

Hanmer Management Ltd

Enterprise M3
Export Review Report

19th December 2019



Executive Summary	3
1. Introduction and background review	4
2. Mapping of export support services	12
3. SWOT analysis	15
4. Data analysis	19
5. Consultation feedback	21
6. Overview of LIS	23
7. Recommendations	25
Annex 1 - Service descriptors	29
Annex 2 - Customer journey for ERDF Internationalisation programme	35
Annex 3 - List of interviewees	36

Executive Summary

This review was commissioned by Enterprise M3 to bring focus and clarity on the range of export support services available within the Enterprise M3 area. The review considered existing programmes that are available in the marketplace alongside those to be launched in 2020 (including one programme subject to approval). Consultation with business support providers was completed to understand the challenges and opportunities within the marketplace along with gaining an understanding of partnership working. The review also considered the export data for both products and services to provide a benchmark against which future activities can be measured.

The review has concluded the following key points.

- there is a range of export business support provision in the marketplace with a variety of organisations involved in its delivery;
- whilst there is limited duplication of direct support between providers, there is a lack of coordination between them and some confusion exists in the marketplace;
- a gap exists in the marketplace in the provision of support for those businesses who are new to exporting or have never considered the opportunity for exporting;
- challenges exist with the awareness of export support services that are available to business and partnership working both of which will require focus and resource to overcome.

The current ONS data for Enterprise M3 indicates £26.14 billion of exports in 2017 which is 4.5% of the UK market. This comprises £14.56 billion of goods and £11.57 billion of services and makes Enterprise M3 one of the top performing NUTS3 areas in the country. Changes to the methodology used to compile these figures has occurred and will be subject to further change leading the data to being described as experimental and estimated. This will provide a challenge in assessing the effectiveness of existing and future programmes.

Enterprise M3 and the wider partnership group can use the findings from this review and its recommendations to further develop the provision and effectiveness of export support services to a larger number of businesses in the area.

1. Introduction and background review

- 1.1 The purpose of this report is to bring focus and clarity on the range of export support services available within the Enterprise M3 area. By identifying what range of support is currently provided in the marketplace, it will be possible to see what gaps exist and how these might be addressed in the future. Review of the export data for both product and service activity will provide a base line against which future plans can be accessed.
- 1.2 There are a number of complementary workstreams underway all of which have impact upon export support services. These are detailed below as part of the background review.

LIS strategy

- 1.3 Enterprise M3 is currently developing its Local Industrial Strategy (LIS) and its initial analysis has led it to identify a number of long-term strategic priorities around which to build the LIS. These reflect the priority areas of identified by business and partners along with a focus on enhancing productivity. One of the nine strategic priorities identified is exporting
- 1.4 Exporting businesses are generally more productive, create more jobs, and pay higher wages than those that do not. Higher value-add and more productive businesses are also more likely to engage in exporting. The precise causal relationship between exporting and productivity is hard to demonstrate (in terms of which comes first) but the correlation is strong.
- 1.5 Selling beyond local markets increases demand for goods and services and as a result helps stimulate more investment. Exporting can also contribute to knowledge spill-overs through access to wider knowledge communities of other high skilled businesses which are also engaged in exporting activity.
- 1.6 Nationally, Government wish to see exports increase by value from 30% to 35% of GDP yet the available data on exports of goods and services is challenging to identify at the level of an individual LEP. For EM3 exports of services by value in 2017 were around £11.6 billion for the central Hampshire and north and west Surrey areas. Exports of goods by value were about £14.6 billion for the same area, a total export value of £26.1 billion. This would equate to 4.5% of the UK total.
- 1.7 The two main ambitions for the LIS are to promote:
 - additional exporting by high value add (including scale up) firms
 - integrated arrangements between EM3 (including the Growth Hub), DIT, Chambers of Commerce, local authorities and other organisations in the EM3 area to maximise the impact and efficiency of the available support mechanisms.
- 1.8 The LIS identifies that the following activities need to be completed
 - A more detailed analysis of the trajectory on export performance on both goods and services and by sector
 - A thorough appraisal of the current support arrangements for exporting

- Encouraging businesses to overcome attitudinal barriers through publicity and events for potential exporters
- Informing businesses to address lack of knowledge by deploying national intelligence, providing advice and mentoring and using other means to spread the word
- Connecting businesses in terms of networks and contacts and addressing uncertainties about accessing markets
- Providing access to finance to ensure that businesses have the capacity to deliver on export contracts.

Export Support Working Group

- 1.9 The Export Support Working Group was established in May 2019 to action the activities identified in the LIS and shown above. A facilitated workshop was held to start the process and bring together partners who are involved with the provision of export support services in the Enterprise M3 area.
- 1.10 Partnership attendance at the workshop included Hampshire Chamber of Commerce, Surrey Chamber of Commerce, Hampshire County Council, Enterprise M3 Growth Hub, WSX Enterprise, Department for International Trade (DIT) and Enterprise M3.
- 1.11 Whilst the workshop was a useful forum to start conversations with respect to the provision of export support services, it was felt that some detail was lacking from the discussion and it appeared that not all organisations were fully engaged with the process.
- 1.12 It was also noted that the attendees at the Export Support Working Group mirrored those who were participating in the EIS Interreg working group and that the two meetings should merge to reduce the burden of attending meetings.
- 1.13 Subsequent meetings have sought to develop the export support services matrix and develop better partnership working and greater understanding of what each organisation can provide.

EIS project – Everywhere International SMEs

- 1.14 The Everywhere International SMEs (EIS) project is an Interreg project due to run until September 2020. The aim of the EIS project is to impact investment for growth and jobs, impact European Territorial Cooperation and help support regional development policy.
- 1.15 9 partner organisations working across 7 European regions each undertake a peer review within their local area alongside development of an action plan. The objectives of the action plan within Hampshire are
- To make better use of local resources to develop a more strategic and coordinated approach to supporting SMEs that adds value to the national DIT service;
 - Encourage and enable improved communication, collaboration and coordination amongst stakeholders and business support organisations, and

- Encourage a no wrong door policy – whatever the point of entry – providers will put the full range of services in front of the client so it is the client’s choice how best to make use of the support available for every step of their business growth needs and how internationalisation could enable that.

1.16 Through the first phase of the European partnership, the Global EIS tool has been developed. Discussed with stakeholders to illustrate current and future support/resource, the tool illustrates the features of a good internationalisation support infrastructure.

1.17 The core of the EIS Global Tool is the SME exporting process. Its purpose is to help SMEs plan, prepare and deliver export opportunities in a systematic way. The application of a standardised SME exporting process is also intended to ensure that business support stakeholders have a common understanding of the exporting activities of SMEs.

1.18 Global EIS internationalisation process for SMEs



1.19 The four key steps of the Global EIS tool are

- Step 1 – THINK – why go international
- Step 2 – DECIDE – what, where and how to go international
- Step 3 – PLAN – when to go international
- Step 4 – GO – ready to export

HMG Export Strategy

1.20 The HM Government Export Strategy was launched in 2018.

1.21 The UK's Department for International Trade (DIT) has overall responsibility for promoting UK trade across the world and attracting foreign investment to our economy. They are a specialised government body with responsibility for negotiating international trade policy, supporting business, as well as delivering an outward-looking trade diplomacy strategy.

1.22 The strategy confirms that the UK Government will focus on the four core functions that government can perform in UK exports. These are

- Encourage and inspire businesses that can export but have not started or are just beginning; placing a particular focus on peer-to-peer learning;
- Inform businesses by providing information, advice and practical assistance on exporting;
- Connect UK businesses to overseas buyers, markets and each other, using our sector expertise and our networks in the UK and overseas; and
- Place finance at the heart of our offer.

