



Department for
International Trade

Understanding businesses' use of export promotion support services

Research report

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Executive Summary

Context

International Trade Advisors (ITAs) provide support to businesses on trade in the English regions for the Department for International Trade (DIT). As part of delivering the Export Strategy¹, DIT is considering the role that their ITAs should play in delivering support to businesses and how this offer can be improved.

As part of this, a key consideration is ensuring that Government intervention is focussed on addressing market failures and that support from the private sector should be sought where it is available in order to stimulate the market for export promotion support.

Previous research conducted by DIT and Ipsos MORI with medium-sized businesses² identified an appetite from businesses to receive tailored support to help them overcome the barriers they face when exporting. Businesses felt that one solution could be to broker support to the private sector in order to stimulate the market for export promotion support. To understand whether such an approach could be feasible, DIT commissioned Ipsos MORI to conduct research to better understand the quality of support services that businesses are currently paying to use and any gaps in provision.

Aims and objectives

This research sought to bridge an evidence gap on what private sector exporting support is available to businesses, how useful or relevant this support is (that is its quality) and how much it costs. In doing so, the research explored current gaps in the market, and what role ITAs should take in the future.

Specifically, the study explored:

- Businesses' awareness and use of support services that are available when seeking to export their products and services;
- How effective this support is and whether businesses consider it to be good quality and value for money (the extent to which it addresses the barriers they face and meets their expectations);
- Any support services which businesses want or need but do not believe to be currently available.

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https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/737201/HMG_Export_Strategy.pdf

² DIT, 2021, Understanding Medium-Sized Businesses' Exporting Behaviour and the Role of DIT

Methodology and sample

Ipsos MORI conducted 53 qualitative depth interviews with businesses that had exported in the past 12 months, and had used at least one form of non-Government support to help them export. Interviews were conducted by telephone between 1 April and 23 May 2019.

Key Findings

Which organisations do businesses seek support from, and which barriers do they seek paid support for?

DIT's Export Strategy³ has identified six key barriers businesses face to exporting: lack of exporting knowledge, limited access to networks of clients and suppliers, high trade costs and lack of funding, limited internal capacity and capability, attitudinal barriers, and market-specific barriers.

This research identified that businesses were seeking private-sector support from a range of sources:

1. Functional support in reaction to specific barriers:

- **Shipping agents** – to collect and transport goods, deal with customs paperwork, and for general advice. This support helped them to overcome capability barriers, as well as knowledge barriers. Businesses paid on a per-export basis, with the price varying from £200 to over £1,000, depending on the size, type, sensitivity of the goods and the distance they needed to travel.
- **Market research** – to understand markets and potential customers better, and make contact with agents and buyers. This support helped them to overcome knowledge and network barriers, as well as to gain access to target markets. Businesses paid between £250 and £1,000 for market research, depending on the output required and audience being surveyed.
- **Consultants** – to provide market intelligence, strategic advice and business planning, support on trade missions and for dealing with processes. This support helped them to overcome knowledge, network and capability barriers. Consultant fees varied greatly.
- **Training** – to upskill staff on general exporting processes or on industry-specific regulations. This support helped them to overcome knowledge and capability barriers. For in-person training, businesses paid around £300 or £400 per member of staff.

2. Functional or advisory support needed to address regulatory or industry barriers:

- **Chambers of Commerce** – to sign off and approve documents, obtain licensing, attend training and seminars, and for general advice and guidance. This support helped to overcome regulatory, knowledge and network barriers. Businesses usually paid around £100 for an annual subscription to their Chamber of Commerce, or fees of approximately £30 per document approved.

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https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/737201/HMG_Export_Strategy.pdf

- **Industry bodies** – to understand market regulations better, provide endorsement or certification, and to find out about export opportunities. This support helped to overcome knowledge, network, and market-specific barriers. The cost of these services varied according to the industry body and the services they offered.

Figure 1: Summary of the export support services that businesses have paid to use and the barriers they were seeking to address

Networks/contacts			Private sector market research	Private consultancy		Industry bodies
Costs						Industry bodies
Capacity/resources		Shipping agents/freight forwarders		Private consultancy	Training and seminars	Industry bodies
Attitudinal						
Market specific	Chambers of commerce		Private sector market research	Private consultancy		
Knowledge	Chambers of commerce	Shipping agents/freight forwarders	Private sector market research	Private consultancy	Training and seminars	Industry bodies

Businesses did not usually recognise export support as a separate, standalone service, but rather as support ‘to do business’ or to aid growth. This suggests the ITA role should not be promoted exclusively as export support but as more general business support to help organisations develop and grow.

Businesses were aware that private sector support was available but were often unable to recall specific services or providers when asked, especially if they had not used these before. This suggests ITAs could have a role in raising awareness of the specific paid-for support available, ensuring those services reach the businesses that need them.

How effective is this support and do businesses consider it to be good quality and value for money?

A support service was more likely to be thought effective if it met any of the following criteria:

- achieved an immediate outcome (e.g. transported a product overseas);
- relevant and tailored to the business;
- increased understanding or knowledge;
- convenient to use and did not cause delays or issues;
- provided in a timely way;
- aided the business in multiple ways; or
- provided peace of mind.

Businesses interpreted ‘value for money’ in many ways. Views were influenced by business needs, the type of support being sought, and the price paid. In its most basic form, ‘value for money’ meant a service which:

- delivered the intended outcome, within the agreed budget and time;
- was competitively and appropriately priced; or

- provided a clear return on investment (even if in the long-term).

In most cases, businesses were pleased with the support services they had used, and considered them to be effective at overcoming barriers and providing value for money. Businesses that did not have such positive experiences either used another provider or in some cases decided not to export to that market as a result.

