learning from business facing staff and client companies, to inform both the quantitative research and the development of future detailed client survey
- conclusions that will feed into and shape the current provision of support as well as future monitoring and evaluation

2 Approach

The approach to the evaluation follows the three stages outlined in Figure 2.1.

Figure 2.1: Method Diagram



The sections that follow provide the analysis of the consultation with business facing staff and the partners' management information.

3 Consultation Feedback

The following section provides an assessment of the feedback received from 67 one-to-one consultations⁸ across SE/SDI (44), HIE (12), SCC (9) and Scottish Government (2). In addition, we conducted two focus groups centring separately on early-stage and experienced exporters. These were attended by 11 people of which three were not part of the one-to-one consultations. Focus group feedback has been integrated throughout this section including in the direct comments where appropriate.

3.1 Respondent profile⁹

All respondents had significant experience of international trade, some over 20 years. While some were no longer in business facing roles, they either previously had been or were managing teams that were.

3.1.1 Sectoral coverage

Table 3.1 shows that the respondents in direct business-facing roles represented all sectors across the partner organisations.

Table 3.1: Sectoral representation across business-facing respondents

SE/SDI Sectors	Responses	HIE Sectors	Responses	SCC Sectors	Responses
Aerospace, defence and marine	10	Technology and Advanced Engineering	9	Engineering & Advanced Manufacturing	4
Technology and engineering	13			Technology, Digital & Media	7
Food and drink	10	Food and drink	9	Food & drink	7
Energy - low carbon and renewables	7	Energy and low carbon	8	Energy	5
Energy - oil and gas	7				
Financial and business services	6	Finance and business	5	Financial and Business Services	6
Creative industries and textiles	4	Creative industries including textiles	7	Creative industries	6
Life sciences	10	Life sciences	6	Life & Chemical Sciences	7
Chemical sciences	7				
Tourism	3	Tourism	7	Tourism	6
Further and higher education	3			Education	6
Construction	6				
Consumer goods	3				
Non sector	3				
TOTAL RESPONDENTS	30		9		7

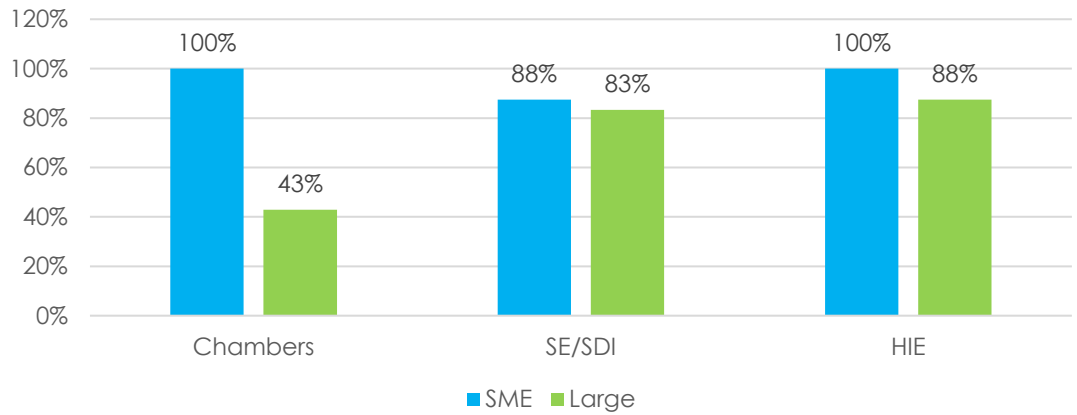
⁸ While three interviews were attended by more than one person, individual reviews were recorded.

⁹ This excludes the focus group participants.

3.1.2 Business size

Respondents worked across a mix of SMEs and large companies. Figure 3.1 shows the breakdown across the partners.

Figure 3.1: Business size overview

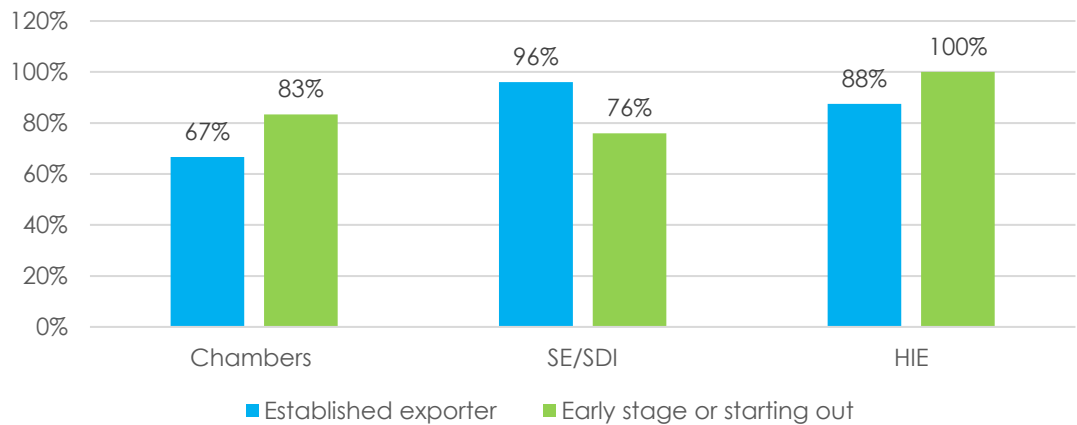


N=39

3.1.3 Exporting status

Respondents worked across a mix of established exporters and early-stage/new exporters. Figure 3.2 shows the breakdown across the partners.

Figure 3.2: Exporter overview

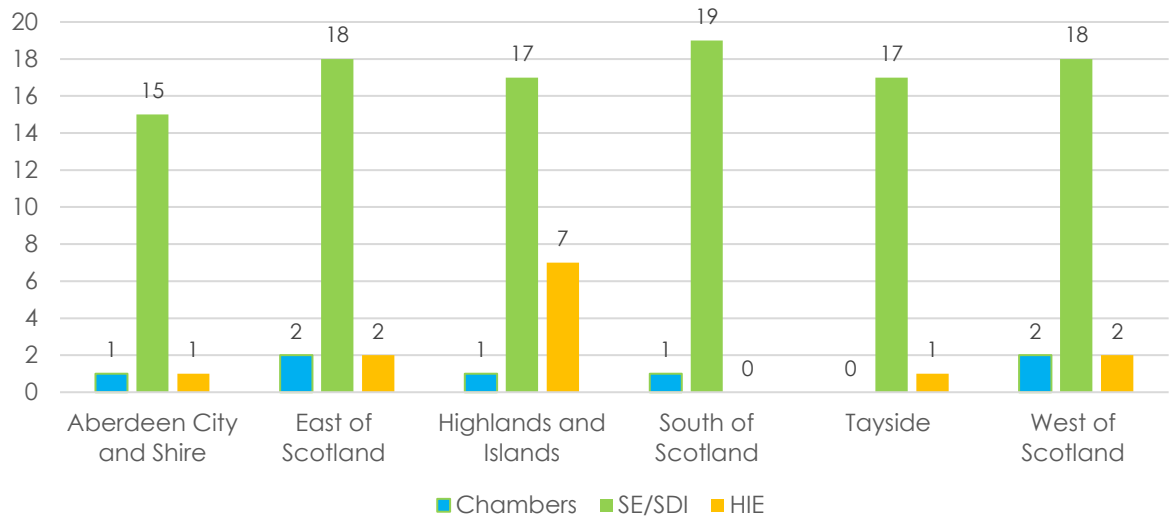


N=39

3.1.4 Business geography served

Almost half of the respondents (31, 46%) indicated the location of the business they supported. Figure 3.3 shows the split across each geography. There were two HIE respondents that had supported businesses in areas beyond Highlands and Islands in a previous role or because the company had multiple sites.

Figure 3.3: Business geography served

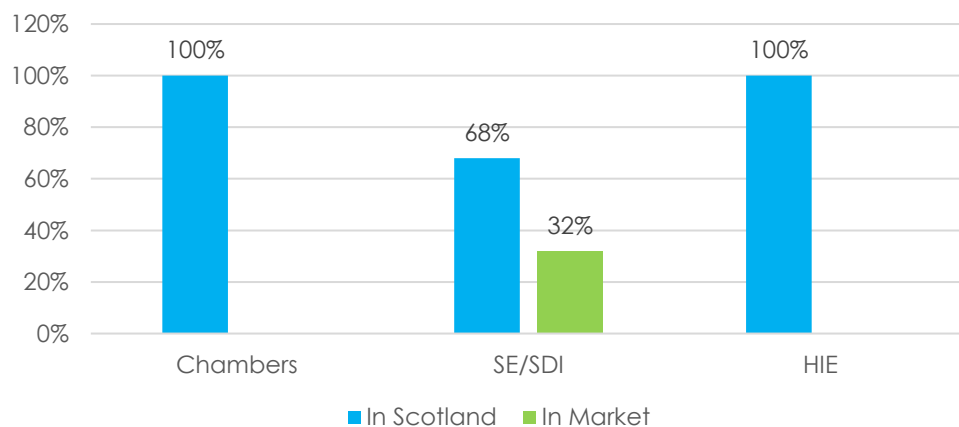


N=31

3.1.5 Respondent location

80% of respondents were located in Scotland and the remaining overseas (20% of total respondents, 30% of SE/SDI); all overseas (in market) were SDI staff. Figure 3.4 presents the split per partner.

Figure 3.4: Business-facing staff location

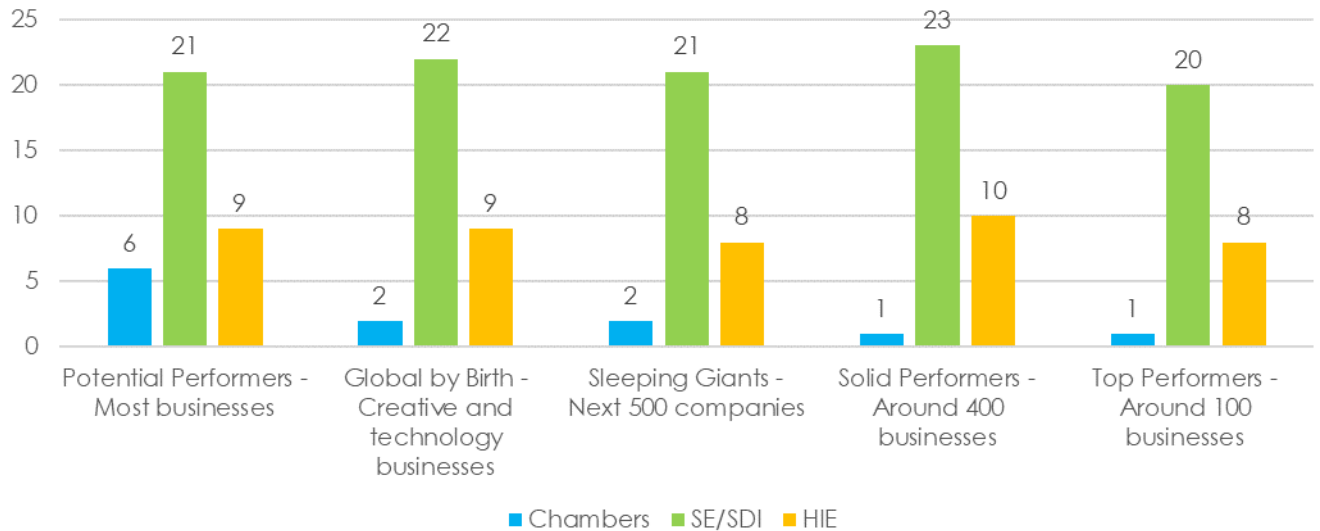


N=40

3.1.6 EGP category

Respondents from SE/SDI and HIE worked across all EGP categories; for the Chamber the majority worked with the Potential Performers. Figure 3.5 presents the split per partner.

Figure 3.5: Business-facing staff EGP category



N=41

3.2 Barriers to exporting

3.2.1 Experienced exporters¹⁰

Almost all respondents (63, 94%) provided views on the **biggest barriers for experienced exporters** trying to increase international sales. The main themes were:

- Resources/capacity/capability (specifically workforce and in market experience/personnel) (15, 24%)
- Funding including investment (11, 17%)
- Market knowledge aligned to target market and research investment (8, 13%)
- Compliance, paperwork and certification, including tariffs (6, 10%)
- Securing in market personnel (5, 8%)
- Partnering/distribution relationships/supply chains (4, 6%)
- Market access/expansion (3, 5%)
- Lack of strategy (3, 5%)

Other barriers highlighted included: competition, mindset/self-belief, identifying customers.

“Capacity limits in the business can be a significant barrier; look for reps in countries, challenge around building up and identifying good business partners.”

“Where there isn't immediate support, i.e. areas outwith the EGP, there is a perception that public support is less available in these areas.”

“Financing, identifying sales staff in overseas markets, adequate marketing, follow through on sales leads, understanding the market environment, resource limitations.”

¹⁰ Charts for thematic feedback are provided in Appendix 2.

3.2.2 Early-stage exporters

Almost all respondents (62, 93%) provided views on the **biggest barriers for early-stage exporters** trying to increase international sales. The main themes were:

- Resources/time/capacity (23, 37%)
- Experience/skills/capability – how/where to start (22, 35%)
- Market intelligence/in market know how/uncertainty in demand (21, 34%)
- Funding/investment/financial support (16, 26%)
- Paperwork/compliance/regulations (14, 23%)
- Finding partners/contacts/supply chains (13, 21%)
- Brexit – and changing political landscape (9, 15%)
- Product differentiation/export strategy (8, 13%)
- Personal barriers – confidence, ambition, language (8, 13%)
- Getting right advice/information, including knowing where to find it (8, 13%)

Other barriers that were highlighted less frequently included: COVID-19, competition, customers, risk taking associated with doing business in other areas.

“Funding, leadership, knowledge of markets and potential customers, personal barriers- scared of taking the risk.”

“Just getting companies to be comfortable with the idea, understanding the scope, and having the right skills, getting access to resources and understanding the markets – COVID-19 and Brexit have been challenging.”

“Lack of funding support. Most of the funding is only available to companies that have a certain turnover or fall into the EGP category. In food and drink there are many small businesses that are difficult to support.”

“Brexit has meant that it is not easy to get to market. Businesses need to have the right business model for Brexit and be able to deal with the extra legislation etc. Lack of knowledge is a barrier and understanding what is fully involved in exporting.”

3.2.3 How barriers have changed in recent years

Two thirds (45, 67%) of respondents provided views on **how barriers changed in recent years**. In general respondents felt that new or early-stage exporters had been hardest hit by these barriers, with the larger exporters being more resilient. The main themes were:

- Brexit – this has been the most impactful particularly for the early-stage/new exporters, complexity, tariffs, cost of doing business, difficulty in selling to EU, bureaucracy, uncertainty – however it has led to businesses looking beyond the EU or focussing on the UK (22, 49%)
- COVID-19 – impacting on physical trade/market access, labour shortages (16, 36%)
- Rising cost, including cash flow and resources – linked to above and impacted but an inability to recruit/retain skilled staff (8, 18%)

Additional barriers included: pressures on supply chain/logistics (5, 11%), lack of funding/wider support packages for new exporters (3). Some comments on how barriers have changed were:

“Unquestionably, the last few years has put immense strain on our companies: cash flow is incredibly challenging, markets have closed, supply chains have been difficult, costs have been increasing, companies can't afford staff, they can't find the right staff, they can't scale production, logistics are expensive and limited, paperwork and ease of exporting to the EU has got harder and far more costly.”

“Brexit has led to increased complexity and costs to doing business in the EU. COVID-19 has led to an increase in doing trade (both imports and exports) internationally.”

“At the moment we are seeing a lot of companies having to switch their strategy and look to building business outside the EU. This means that yes they are growing internationally but they are really still in recovery due to the loss of business from the EU.”

“Companies today have good access to information online via various sources and platforms about new markets. They are more informed now than before and companies in the tech space are often well connected in different geographies. The support need evolves continuously in terms of being more specific and tailored.”

3.3 Changing business support needs

Over three quarters (51, 76%) of respondents provided views on **how business support needs have evolved in recent years**; a further three indicated not close enough to comment. There was a wide range of responses to this question, with only a few mentioning the difference between early-stage and experienced exporters. The most frequent areas where support needs had evolved were as follows:

- Increase requirement for technical advice/specialist expertise, linked to compliance, regulations, tariffs and more complex paperwork (mostly linked to Brexit) (15, 29%)
- Move to virtual/online approach, including the increased leverage of e-commerce/digital channels (14, 27%)
- Increased need for investment, funding, including recovery support; some noted the current lack of funding (13, 25%)
- Changing approach to customer engagement, sales and marketing strategies including networking (10, 20%)
- Impact on production and target markets; fewer companies exporting/looking to export beyond the UK, focussing on existing business (7, 14%)
- More focus on the hybrid approach, ensuring a face-to-face element and one-to-one support (5, 10%)
- Increased cost of doing business/more complex operating models – leading to changing logistics, supply chains (5, 10%)
- Increased investment in training/skills development (5, 10%)

Other areas mentioned less frequently included: increased need for in market support, support for companies looking further afield and looking beyond the EU. Some comments on changing business support needs were:

“Advice on new and evolving regulations has been in high demand during the transition period. In recent years, due to COVID-19 and Brexit, companies need more support with finances. There is also a reluctance to travel for physical events so even the key shows which would have had a good Scottish attendance in the past are suffering.”

“We have invested a lot on SE.com around the exports and market – less inquiries through EFRS but have use the system/website more – now a central point of reliable information – this has really helped service the smaller clients.”

“Different support needs particularly with EU as we now have to deal with the tariff compliance issues and need support to build capacity and capability; impact of complying with additional requirements.”

“For SMEs the biggest requirement, especially for inexperienced exporters, is access to specialist exporting expertise. The availability of financial support can be crucial, but this is probably more important for larger exporters.”

3.3.1 How changing needs have been identified, prioritised and met

Over half of respondents (38, 57%) provided feedback on **how changing needs have been identified, prioritised and met**, these were:

- Specialist advice – through trade specialists, sector teams, in market specialists, targeted engagement (18, 47%)
- One-to one support – discussion with companies, clients, introductions (15, 39%)
- Training/upskilling – across virtual/hybrid events, webinars, online information, export training programmes (13, 34%)
- Business consultation, user feedback plus the support of the EFRS and international market research services (10, 26%)
- Linked to Brexit – companies looking further afield, changing business models (4, 11%)

Other areas mentioned included: GlobalScots (3), recovery funds (IRP) (3). Some comments on how changing needs have been identified, prioritised and met were:

“These needs have been identified through the one-to-one relationships the team have with their customers and their frequent conversations they have at both a strategic and operational perspective. IRP has been a critical tool of the consumer industries team – more than 50% of all grants approved to date have been from our sectors, which shows how important it has been for helping companies to pivot and adapt to changing market conditions.”

“For smaller companies needs are usually identified through participation in training or international strategy workshop and met by matching with existing support contract.”

“We have adapted our service offering to meet client requirements. We have invested in upskilling staff to be able to provide technical advice on support on niche topics. We continue to adapt our services based on demand.”

3.4 Internal factors that affect ability to export

The vast majority of respondents (57, 85%) provided their views on **the internal factors that affect a company's ability to either start or expand their international sales journey**. The most frequent comments were:

- Capacity (across management and staff), resources, including finance, cashflow, staff and time (47, 82%)
- Knowledge, capability, skills, expertise – particularly those new to export (25, 44%)
- Confidence, including lack of ambition, leadership and lack of engagement (19, 33%)
- Where to look for support/navigating public sector support (13, 23%)
- Understanding the opportunity, awareness and knowledge of markets (10, 18%)
- Risk aversion (4, 7%)

Other areas included: innovation across products/services (1), knowing customers (1), increased chance of failure (1).

“Capacity and resources are key factors. Very often companies are stretched across several markets. Another important point is pre-conceived notions or lack of awareness of the market opportunities and routes to market.”

“Labour/resources – getting the staff to get to market – businesses focussed on steady and safe markets; some small suppliers that have strong UK listing the will focus on these.”

“When a company has not exported previously, they will not (generally speaking) have the necessary skills and experience in house to allow them to develop a robust international strategy and execute it. Expert assistance is very often required and there is obviously a cost element involved with that.”

“Skills/capability I think is a major issue and one that urgently needs addressing, especially around digital / ecommerce. The re-introduction of an international manager for hire, with flexibility for other types of function/support, would certainly help companies build up their inhouse capability and could accelerate some of the work they had identified through IRP projects we've been working with them.”