1.23 Encourage - We will ENCOURAGE and inspire businesses that can export but have not started or are just beginning



The graphic is a promotional banner for the 'Encourage' campaign. It features a white background on the left and a dark blue background on the right. On the left, there is a red circular icon with a white globe inside, followed by the text 'Over 400k more businesses could export!'. On the right, the word 'Encourage' is written in white with a thumbs-up icon to its left. Below this, the text reads: 'Encourage and inspire businesses that can export but have not started or are just beginning'. Further down, it says 'Visit great.gov.uk to find out more about available support, including missions, and hear from successful exporters'. At the bottom, it says 'Our ambition' followed by 'A comprehensive network of inspiring Export Champions, successful exporters willing to share advice with their peers'.

1.24 To do this, DIT will invest in its digital platform, great.gov.uk, the GREAT campaign and its UK networks to amplify the voices of existing exporters across the UK and raise awareness of the benefits of exporting. DIT will test how it can use targeted messages to motivate SMEs to consider exporting at key points in their business lifecycle or when new trade agreements are introduced. They will also create a network of Export Champions across the UK who offer expertise and guidance to support other companies on their exporting journey.

1.25 Inform - We will INFORM businesses by providing information, advice and practical assistance on exporting from the public or private sector, or their peers.

1.26 To do this, DIT will develop great.gov.uk into a single digital platform for all of government’s business growth and export support. They will ensure the trade support networks and International Trade Advisers in the UK and overseas are optimised to help businesses build their exporting knowledge and capability; and encourage SMEs to access the specialist advice and support from the private sector including by assessing the potential for financial incentives such as vouchers, grants and loans, and by improving signposting to the relevant export support in the public and private sector.

1.27 We will CONNECT UK businesses to overseas buyers, international markets

1.28 This will occur by helping business overcome trade barriers, especially in emerging and developing markets. DIT will strengthen its international trading relationships through its ministerial visits, Prime Minister’s Trade Envoys, and new government-to-government commercial models to facilitate business introductions and improve market access through reducing non-tariff barriers. To facilitate this, they will develop a digital service to enable business and trade associations to report non-tariff barriers from around the world. A network of Her Britannic Majesty’s Trade Commissioners (HMTCs) will lead the Department for International Trade (DIT) overseas network at a regional level. The HMTCs will cooperate closely with Ambassadors and High Commissioners.

1.29 We will put FINANCE at the heart of our offer.

- 1.30 UK Export Finance (UKEF) is an innovative and flexible export credit agency and has a suite of products and services to support UK exporters to ensure that no viable UK export fails for lack of finance or insurance. DIT will raise awareness of how UKEF's trade and export finance and insurance products can increase the global competitiveness of exporters, and bring together the UK supply chain and consortia around large UK exporters engaged in overseas opportunities. In addition, they will analyse the full range of UKEF's statutory powers to identify where we can consider creating new products and enhancing existing ones.
- 1.31 DIT has 30 International Trade Advisers operating across the South East all of whom have a successful track record of exporting and provide both sector and activity specialisms. Whilst this service is open to all exporters, the focus is on high growth potential exporters with turnover greater than £500k and where a product or service is able to be internationalised. There is also an ITA supporting enquiry team providing support.

ERDF Internationalisation programme

- 1.32 The ERDF Internationalisation programme is a 3-year collaborative project across the Enterprise M3 Area. Subject to agreement by the managing authority, the £2 million programme will launch in July 2020.
- 1.33 It is designed to build on the project methodology of the Everywhere International SMEs (EIS) funded under Interreg Europe and will use the 4-step Global EIS Tool methodology for structuring its delivery.
- 1.34 The programme is directed at SMEs new to exporting and those that wish to expand to new markets. The project will be led and coordinated by Enterprise M3 LEP in partnership with Hampshire Chamber of Commerce, Surrey Chambers of Commerce, EM3 Growth Hub, University of Surrey (SETsquared), University of Winchester, Surrey County Council and Hampshire County Council. The project will ensure collaborative working between this programme and the DIT South East offer.
- 1.35 The project will consist of 5 main activities:
- Establish an Export Academy supported by a network of Export Growth Leads.
 - Development of a 12-month Pre-Export Programme for SMEs
 - Establishment of an Internationalisation Grant Funding Scheme
 - Soft landing zone at the University of Surrey
 - Monitoring and progress review
- 1.36 This programme is responding to an identified gap within the marketplace and focussing on new to export businesses and those who might not even have considered exporting as part of their business mix. It will be an important part of the business support mix and by driving market making and raising awareness of exporting opportunities, should identify businesses who otherwise have not been engaged.

The South Internationalisation Fund

- 1.37 For launch in April 2020, the South Internationalisation Fund will complement the existing DIT service by providing financial support to nudge SMEs, who would not otherwise have done so, into making investments in international trade activity. The Enhanced ITA Service (EITA service) will diagnose SME's international trade barriers/needs, brokering them to market proven professional service suppliers or aiding participation in Trade Fairs and Missions.
- 1.38 The project will facilitate the implementation of better international trade planning by local companies, leading to increased sales and profits, creating the capability for further investment. Increasing understanding of international competition will help local companies improve their positioning. Increasing market spread will help make companies more stable, resilient and less vulnerable to market changes. Using market proven consultancy will increase management confidence and expertise. Support will save managers' time and effort and help them overcome current challenges.
- 1.39 The new DIT EITA service will target High Growth Potential (HGP) SMEs which are financially stable, with turnover of more than £500k, a product or service to trade internationally, or which could be developed for international trade, and who see international trade as a path to growth. Whilst DIT will concentrate its high value, intensive support on high growth potential companies, the approach to targeting will be flexible where the number of HGP beneficiaries is low. Project eligibility and suitability criteria will test and demonstrate why the business requires funding without being so burdensome to applicants that it reduces take-up.
- 1.40 DIT confirms that it endeavours to target companies in the LEPs priority sectors:
- ICT and Digital Media
 - Pharmaceuticals
 - Aerospace and Defence
 - Professional and Business Services
- 1.41 The needs of companies with lower potential will increasingly be met by DIT's expanding digital services, which make it as easy as possible for businesses to find, access and successfully navigate all export advice, support and information provided by government, such as export tariffs and licenses, market access issues, and trade and export finance. In addition, DIT is developing tailored guidance for different sectors on entering new markets and the new trading environment as we leave the EU.

Chambers of Commerce

- 1.42 Two Chambers of Commerce operate across the Enterprise M3 area; Hampshire Chamber of Commerce and Surrey Chambers of Commerce. Both Chambers are British Chambers of Commerce accredited Chambers and are authorised issuing bodies on behalf of HM Government for certain types of export documentation. The Chambers provide the documentation needed to trade internationally and help with understanding the regulations

surrounding international trade. Businesses do not need to be Chamber members to access the services available. These include:

- Certificates of Origin – both European Community and Arab British versions
- HMRC preferential trade documents: EUR1 and ATR
- ATA Carnets (passport for goods)
- Foreign and Commonwealth Office – presenting documents for apostille and, if required, to non-Arab Embassies for legalisation

1.43 The Chambers also provide access to the British Chambers of Commerce Global Business Network. This is a comprehensive international network of British Chambers of Commerce and business groups located across the world that supports two-way commerce and business between each location and the UK.

Enterprise M3 Growth Hub

1.44 Aimed at businesses looking to succeed in the Enterprise M3 area, the Enterprise M3 Growth Hub is an expert advice and resource network which helps businesses achieve results quickly through a free personal, tailored service focused on Growth.

1.45 When export is part of business growth, the Growth Hub signposts to other business support organisations who can provide a direct service. These includes referrals to the Chambers for export documentation and to DIT for in depth support and export finance. Referrals may also be made to private sector organisations who are known to provide appropriate support. Typically, most referrals are made to the Chambers who are most responsive to business enquiries.

Other providers

1.46 Other providers include private sector organisations with specific expertise in exporting and business growth challenges along with a wider range of membership organisations including the IOD, FSB and CBI. Whilst the latter may not provide direct export support, they are well connected to businesses and part of the business support environment.

2. Mapping of export support services

The process

- 2.1 During 2019 and as one of the activities of the Export Strategy working group, mapping was undertaken of the export support services available to businesses in the Enterprise M3 area. This occurred during working group meetings and attempted to plot services against the four objectives of the Government's export strategy, namely encourage, inform, connect and finance.
- 2.2 The mapping focused on the offerings from the following organisations
 - Department for International Trade
 - Hampshire Chamber of Commerce
 - Surrey Chamber of Commerce
 - Hampshire County Council
 - Enterprise M3 Growth Hub
 - WSX Enterprise
- 2.3 An Export Support matrix was produced with input from the partners listed. Whilst the matrix was accurate in terms of its content, it was quite complex to read and difficult to use, primarily because of its attempt to match support against the four objectives of the export strategy. This matrix has now been revisited with all partners who were asked to confirm the following
 - The range of export support services they offer to business
 - Which businesses can benefit from these services
 - Which businesses, if any, are excluded
 - How the service is delivered
 - Key contact details
- 2.4 A template has been developed to cover these heading and an A4 sheet for each organisation is provided in the appendix.

Review of provision

- 2.5 Reviewing provision against the four objectives of the export strategy is not really meaningful either to the partner network or to businesses. This arises as all organisations encourage, inform and connect businesses. These words form the basis of the work they undertake and how they operate. However, in order to provide some granularity for this review, organisations did detail the degree to which they provide certain services which has led to some differentiation between provision. With respect to the finance objective, this is primarily the role of DIT and provision of the Export Finance Guarantee. However, this will

change with the launch of the ERDF Internationalisation Programme when grants will be administered by the Enterprise M3 LEP.

	Encourage	Inform	Connect	Finance
DIT	✓✓✓	✓✓✓	✓✓✓	✓✓✓
Hampshire Chamber of Commerce	✓✓	✓✓	✓✓	
Surrey Chamber of Commerce	✓✓	✓✓	✓✓	
Enterprise M3 LEP		✓		
Enterprise M3 Growth Hub	✓✓	✓✓	✓✓	
Hampshire County Council	✓	✓	✓	

✓✓✓ - high level of activity

✓✓ - moderate level of activity

✓ - some activity but not key focus of organisation

- 2.5 No further work has been undertaken on mapping against the four pillars as this has no additional value in understanding the range of resources in the marketplace.

Overlaps and gaps in service provision

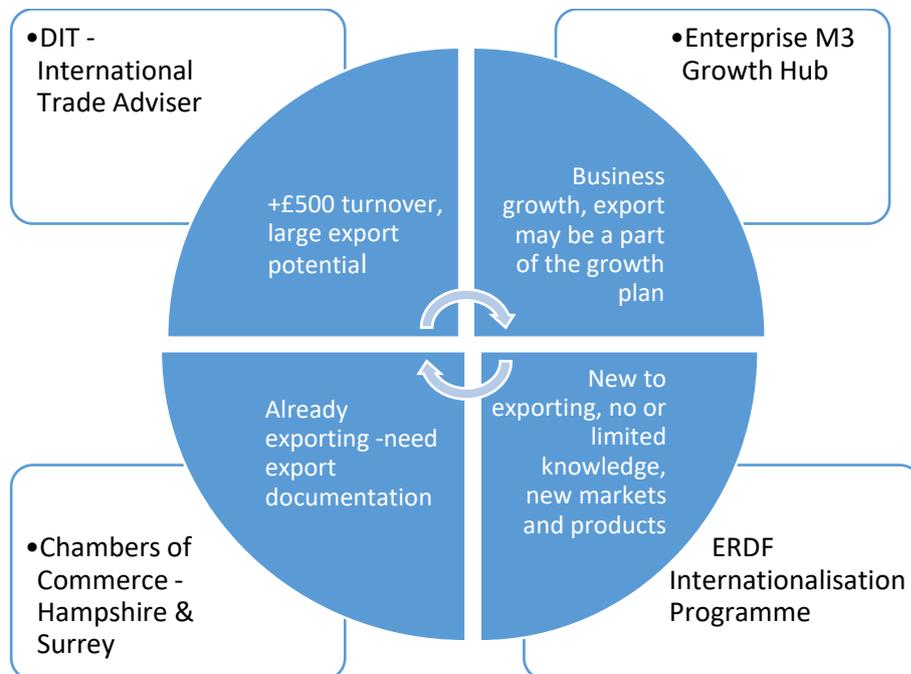
- 2.6 Review of the services available to businesses would suggest there is very little overlap in terms of provision. It was noted that *'better communication with respect to events would help to avoid some duplication'* but typically this is of similar topics being covered within the same six months by different organisations. This should be avoided to make best use of resources and drive attendance.
- 2.7 With respect to gaps, there is an obvious one at the start of the exporting journey. If we recognise that exporting is not always considered when setting up in business or contemplated once a business is established, there is an opportunity to assist new to exporting businesses. This would help to demystify the process and ensure new exporters have access to the right type of support.
- 2.8 It is hoped that the ERDF Internationalisation Programme (subject to approval) will help to satisfy this identified gap within the marketplace.

The Customer Journey

- 2.9 Detailed discussions with all partners highlights the need for a simplified customer journey. Whilst each organisation has its own customer journey and associated processes, several

partners confirmed *'there is no one export services support process designed from a customer perspective'*.

- 2.10 Annex 2 describes the customer journey anticipated for the ERDF internationalisation programme. It does not include all partners and is specific to this programme, excluding access from or reference to other service providers.
- 2.11 It was felt that that there should be *'a more joined up customer facing service with less focus on targets and more on providing the best solution for the customer'*. One partner commented *'no organisation is separate from the rest but should be part of an overall customer focused system'*.
- 2.12 It is recognised that *'no current organisation has the capacity to deal with all customer enquiries'* and that from a customer perspective they do not mind who they speak to as long as the support is appropriate and relevant and available at the time their business support need arises. No organisation is separate from the rest but is part of an overall customer focused system. All organisations are the front door or starting point for export support if that's where the customer comes in.
- 2.13 If this is recognised by the partner network then no new customer journey is required. The existing ones are correct and all partners own not only their part of the customer journey but also the overall approach.
- 2.14 As part of this review, all organisations were able to confirm their main focus which the diagram below attempts to show as a simple summation of who does what.



3. SWOT analysis

- 3.1 A SWOT analysis was completed as part of the EIS project. This has been reviewed and updated as part of this document to reflect the current status of the UK economy, changes to the exporting environment and to provide an Enterprise M3, rather than Hampshire, focus.
- 3.2 The SWOT analysis is focussed on export support services for SMEs.