3.5 Impact of the changing global environment

Respondents were asked how **the changing global environment for their companies affected choices relating to international sales/exporting plans**. They were asked about the challenges, opportunities, and how they will change in the future with regards to BREXIT, COVID-19, Net Zero and the Fair Work/Inclusive Growth Agenda. The findings are summarised in Table 3.2, showing the number and percentage of respondents from those that answered each question.

Table 3.2: Summary of the challenges, opportunities and future developments

Theme	Challenges	Opportunities	Future
BREXIT	<ul style="list-style-type: none"> Greater complexity, rules and levels of administration, paperwork and processes (25, 45%) Increased costs (20, 35%) Access to labour market (12, 21%) <p style="text-align: right;">N=56</p>	<ul style="list-style-type: none"> Open up to new/ other markets (23, 59%), specifically: <ul style="list-style-type: none"> ASIAPAC (3) Americas (4) UK markets (4) <p style="text-align: right;">N=39</p>	<ul style="list-style-type: none"> Need for enhanced understanding and increased clarity of paperwork, processes and regulations (10, 36%) Consider diversification to America/ASIAPAC (6, 21%) Emergence of Free Trade Agreements/ partnerships/ framework agreements (5, 18%) <p style="text-align: right;">N=28</p>
COVID-19	<ul style="list-style-type: none"> Inability to travel (28, 53%) impacting face-to-face meetings in market and movement of personnel Supply chain and logistics (11, 21%) Staff shortages and recruitment (9, 17%) <p style="text-align: right;">N=52</p>	<ul style="list-style-type: none"> Adapting/ diversifying/ new products or services offered/ new markets/ sectors (16, 35%) Move to e-commerce/digital solutions/ increased online sales (15, 33%) Virtual trade missions (4, 8%) <p style="text-align: right;">N=45</p>	<ul style="list-style-type: none"> Continued shift to virtual/ e-trade/ omnichannel and hybrid ways of working (14, 42%) New ways of working and COVID-19 driven solutions will become the norm (7, 21%) <p style="text-align: right;">N=33</p>
Net Zero	<ul style="list-style-type: none"> Lack of knowledge, understanding and support in how to implement (12, 24%) Challenge between reducing carbon footprint and trade/ exports/ events (8, 16%) Need for finance and investment (6, 12%) <p style="text-align: right;">N=50</p>	<ul style="list-style-type: none"> Sustainability (7, 15%) Technology and digital solutions (6, 13%) Recognition of Scotland's position and of early adopters/ those promoting NZ strategies (6, 13%) New products/ services/ markets/ industries (6, 13%) <p style="text-align: right;">N=45</p>	<ul style="list-style-type: none"> Increase in customer demand for NZ/ sustainability credentials (6, 19%) Companies that emphasize and focus on NZ will thrive (6, 19%) NZ will become mainstream as companies transition to this (6, 19%) Need for specific NZ support and investment (4, 13%) More digital/ virtual solutions (3, 10%) <p style="text-align: right;">N=31</p>
Fair Work	<ul style="list-style-type: none"> Increased cost to employers , particularly SMEs – through higher wages and integrating FW practices (8, 27%) Overcome dependence in some sectors on low paid workers (4, 13%) Need for improved knowledge and understanding (4, 13%) <p style="text-align: right;">N=30</p>	<ul style="list-style-type: none"> Marketing and increasing competitiveness of Scottish companies that support this (12, 42%) Recruitment and retention/ widening talent pool and increasing skills (11, 39%) Guidance and support eg public sector/wider partners (3, 11%) <p style="text-align: right;">N=28</p>	<ul style="list-style-type: none"> Companies will need to adapt and fair work will become increasingly important (the norm) (12, 80%) <p style="text-align: right;">N=15</p>

Over half (37, 55%) of respondents provided views regarding **other factors likely to influence company's choices relating to international sales/exporting plans**. The main themes were:

- Need for increased knowledge and understanding of new markets (9, 24%)
- Increased focus on UK market (5, 14%)
- Free trade agreements (5, 14%)
- Geo-political impacts (5, 14%)
- Changing supply chains (5, 14%)

Other themes included macro-economic factors such as unemployment rates/inflation (3) and digital and e-commerce (3).

3.6 Export Growth Plan (EGP)

From over four fifths (55, 82%) who responded to this question, **over half (32, 58%) believed the Export Growth Plan worked**, while the remainder did not.

3.6.1 Worked well

Almost three quarters of respondents (48, 73%) provided feedback on **what works well about EGP**. Half (24, 50%) stated that the EGP provided a clear structure/framework to support company prioritisation and segmentation. Some other aspects that worked well included:

- Focus on markets and sectors, including a clear market strategy/plan (14, 29%)
- Targeting large companies leading to large impact across jobs, turnover and GDP (12, 25%)
- Strong network of trade and in market specialists (5, 10%)

Another area noted was the fact that it was evidence based/data driven (2).

"It gives great focus to our teams and our operating plans. It sets some parameters around who we should work with and why. Rather than going off in lots of different directions and creating opportunities in multiple markets; we can focus on those companies and those markets which are most likely to make a significant difference to Scottish exports."

"Focusing and prioritising our support and what we do to ensure the maximum impact and benefit for our companies and our economy."

"Values the robust evidence base of ATN, an incredibly comprehensive baseline. It also prioritised the targets, e.g. focus on top 1200. This is helpful."

"EGP companies provide the greatest impact in terms of GDP / jobs."

"Trade advisers who really know the practicalities of their markets and can offer realistic practical advice."

3.6.2 What worked less well

Slightly over three quarters of respondents (51, 76%) provided feedback on **what does not work well about EGP**. There was strong viewpoint the focus on experienced businesses limits the support that can be provided and that there was an inability to 'feed the funnel' with new exporters (22, 43%). Some other aspects that did not work as well included:

- Inability to help the key targets of EGP – i.e. the bigger companies that already trade overseas and have lots of experience and maybe don't need the help that delivery providers can offer (11, 22%)
- EGP being too structured/lacking flexibility – leading to lack of churn in the 1,200 companies (10, 20%)
- Too much focus on the numbers – areas of biggest impact and not linked to market failure (8, 16%)
- Lack of a partnership approach across public sector partners (4, 8%)

Other areas that worked less well included: lack of focus on net zero (3) and no Export Advisory Service¹¹ (2).

“Many of our very experienced exporters (e.g. our whisky companies) don't need or indeed want our export support. They probably need UK support around issues of excise, tariffs in some markets (e.g. India), infrastructure issues. These aren't issues that SDI can address and focusing resource on those companies is a waste as there is no additionality.”

“It limits the pipeline and we have to turn companies away. The big companies don't need our help, therefore it is the middle chunk we deal with all the time and within that there are some that don't want to work with us, or don't actually export but we can't take them off the list.”

“Big drive to stay focused only on these segments. This could be at the determinant of future pipeline as may be less focus on inspiring future exporters. Previously equal focus on early stage and existing and now it feels like more focus on existing exporters.”

“It would be worth considering adding more flexibility around selecting companies and involving in market specialists in the selection process. As an example, when there is robust work around specific routes to market, it would be efficient to recruit more companies to quickly grow exports through those channels. The in-market specialist could provide valuable perspective in this process.”

3.6.3 How EGP impacted the identification and prioritisation of international trade support

Slightly over half of respondents (36, 54%) commented on **the extent to which EGP impacted on the identification and prioritisation of international trade support needs**. A further four respondents were unsure/had limited involvement. Respondents commented both positively and negatively. The most frequent feedback is summarised in Table 3.3.

Table 3.3: How EGP impacted on identification and prioritisation of trade support

Positive Impacts	Negative Impacts
<ul style="list-style-type: none"> • Provided funding, resources, support for key markets; EGP provided a clear guide on who could be supported (8, 22%) • Focused on top exporters/performers – so the biggest impact; maximised ROI (5, 14%) 	<ul style="list-style-type: none"> • Lack of support for early-stage/new to export/no resources to prospect (5, 14%) • Too much focus on top companies (4, 11%) • None or limited impact, no longer needs or market failure driven (4, 11%)

Other positive impacts included good sectoral specific support (1), and shared focus (1), and negative impacts include no say on identification of companies/initially this was poor (2), delivery agents toolbox not fit for EGP purpose (1). Some specific comments were:

¹¹ Historic programme offering one to one support for exporting

Positives:

"It has brought much needed additional support in areas like in market specialists, grant funding (IRP), and the raising of trade's profile."

"It prioritises the companies we work with and the markets we are focused on but it doesn't change how we work with a company to understand their strategic direction and/or what we do to support them."

"Hugely by focusing on 80% that crucially get the 121 support. Although 1 to many support is available, most of our effort is currently on the EGP companies."

"Has helped prioritise as resources are not unlimited but worried that new companies not on the list and who could do well are missing out."

Negatives:

"Our toolbox doesn't match the requirements of most companies in the EGP; EGP companies have not always wanted to deal with us or tend to not always need the traditional products; EGP export destinations limits ability to support companies to pursue/ realise opportunities out with specified priority list."

"It hasn't affected it at all. There is no mechanism in EGP to develop solutions to exporting needs. If anything, it has taken us away from the principle of identifying needs because the focus is on servicing the top 1,200."

"I'm not sure that Scotland's top performing export businesses need "economic diplomacy" or specialist support to increase exports from the public sector - where is the market failure?"

3.6.4 How EGP assisted with operational delivery of impactful projects

Over half (34, 51%) of respondents were able to comment on **the extent to which the introduction of the EGP assisted (or otherwise) with operational delivery of impactful projects**. Six respondents were unsure or felt it was too early to comment. The most frequent comments were:

- Better prioritisation and planning such that it was easier to understand the portfolio of companies, allowing focus on specific markets/strengths (9, 26%)
- Unaware of greater impact/not helpful (9, 26%)
- Not sure how we help large companies, they don't need our help (9, 26%)
- In market and trade specialist noted as great resource (7, 21%)
- Limited impact and support for SMEs (7, 21%)
- Funding, specifically IRP very helpful (6, 18%)
- Does not take into account market failure (6, 18%)

"Focused efforts, now easier to look for business opportunities overseas when having a few selected Scottish capabilities in mind. Easier to work more strategic with these companies and provide expertise at different levels and more geographies when we are more focussed."

"We delivered IRP to assist companies with their recovery from Brexit and COVID-19. This has allowed us to assist companies where they have required the most help during a challenging period."

"In F&D we had a team of in-market specialists for the five years prior to EGP, so for our sector we don't feel there has been more impact since the EGP introduction. For other sectors the in-market specialists have been incredibly beneficial."

"I think the approach that we have taken and the step change to be looking to work with clients much more strategically has resulted in more impactful projects."

"I think it is effective in providing an overall plan and strategy for the Scottish Government and Economic Development Agencies. Projects such as ITP2 have been particularly effective in having an impact of the number of Scottish companies focussing on the EGP target export markets."

"The plan has resulted in less specialist trade advice being made available to help small business start exporting and/or growth their exports. We are not widening the pool of potential exporters in Scotland."

3.6.5 How EGP evolved to address implementation

Almost half of the respondents (31, 46%) were able to comment on **the extent to which it been necessary for EGP to evolve** to address any implementation challenges such as those associated with Brexit and COVID-19. Five respondents were unsure or stated they were unable to answer. The most frequent responses were:

- Not evolved at all/no review of the supported companies list (9, 29%)
- Still needs to evolve more, was developed pre COVID-19 and Brexit, needs to look at new geographies (9, 29%)
- Introduction of IRP was a good support (3, 10%)
- Implemented 'soft changes' such as some support for early-stage exporters (3, 10%)

Other areas mentioned included: too much time spent chasing those who don't need our help, EU viewed as a priority market, need to re-prioritise the ATN actions.

"There has also been no "review" of the EGP company list. For most companies we are relying on turnover and international sales data that is now out of date. Also many companies turnover or international sales may have declined in that time and might not now meet the original criteria."

"I still think it needs to evolve more as it was written pre-pandemic and pre-Brexit; both have changed everything for our sector. In my mind, the only thing that has evolved so far is the introduction of the IRP."

"I'm not sure it has evolved as much as it could have. It still feels a little rigid in its approach. We have pushed quite hard for a more relaxed criteria for consumer industries companies and that has been implemented and allows us to work with companies who don't yet meet EGP criteria but we believe has the potential to scale."

"We have implemented 'soft changes' ourselves to address challenges. For example, we have introduced a category of company called 'Starting Out', so that we can maintain a watching brief on those companies not yet top 1,200 ready, but which are building their capability. We have also softened some of the segment criteria so that we can account for more 'export potential' in the Global By Birth category."

3.6.6 Difference in effectiveness of support currently and pre-EGP

Almost half of respondents (30, 45%) were able to comment on **the difference in effectiveness of support between the pre-EGP activities and the current support approach**, of which the majority (23, 77%) felt there was a difference (both positive and negative) and the remaining (7, 23%) thought no difference. A further five respondents were unsure. The most frequent responses aligned to effectiveness are presented in Table 3.4.

Table 3.4: Effectiveness of support pre-EGP and currently

More effective pre-EGP	More effective now
<ul style="list-style-type: none"> Lack of support for new starts/early-stage companies making it less effective for this group (12, 40%) Pre-EGP much more intensive funding support (6, 20%) Pre-EGP better level of service predominantly as more one to one support (6, 20%) No Export Advisory Service (EAS) now (4, 13%) Loss of grant support (3, 10%) 	<ul style="list-style-type: none"> Impact may be worse without EGP due to the prioritisation of higher performers (7, 23%) Now have in market specialists (5, 17%) More digital/online now – more cost efficient service/ability to reach (6, 20%) More about export ambition pre-EGP (3, 10%)

Some additional differences included: still away to go as working with less resources (2), remained unchanged as generally still working with the same products and support (2).

"I think we were better at prospecting and raising the ambition of all companies prior to EGP. I also think we provided all businesses with a better level of service."

"There has been a reduction in client portfolio and who we can support. With EGP we have had to evolve and change and we are not there yet. Cannot say yet what the impact has been, it's too early to say and there is a lag in how to measure. It has been more about trade recovery getting back to pre-COVID-19 levels."

"Greater emphasis on a more strategic dialogue and relationship with our client base. Having a smaller portfolio allows that greater focus and a shift away from being "transactional" or events-focused to outcome focused."

"Greater use of in-market specialists and the value companies are getting from the connections and introductions they are able to make as opposed to just relying on grants and travel support to attend trade shows."

"Prior to EGP we worked with a range of companies and had good engagement with them to offer the support (mainly financial) to assist. Post EGP a lot of time was spent trying to engage the companies on a more restricted portfolio (ie no financial support) which wasted time as 90% didn't engage."

"This programme is now more successful and more focussed and more support from government so ATN a good move for us."

3.7 Mechanisms of trade support

3.7.1 Most effective mechanisms of trade support

The majority of respondents (57, 85%) provided their views on what they thought was **the most effective mechanisms of trade support**. The most frequent comments were:

- Trade specialists/trade advice (12, 21%)
- Grants/IRP/investment (12, 21%)
- market/technical support (11, 19%)
- International networks – including GlobalScots (8, 14%)
- Market research/intelligence (7, 12%)
- Digital offering/self-service approach (7, 12%)
- International manager for hire (5, 9%)
- Trade fairs/international events/missions (5, 9%)

Other areas that were mentioned included: one-to-one support and the Chambers network.

Focus group participants highlighted the previously available Export Advisory Service (EAS) of one-to-one support as a particular good mechanism for non-experienced exporters. They stated that without EAS, there will be companies that they will be unable to help as those most attracted to these campaigns will be early-stage and new exporters.

They highlighted that the removal of EAS had already had implications, including partners developing regional services to try to fill the gap resulting in companies receiving different levels of support. In addition, no EAS has led to lack of the pipeline of companies whose export scale and potential had previously been identified through EAS. Overall, they stated that the service offering for early-stage exporters had reduced and there was less support available to promote to this group of companies.

For experienced exporters focus group participants stated that for many big companies, it is unclear what the market failure for intervention is and therefore the public sector role. They stated they don't need the same in-depth support as the smaller companies and felt that as ATN moved into its next phase that the original 80:20 split of support for EGP companies ie EGP companies take up 80% of staff time, would shift towards 60:40 over the coming years as some categories in EGP will need more light touch support.

"Good strong overseas colleagues, lots of good local market intelligence, in market trade specialists. IRP gives some financial support – can be used for lots of things – good feedback to date; international manager for hire – previous scheme – very well received and excellent feedback."

"International networks are a vital component of export success – getting to know different business environments, how supply chains operate, and valuable warm introductions are made which can support trade aspirations and successful market entry. More work needs to be done to raise awareness with companies how international networks and connections are so valuable."

"International manager for hire worked well as it gives the company boots on the ground, which is key to achieving success in an overseas market."

"Market specialists are very successful, and GlobalScots could use them more. IRP has been successful. Wider SE support supports in R&D which will impact growth and international sales."

"Companies are now using digital to get traction to help implement international strategy in a more cost-effective way – we are analysing the data on webinars and events that have gone digital."

"By helping companies who are already ahead of the curve grow their exports in such new markets we can help create market leaders. When such companies achieve success they are responsible for exponential growth and we need more such players if we are to grow export sales."

"SDI used to run an Export Advisory Service (EAS), it allowed non experienced exporters about 1.5 days one-to-one support. The intervention was important for companies who weren't sure who to turn to for advice or how to access support."

3.7.2 Works less well

Over half of respondents (37, 55%) provided feedback on the on **what worked less well about the current trade support mechanism**. Two were not close enough to comment. The main themes were:

- No or limited financial levers, lack of export finance/grants (12, 32%)
- Limited one-to-one, face-to-face advice – more focus on virtual/online – driven in part by COVID-19 but also reduced funding (8, 22%)
- Confusing landscape for companies/fragmentation across the agencies, poor communication between agencies (6, 16%)
- Need for a clearer service portfolio to allow teams to better meet the need targets (5, 14%)

Other areas mentioned were: lack of follow up support to maximise the impact and understand readiness (3), trade missions to too generic (3), poor marketing support/promotional material/website (2).

Focus group participants agreed with the areas mentioned above. As noted above the lack of the EAS was having a negative impact for the least experienced exporters.

“Limited funding, limited one-to-one support, lack of clarity around SE customer relationship approach especially given Brexit and COVID-19.”

“The lack of funding through ATN only a small £9k grant support to implement the plans but we don't have any money/internal resource; even less in rural areas as they are not the top performers.”

“It would be helpful to have a process to recruit companies that fit with the programmes we have developed. It could be an efficient way to usher new exporters and maximise the work of in market specialists.”

“No international manager for hire programme – this is the biggest loss – no risk share and no/limited in market experience directly available to the company; exacerbated by COVID-19.”

“Having no financial levers to de-risk companies entering new markets.”

3.7.3 Combinations of support that are effective in leading to increased trade and impact

Over two fifths of respondents (28, 42%) provided feedback on what they thought were **the combinations and timings of support that are effective in leading to increased trade and economic impact**. A further three respondents were unsure/unable to comment. The recurring themes were:

- Strategy advice/workshop linked to an export action plan and support of market entry/opportunity mapping (7, 25%)
- Bespoke support aligned to mapping requirements – focus on individual customer journey (6, 21%)
- Bespoke advice linked to partners and sectoral specialists and including support for innovation, digital development etc (4, 14%)
- Investment funding to support company development first and specialist advice to maximise the impact (3, 11%)

“Bespoke advice on doing business overseas and introductions to partners has the maximum impact. Financial support for overseas expansion should be strategic and not only addressed for travel assistance. Equipping companies with solutions for their digital transformation journey and innovation should be given importance.”

“It's helpful if companies have adequate funding before they start looking at an overseas market – a lot is needed in terms of marketing investment, funds to meet compliance and regulatory requirements.”

“Its very rare that a company only needs trade support – bring in support across the specific areas – SMAS, R&D, investment support.”

“Delivering International Strategy Workshops at the beginning of any export journey. This provides companies with a clear strategy and action plan.”

“I don't believe there is a one size fits all approach, each company and situation is different. It is about having a large enough toolbox to be able to support varying circumstances. Or a very flexible small set of tools.”

3.7.4 Factors that make a difference to increased international trade

Over half of respondents (36, 54%) commented on **the factors that make a difference to increased international trade**. We note that while respondents rarely split by those starting their export journey and experienced exporters the majority were focused on support for the early-stage of exporting.