<p>STRENGTHS</p> <ul style="list-style-type: none"> Exporting businesses are more productive, create more jobs and pay higher wages than those that do not. Business support has a proven impact on increase in exports and turnover where SMEs have been assisted Clear government policy and focus on exports. Good quality business support exists in Enterprise M3 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> Limited coordination between business support providers Complex and confusing business support offer Competitive marketplace Fragmented delivery of service No specific LEP export data exists. Limited awareness amongst SMEs (includes start-ups and micros) of export business support offer Export is considered 'hard to do'.
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> Improve communication, co-ordination and strategic collaboration between DIT and local partners to make better use of existing resources Improved marketing, awareness raising and take-up of export support Collective targeting and engagement of SMEs with the potential to internationalise. BREXIT opportunity to connect and refocus stakeholders and business. Global EIS tool 	<p>THREATS</p> <ul style="list-style-type: none"> BREXIT and the uncertainty of the outcome of negotiations for exiting the EU. Changes in the UK economy USA tax reform and changing trade policies Unstable international situation Increased international security and bureaucracy No clarity on the level of future Government funding for DIT and LEPs

Strengths

- 3.3 The value of exporting businesses to the UK economy is huge not just in terms of numbers (see section 4 – data analysis) but also in terms of their higher productivity, ability to create more jobs and for those jobs to pay a higher wage than in businesses that do not export (ref

– BIS (2011) International trade and investment: the economic rationale for government intervention). Typically, they are more likely to be high-growth, scale-up businesses

- 3.4 It is also clear from the same report that business support has a proven impact on increase in exports and turnover where SMEs have been assisted. Alongside improved business performance, assisted SMEs have noted the following qualitative benefits to their business
- Increased skills and knowledge
 - Changed behaviour
 - Increased innovation
 - Ability to overcome trading barriers.
- 3.5 These qualitative benefits clearly have also led to wider implications for the performance of the business in the medium to longer term, as a result of strengthening capabilities, and increasing the firm's access to international networks. This is reflected in the fact that among those who report additional sales, around 44 per cent report increased UK sales as well as increased exports.
- 3.6 This evidence supports the role the public sector and its partners can play in driving exports as part of a wider system of business support. This has been recognised in the UK Government Export Strategy and is recognised locally by Enterprise M3 and its partners. At the current time, significant resources are being invested in the target of increasing UK exports through funding to DIT and national campaigns. However, this may be subject to change following the recent general election and direction of travel of the new Government.
- 3.7 The range of export support services provided within the area are quality activities delivered by respected organisations. This supports the strong track record of Enterprise M3 in supporting the local business base.
- 3.8 The Enterprise M3 business base has one of the strongest track records of exporting of all regions in the UK and clearly there is already an ability and desire to build on this. This provides a really firm foundation to support future developments and means that the building blocks of an excellent support system are already in place.

Weaknesses

- 3.9 The UK Export Strategy identifies that too many businesses face barriers that prevent them from reaching their exporting potential. For some, the barrier is not having the right contacts in overseas markets; for others, it is concerns about payment risk or non-tariff barriers and for others still, it is a concern about not having the right skills or capabilities.
- 3.10 Work undertaken by the EIS project also highlights the lack of coordination between business support providers and, to a certain extent, competition amongst them. Each organisation is focussed on delivering their services and in the case of publicly funded activity, achievement of targets. This becomes the key focus rather than coordination with other partners. The offer then becomes complex and confusing for businesses who are not bothered by who does what but just require the answer to their question at any given time. Businesses also

have limited awareness of where to go for support and have neither the time nor inclination to find this. The system needs to be much easier to understand.

- 3.11 Business surveys suggest there is an inherited characteristic in businesses that exporting comes after launching a business successfully in the UK when ideally, exporting should be considered as part of the growth mix from the outset. There is a belief that export is 'hard to do' which makes it a secondary consideration in business growth. The export support needs of businesses will differ depending on their level of experience and how well developed, well-regulated and transparent their target market is.
- 3.12 For the LEP, there is an added weakness in that no specific LEP export data exists. This makes it difficult to identify the base line figures against which future projects can be assessed. In the short term, this is likely to continue and the best attribution of numbers will be a combination of the three NUTS3 areas comprising West Surrey, Central Hampshire and North Hampshire. It will continue to be important, inspite of this weakness, to use data driven analysis and market intelligence to identify the priority sectors, markets and types of business most likely to deliver export growth.

Opportunities

- 3.13 Global trade is growing and changing rapidly, representing a world of opportunity for UK exporters. Approximately 90% of global economic growth in the next 10 to 15 years is expected to be generated outside the EU, while the growth of the digital economy and trade in services is making the world smaller than ever.
- 3.14 Exports represent 30% of UK GDP, which is broadly similar to France, Italy and Canada, but substantially behind Germany. Given all of the UK strengths, the UK should be trading more strongly.
- 3.15 Whilst Brexit and the future trading relationship with the UK remains uncertain, there is a whole world of exporting opportunity outside of the EU that UK businesses should be selling to. Whilst Europe has typically been as easy place to start with exporting, other countries are now looking at equally accessible. Different forms of export guidance and support will be required at different stages as the UK leaves the Customs Union.
- 3.16 There is a huge opportunity to improve communication, co-ordination and collaboration between DIT and local partners to make better use of existing resources. Feedback from the consultation process (see section 5) would suggest that all partners are willing to work on this opportunity and provide a more customer centric approach to business support. It is recognised that at a time of limited resources, improved partnership working should help to improve efficient working.
- 3.17 Improved marketing and awareness raising is also required along with the collective targeting and engagement of SMEs with the potential to internationalise. This will lead to an increase in the productivity of businesses and also the productivity of the Enterprise M3 economy as a whole. Whilst approximately 10,000 Enterprise M3 businesses currently export this in only 11% of the total business population of 89,700 businesses. There is a huge potential latent demand for export support from new, early stage or inexperienced businesses that need export support.

- 3.18 The Global EIS tool should be considered as a useful mechanism to help engage with businesses who are either not exporting, are reluctant exporters or who do some exporting but could do more. The tool is a useful 'get ready for export' mechanism and needs to be more widely exploited.

Threats

- 3.19 Whilst not best practice within a SWOT analysis, BREXIT is currently both an opportunity and a threat. This threat might diminish once the uncertainty surrounding the outcome of negotiations for exiting the EU is known and the UK Government deal is sanctioned or otherwise. Until this detail is known, the threat remains.
- 3.20 Alongside BREXIT, changes within the UK economy coupled with USA tax reform and changing trade policies and wider international stability will continue to cause concern to any current or new to export businesses.
- 3.21 The UK also needs to recognise the need to internationalise the local economy at the pace required to keep up with our competitors. Other countries already have strong export support strategies and plans in place and the UK must remain competitive against them.
- 3.22 At a national level, DIT is currently reviewing its policy alongside no clarity yet being given on the level of future DIT funding.

4. Data analysis

Introduction – sources of data/background

- 4.1 The UK Export Strategy sets a new national ambition to transform export performance, raising exports as a proportion of GDP from 30% to 35%. This is a huge challenge and will be monitored by the Office of National Statistics (ONS) quarterly survey.
- 4.2 Whilst the quarterly survey is useful for the Government to monitor progress, it is no use to individual LEPs due to its lack of granularity. ONS data is available at the NUTS3 level (Nomenclature of Units for Territorial Statistics) which aims to provide a single and coherent territorial breakdown for the collection, development, and harmonisation of EU regional statistics.
- 4.3 Enterprise M3 comprises 3 NUTS3 areas; West Surrey, Central and North Hampshire

Figures for 2017

- 4.4 Value of goods exports from Enterprise M3 LEP area and destination, 2017, £billion.

	EU	Rest of world	Total
West Surrey	2.402	2.456	4.858
Central Hampshire	2.485	1.852	4.337
North Hampshire	2.583	2.785	5.368
TOTAL EM3 LEP Area	7.47	7.093	14.563

Value of service exports from Enterprise M3 LEP area, 2017 £billion.

	EU	Rest of world	Total
West Surrey	1.832	2.995	4.827
Central Hampshire	0.763	1.029	1.792
North Hampshire	1.515	3.443	4.958
TOTAL EM3 LEP Area	4.11	7.467	11.577

Both West Surrey and North Hampshire with figures approaching £5 billion are amongst the highest export by value NUTS3 areas. Four areas outside of Greater London have similar figures; Manchester (£4.39 billion), Berkshire (£9.23 billion), Aberdeenshire (£4.76 billion) and Edinburgh (£5.27 billion). This compares to an average value of service exports at NUTS3 level of less than £1 billion and would indicate a very strong performance within the Enterprise M3 area.

Total value of service and goods exports from Enterprise M3 LEP area 2017, £ billion

	EU	Rest of world	Total
West Surrey	4.234	5.451	9.685
Central Hampshire	3.248	2.881	6.129
North Hampshire	4.098	6.228	10.326

TOTAL EM3 LEP Area	11.58	14.56	26.14
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- 4.5 National estimates for 2017 service and goods exports are £278 billion and £297 billion respectively. This would equate to Enterprise M3 having a 4.2% national share of service exports and a 4.9% share of goods exports. Overall, this equates to a combined services/goods export figures of 4.5% of the national total.
- 4.6 In 2016, service exports were £9.963 billion (West Surrey £4.408bn, North Hampshire £4.153 bn, Central Hampshire £1.402 bn). This would suggest a 16% increase in the value of service exports over one year. However, consideration needs to be made of the following caveat.

NB

- 4.7 It is noted in the release details for the 2017 data that 'this release uses many of the same processes as our previous articles, but we have made some notable improvements to our methodology based upon wider methodological developments and in order to meet user needs. As a result of these changes, this release is not entirely consistent with our previous subnational estimates and we therefore advise caution when comparing these results with previous results'. Elsewhere, it is also suggested that all values are 'experimental and estimated'.
- 4.8 Interestingly, the value of goods exports from the Enterprise M3 area in 2018 shows an increase to £17.09 billion. This would suggest a 16% increase in value. Whilst possible, this might suggest that the figures are not yet robust and some of the increase is due to changes in methodology rather than exports increasing.

5. Consultation feedback

- 5.1 Detailed conversations have been held with individuals from the partner organisations involved in providing export support services. These have been confidential in nature and have sought to understand both the challenges and opportunities afforded in the marketplace. This approach has elicited a wide range of responses which are detailed below under specific category headings. Statements in italics are direct, non attributable, comments.
- 5.2 These responses have assisted in the development of the report recommendations.

What does success look like?

- 5.3 All partners were asked to define what success looks like for export support services.
- *More businesses exporting*
 - *More businesses aware of exporting as a business opportunity*
 - *Businesses making informed decision concerning their export potential*
 - *Businesses know where to go to receive the right type of support for them at any given time in their export journey*
 - *Handovers between partner organisations are smooth and not seen by the business*
 - *Support is customer centric rather than target driven*
 - *Barriers between organisations are broken down*
 - *The Global EIS tool is used to plan operational delivery*
 - *Additional resources are made available where gaps are identified in market provision*
- 5.4 Although there was considerable agreement on these success statements during 1-2-1 conversations, there was also a concern voiced by several partners *'that we are not all on the same page'*.
- 5.5 It was also suggested that organisations *'do not understand their role in the hierarchy'* and *'are trying to out-compete each other'*.

Marketing & Communications

- 5.6 DIT undertakes national marketing and has utilised the 'Business is Great' campaign over the last few years. Whilst this drives a level of awareness of DIT, it is not particularly focussed and does not appear relevant to local businesses. Newable, the DIT South East contract provider, undertakes *'highly targeted precision marketing'* to identify appropriate businesses in the area that might require export support. This approach has been honed over the years and has a good success rate of leads becoming ITA involved businesses. However, the approach is limited by availability of funding and there is still a challenge in finding the right number and quality of exporting businesses to meet the DIT targets.

- 5.7 In spite of this work, there is a general feedback that there is a *'lack of awareness in the business community of the offer from DIT and how it can be accessed locally'*.
- 5.8 Both Chambers are in regular communication with their members and have suggested that they could be *'used as a route to market for DIT'*. In particular, provision of monthly information from DIT to the Chambers re events and missions would enable greater exposure of all activities and help drive business awareness attendance.

Referrals

- 5.9 Referrals do occur between business support organisations in the Enterprise M3 area with respect to export support services. However, these are not of the quality and number that would be expected. In particular, it was stated that *'DIT receive limited referrals from the Chambers or Growth Hubs'*. It was noted that this is the case across the South East region and not specific to the Enterprise M3 LEP area.
- 5.10 Where referrals are made, there is *'a preference to go to an individual'* to provide better customer service rather than via a generic access point. However, opportunities to do this are limited by lack of contact details and limited knowledge of individuals and their specialisms
- 5.11 Typically, the Chambers receive the highest number of referrals as they provide a unique service with export support documentation. There is no confusion as to who provides this service.

Partnership working

- 5.12 Responses to questions on partnership working were particularly strong from all consultees. It is felt that there is a multi-layered approach to the provision of export support services and whilst this might work for each organisation, *'it is not customer centric'* and leads to a confused business support offering.
- 5.13 It was suggested that *'there are many different perspectives on partnership working depending on the organisational needs at that moment in time'*. All organisations stressed the *'desire to collaborate and not compete'* but recognise that organisational priorities might not always fit with this desire.
- 5.14 It is noted that current relationships appear to work at an organisation to organisation level rather than being at an individual/personal level. In particular, referrals would like to be *'made to an individual rather than the organisation to provide better customer service'*.
- 5.15 Whilst the range of partners included in the working group is appropriate, there are other organisations who should be aware of the export support services on offer. This includes the FSB, IOD and other membership organisations who are well connected to business.
- 5.16 There is a general feeling that whilst the partnership meetings have been OK, *'nothing happens between them'* and there is *'a general apathy in this area'*.

6. Overview of LIS

- 6.1 The work undertaken to produce this review provides focus and clarity on the range of export support services available to businesses within the Enterprise M3 area. It has sought to support the two main ambitions of the LIS with respect to exporting which are to promote
- additional exporting by high value add (including scale up) firms and
 - more integrated arrangements between Enterprise M3 (including the Growth Hub), DIT, Chambers of Commerce, local authorities and other organisations in the area to maximise the impact and efficiency of the available support mechanism
- 6.2 The work responds to the two key activities identified in the development of the export section of the LIS; a detailed analysis of performance for goods and services and a thorough appraisal of support arrangements for exporting.

Detailed analysis

- 6.3 The LIS identified that a more detailed analysis of the trajectory on export performance on both goods and services and by sector was required. An initial review identified that ONS experimental data might be available for some NUTS3 areas but only combined authorities; the Institute for Exporting is a source but has no appropriate data available; and some of the manufacturing federations such as food and drink have some regional data but nothing for smaller areas such as the LEP.
- 6.4 It was identified that HMRC break down exports of goods and services into sub-national NUTS3 areas of which the combination of Wes Surrey, Central and North Hampshire comprises the Enterprise M3 area. On this basis, data is available historically and will be provided by ONS on an annual basis
- 6.5 Updated figures for 2017 have been provided in section 4 – data analysis but should be treated with a note of caution if compared against previous years. It has been noted in the release details for 2017 that ‘improvements have been made to the methodology based upon wider methodological developments and as a result of these changes, this release is not entirely consistent with previous estimates and caution should be advised’. The results are deemed ‘experimental and estimated’.
- 6.6 Interestingly, this approach has been used for all 2017 ONS data and would suggest that comparisons between areas would be beneficial when looking at changes as all areas have been through the same methodology. It should also be recognised that the availability of ONS annual data will not be useful at the micro level of performance management.