- Access to expertise, market know-how/in market knowledge – right support at the right time – this was described as more important to early-stage exporters (17, 47%)
- Resources in the business – people, time, money, capacity (9, 25%)
- Market entry/route to market support – supporting market readiness (7, 19%)
- Clear export plan/strategy and vision (7, 19%)
- Confidence, managing risk, awareness raising, ambition (5, 14%)
- Understanding opportunities/demand mapping (4, 11%)
- Access to finance/grant support (4, 11%)

Other themes included: adaptability, nurturing innovation, need to support new to exporting, international networks and relationships.

"Market entry support - introductions via SDI specialists, access to finance, training, advice and support and a package of grant support."

"They require the right resource (people, time, money), have a strategy, market knowledge, researched market entry options, understand consumer behaviour in that market, have a product that there is demand for."

"For new or relatively inexperienced exporters being able to support the businesses from the international strategy workshop through to offering experienced SDI advisor support and then following this up with in market expertise. These clients tend to need support with attending trade fairs but also while in country arranging and attending customer meetings. Identifying and supporting with cultural and language barriers."

"Ultimately the biggest thing is preparedness – whether the company has set themselves up for success by having a clear understanding of the market (who is their competition, how do they need to market themselves, what buyers should they be going after, what should their focus be), effective pricing (is the pricing going to work in this market), adequate marketing (are they able to be heard above the noise), and, of course, a quality product that buyers are actually looking for."

"Funding and investment. We have far too many small pots of grants and prizes and loans and schemes and calls – and they're a) impossible to navigate and b) too small to have any impact alone."

3.7.5 Factors that make the most difference in the export journey

Less than half of respondents (26, 39%) provided feedback on **the factors that make the most difference or derive the most value for a company's export journey**. In general these build on previous feedback with the most common themes being:

- Need for on the ground presence/visiting overseas markets/focus on the target markets (14, 54%)
- Being agile, responding to customer need, linked to stage in international journey (8, 31%)
- Matching opportunities to capabilities/aspirations – focussed not scattergun approach (4, 15%)
- Grant support/finance including access to scale up capital (4, 15%)
- In market specialists (3, 12%)
- International strategy (3, 12%)

Other areas highlighted were: translation of a strong market approach to other areas (2), demand-led instruments aligned to business need (2), structured approach (2), international manager for hire (2), one-to-one support (1).

"Companies need to focus on getting it right in one market and ensure that they put the right level of support and effort into building that market to ensure it is sustainable before moving to the next market. Once they have a model that is successful, they can then take that approach and develop a new market."

"Being able to provide a tailored support – historically had an account manager model which worked well. Within the new system its more difficult to do this – moved to a call model e.g. green jobs; the model is now under development. General feedback that the new model is not working – sense we need an account management model etc."

"Best value is supporting both ends of customer journey – helping people consider what their international strategy should be as well as providing the in market support – we have a strong international footprint – both areas are very valuable."

3.8 Effectiveness of public sector trade support system in Scotland

3.8.1 Working well

Almost two thirds (43, 64%) of respondents provided views on **what was working well about the public trade support in Scotland**. Respondents acknowledged equally that there is a comprehensive range of support available (18, 42%) and that partnership working is effective or has improved (18, 42%).

Over one quarter (12, 28%) highlighted individual organisations or aspects that work well. All agencies were mentioned, and individual aspects included DIT, early-stage support, online support, account management. Three participants commented on the effectiveness of industry partners and export partnership to support the Food and Drink sector. A further four respondents were unable to answer.

"It is good that Scottish companies have multiple agencies they can draw support from."

"There is a real willingness for everyone to come together and not duplicate things."

"We are improving. There is more pressure on us to think digital and share data. There is more direction from Scottish Government for us to be better aligned and now we have a lot of multi partner approaches to projects."

"People work hard, are connected and want to make a difference."

3.8.2 Working less well

Almost three quarters (49, 73%) provided views on **what works less well about the public trade support in Scotland**. Almost half of respondents believe that there is a cluttered landscape, where customers do not know who to turn to for advice and support, often linked to duplication of effort and a need for improved partnership working – this is a odds with the previous section where over 40% noted partnerships as improving or working well. Responses related to:

- Cluttered landscape that is confusing to navigate (24, 48%) – lack of clarity for companies on which organisation is most appropriate for different kinds of support, too many routes and entities providing similar services
- Partnership working, communications between agencies and duplication of effort (23, 47%) – agencies working in isolation, with lack of coordination, integration and collaboration, lack of clear strategic direction
- Gaps in provision for early-stage exporters, smaller companies and high growth SMEs, lack of financial support for specific areas (12, 24%)

Other comments related to marketing and communications, political agendas, governance and bureaucracy. Focus group participants provided similar feedback and stated there was a need for more joined up enterprise support and to present the added value of the public sector support. They also stated that this was already happening and partners were communicating more.

“We need to ensure we have clear communication around how we work together with partners and avoid any confusion as it appears to be a cluttered landscape for our businesses.”

“The cluttered landscape can make it hard to navigate for the customer and there can be duplication of effort e.g., Brexit – each agency had their own info on Brexit – all very similar to each other. Would have been better placed working with more of a ‘Team Scotland’ approach rather than each agency putting out their own copy.”

“Working with partners is really important and having an overall plan for us all, with clear areas and remit for each as this is not the case at the moment. Passing on the baton for a company between partners is not happening effectively.”

“It’s hard to uncover what support is available via SDI to support SMEs to start out and grow export markets. Finding out who or what support is available via SDI/SE for new or establishing SMEs is harder to locate and understand.”

“There are still companies falling through the gaps in the network of support i.e. some businesses don’t meet all the criteria for public sector support and we often experience companies coming to us directly for support. Perhaps the criteria for public sector support could be clearer.”

3.9 Factors that influence the success of trade support

Over half (34, 51%) of respondents provided varied views on **other factors that can influence the success of international trading support**. A further three respondents did not have any further comments. The key themes were:

- More online information and digital presence (8, 24%)
- Partnership working and joined up approach (6, 18%)
- Branding/ leveraging UK/ Scotland brand and raising awareness (5, 15%)
- In – market specialist advice and support (4, 12%)

Other comments included funding and investment (3) current restrictions of EGP, particularly in growing pipeline (3), clear processes and communications (2), provision of high quality research and knowledge (2).

Focus group participants added that if previous support is brought back or new support is introduced, duplication of services amongst partners needs to be avoided and a more joined up approach adopted. Many local authorities and regional partners are already developing and procuring their own services and programmes of exporting support. As such the landscape could become more cluttered with loss of clarity over the support available and the user journey. Participants highlighted the Business Support Partnership which is made up of different public sector partners including Business Gateway, Scotland Food and Drink, Local Authorities amongst others. Its key role (which is wider than exporting) is to help partners developing new products and services, to identify areas of duplication across other partners and to work with them to find solutions.

“There needs to be more online and information on where to find advice. Companies are routed direct to a field office now which is only ‘pull’ support and no ‘push’ – i.e. they can tell them about the market but they don’t necessarily have an understanding of Scottish companies.”

“Partners working together, collaboration. Companies just want the support; they are not concerned who it is from.”

“The last couple of years has taught us that we need to be flexible, we need to be able to adapt and be more agile. We need to be constantly listening to the needs of our businesses and be prepared to flex when needed and required.”

“We should allow ourselves to be experts in our focused sectors and position ourselves this way in Scotland as well to build credibility to our brand. We should not offer “let me google that for you” services, but rather have a clear portfolio of services we want to engage with.”

“The elephant in the room is ATN and this is tying the hands of some colleagues.”

3.10 How international trade drives other factors and vice versa

More than two thirds (45, 67%) of respondents provided comments about **how international trade support 'works' with and drives the innovation, investment and inclusive growth agendas** – and vice versa. Most acknowledged the correlation between them, although there were differing views as detailed below:

- They are all interlinked and feed off each other (12, 26%)
- Innovation and/or investment is needed prior to internationalisation (8, 17%)
- International trade is the driver (6, 13%) for:
 - stimulating innovation
 - increasing sales
 - investment in product development and staff/ job creation
- More should be done to demonstrate how international trade drives other factors (16, 36%) through:
 - better linkages and collaborative working
 - support and advice for companies
 - financial investment

"They are all interlinked and interconnected. It is very difficult to separate them out and they must all work together and all support each other to help drive growth."

"International trade and innovation are probably the two most important business functions, to help achieve a growing and diverse economy, they both support each other."

"Companies frequently need to innovate to become market ready for an international market. The potential growth in international sales can drive economic growth in areas targeted by the inclusive growth agendas."

"You need to be able to exploit the innovation and we lack the mechanisms to support this – getting the product to market and selling it profitably. Funding to help increase sales should be part of the support to help truly exploit what comes from investment and innovation."

3.11 How companies have used trade support learning without further support

Respondents were asked about examples of where companies have used international trade support learnings to access additional markets/geographies without requiring further support. Two fifths (28, 42%) of respondents provided comments:

- Almost half (13, 46%) were not aware of any examples of this, or not close enough
- One quarter (7, 25%) advised that companies usually require some further support
- 14% (4) advised that this is not tracked
- One fifth (6, 21%) were able to provide examples:
 - early-stage support was provided to enable companies to enter one market and they then went on to address multiple new markets on their own (Food & Drink and Health & Wellbeing)
 - support which then helped companies grow their business subsequently on their own and raise additional funding (Digital Health and Technology & Advanced Engineering)

"In my experience if you can support and work intensively with a client right at the beginning of their export journey, success in one market will very often raise their ambitions and be the catalyst for them being successful and exploring others."

3.12 Gaps in current provision

Over half (36, 54%) of respondents provided views on what **support companies need that is not currently being offered**. A further eight respondents were not aware of any gaps or had already highlighted these. Suggestions were varied, with many echoing their previous responses:

- Incentives and advice on how to achieve **net zero targets**, whilst trading internationally (12, 33%)
- **Funding and investment**, particularly to support new export targets, start-ups and help get companies to market (9, 25%)
- **Consideration of companies needs and adapting services to fit** (8, 22%) – surprisingly three respondents commented that greater consideration should be given to digital solutions/ support despite the amount of support currently available
- **Technical/expert support and advice** – with regards to compliance/ regulation, FTA's, planning/ strategy (5, 14%)
- Support to companies affected by **COVID-19** and in market support to "demystify" **Brexit** (5, 14%)

Other comments included sales and marketing support (3) early-stage mentoring/ one-to-one support (3), access to temporary resources, similar to international manager for hire (3), in-market support (2) – building on trade specialist role or accelerator programme, ongoing support/ account manager (1), supporting company innovation (2) and a joined up, consistent approach across partners (2).

Focus group participant agreed with the gaps in provision especially for early-stage exporters. They viewed Brexit as increasing the needs of businesses that were operating or trying to operate in Europe.

For early-stage exporters participants highlighted a range of developments that would help support early-stage companies:

- **Preparing to Export Programme** – is already set up and will continue to be developed, it can help address needs of early-stage exporters
- **E-learning development** with one-to-one/one to few/peer-to-peer support
- **The B2B e-Commerce Accelerator Programme** which ran last year worked well in terms of building capability within companies – it was a mix of consultancy and one-to-one support but also involved a lot of peer-to-peer support for the companies who participated in the accelerator together
- **Creating a logged in user experience** – there is an aspiration to provide users with an 'end-to-end logged in (tracked) experience'. At the moment information is offered only as a service which is the extent of the self-serve offering. The ability to track where a client is in their exporting and support journey would help add significant value. It would allow their specific needs to be identified and support to be tailored at different stages.

"The drive towards net zero is an area that many of the companies we support are aware of and some have made changes to reduce their carbon footprint, however it's an area that we need to devote more time to and understand how we can support them further. In the practicalities of day-to-day business I suspect that companies have other priorities that take precedence over net zero. The message needs to be stronger from Ministers and legislation or compensation will need to be required otherwise the business who want to change will be slow to change."

"Business support and advice is good, but SMEs and start-ups need funding too or at least more help to access the limited funding available."

"We have to go back to understanding our purpose. Why do we exist and for whom? When answering these questions, we can much easier articulate the services we want to provide, in what stage and to whom."

"There needs to be more support on market entry, especially in compliance/regulations. There is only so much the in-market specialists can do in this regard, it really requires an outside professional to advise on."

3.13 Key success factors for an effective trade support offering

The majority of respondents (53, 79%) provided feedback on the **key success factors of an effective trade support ecosystem**. The most common themes were:

- Joined up approach/cross-agency collaboration to setting objectives and goals; use data sharing and common frameworks and signposting (28, 53%)
- Agile and responsive support linked to company journey/package of support including early intervention (11, 21%)
- Clarity on what support is available, strong communication and marketing (10, 19%)
- Good market intelligence/insights, knowledge and personal contacts (9, 17%)
- Funding linked to practical support (6, 11%)
- Connectivity with international field expertise/in market expertise (6, 11%)
- Strong digital offering (3, 6%)
- Focus on priority markets and value proposition for said markets (3, 6%)
- Good knowledge of the Scottish company base (3, 6%)

Other themes included: strong relationships with the company/understanding them (2) and linking to innovation/other supports (2).

"Clear focus on priority markets that we will support trade. Recognising it takes time to build an export market and support has to reflect this the companies support changes as they change. We need to be responsive and not just support the same exporters."

"Focus, clear roles and responsibilities, skilled trade resource, market insights, funding, interconnecting areas of gov working together (trade policy, infrastructure, skills, innovation and investment)."

"Communication across all parties – two-way relationship – being able to articulate what we do, the benefits of what we do, the benefits of trade and articulate why we need the information we ask for eg the international sales level/value."

"Adequate guidance from the government, but not too much "hand-holding", adequate investment ecosystem, an environment which fosters entrepreneurship and innovation, good transport connections overseas."

"Getting the right support to companies at the right time and joining up. Sharing data and having a 360 view of a company regardless of how they entered the system and making sure they don't fall through cracks."

"I think we really have the fundamentals sorted - we have trade advisors in Scotland working directly with Scottish companies at a strategic level; we have in-market specialists who can be brought in to support these companies when targeting a particular market; and we have some limited funding vehicles and international events programme to help encourage them to invest in new market development. We also have a range of others we can bring in for certain elements of their international journey from international market research, technical enquiry service, GlobalScots and support for innovation."

3.14 Final comments

Slightly under half of respondents (31, 46%) provided some final comments. This feedback correlates well with the findings already presented, and the main themes included:

- More agile approach aligned to company need, plugging gaps in support linked to ATN as it needs to evolve (9, 29%)
- Creation of a development/opportunity pipeline to ensure there are more new companies that can move into the funnel (6, 19%)
- Believe ATN is working, however we need to measure the value across delivery, trade specialists, not entering the wrong market (6, 19%)
- Increased dispersal of staff resource across the regions, including more connections with trade and in-market specialists (5, 16%)
- More coordinated working across delivery partners, including integration with other services eg innovation and investment (5, 16%)
- Less bureaucracy and regimented support – too many actions in the current version of ATN (3, 10%)
- Increased alignment with UK Government/DIT support – leverage their support (3, 10%)

Other themes included, increased marketing collateral/promotional material – not addressing market failure and attribution of the support (2), showcase the sector (2), strengthening the one-to-many offer (2), ensure trade missions are part of the offering (2), more grants/funding (2) and improved digital offering (2).

Focus group participants provided the following final comments:

- Digital services are extremely valuable for rural and island communities – the travel time required to attend events has been a barrier to accessing support in the past
- New mentoring support and international workshops has been interesting, though it may be tricky to find out who is the best partner to deliver that support
- Investigate and learn from others devolved administrations and other comparable regions and countries (e.g. Enterprise Ireland, Invest NI, Business France)
- Mapping and scanning of the landscape of support is very important, we should continue to build on and improve our current activity in this area
- An increasingly cluttered landscape of support can make the point of entry difficult for companies – participants noted that DIT and SOSE were adding to the delivery landscape
- Companies should be able to access the same level and consistency of international support regardless of their location

Focus group participants also mentioned the support provide by DIT. They noted that they have a significant budget and are rapidly developing new exporting products and services. We are working to align our products and services with DIT services through their Scotland Hub. They recently launched the Export Academy which includes products and services to support new and less experienced exporters. It will be important to ensure Scottish services do not duplicate this and to make sure DIT signpost to us and vice versa. A complex data exercise has just been completed with DIT, (data sharing agreement and an MOU), to allow SDI and partners to better understand companies using UK wide support.

4 Partner Management Information Analysis

Detailed management data and information from SE/SDI, HIE and the Scottish Chambers of Commerce (SCC) has been collated and analysed to understand:

- The number and type of interventions which make up international projects including non-trade related products such as innovation support and investment support
- The links between support delivered and levels of planned international sales

This will tell us what factors might lead to higher levels of planned international sales.

For the Enterprise Agencies (SE/SDI/HIE) the key measure of the success of trade support delivered is Planned International Sales by supported companies. This is the expected companies' international sales e.g. to a particular market, as a result of a new product etc as a result of the project/support.

It should be noted that data from each of the partners differs in content and therefore the analysis for each is slightly different.

4.1 Overview of SE/SDI data

Management data was extracted from SE/SDI's Dynamics CRM system over three years:

- 2018/19
- 2019/20
- 2020/21

The dataset was built from projects which contribute to the 'Planned International Sales' measure in the years reported.

SE/SDI support can relate to one or more intervention, usually grouped under a single project on Dynamics. A project is made up of 1 or more interventions all contributing to the same planned international sales figure. The main aim of support is helping businesses into new markets (geographic and/or with a new product) with the aim of securing exports as a result of support.

Based on the data provided, analysis has been carried out broken down by:

- Interventions/projects
- Exporting status
- Company size
- Intensity of support including relationship management status
- International versus no international¹²
- SDI Inward Investor
- Sector and region
- Country of export opportunity

For projects completed during the study period, 2,241 companies received 8,447 interventions consisting of 3,747 international projects¹³ resulting in £4,886,140,310 of planned international sales¹⁴.

¹² Support delivered is tagged in the database as either international (related to export growth ambitions) or non international (relating to wider business growth support)

¹³ A project is made up of one or more interventions all contributing to the same planned international sales figure. The main aim of support is helping businesses into new markets (geographic and/or with a new product) with the aim of securing exports as a result of support.

¹⁴Note this is sales over three years only

Companies have been broken down into three cohorts:

1. Companies receiving any international support (either international support only or as part of a package with SE support) who contributed to the measure (£0> value planned international sales): **922**
2. Companies receiving any international support (either international support only or as part of a package with SE support) who didn't contribute to the measure (£0 value planned international sales): **976**
3. Companies receiving only SE non-international support (ie no international support) who contributed to the measure (£0> value planned international sales): **343**

Table 4.1 shows the difference in average planned international sales by the three cohorts.

Table 4.1: Company cohorts

International status	Number of companies	Average planned international sales per project
Companies receiving any international support who contributed to the measure	922	£1,916,501
Companies receiving any international support who didn't contribute to the measure	976	£0
Companies receiving only SE non-international support who contributed to the measure	343	£ 1,525,909

Companies receiving any international support who contributed to the measure had 25% higher planned international sales than companies with no international support who contributed to the measure.

4.1.1 Interventions/projects

There are 71 different interventions provided. See Appendix 1 for a list of these broken down by ACE. ACE is the three-stages of support as described by the A-C-E model.

The most frequently delivered interventions include:

- **International Specialist Engagement** – one-to-one exporting advice delivered through SDI staff
- **International Specialist Engagement (Contractor)** – one-to-one exporting advice delivered through contractors
- **International Market Events** – SDI International Market Events, Enterprise Europe Network Scotland (EENS) brokerage events, other International Market Events (organised by Scottish-based international trade support organisations), UKTI Tradeshow Access Programme (TAP) Support
- **International Access Support** – travel and accommodation support to access international markets
- **SDI Field Office Support** – support for international projects
- **Overseas Market Support** – market research consultancy, identification and analysis of new market opportunities including Alliances/Joint Ventures and Acquisition, development of Marketing plans for new market(s)/new product(s)

Table 4.2 shows a breakdown of the most frequently delivered interventions.

Table 4.2: Delivered interventions

Intervention	No. of times accessed	By no. of companies	Average number of times accessed
International Specialist Engagement	2,112	759	2.8
International Specialist Engagement – Contractor	2,053	723	2.8
International Market Events	839	538	1.6
International Access Support	410	315	1.3
SDI Field Office Support	377	229	1.6
Overseas Market Support	320	255	1.2
Project Support – Innovation	284	244	1.2

In some cases, several interventions contribute to a project which in turn leads to a 'Planned international sales' figure. Projects range from 1 intervention up to 5 interventions, with the average being 2¹⁵. Table 4.3 shows that just over half of the projects (56%) are made up of just 1 intervention with a further 37% consisting of two interventions.

Table 4.3: Number of interventions within a project

Number of interventions	Projects	Average planned international sales per project	Range
1	2,093	£1,422,098	£0-£333,000,000
2-5	1,401	£1,206,039	£0-£90,000,000
6-10	185	£869,804	£0-£39,500,000
11- 20	58	£857,333	£0-£13,000,000
21+	10	£939,000	£0-£4,400,000

Those consisting of just one intervention also had the highest average planned international sales.

Table 4.4 provides a breakdown of average planned international sales for each single intervention project as well as the number of single intervention projects this relates to and whether the intervention was international or non-international. Interventions were classed as international if they were delivered by SDI and non-international if delivered by SE (see section 4.1.5 for further analysis on this).

It should be noted that the top four single intervention projects are based on just one or two company and therefore the international sales figure is not a true average and may be viewed as potential outliers.

¹⁵ Averages are based on an arithmetic average (mean)

Table 4.4: Planned international sales for single interventions

Intervention	Average planned international sales	Number of single intervention projects	International/non international
Large R&D Grant	£60,000,000	1	Non international
International Scale Up Grant	£7,600,000	1	International
Expert Support - Energy Market	£5,000,000	1	Non international
High Growth Ventures Development Support	£3,500,000	2	Non international
No product support	£3,374,310	113	-
International Manager for Hire	£3,188,954	46	International
International Market Events	£2,412,565	499	International
Project Support WPI - Leadership	£2,225,000	4	Non international
Project Support -Digital Transformation	£2,158,371	54	Non international
Project Support - Productivity	£2,037,127	55	Non international
Business Improvement Manufacturing Improvement	£2,000,000	1	Non international
Development Project Implementation Support	£1,379,103	29	Non international
International Specialist Engagement	£1,378,305	286	International
Project Support - Innovation	£1,315,984	136	Non international
R&D Grant	£1,313,770	60	Non international
Project Support- Strategy Development	£1,250,255	21	Non international
Overseas Market Support	£1,212,880	25	International
Innovation Specialist Engagement	£1,054,167	12	Non international
International Access Support	£1,003,287	41	International
Financial Readiness Support (IRS)	£1,000,000	1	Non international
Scotland Food & Drink National Skills Academy	£930,000	1	Non international
SE SMART Feasibility	£540,000	1	Non international
ScotGrad Placement - International	£514,500	5	International
Workplace Innovation Fund	£500,000	1	Non international
ScotGrad Placement - Innovation	£435,448	15	Non international
Project Support - Market Development	£433,774	96	Non international
Make It To Market	£420,000	5	International
Project Support - International	£377,500	4	International
Project Support WPI – Workplace Organisation	£291,667	6	Non international
Project Support – Strategy Development (International)	£250,000	21	International
By Design	£215,436	95	Non international
ScotGrad Placement – Productivity	£207,225	20	Non international
Cross Sector Missions	£146,917	12	International
International Specialist Engagement – Contractor	£146,696	224	International
Expert Support – Marketing – International Module	£146,000	10	International
SDI Field Office Support	£33,826	69	International
Project Support WPI – Management	£30,000	1	Non international
Expert Support – Marketing – Domestic Module	£13,333	3	Non international
Strategy Planning Workshop – International	£13,111	36	International

Single intervention projects that resulted in no international sales included (of which 54% were international and 46% non international):

- Brexit Support Grant (non international)
- Expert Support – Innovation (non international)
- GlobalScot (international)
- HGV Early Team Development (non international)
- Intellectual Asset Specialist Engagement (non international)
- International Business Opportunities (international)
- International e-Commerce Workshop (international)
- International Market Presence (international)
- International Technical Services (international)
- Managing People for Growth (non international)
- Preparing to Export Advanced (international)
- Preparing to Export Introductory (international)
- Strategy Planning Workshop – General (non international)

Some projects included interventions delivered more than once. The most common interventions to be delivered more than once as part of a project included:

- Intellectual Asset Specialist Engagement
- International e-Commerce Workshop
- International Market Events
- International Specialist Engagement – Contractor
- International Specialist Engagement
- Project Support - Market Development
- Project Support - Strategy Development
- SDI Field Office Support

With the exception of the e-commerce workshop these are bespoke supports such as one-to-one advice and are often the same intervention but a different type of support.

803 projects that contributed to the international sales measure consisted of more than one intervention. Looking at a sample of 100 of these projects (those with the highest planned international sales) the following interventions appeared most commonly:

- International Specialist Engagement (65% of projects)
- International Market Events (40% of projects)
- International Access Support (37% of projects)
- Overseas Market Support (27% of projects)
- International Manager for Hire (23% of projects)
- SDI Field Office Support (13% of projects)

Table 4.5 shows the most common combinations of interventions as part of the 100 projects, along with the average planned international sales.

Table 4.5: Intervention combinations

Intervention combination	Number of projects	Average planned international sales per project
International Market Events & International Specialist Engagement	29	£16,655,172
International Access Support & Overseas Market Support	8	£10,234,750
International Market Events & International Specialist Engagement & SDI Field Office Support	4	£13,250,000
International Access Support & International Specialist Engagement & Overseas Market Support	4	£5,875,000
International Access Support & International Manager for Hire	4	£16,875,000

The majority of projects (80%) were targeting just one of the 3 types of support i.e. A-C-E and 65% included C. The breakdown is shown below:

Figure xx: Projects by A-C-E

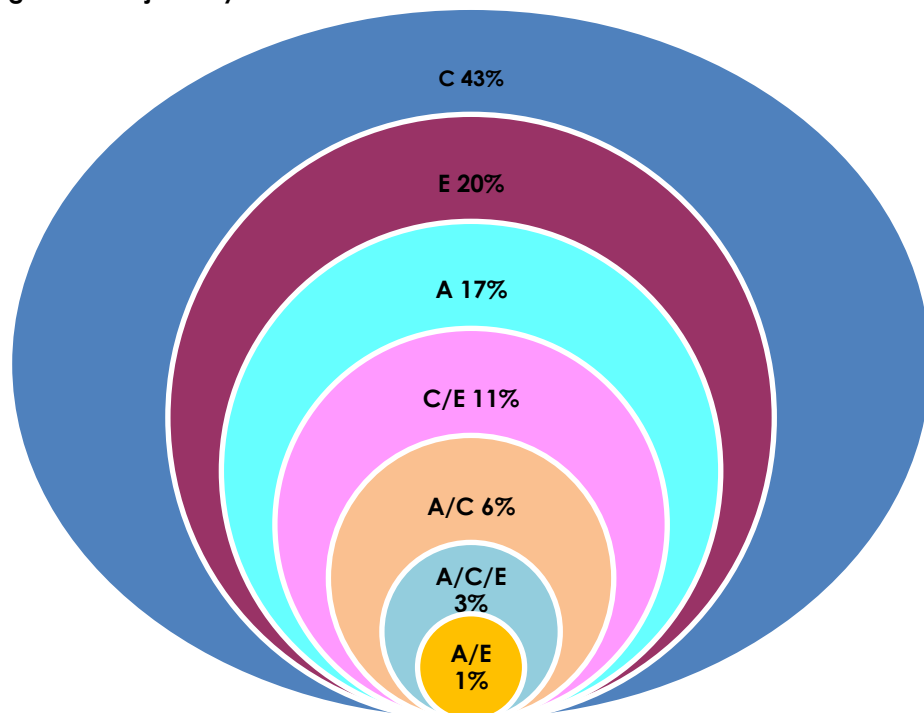


Table 4.6 shows the difference in planned international sales by stage of A-C-E¹⁶. Projects targeting A, C and E had the highest average planned international sales figures at £2,353,406. Data suggest that SDI could consider playing a stronger support role in the 'E' stage since this is where sales are actually achieved.

¹⁶ Analysis has been done on an individual project level and not by company, therefore companies with multiple projects will have been reviewed on an individual project basis

Table 4.6: Project type

Stage of ACE	Number of projects	Average planned international sales per project
Projects A only	600	£2,019,017
Projects C only	1,576	£583,877
Projects E only	709	£1,486,746
Projects A+C	226	£2,602,367
Projects A+E	29	£845,429
Projects A+C+E	102	£2,353,406
Projects C+E	392	£1,195,181

Projects are also categorised as 'advisory', 'financial' support or both (detailed in Appendix 1). 70% were advisory support only, 19% financial support only and 11% were both. Table 4.7 shows the difference in planned international sales by advisory and financial support or both.

Table 4.7: Project type

Project type	Number of projects	Average planned international sales per project
Advisory support	2,544	£1,165,618
Financial support	706	£1,152,615
Both	403	£1,809,420

Projects that were purely advisory support had slightly higher average planned sales than those that were financial. However, projects that received a mix of both advisory and financial support had significantly higher average planned sales (64%).

The length of time between projects commencing and their completion ranged from less than a year up to 6 years. Table 4.8 shows that the majority of projects (82%) were completed in under 2 years.

Table 4.8: Project length of time¹⁷

Project length of time	Projects	Average planned international sales per project
<1	1,447	£1,669,464
1	1,483	£823,759
2	534	£1,244,136
3 +	160	£1,228,136

**123 projects did not have start dates and have therefore not been included*

Projects lasting less than a year had the highest average planned international sales.

4.1.2 EGP status

Those with Export Growth Plan (EGP) status are businesses who are likely to make a significant contribution to export growth because they have clear international action plans¹⁸.

21% of companies receiving support were EGP companies and 67% were not. A further 12% were pre-EGP status. The EGP plan was launched in May 2019 and therefore companies accessing support before this period have been classed as pre-EGP status.

¹⁷ Project length of time is based on the start date of the first and last intervention that made up the project and the planned international sales aligns to the financial year of the last intervention

¹⁸ An international action plan agreed with company and from this a project is defined (market expansion or new market etc). A project then consists of one or more interventions. When the project is completed the company confirms its plans for growth of international sales arising from the project over the subsequent three years

Table 4.9 shows the difference in planned international sales by EGP and no EGP companies. Those with EGP status had significantly higher planned international sales than those without.

Table 4.9: EGP status

Export status	Number of companies	Average planned international sales per project
EGP	462	£2,102,675
No EGP	1,512	£729,679

4.1.3 Company Size

Company size has been defined as SME or non-SME.

57% of companies were SME' while 19% were non-SME. For 24%, company size was not reported. SMEs had on average 4.6 projects while non SME's had 4.6.

Table 4.10 shows the difference in planned international sales by company sizes. Unsurprisingly, planned international sales were higher in the non-SME than SME category.

Table 4.10: Company size

Size	Number of companies	Average planned international sales per project
SME	1,277	£1,014,418
Non-SME	436	£2,422,091
Status not reported	528	£1,149,274

4.1.4 Intensity of support

The number of projects a company received ranged from 1-13 with the majority receiving just 1 (65%).

Table 4.11: Number of projects

Number of projects	Number of companies
1	1,450
2-5	740
6-10	47
11+	4

Of the 791 companies that had more than 1 project; 31% (245) saw the international sales value aligned with each project increase from the earliest to latest project while 23% (185) remained the same and 46% (361) decreased.

977 companies (43%) had only project(s) that had no international sales value attributed to them. Table 4.12 shows the breakdown of number of projects per company with no international sales.

Table 4.12: No international sales

Number of projects with no international sales	Number of companies
1	862
2	92
3	20
4	3

A further 442 companies (20%) had a mix of both £0 value projects and £+value projects while the remaining 822 (37%) had only £+value projects.

62% of companies and 38% of projects were NRM (Non-Relationship Managed). Table 4.13 shows the breakdown in average planned sales for projects of DRM (Direct Relationship Managed, also known as Account Managed) companies compared to projects of NRM companies.

Table 4.13: DRM/NRM

Project type	Number of companies	Number of projects	Average planned international sales per project
DRM	842	1,841	£1,788,380
NRM	1,399	1,906	£836,166

Projects of companies that were DRM had more than double the average planned international sales compare to those that were NRM.

4.1.5 International versus no international

Products/services include a mix of SDI products/services and SE products/services – these are labelled 'international' and 'national' respectively. Where the SE activity delivered to the company isn't in the "International Product" category but from another business support area, e.g. Innovation, R&D or Leadership, the measure still applies where the export sales from the project has been forecast.

Table 4.14: International versus no international

International status	Number of companies	Number of projects	Average planned international sales per project
International	1,571	2,814	£1,347,802
No international	343	832	£1,258,325
Both	327	39	£520,974
No status provided	-	62	£ 422,290

4.1.6 SDI Inward Investor

57 companies were supported to invest in Scotland. These companies were recorded as a "Validated Inward Success" with the associated forecast employment contributing to the SE Business Plan Measures of Planned Jobs from inward investors.

The companies had the following support as part of an international project

- Expert Support (including innovation, domestic and international modules)
- GlobalScot
- ICT Specialist Engagement
- IMProve Assessment
- Innovation Specialist Engagement
- International support (including access support, e-Commerce workshop, international manager for hire, market events)
- International Specialist Engagement (including contractor)
- International Technical Services
- OD Specialist Engagement
- Overseas Market Support
- Project Support (including market development, productivity, strategy development, innovation, workplace organisation and digital transformation)
- R&D Grant
- ScotGrad Placement – Productivity
- SDI Field Office Support
- Strategy Planning Workshop - International

Table 4.15 the difference in planned international sales by those received SDI inward invest and those not.

Table 4.15: SDI inward investor

SDI investor	inward	Number of companies	Average planned international sales per project
Yes		57	£2,425,995
No		2,184	£1,268,489

Those receiving support to invest in Scotland had more than double the average planned international sales compared to those that not.

4.1.7 Sector and region

Figure 4.1 shows the range of sectors companies with technology and engineering, food and drink and energy the most common. Those indicated red align to the Scottish Governments EGP sector profiles.

Figure 4.1: Sector¹⁹

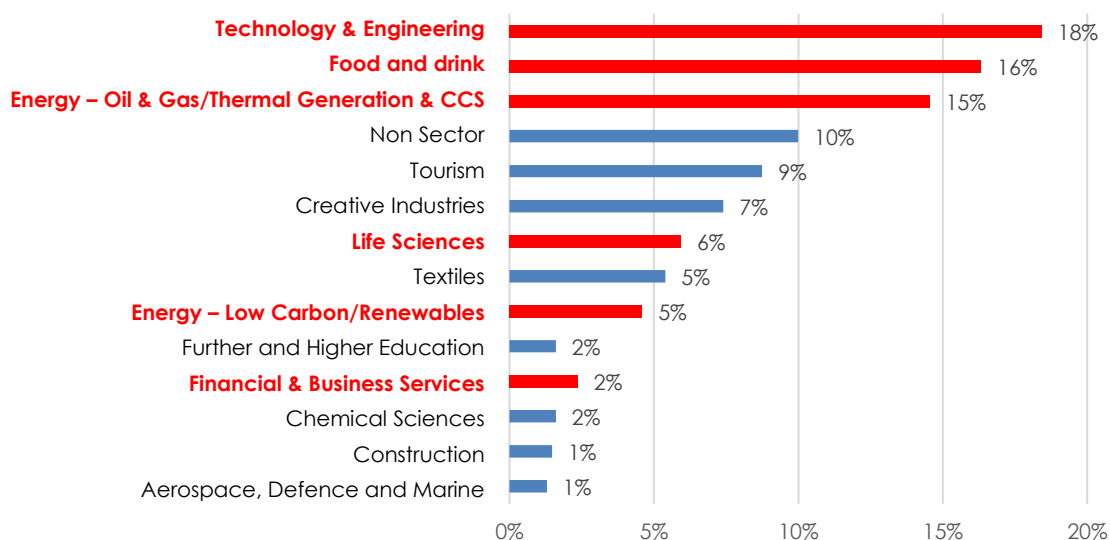


Table 4.16 shows the difference in average planned international sales across sectors with energy (both low carbon/renewables and oil & gas/thermal generation & CCS), aerospace, life sciences and technology and engineering seeing the highest levels of average planned international sales.

Table 4.16: Sector

Sector	Number of companies	Average planned international sales per project
Energy - Low Carbon/Renewables	103	£3,914,362
Aerospace, Defence and Marine	29	£2,898,364
Life Sciences	133	£2,314,638
Energy - Oil & Gas/Thermal Generation & CCS	326	£2,047,904
Technology & Engineering	413	£1,592,249
Forest Industries	8	£930,417
Construction	33	£845,769
Textiles	121	£749,796
Food and Drink	366	£727,036
Financial & Business Services	53	£694,714
Chemical Sciences	36	£599,005
Tourism	196	£508,183
Creative Industries	166	£292,026
Further and Higher Education	36	£229,022
Non-sector	224	£207,702

¹⁹ Note these are SE sectors assigned by SE staff. Non-sector means not one of SE key sectors

Figure 4.2 shows the range of regions companies came from. 33% were from West Scotland, 31% East Scotland and 17% Aberdeen.

Figure 4.2: Region

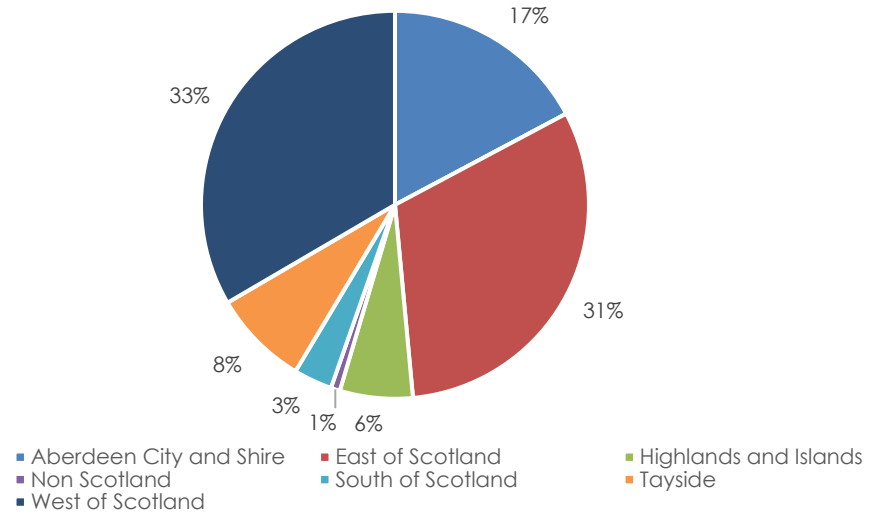


Table 4.17 shows the breakdown of region by average planned international sales. Aberdeen had the highest levels of average planned international sales followed by the West of Scotland and Highlands and Islands.

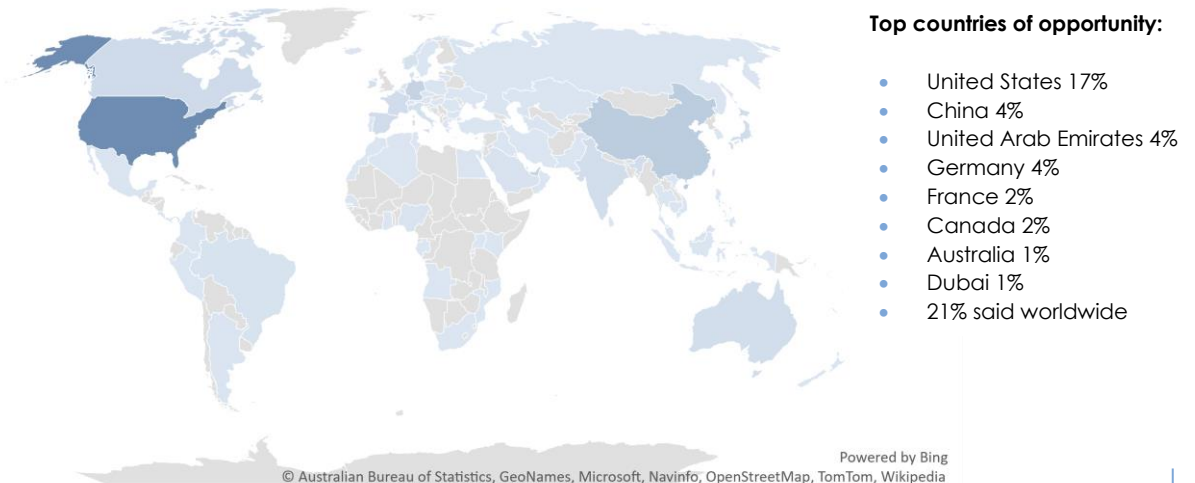
Table 4.17: Region

Region	Number of companies	Average planned international sales per project
Aberdeen City and Shire	388	£1,847,395
West of Scotland	748	£1,367,389
Highlands and Islands	137	£1,169,517
East of Scotland	696	£1,091,986
Tayside	183	£1,026,029
South of Scotland	73	£507,984
Non-Scotland	17	£438,286

4.1.8 Country of export opportunity

Figure 4.3 maps out the country of export by project and shows the global reach with the United States, China, the United Arab Emirates and Germany being some of the more common locations.