Appraisal of support arrangements

- 6.7 This review has undertaken a thorough appraisal of the current support arrangements for exporting. Detail of this appraisal is provided in the background review of service provision, mapping of export support services and consultation with business support providers. This work has led to the development of the following conclusions

- there is a range of export business support provision in the marketplace with a variety of organisations involved in its delivery;
- there is limited duplication of direct support between providers but there is a lack of coordination between them and some confusion exists in the marketplace;
- a gap exists in the marketplace in the provision of support for those businesses who are new to exporting or have never considered the opportunity for exporting;
- challenges exist with the awareness of export support services that are available to business and partnership working both of which will require focus and resource to overcome.

6.8 The development of these conclusions alongside detailed analysis of the contents of this report leads to the recommendations listed in section 7. These recommendations also seek to respond to the additional LIS statements stated below

1. **Encouraging** businesses to overcome attitudinal barriers through publicity and events for potential exporters
2. **Informing** businesses to address lack of knowledge by deploying national intelligence, providing advice and mentoring and using other means to spread the word
3. **Connecting** businesses in terms of network and contacts and addressing uncertainties about accessing markets
4. **Providing access to Finance** to ensure that businesses have the capacity to deliver on export contracts.

7. Recommendations

The recommendations are considered under the headings of operational delivery, partnership working and strategy

Operational delivery

7.1 Recommendation 1 – new to exporting businesses

The DIT website is a comprehensive source of information for exporting businesses, providing useful guidance and lots of detail for export ready businesses. However, its initial guidance starts with advice for exporters including developing an export plan, looking at export markets and investigating export finance. There is a significant step before this – getting ready for export. Consideration should be made of using the Global EIS tool as an on-line guide through the Think, Plan, Decide, Go steps. This is an excellent tool and may help to bring new to export businesses into DIT services. Recent work undertaken by DIT on its website with respect to Brexit shows how an interactive tool could be utilised to support a wide range of businesses.

The Global EIS tool should also be used on all partner websites to help guide new to export businesses into the marketplace. It would also be a useful tool for the National Business Support Helpline who should be made aware of its availability and be encouraged to use it when dealing with telephone and on-line enquiries.

7.2 Recommendation 2 – awareness raising

There is currently a range of export business support provision in the Enterprise M3 area with new programmes being launched in 2020 (DIT internationalisation funding and subject to approval, Enterprise M3 internationalisation programme), both of which fill a gap within the marketplace. However, awareness of all current schemes appears low and businesses struggle to navigate the business support offer. This may only worsen once new provision is available.

Subject to availability of funding, an Enterprise M3-wide marketing campaign to raise awareness of export support services should be developed. This should cover the full spectrum of support available and all businesses, from those who are yet to consider exporting, alongside those who want to move into new markets and export further. This campaign should not be programme specific but could focus on key sectors for maximum impact.

In the meantime, DIT should work with the Chamber and Growth Hub marketing teams to raise awareness of their local activity, in particular events. This could also include Enterprise M3 LEP, FSB, IOD and CBI all of whom are dealing with businesses on a daily basis. Use of these routes to market would increase direct exposure to over 8000 businesses across the Enterprise M3 area whilst also extending awareness through social media channels.

7.3 Recommendation 3 – enhancement of sector support

A review should be undertaken of the capacity within the DIT ITA team, particularly with respect to the Enterprise M3 sectors. With development of an HPO in Immersive Technologies coupled with the focus on space and gaming, it may be necessary to supplement the existing resource and ensure a full complement of sector specific ITAs are available that meet the requirements of the Enterprise M3 area.

7.4 Recommendation 4 – information sharing

In order to improve customer service and provide a more efficient and direct handling route, organisations would like to pass business details directly to a named individual. It would be useful for DIT and the Growth Hub to make available a list of advisers/growth champions along with sector specialisms and contact details. For DIT, a list of individual posts for inward investment opportunities would also have huge value.

There also needs to be the removal of barriers that restrict the sharing of information between organisations. Whilst compliance with GDPR is required, this should not restrict providing the best service to the business, irrespective of who provides that service.

Partnership working

7.5 Recommendation 5 – removal of overlaps and duplication

Whilst there are limited direct overlaps and duplication within the marketplace, care needs to be taken with the programmes being launched in 2020. The DIT internalisation fund and the Enterprise M3 ERDF internationalisation programme (subject to approval) will both provide access to grants. Whilst the level of grant funding available and the criteria by which this might be accessed are different, there is the opportunity for confusion within the marketplace. Detailed discussion is required in the partnership group to ensure this potential issue is resolved prior to operational delivery.

Ongoing review of business support programmes should be undertaken by the partnership group to minimise duplication of provision. This should always be considered from a customer/business perspective who might not always appreciate the different nuances between providers.

7.6 Recommendation 6 – enhanced co-operation

No export support service partner in the Enterprise M3 area is completely happy with current arrangements and levels of partnership working. Whilst not an ideal position, the fact that all partners are in agreement that something needs to change, provides a great opportunity to do something different and improve the situation. These changes could be significant in nature or more evolutionary. The most significant change would result in new organisational arrangements. This could arise if Government decides that DIT and BEIS require a different focus in the future or are indeed merged into a single department. Evolutionary changes to existing services will occur with actions being taken to improve partnership working. In this area, initial consideration might be given to the following

- Contact between operational staff within organisations as part of team meeting e.g. ITAs meet the Growth Champions, Chambers provide update to ITAs re ERDF programme
- Improved communication particularly with respect to events
- Commitment to joint activity