Figure 4.3: Country of export opportunity by project



*Companies often listed more than one country

When broken down by average planned international sales, projects that were focused on export opportunities in Belgium, Egypt, the Netherlands, Nigeria and United Arab Emirates had the highest levels of average planned international sales. While Antigua and Barbuda had the highest planned international sales, this was only based on one company.

Those highlighted red align to the Scottish Governments 'priority 1' list of countries expected to provide the most opportunity for Scotland's future export growth.

Table 4.18: Country of export opportunity

Country of export opportunity	No of companies	Average planned international sales per project	Country of export opportunity	No. of companies	Average planned international sales per project
Antigua and Barbuda	1	£5,890,000	Rwanda	1	£371,000
Not applicable	105	£3,333,921	Canada	51	£366,686
United Arab Emirates	117	£4,137,248	Switzerland	9	£350,909
Netherlands	24	£2,799,200	China	121	£349,047
Portugal	2	£2,450,000	France	52	£328,733
Egypt	18	£2,346,158	Sri Lanka	1	£327,800
Nigeria	13	£2,346,154	Angola	6	£322,000
Australia	49	£2,110,801	Montserrat	1	£300,000
United States	492	£1,194,976	Saudi Arabia	22	£270,097
Dubai	37	£1,617,665	Spain	44	£264,311
Belgium	13	£1,583,214	India	56	£263,556
Greece	2	£1,500,011	Malaysia	19	£245,316
Blank	718	£1,420,394	England	17	£225,000
Worldwide	629	£1,307,169	South Africa	4	£200,000
Scotland	14	£1,249,404	Russia	6	£187,500
Mozambique	1	£1,000,000	Hong Kong	12	£180,000
Norway	29	£830,933	Sweden	4	£180,000
Mexico	8	£763,750	No Country Identified	123	£149,919
Azerbaijan	4	£725,000	Senegal	4	£125,000
Oman	3	£703,333	Ireland	38	£123,536
Qatar	3	£666,667	Kuwait	3	£100,000
Romania	1	£650,000	Bulgaria	1	£100,000
Singapore	22	£621,909	Taiwan	3	£95,000
Germany	128	£596,333	Italy	26	£81,852
Ghana	6	£583,333	Denmark	21	£69,857
Japan	64	£561,547	Vietnam	5	£60,000
Estonia	1	£500,000	Turkmenistan	5	£35,000
Brazil	19	£478,526	Poland	5	£21,000
Algeria	4	£425,000	Cambodia	1	£20,000
Austria	1	£400,000	New Zealand	3	£10,000

*Companies often listed more than one country

4.2 Overview of HIE data

In addition to the SDI delivery in the Highlands and Islands, HIE has delivered a variety of both individual company or one-to-many interventions via dedicated trade resources to target increased trade and exporting activity and deliver against the International Sales measure.

From July 2015 to March 2021, HIE delivered the International Highlands and Islands programme (IHI) partly funded by the European Regional Development Fund (ERDF) with a focus on trade and export growth. The programme offered awareness activities, trade workshops, one-to-one advisors in Food and Drink and Tourism, amongst others. In addition, HIE's Go Global offers funding to attend exhibitions, undertake market visits and prepare products for international markets.

The sections that follow analyse the HIE delivered support broken down by:

- Interventions/projects
- Intensity of support
- Relationship management status
- Sector and region

862 companies have received 1,687 interventions delivered between 2015-2021, of which 142 companies received Go Global funding, resulting in £83,096,482 of planned international sales.

40 also received SDI/SE support and/or 4 went on Chambers trade missions. Note that these figures might be underestimated as company's names may have been entered differently into each system making mapping across difficult. A look up was used to highlight where certain words within a company name appeared on each data set but some may have been missed.

4.2.1 Interventions/projects

The number of interventions being received by companies ranged from 1 to 15 with the majority (62%) receiving just 1.

Table 4.19: Number of interventions

Number of interventions	Companies
1	533
2-5	287
6-10	32
11- 15	10

The most frequently delivered interventions include:

- market awareness
- preparing to export
- IHI Go Global
- international action plan

Table 4.20 shows all the interventions accessed.

Table 4.20: Top interventions accessed

Intervention	No. of times accessed	No. of companies accessing it more than once	Average number of times accessed if more than once
Market awareness	696	116	2.9
Preparing to export	309	39	2.4
Go Global	171	36	2.5
International action plan	151	7	2.3
Preparing to export - ecommerce	118	5	2
Supply Chain Introductions/Globalscots/High Value Networks	57	3	2
Export Advisory	51	0	-
Brexit Review	45	0	-
International strategy workshop	44	0	-
Awareness - GIA only	17	0	-
Advisory support - PA	13	0	-
Collaborative Export Solutions	12	4	3
Int Manager for Hire	3	0	-

The most frequently delivered interventions were the ones that were more likely to be delivered to a company more than once.

4.2.2 IHI Go Global planned international sales

IHI Go Global was accessed by 142 companies across 170 interventions (36 companies accessed it more than once), resulting in £83,096,482 of planned international sales.

62% (88) of companies also received other interventions. These were across the range of interventions. On average, these companies accessed five interventions including IHI Go Global.

4.2.3 Account managed status

The majority of companies (62%) were not Account Managed (AM) while just under a third (27%) were. 5% had their AM status discontinued with 1% potential for AM and 0.5% in the pipeline. The status was not known for 3%.

Table 4.21: Account managed status

Yes	No	AM discontinued	Potential for AM	Pipeline	Status unknown
27% (237)	62% (536)	5% (47)	1% (9)	0.5% (4)	3% (29)

4.2.4 Sector and region

The HIE support is being delivered across the Highlands and Islands as shown in Figure 4.4 below. Inner Moray and Firth had more companies accessing the support than any other region.

Figure 4.4: Region²⁰

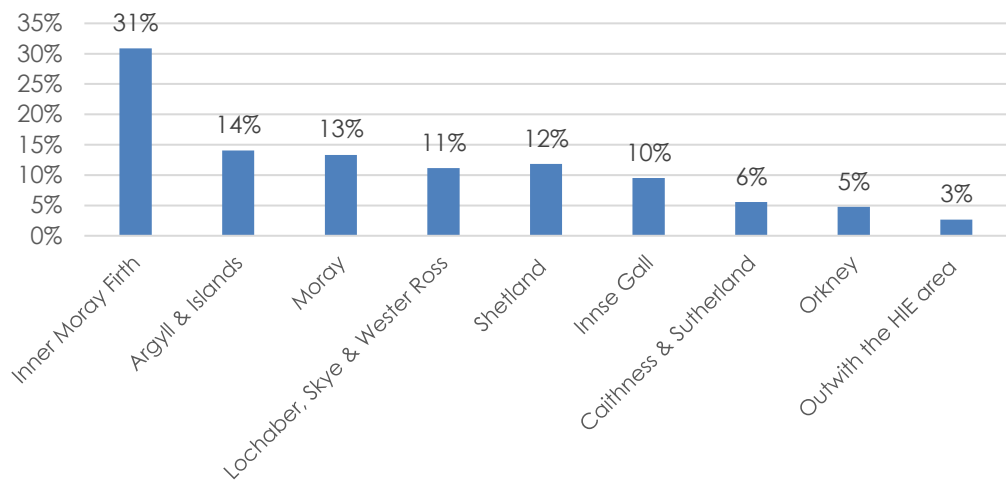
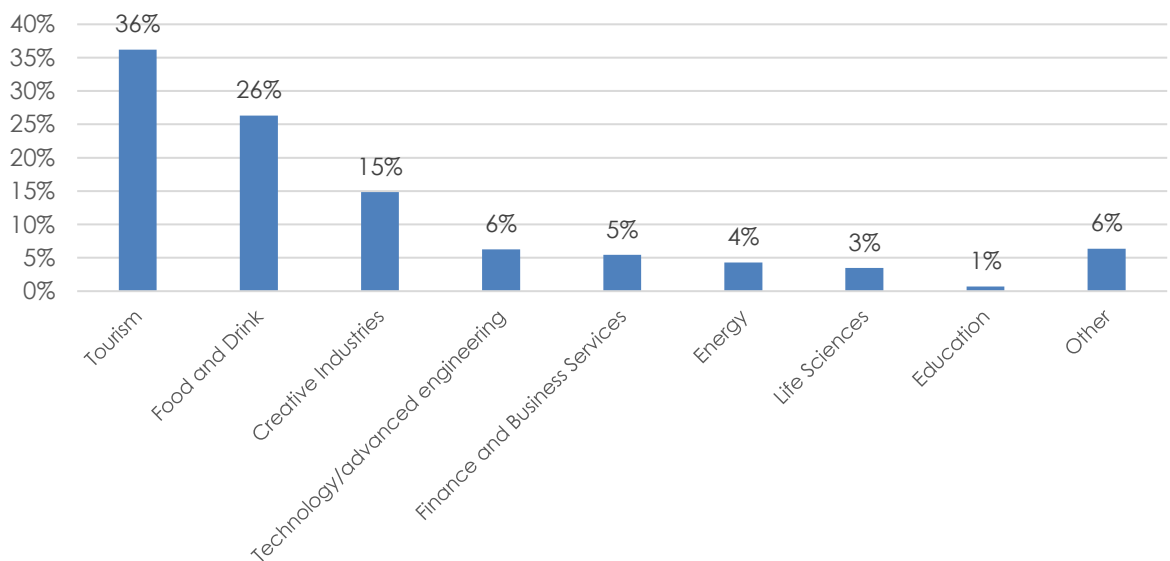


Figure 4.5 goes on to show the range of sectors companies accessing the support operate in with tourism and food and drink two of the most common.

Figure 4.5: Sector²¹



4.3 Overview of the Scottish Chambers of Commerce data

Based on data provided to Frontline in July 22 by the Scottish Chambers of Commerce a total of 618 companies were reported to have attended in Chamber missions. 128 attended multiple missions ranging from 2-8, with the average being 1.6.

Table 4.22 shows the breakdown of company attendees per year:

Table 4.22: Number of companies attending per year

Trade missions – number of companies attending		
Year 1	Year 2	Year 3
172	282	375

²⁰ 35 companies had two locations against their name

²¹ 38 companies were across multiple sectors

There were 71 missions and 829 instances of mission support to companies across three years as shown below:

Table 4.23: Missions by companies

Mission	Number of companies	Mission	Number of companies
Norway – Aberdeen	55	China (x3) - SCC	54
Falklands – Aberdeen	45	Shenzhen (x5) - Edinburgh	40
Abu Dhabi - Aberdeen	31	Shanghai (x2) – Glasgow	29
Germany (x2) – Edinburgh	25	Florida, USA (x2) – Forth Valley	21
Donegal – West Lothian	20	Mongolia – West Lothian	18
Guyana – Aberdeen	18	California, USA – West Lothian	17
Bulgaria – Edinburgh	17	Colombia - Inverclyde	16
Poland (x2) – Edinburgh	16	Belgium –Forth Valley/Perthshire	16
Germany - Aberdeen	16	New York - Glasgow	16
Nova Scotia (x2) - Lochaber	16	Bulgaria – Glasgow	14
Shandong, China – SCC	14	Chennai - Dundee	13
Inner Mongolia, China – SCC	13	Ireland (x2) – Edinburgh	13
New York – Forth Valley	11	Uzbekistan - Aberdeen	10
Germany - Glasgow	10	Chicago, USA – Inverness	10
Expo 2020 (x2) - Aberdeen	10	Toronto, Canada – Edinburgh	9
Italy - Glasgow	9	Ghana – Aberdeen	9
Spain – Edinburgh	9	Portland, USA – Glasgow	9
Dubai - Dundee	9	Rotterdam – Glasgow	9
Ontario - Inverness	9	Italy - Inverclyde	9
Pacific Northwest USA – Edinburgh	8	Barcelona – Glasgow	8
Quebec - Edinburgh	8	Netherlands - Edinburgh	8
Boston - Edinburgh	8	Denmark - Edinburgh	8
Miami - Inverclyde	8	Netherlands - Dundee	8
Donegal – Ayrshire	8	Virginia - Dundee	8
North Carolina, USA – Lochaber	8	France – Edinburgh	7
Finland – Edinburgh	7	British Columbia - Lochaber	7
Philadelphia, USA – Edinburgh	7	Atlanta – Ayrshire	6
Poland – East Renfrewshire	6	Pan-Africa – Aberdeen	6
Norway – Glasgow	6	Mongolia – SCC	4

5 Emerging Findings

The following summary was developed through extensive consultation with business-facing staff across delivery partners, including face to face, e-survey and focus groups. Respondents represented all sectors, all EGP categories and were from across Scotland. The main themes were:

Barriers to exporting – resources/capacity were the top barrier across all exporters, this was followed by skills and market intelligence for early-stage and funding/investment for experienced exporters. Not surprisingly the biggest impact on barriers was Brexit, closely followed by COVID-19. In general, early-stage were more affected.

Changing business support needs – the biggest change was the need for technical advice/specialist expertise, linked to compliance, regulations and tariffs; predominately linked to Brexit. This was followed by the move toward virtual/online support; predominately driven by COVID-19; and the increased need for investment and funding – which was most likely driven by the additional costs linked to Brexit and COVID-19.

Impact of the changing global environment – not surprisingly Brexit, COVID-19 and Net Zero were all having extensive impact on the ability to export. Respondents were easily able to cite challenges, opportunities and future developments. Less respondents were able to comment on fair work/inclusive growth areas.

Export Growth Plan (EGP) – over half of respondents believed EGP worked well, noting it provided a clear structure/framework to support company prioritisation and segmentation; the focus on markets/sectors including a clear strategy/plan was also highlighted favourably. The high focus on experienced businesses was viewed less favourably with respondents stating that this limits the ability to feed the funnel with new exporters; the lack of churn in companies and the lower additionality of support were also highlighted as problematic.

EGP operational delivery and evolution – while equal numbers felt that EGP had not had an impact on operational delivery or focussed on companies that didn't need support, others stated it supported better prioritisation allowing focus on markets and strengths. In general, many thought that EGP had either not evolved or still needed to evolve more, noting it was developed pre-Brexit and COVID-19.

Current and pre-EGP support – the majority of respondents stated that support was different pre-EGP, with the highest proportion noting lack of current support for early-stage exporters being an issue. Others felt that export impact may have been worse without EGP due to the focus on experienced exporters. Some respondents believed that funding support was more intensive pre-EGP and there was a better level of service which suggests for some pre-EGP was more effective.

Mechanisms of trade support – the most effective mechanism was trade specialist and the grants/IRP support. This was closely followed by market/technical support. Focus groups highlighted the EAS as the most effective support and that its removal had multiple negative implications. The least effective was the lack of financial levers and the limited one-to-one/face-to-face advice available.

Combinations of support that help trade support – one quarter of consultation respondents highlighted strategy advice linked to an export action plan, closely followed by bespoke support with a focus on the traditional company journey. However when looking at the management information a company journey was not apparent, companies got the support they needed when they in a bespoke way.

Factors that make a difference to increased international trade – predominately focussed on access to market know-how/in-market expertise – provision of the right support at the right time. The right resources were the next most important factor.

Factors that make a difference to the export journey – focussed on the need for an on the ground presence and being agile and responsive to customer needs.

Effectiveness of the public sector trade support system in Scotland – most respondents acknowledged the comprehensive range of support available and that partnerships were now working more effectively. However, some also highlighted the cluttered landscape, potential for duplication and a need to improve partnership working. This was related to the number of delivery partners, the wide range of supports available and the number of access points to the support. Removal of EAS also led to a patchy service with some local authority areas providing support and others not.

Factors that influence the success of trade support – reiterated the need for a joined-up approach while including an online/digital presence. Focus groups noted the potential for duplication if new supports are introduced as many local authorities/regional partners are already developing programmes of export support.

Factors that are driven by or drive international trade – it was acknowledged that innovation and investment correlate well with internationalisation with most noting they are interlinked and feed off each other. Some felt innovation and investment were needed first, others believed international trade is the driver.

Gaps in the current provision – built on previous responses including funding, investment, incentives and advice and how to achieve Net Zero targets. Support to help demystify the implications of Brexit was noted for new and experienced exporters.

Key success factors for an effective trade support – focussed on a joined-up/cross agency collaboration to set objectives and goals with common frameworks and data sharing. They also noted the need for agile support linked to the company journey linked to earlier interventions.

Appendix 1: Products/Services Aligned to ACE

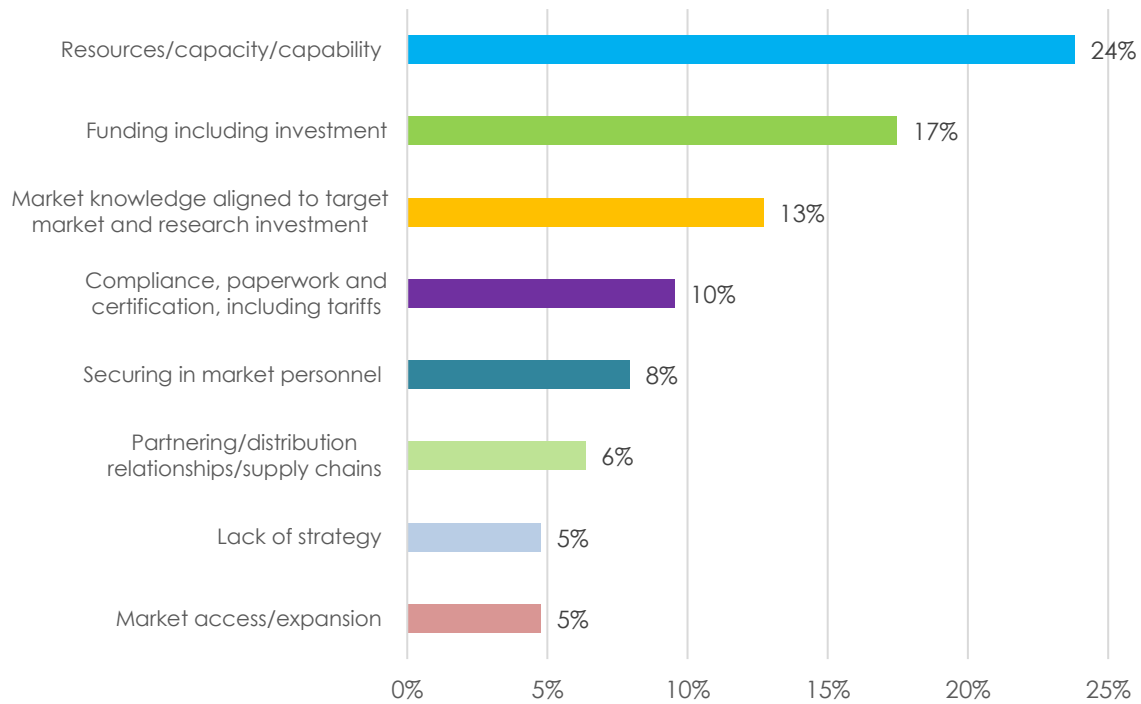
Product/Service	Advisory (staff/consultants)	Input	Grant Contribution	Level 1 / A	Level 2 / C	Level 3 / E
INTERNATIONAL						
Cross Sector Missions (2359)	X		X			X
Expert Support – Marketing – International Module (2460)	X				X	
GlobalScot (2284)	X				X	X
International Access Support (2539)	X					X
International Business Opportunities (2029)	X			X		
International e-Commerce Workshop (2481)	X			X		
International Manager for Hire (494)	X		X			X
International Market Events (522)	X			X		
International Scale Up Grant			X			X
International Specialist Engagement – Contractor (2477)	X				X	
International Specialist Engagement (2324)	X				X	
International Technical Services (2479)	X			X		
International Trade Training (2367)	X			X		
Overseas Market Support (568)	X					X
Preparing to Export Introductory (2364)	X				X	
Project Support -Strategy Development (International) (2454)	X				X	
SDI Field Office Support (2545)	X					X
Strategy Planning Workshop – International (492)	X				X	
Brexit Support Grant			X		X	
International Manager for Hire Introductory (2361)	X		X			X
International Market Presence (2135)	X				X	
Preparing to Export Advanced (353)	X				X	
NON-INTERNATIONAL						
Business Improvement Manufacturing Improvement (2144)			X			X

By Design (2536)		X		X	
Capital Grant – Small R&D		X			X
Deeper Innovation (2531)	X			X	
Development Project Implementation Support (2445)		X			X
Expert Support – Energy Market (2337)	X			X	
Expert Support – Innovation (2141)	X			X	
Expert Support – Marketing – Domestic Module (2459)	X			X	
Financial Readiness Support (IRS) (574)	X	X		X	
HGV Early Team Development (2541)	X	X			X
High Growth Ventures Advisor Support (2542)	X				X
High Growth Ventures Development Support (2564)		X			X
ICT Specialist Engagement (2123)	X			X	
IMProve Assessment (2377)	X			X	
Innovation Services Surgery (2140)	X		X		
Innovation Specialist Engagement (2121)	X			X	
Intellectual Asset Specialist Engagement (2461)	X			X	
International Strategy Development Programme (ex GCDP) (493)	X				X
Investment Specialist Engagement (2373)	X			X	
IP Audit (2548)		X		X	
Large R&D Grant (2118)		X			X
Leadership For Growth (728)	X				X
Make It To Market (2530)		X		X	
Managing People for Growth (2112)	X			X	
OD Specialist Engagement (2372)	X			X	
Organisation Development Review (2368)	X			X	
Project Support – Market Development (2146)		X			X
Project Support – Productivity (2150)		X			X
Project Support – Strategy Development (2147)		X			X
Project Support – Innovation (2117)		X		X	

Project Support – International(2365)		X		X	
Project Support WPI – Leadership (2513)		X			X
Project Support WPI – Workplace Organisation (2149)		X			X
Project Support -Digital Transformation (2119)		X			X
Project Support WPI – Management (2148)		X			X
R&D Grant (2118)		X			X
Scotgrad (2055)	X	X		X	
ScotGrad Placement – Innovation (2486)		X		X	
ScotGrad Placement – International (2487)		X		X	
ScotGrad Placement – Productivity (2485)		X		X	
Strategy Planning Workshop – General (2113)	X			X	
Training Plus (924)		X			X
Workplace Innovation Fund (2560)		X			X
WorkPlace Innovation – WPI MasterClasses (2555)	X		X		
Scotland Food & Drink National Skills Academy (2430)	X				X
SE SMART Feasibility (591)		X			X
Strategy Planning Workshop – Relationship Manager (2522)	X			X	

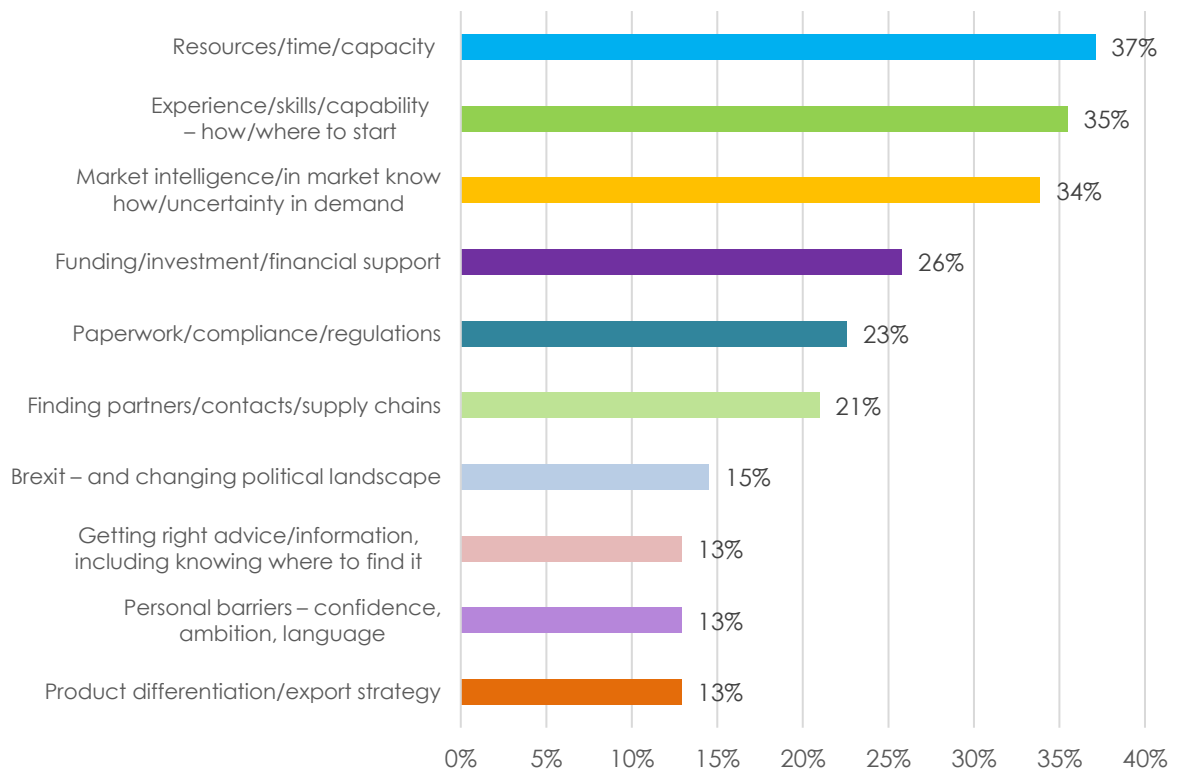
Appendix 2 – Business Facing Staff Feedback Charts

Biggest barriers for Experienced Exporters (3.2.1)



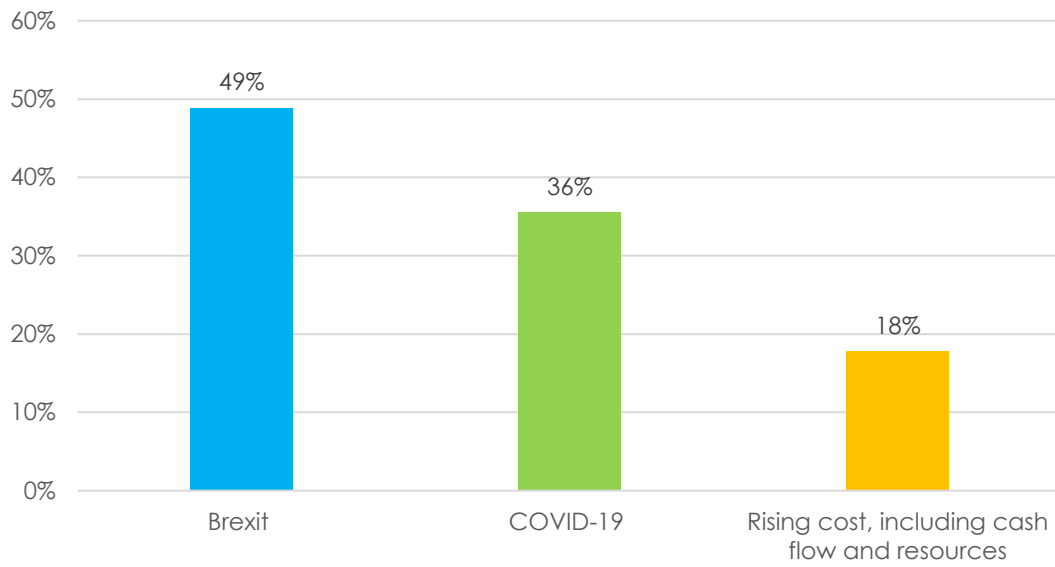
N=63

Biggest barriers for Early-Stage Exporters (3.2.2)



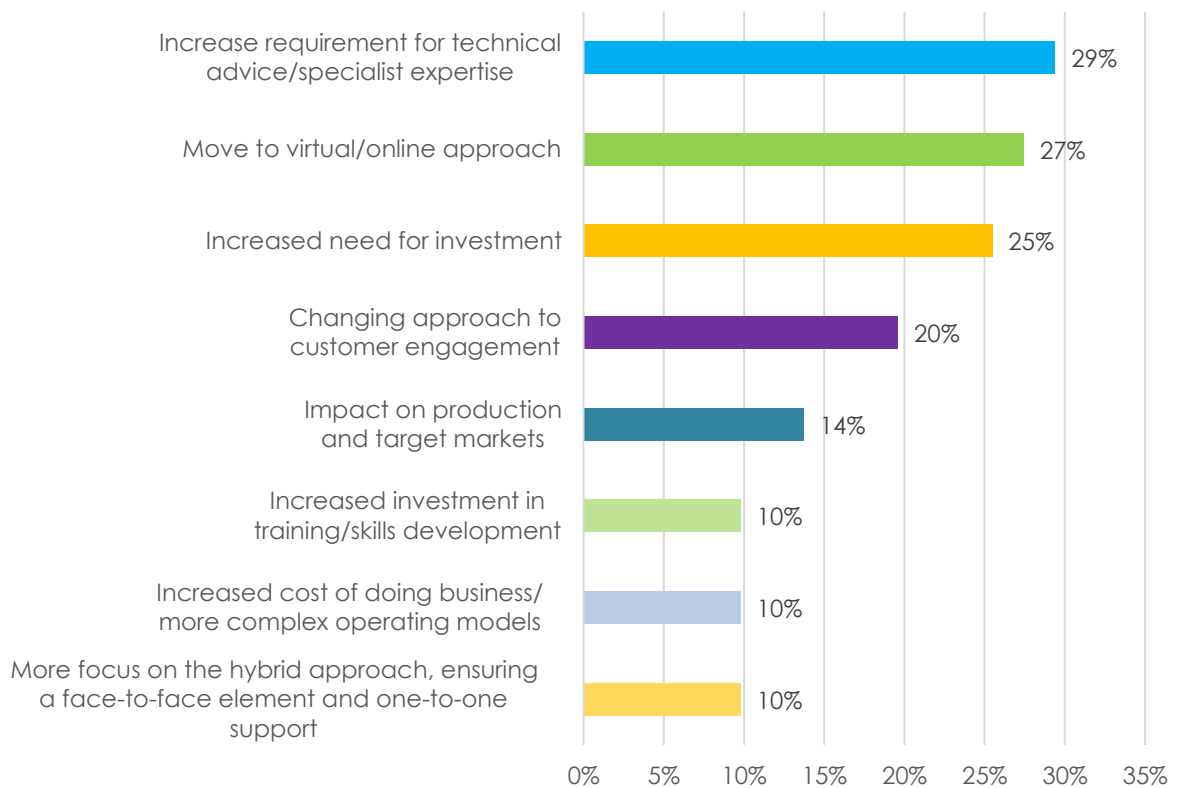
N=62

How barriers changed in recent years (3.2.3)



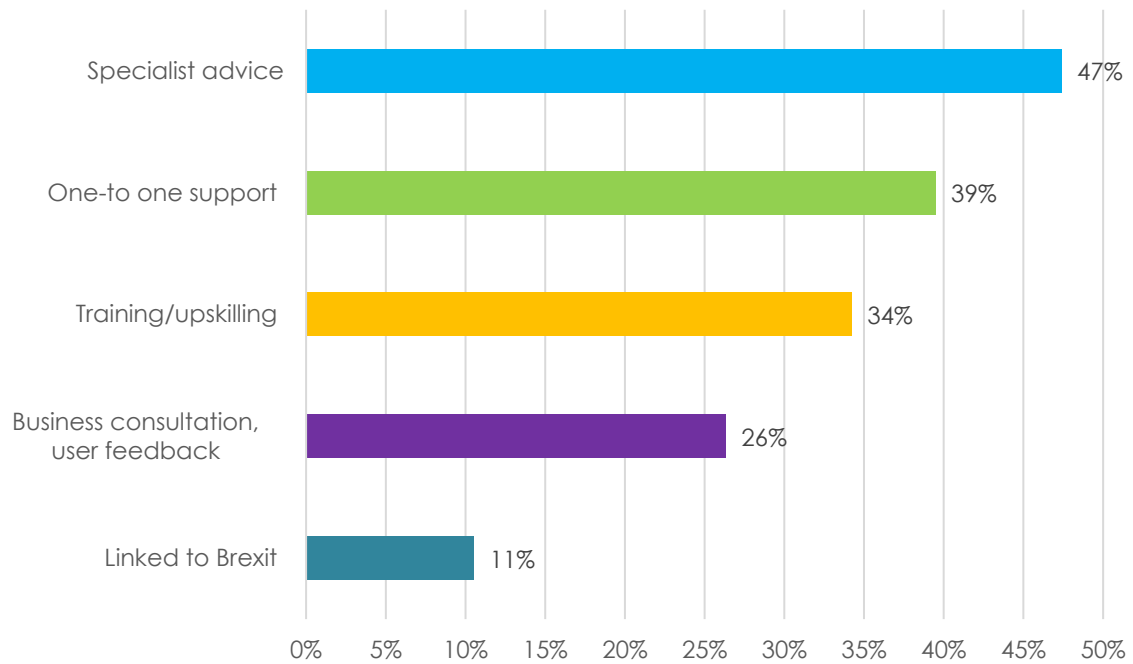
N=45

How business support needs have evolved in recent years (3.3)



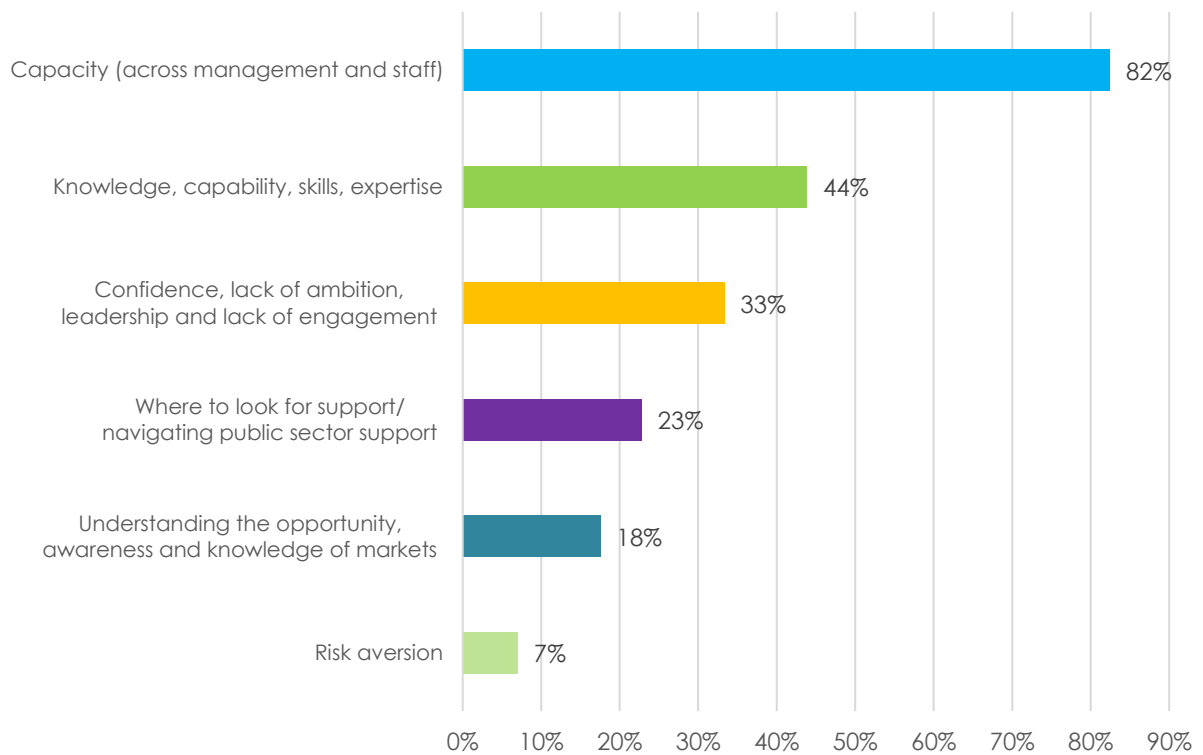
N=51

How changing needs have been identified, prioritised and met (3.3.1)



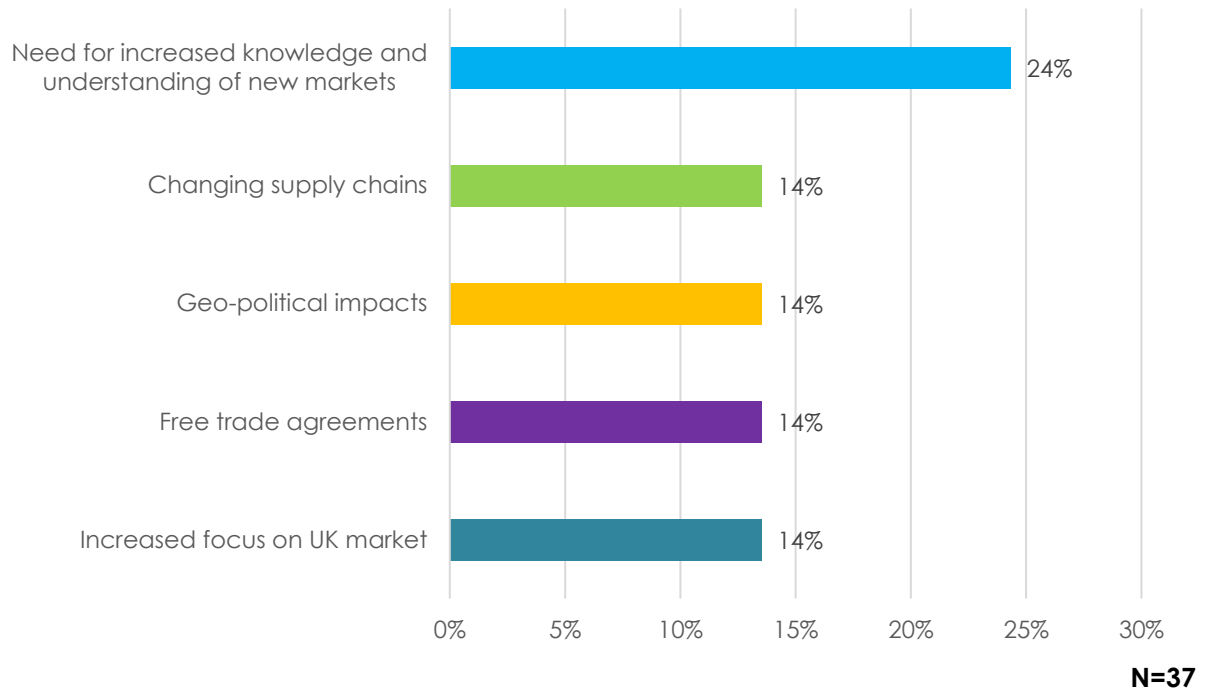
N=38

Internal factors that affect ability to export (3.4)