Strategy

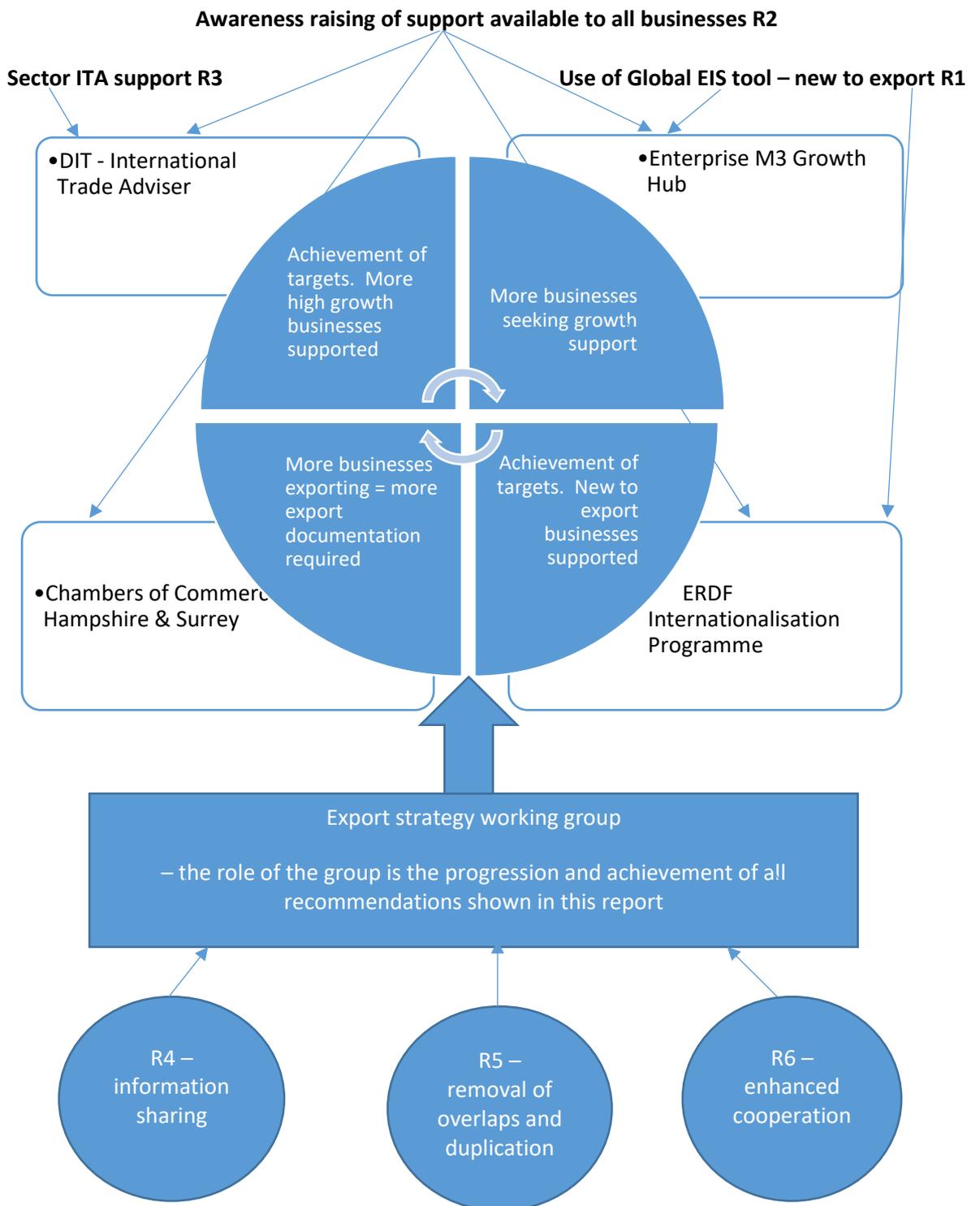
7.7 Recommendation 7 – further evidence

Further work is required strategically to identify the scale of the export opportunity in the Enterprise M3 area. In developing this strategic approach, it will be necessary to

- Gain more detailed knowledge of the Enterprise M3 export market, by sector and geography, to ensure work is driven by market intelligence
- Assess the scope and scale of the exporting opportunity available in Enterprise M3
- Determine what focus and emphasis should be on growing existing exporters or introducing new businesses to export activity
- Review how Enterprise M3 should play to its existing strengths and/or invest more into emerging markets
- Better understand export support needs of businesses at different stages of export activity and the role the public sector and partners can play in driving exports as part of the wider business support landscape

Impact of recommendations

- 7.8 All recommendations will result in some impact on the provision of export support services. This can best be illustrated through enhancement of the organisational overview diagram. This has been amended to show where a recommendation will have an impact. The aim is to get more businesses exporting more efficiently. This will increase demands on all providers of export support services.



- Recommendations are shown by number e.g. recommendation 1 is R1

Annex 1: Overview of international services for business



1). Provision of export documentation

Hampshire Chamber of Commerce is a British Chambers of Commerce accredited Chamber and an authorised issuing body on behalf of HM Government for certain types of export documentation. The Chamber can provide the documentation needed to trade internationally and help with understanding the regulations surrounding international trade. Chamber members receive a significant discount on some international trade documents. Services cover:

- Certificates of Origin – both European Community and Arab British versions
- HMRC preferential trade documents: EUR1 and ATR
- ATA Carnets (passport for goods)
- Foreign and Commonwealth Office – we present documents for apostille and, if required, to non-Arab Embassies for legalisation

2). Advice, guidance and signposting

The Chamber will provide advice and guidance to businesses to support them trading internationally and will also signpost to other organisations who might provide more specialist international trade support

3). Access to British Chambers of Commerce Global Business Network

This is a comprehensive international network of British Chambers of Commerce and business groups located across the world that supports two-way commerce and business between each location and the UK.

<https://www.britishchambers.org.uk/page/global-business-network>

Key exclusions

No exclusions - all sizes of business and businesses operating in all sectors can benefit from the above support. Chamber membership is not required to access Chamber international services.

Organisation	Hampshire Chamber of Commerce
Address	Ground Floor, Wates House, Wallington Hill, Fareham, Hampshire, PO16 7BJ
Telephone	01329 242420
Website	https://www.hampshirechamber.co.uk
Key contact	Jacqueline Highmore – International Trade Manager
Email	Jacqueline.highmore@hampshirechamber.co.uk



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Organisation	Surrey Chambers of Commerce
Address	Unit 14a Monument Way East Woking Surrey GU21 5LY
Telephone	01483 735549
Website	https://www.surrey-chambers.co.uk
Key contact	Gary Hayes – International Trade Manager
Email	Gary.hayes@surrey-chambers.co.uk



HAMPSHIRE COUNTY COUNCIL

Supporting businesses based in Hampshire and businesses considering Hampshire as a place to locate and invest. The team can assist with the following

1). Location

We promote Hampshire as a top investment location through our Business Hampshire website profiling the area's economic strengths and assets. We work closely with agents, planners, land owners, intermediaries and developers, and through our specialised platform, can provide bespoke property searches for clients linking them to relevant opportunities. We can provide a dedicated account management to support key businesses, helping them to grow, and support for prospective inward investors locating to Hampshire.

2). Information

We have access to national economic data sets. Our Research & Intelligence team undertakes detailed analysis of economic and demographic indicators to inform key decision making and influence policy and strategy

3). Partnerships

We work closely with Government, academia and businesses enabling us to connect companies with other to fulfil their growth ambitions.

4). Finance

We have significant experience in helping companies apply for public sector grants and other support, e.g. business rate relief, that helps them grow and focus on their business objectives.

Key exclusions

No exclusions - all sizes of business and businesses operating in all sectors can benefit from the above support.

Organisation	Hampshire County Council
Address	The Castle, Winchester
Telephone	0300 500 1375
Website	www.hampshire.gov.uk
Key contact	Andrea McCallum
Email	Andrea.mccallum@hants.gov.uk



Aimed at businesses looking to succeed in the Enterprise M3 area, the Enterprise M3 Growth Hub is an expert advice and resource network which helps businesses achieve results quickly through a free personal, tailored service focused on growth. The following resources are available.

1). Business support helpline

Provides advice and guidance to new and existing businesses in the Enterprise M3 area.

2). Business network

Key local, national and international resources are available, services signposted to and a choice of potential suppliers made available.

3). Growth service

Provides access to Growth Champions - specialist business mentors, coaches and advisers. A network of industry experts, on hand to give the help for your specific business need. The Growth service aims to empower business growth, overcoming any barriers faced by the business either now, or in the future. This help includes up to 2 days' free consultancy, mentoring and coaching with our Growth Champions, as well as access to our trusted expert services network.

Key exclusions

All businesses at any stage of their development can access and benefit from the Enterprise M3 Growth Hub's services including the Information Bank, the Resource Network and the Helpline. Additionally, there is specialist growth advice targeted at businesses operating within key sectors.

Organisation	Enterprise M3 Growth Hub
Address	Building 2, Guildford Business Park, Guildford, GU2 8XH
Telephone	01483 478098 (Growth Hub) 0300 456 3565 (Business support helpline)
Website	www.enterprisem3growthhub.co.uk
Key contact	Roya Croudace
Email	admin@enterprisem3growthhub.co.uk

ERDF Internationalisation Programme

1). Export Academy supported by a network of Export Growth leads

Delivered by Hampshire and Surrey Chambers of Commerce in partnership with EM3 Growth Hub, the academy will identify and encourage international growth potential and support businesses to

- Start exporting
- Enhance their exporting skills
- Move into new markets
- Develop products/services for exporting

2). Pre-Export Programme for SMEs

The pre-export programme includes training and consultancy support to targeted SMEs. It will be delivered by the University of Winchester and the University of Surrey in partnership with the Growth Hub. The training and consultancy seeks to help shape the company's strategies to deliver their export ambitions and growth potential. The training sessions will comprise 6 half-day modules

3). Establishment of an Internationalisation Grant Funding Scheme

The Grant Funding Scheme will provide SMEs with access to grants of between £3,000 and £10,000 to support their internationalisation activity. To be eligible, SMEs will need to have completed a minimum of 12 hours of support obtained through the Academy and Pre-Export workshop Programme. Businesses must contribute 50% match.