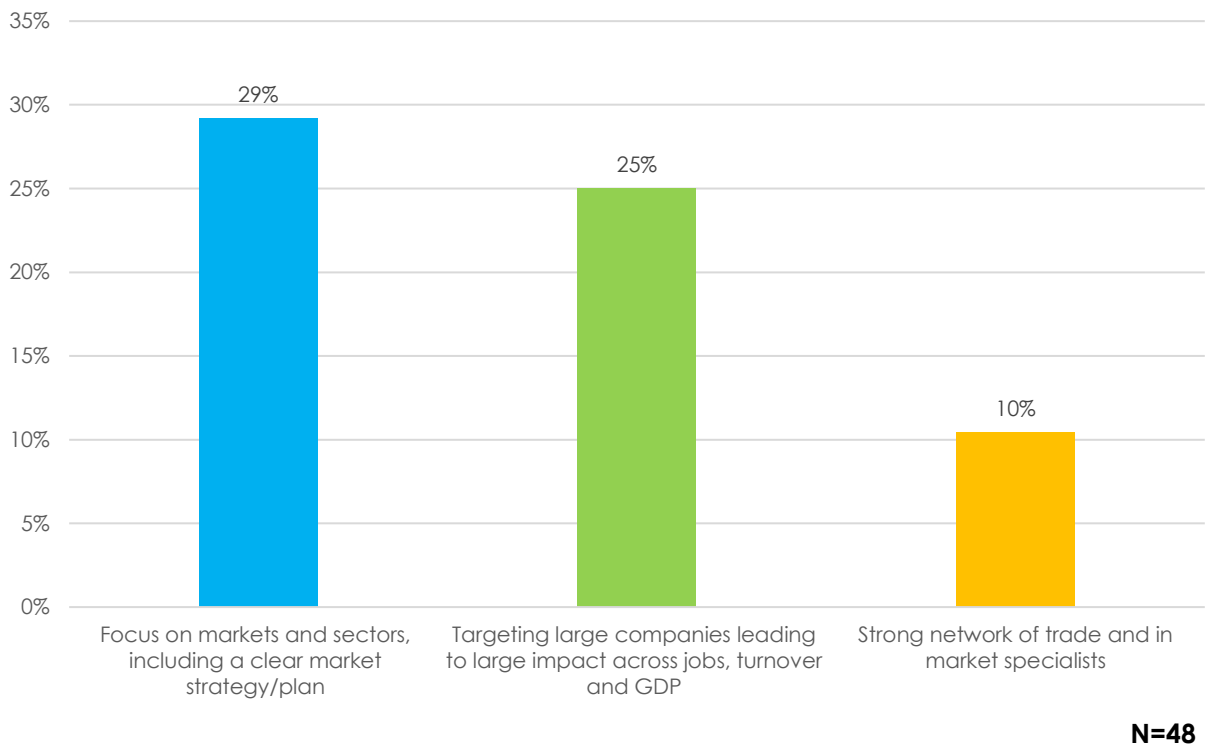


N=57

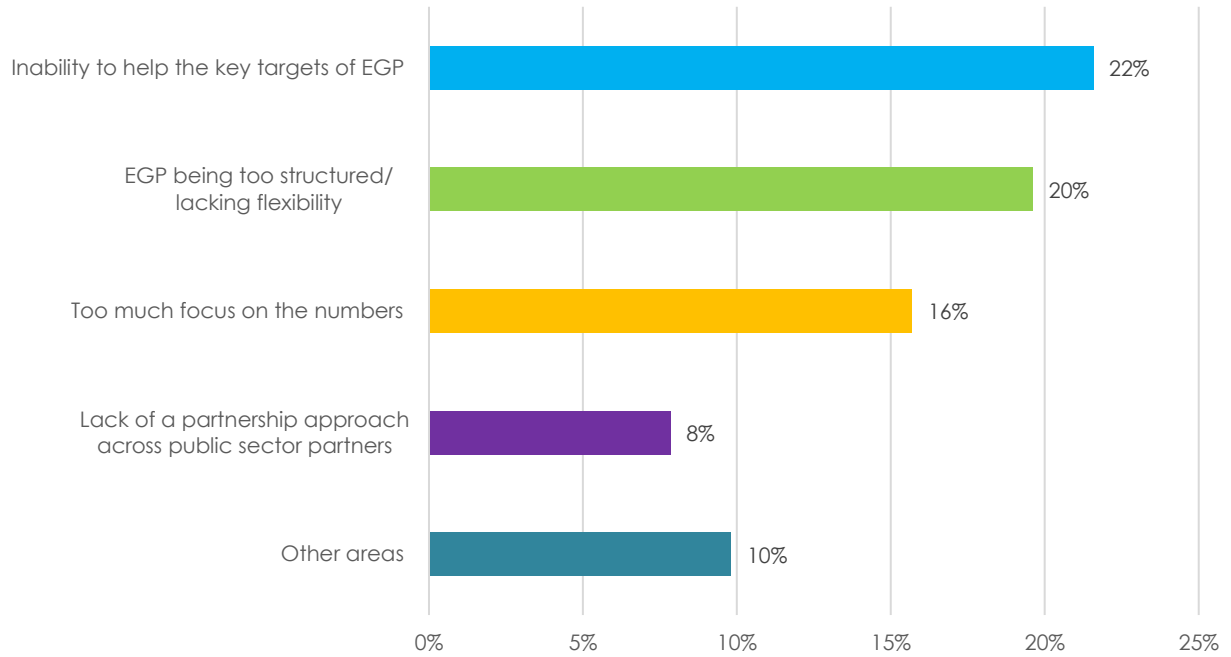
Other factors likely to influence company's choices relating to international sales/exporting plans (3.5)



What works well about EGP (3.6.1)

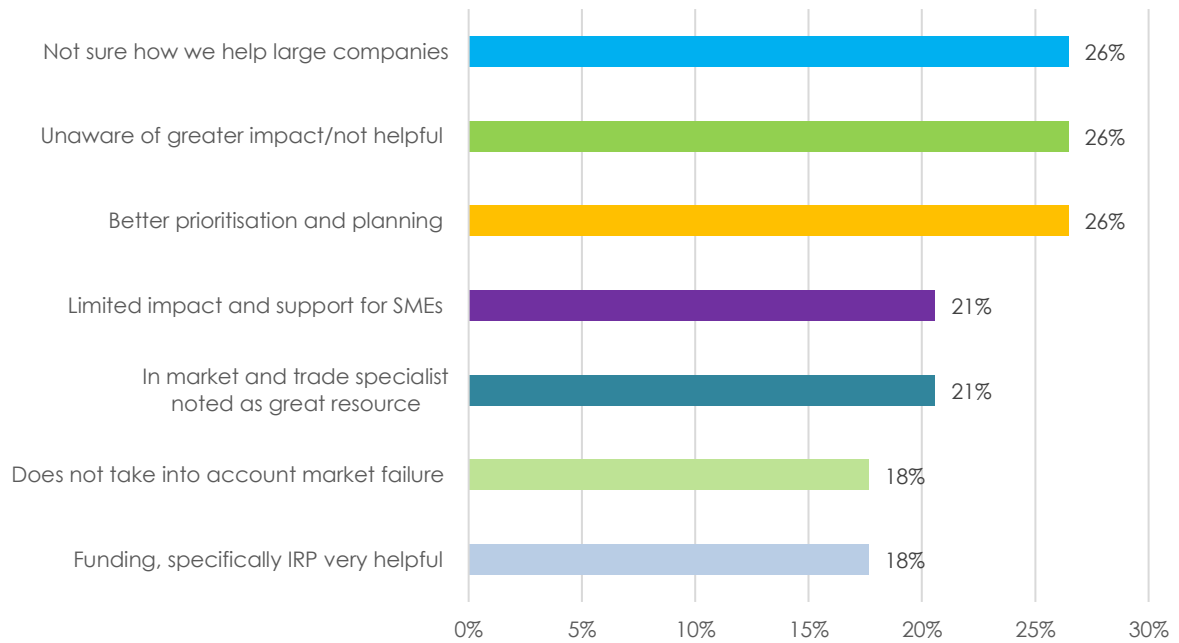


What does not work well about EGP (3.6.2)



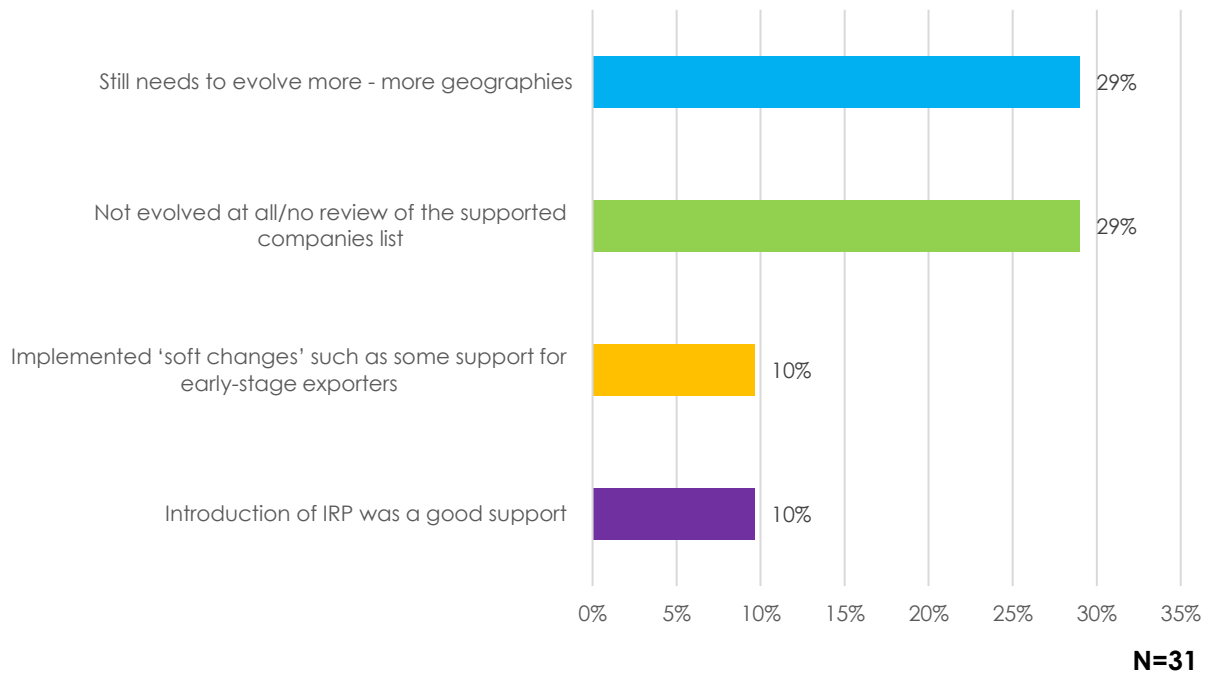
N=51

How EGP assisted with operational delivery of impactful projects (3.6.4)

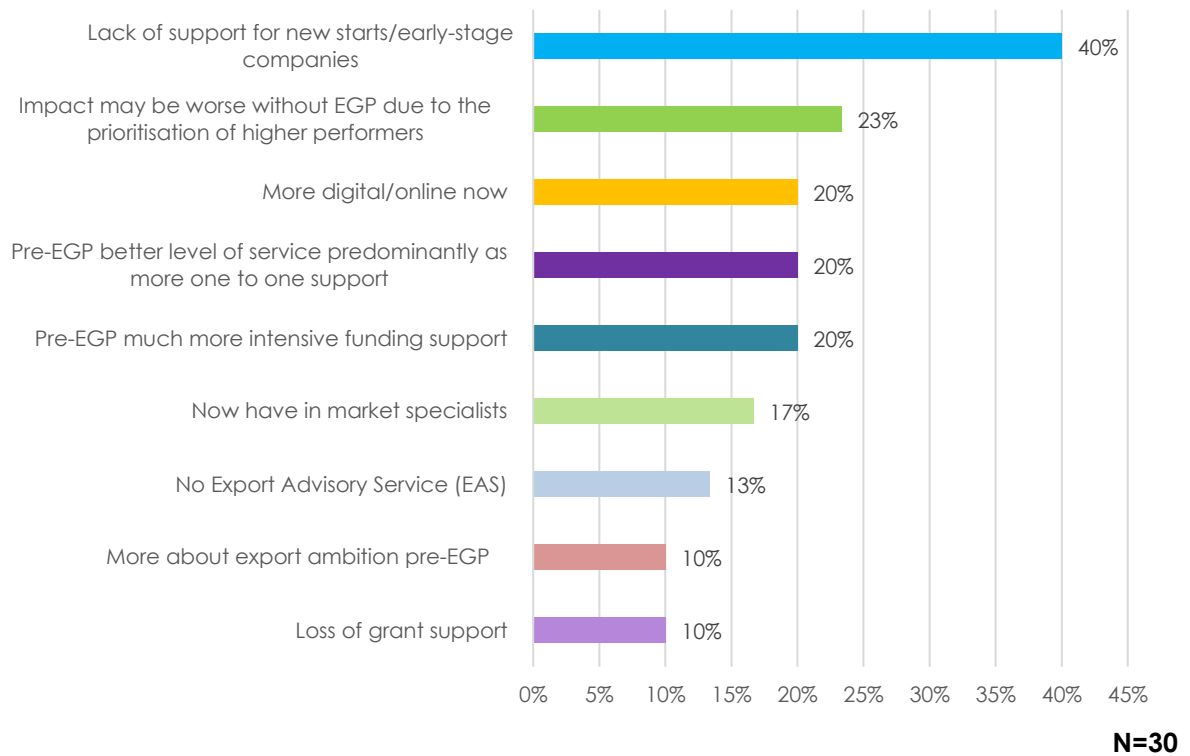


N=34

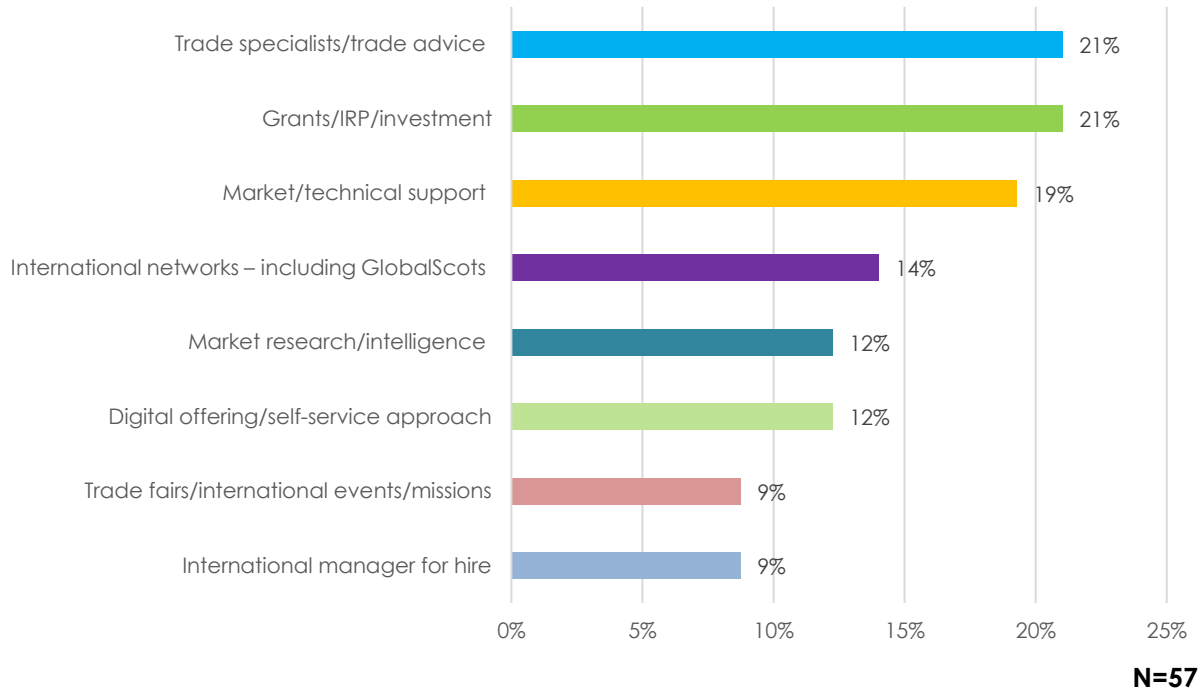
How EGP evolved to address implementation (3.6.5)



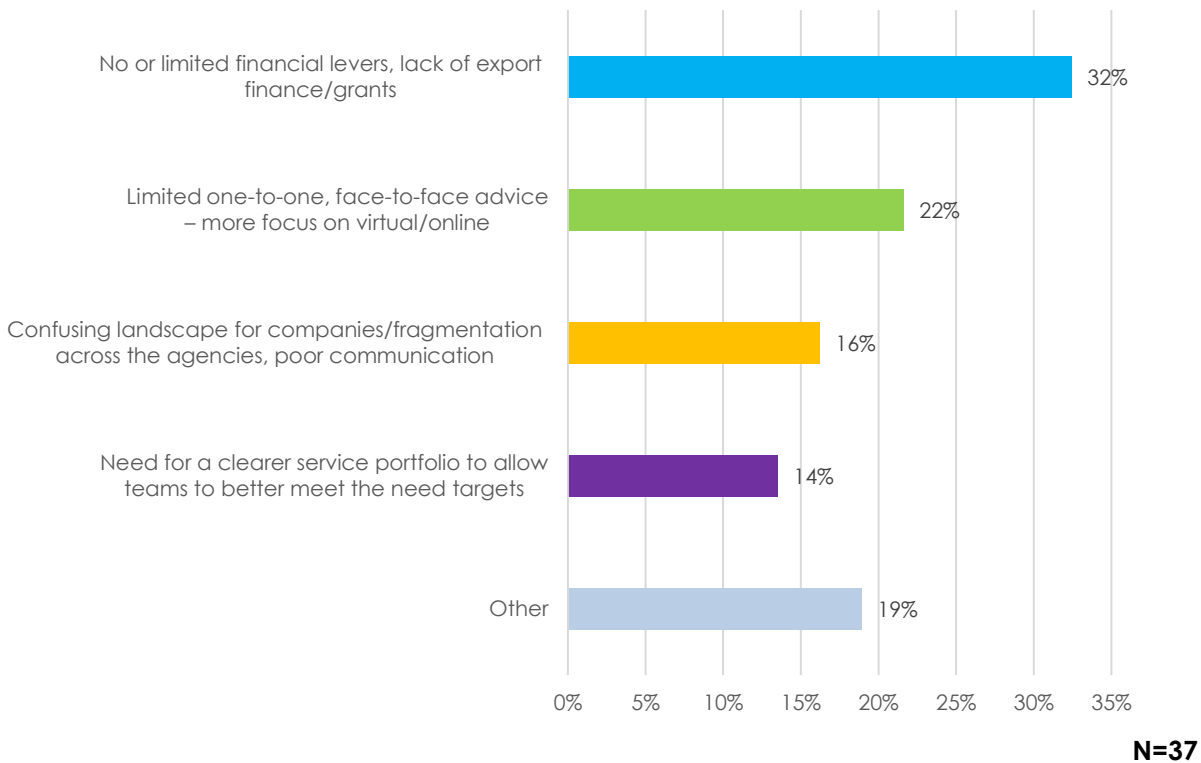
Difference in effectiveness of support currently and pre-EGP (3.6.6)



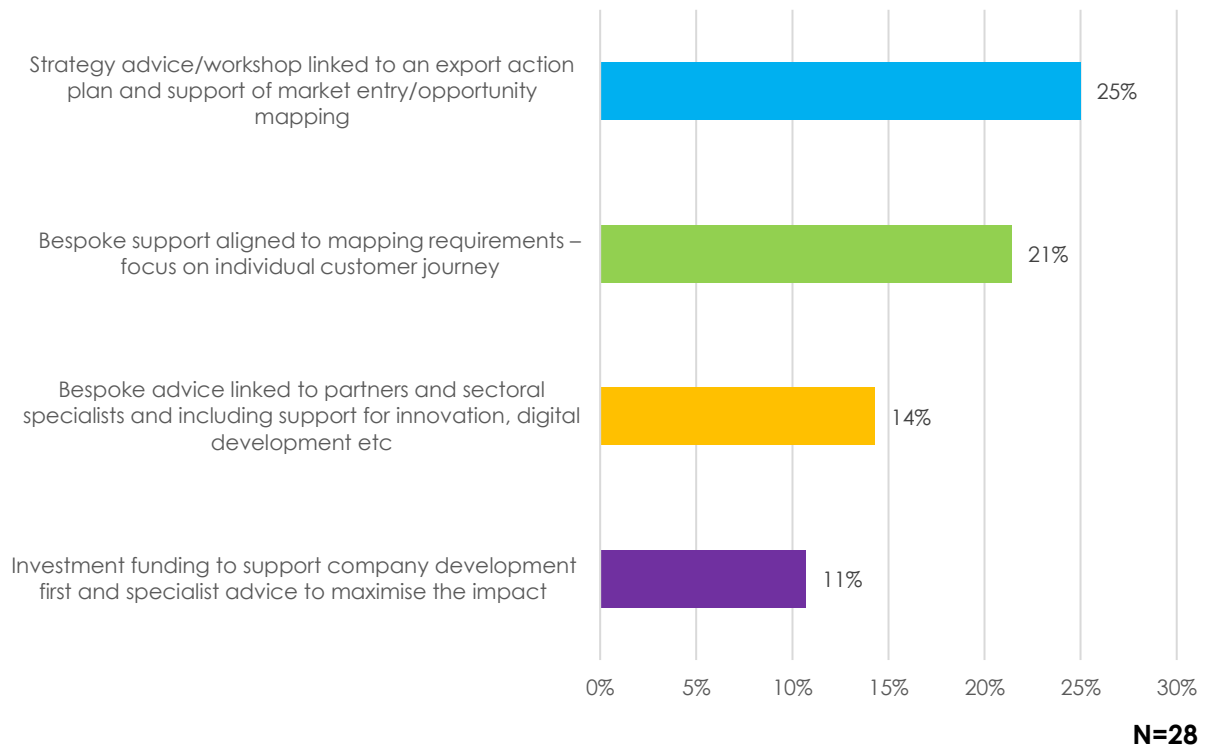
Most effective mechanisms of trade support (3.7.1)



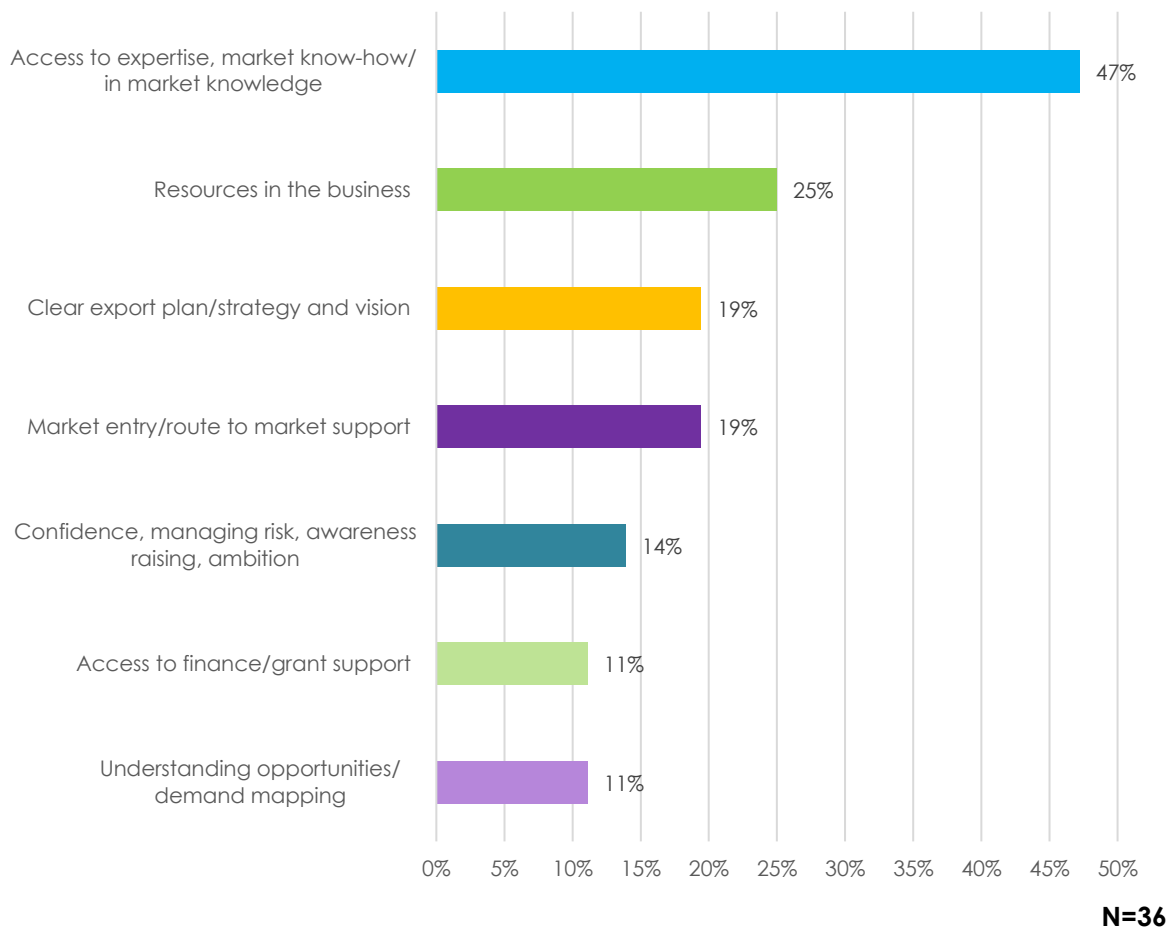
What works less well about the current trade support mechanism (3.7.2)



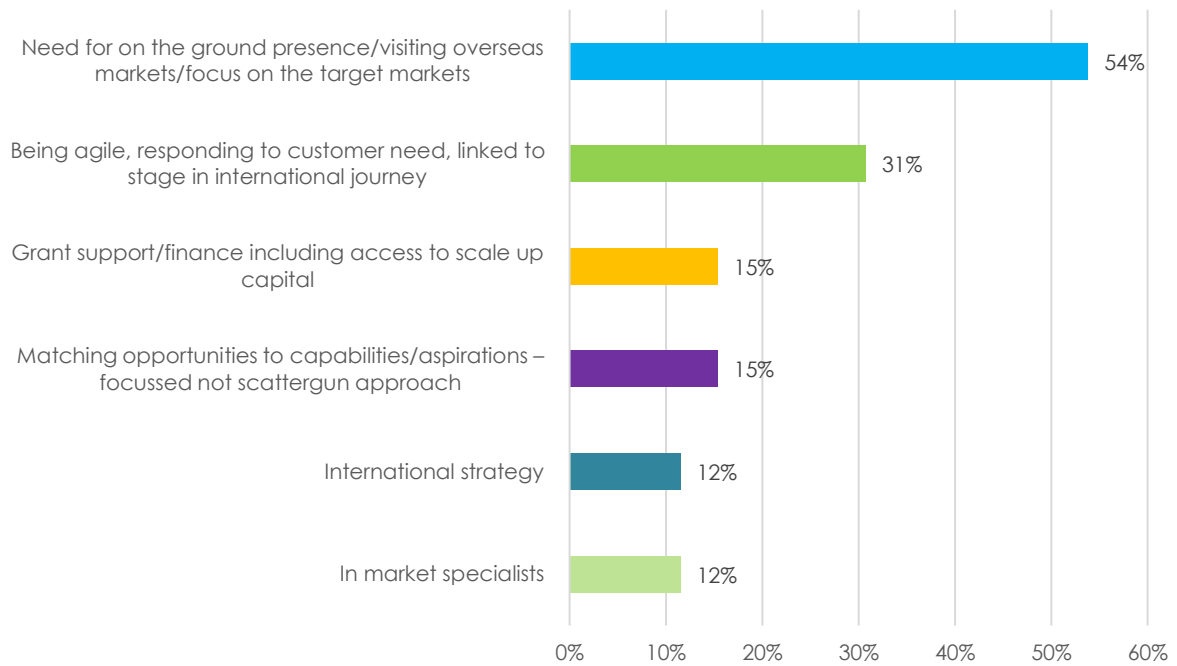
Combinations of support that are effective in leading to increased trade and support (3.7.3)



Factors that make a difference to increased international trade (3.7.4)

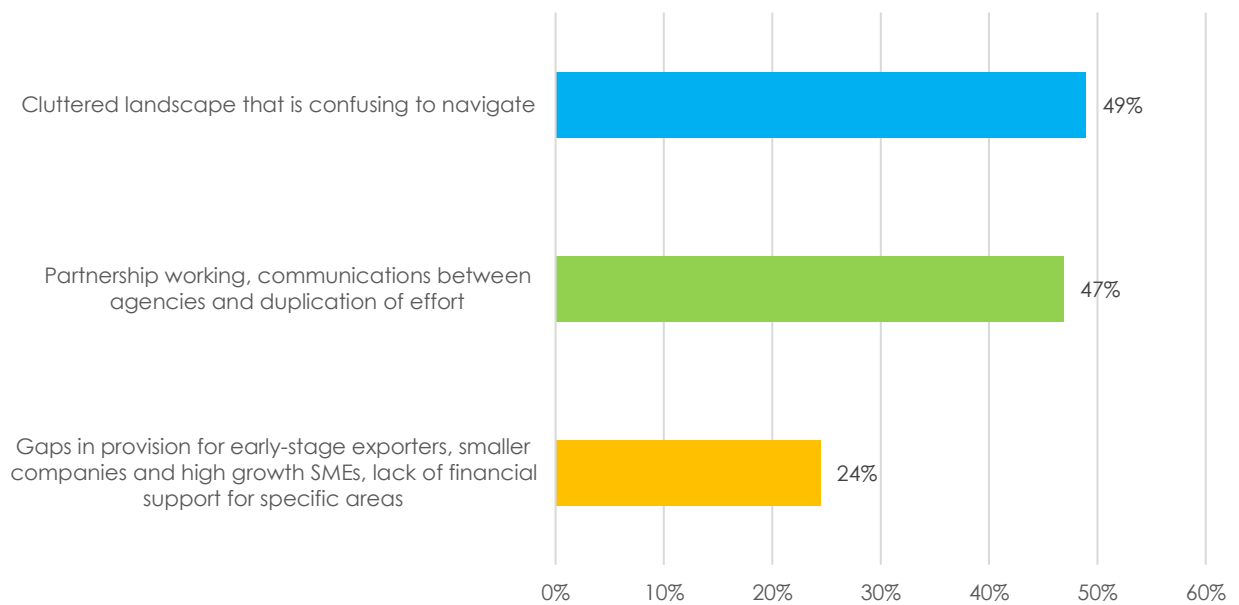


Factors that make the most difference in the export journey (3.7.5)



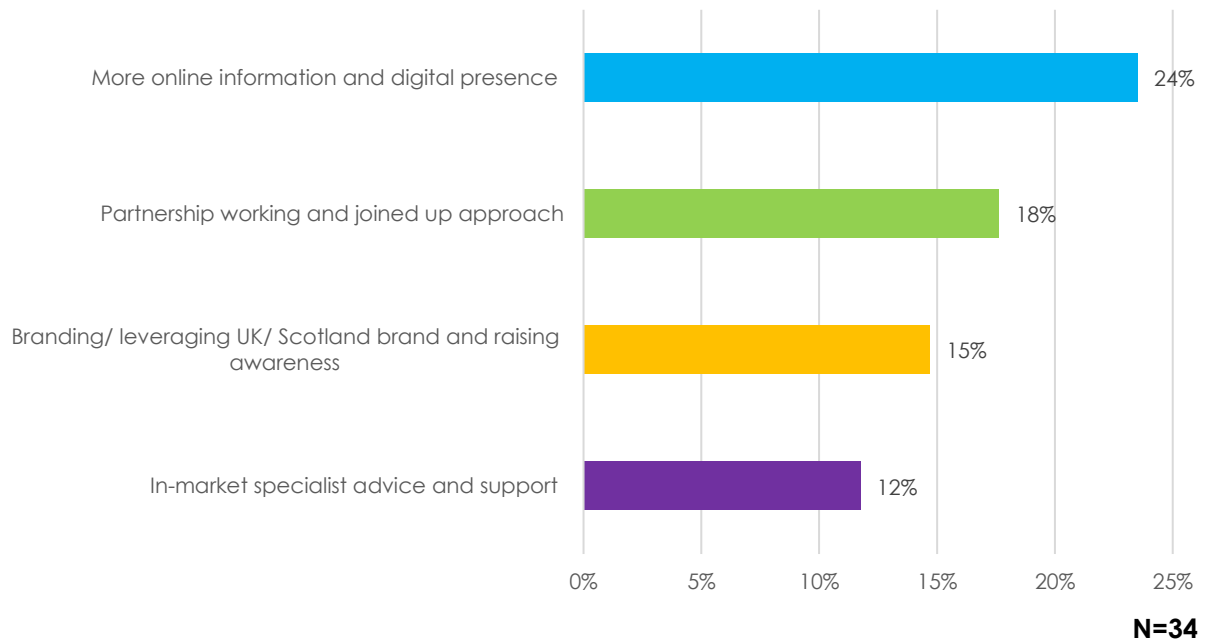
N=26

What works less well about the public trade support in Scotland (3.8.2)

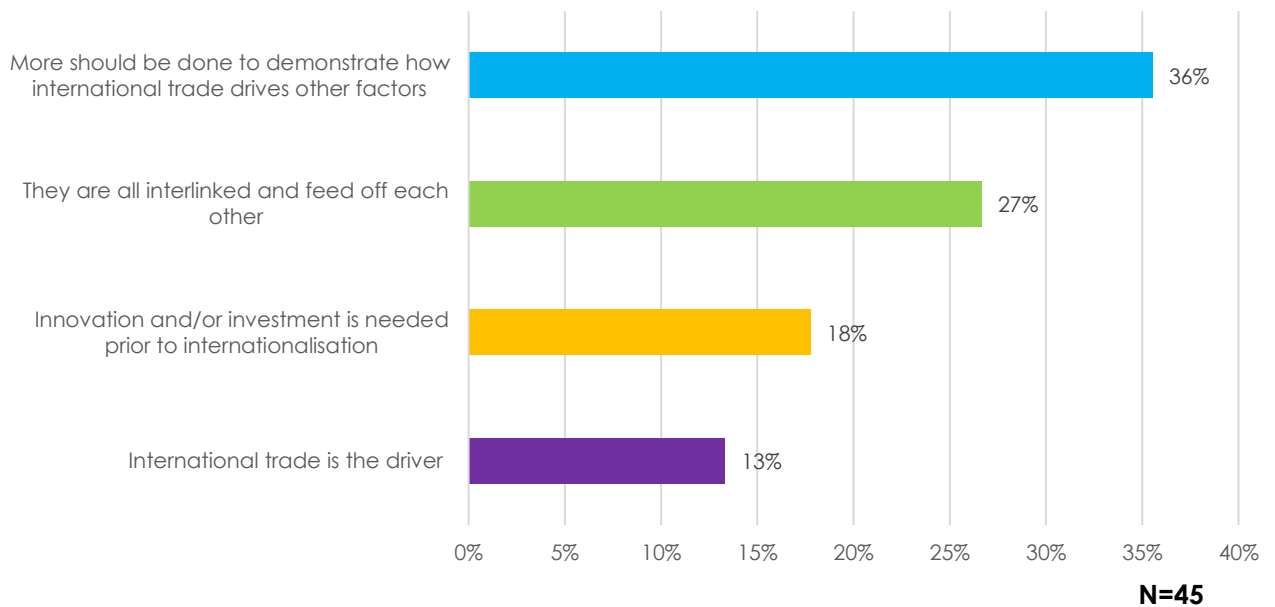


N=49

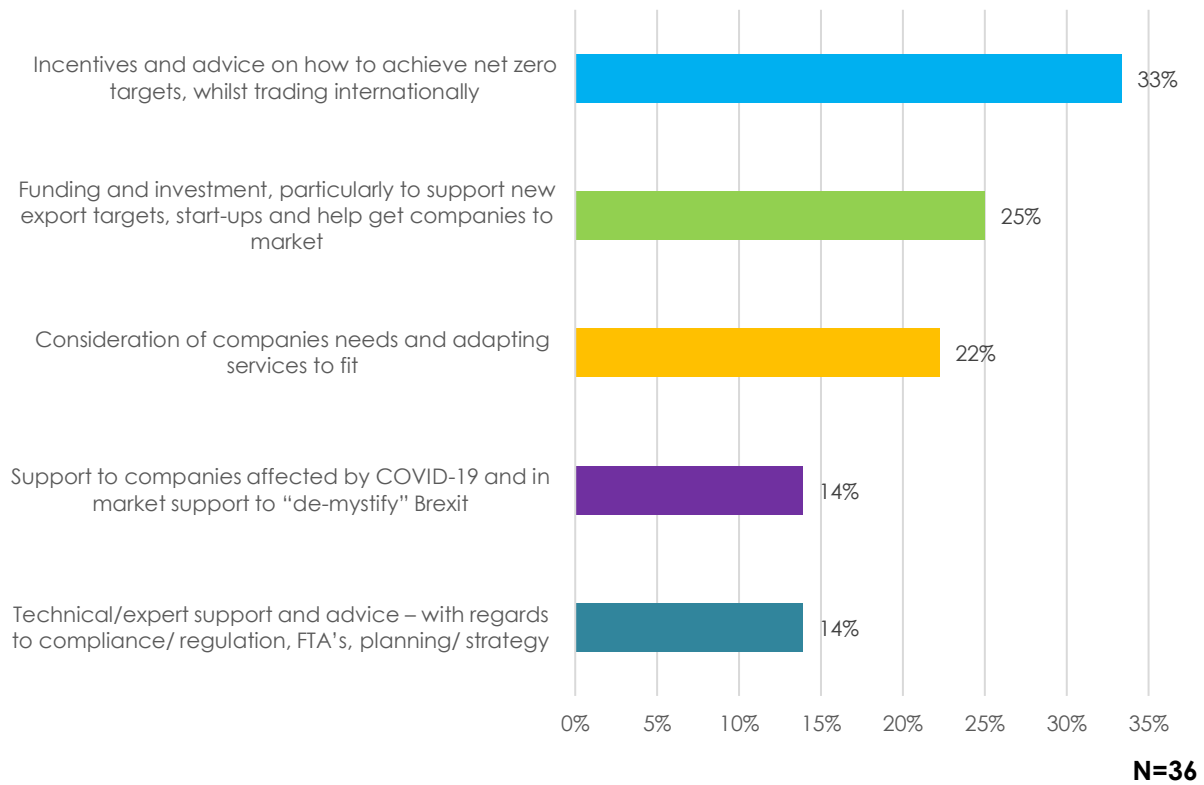
Factors that influence the success of trade support (3.9)



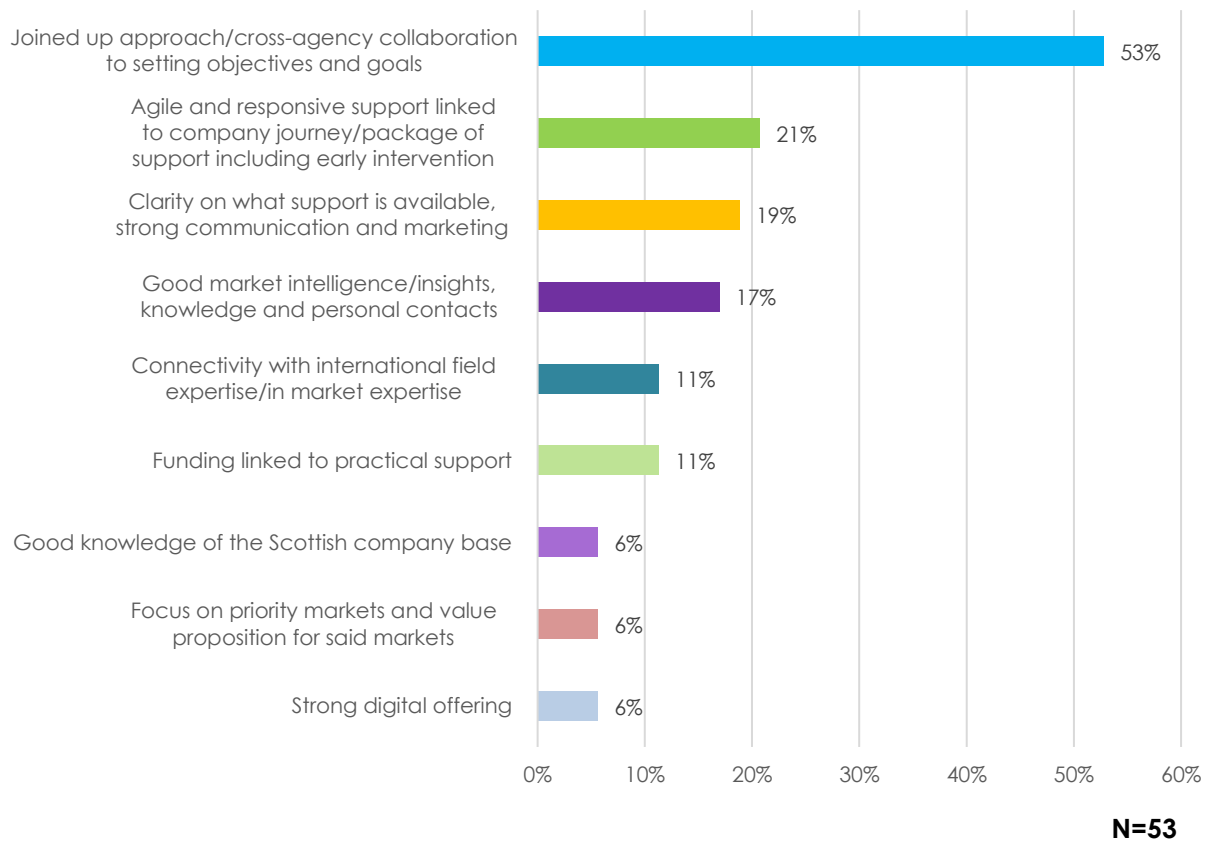
How international trade drives other factors and vice versa (3.10)



Gaps in current provision (3.12)



Key success factors for an effective trade support offering (3.13)



Final comments (3.14)