4). Soft Landing Zone

The services put in place through the Internationalisation project will allow SETSquared Surrey (University of Surrey) to apply to be designated as a Soft landing Zone for the EM3 area. The Soft Landing Zone is an entrepreneurship centre with the capacity of serve foreign companies expanding outside of their domestic markets.

Key exclusions

The programme will target 175 SMEs in the EM3 LEP area focussing on start-ups, soft-landing companies, micro businesses and high growth scale up SMEs that have no or limited experience of international markets but are considering export as part of their growth strategy.

Organisation	EM3 LEP/ Hampshire County Council
Address	EM3 LEP Office, Belvedere House, Basing View, Basingstoke, RG21 4HG
Telephone/website	01256 262760 www.enterprisem3.org.uk
Key contact	Chris Quintana and Kathy Vuillaume
Email	chris.quintana@enterprisem3.org.uk ; kathy.vuillaume@enterprisem3.org.uk



DIT OVERVIEW OF EXPORT SERVICES FOR BUSINESS

The UK's Department for International Trade (DIT) has overall responsibility for promoting UK trade across the world and attracting foreign investment to our economy. They are a specialised government body with responsibility for negotiating international trade policy, supporting business, as well as delivering an outward-looking trade diplomacy strategy.

The aims of the DIT service are to

- Encourage and inspire businesses that can export but have not started or are just beginning; placing a particular focus on peer-to-peer learning;
- Inform businesses by providing information, advice and practical assistance on exporting;
- Connect UK businesses to overseas buyers, markets and each other, using sector expertise and networks in the UK and overseas; and
- Place finance at the heart of their offer.

1). Website

www.great.gov.uk is the government's single destination for information on UK trade, investment, tourism and education. The website provides comprehensive detail on tailored support and advice for businesses on how to start exporting or increase the amount of goods and services they sell overseas.

2). International Trade Advisers

International Trade Advisers (ITAs) are available to provide 1-2-1 support to exporting businesses. This is in-depth advice and guidance and focussed on high growth potential exporters with turnover greater than £500k where a product or service is suitable for exporting.

3). Internationalisation funding

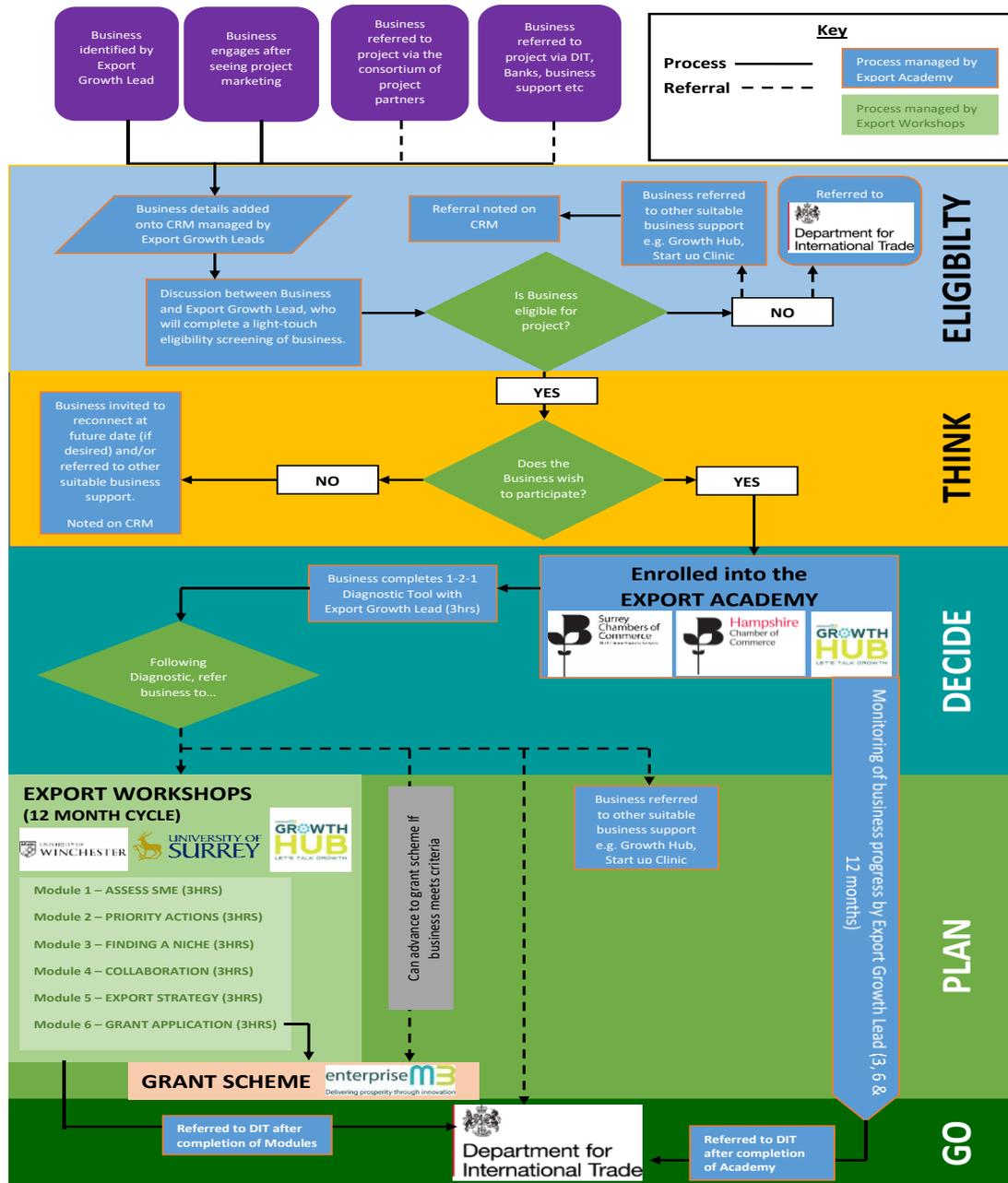
From April 2020, funding will be available to providing financial support to nudge SMEs, who would not otherwise have done so, into making investments in international trade activity. Project eligibility and suitability criteria will test and demonstrate why the business requires funding

Key exclusions

Open to all exporters

Organisation	DIT South East
Address	Unit 10, Fulcrum, 2 Solent Way, Fareham, PO15 7FN
Telephone	0330 300 0012
Website	www.great.gov.uk

Annex 2: Customer journey for ERDF Internationalisation programme



Annex 3: List of interviewees

The following people were interviewed for the partner consultation

- Andrea McCallum Hampshire County Council
- Gareth Roberts Hampshire County Council
- Fiona McMurray Enterprise M3 LEP
- Chris Quintana Enterprise M3 LEP
- Ian Martin Enterprise M3 Growth Hub
- Ben Raby DIT
- Julia Pearson WSX Enterprise
- Ross McNally/Jacqueline Highmore Hampshire Chamber of Commerce
- Louise Punter Surrey Chambers of Commerce
- Rob Lewtas Newable