Businesses found it easier to link value for money and effective support to services which provided a tangible or immediate outcome. They found it harder to assess the value of long-term or more strategic support (that is, business planning), and so were less likely to pay to use these services. This suggests there is a need for a Government service provided free of charge to help with strategic business planning.

Are there any support services which businesses want, but do not perceive to be currently available to them?

The businesses interviewed for this study were all established exporters that felt comfortable and confident in their ability to export their goods and services. Nonetheless they felt there were some types of additional support which could benefit them.

Businesses wanted further support around the EU exit. Specifically, they wanted clarity and certainty about how the withdrawal would affect them so that they could make any required changes and keep their clients informed. Businesses felt that the government was the most legitimate and accurate source of information for this.

Exporting was costly, particularly at the outset, and so businesses wanted support to help address investment barriers. Smaller businesses wanted access to grants and other forms of funding. They reported difficulties securing funding at early stages due to investors' concerns about risks, particularly if returns were not immediate. Previous research by DIT and Ipsos MORI⁴ has already identified that businesses were more willing to pay for support services at a later stage, once they had already committed to exporting and faced fewer risks.

Businesses had a fairly narrow view of the opportunities available to them and were less likely to consider elements of exporting they did not know about. They were also less likely to consider the benefits of strategic export support services. Where businesses were receiving this type of support, for example through their Chambers of Commerce, they found it incredibly valuable. Businesses viewed face to face, telephone or webchat approaches to be the best channels for receiving tailored or advisory support.

Lastly, there was a need to have information and support in one place. Businesses found it time-consuming to search through many different websites for market-specific information.

The role of ITAs in the future

Private sector support is helping many businesses to overcome the barriers they face when exporting. However, there is a gap in the market for higher-level strategic support that ITAs currently provide. Previous research demonstrated that MSBs which had not used ITA support described this role when outlining what support they wanted. This suggests that much of what businesses need is already available through DIT and the ITA service. Further, this report highlights the need for a one-stop-shop that provides businesses with holistic and tailored support, and for this service to be free of charge at early stages.

⁴ DIT, 2021, Understanding Medium-Sized Businesses' Exporting Behaviour and the Role of DIT

There is also a role for ITA support to help businesses think differently about exporting, by encouraging them to reflect and think more strategically about their export performance. ITAs could then help connect businesses to support services that meet their newly identified needs. This means that ITAs have a role to play in raising awareness of private sector support, which is important for ensuring that services reach the businesses that need it.

Conclusions and recommendations

- Businesses did not usually recognise the services they had used as 'support to export', but instead as 'support to help grow the business'. DIT should consider framing advice and support offerings for businesses as 'support with growing the business' or equivalent, to increase their appetite for it.
- Businesses were seeking out support to help them overcome specific, practical barriers to exporting. This already exists in the private sector. However, businesses lack awareness of available services and associated costs outside of those they have already used. DIT should collaborate with providers, signpost businesses to these, and help to identify the most suitable provider to reduce costs and improve their experiences.
- Businesses are not seeking out support to inform their decision-making. There seems to be a role for the ITA in helping them to understand whether more strategic service offerings will be suitable/effective to ensure they do not miss out on trade opportunities. This could involve, for example, explaining the benefits of more strategic support in terms of opportunities, costs and long-term impact. In addition, ITAs should continue to provide high level or consultative support to aid planning and decision making.
- Businesses are not aware of issues they do not already know about. While digital and online support can answer specific questions, it cannot provide strategic thinking. As a result, it can make businesses' thinking more narrow. DIT should continue to provide vital strategic or consulting support to help businesses plan their export activities and growth. The support needs to be tailored and relevant. Face to face meetings, telephone calls or emails are the best channels to provide this.
- Previous research has identified a need for free support at early stages to avoid putting businesses off. Businesses are more willing to pay for services at a later stage, once the risks are more manageable. DIT should ensure that free support is available to those who need it at early stages.
- The price businesses are willing to pay for a service will depend on the business need, legal obligation, convenience, and availability of information. They are likely to pay more for a service if they recognise its long-term benefits or perceive it to make things easier, and less likely to pay for support that does not feel tangible. DIT could encourage investors and lenders to provide financial support for riskier or long-term exports.
- There are gaps in the market for support on EU-Exit, credit for day to day importing activities, and long-term finance. Collaboration with Chambers of Commerce that are already providing some of these services will help to ensure this reaches those who need it.

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Introduction

This report presents findings from qualitative research with exporting businesses, undertaken on behalf of the Department for International Trade. The research was commissioned to explore which private-sector support services businesses have paid to use to assist them in their exporting journey, their experiences of using these, and gaps in provision.

Context

International Trade Advisors (ITAs) provide support to businesses on trade in the English regions for the Department for International Trade (DIT). As part of delivering the Export Strategy⁵, DIT is considering the role that their ITAs should play in delivering support to businesses and how this offer can be improved.

As part of this, a key consideration is ensuring that Government intervention is focussed on addressing market failures and that support from the private sector should be sought where it is available in order to stimulate the market for export promotion support.

Previous research conducted by DIT and Ipsos MORI with medium-sized businesses⁶ identified an appetite from businesses to receive tailored support to help them overcome the barriers they face when exporting. Businesses felt that one solution could be to broker support to the private sector in order to stimulate the market for export promotion support. To understand whether such an approach could be feasible, DIT commissioned Ipsos MORI to conduct research to better understand the quality of support services that businesses are currently paying to use and any gaps in provision.

Aims and objectives

This research sought to bridge an evidence gap on what support is offered to businesses, how useful or relevant this support is (that is, it's perceived quality) and how much this support costs. In doing so, the research aimed to understand gaps in the market, and what role ITAs should take in the future.

Specifically, the study explored:

- Businesses' awareness and use of the support services that are available when seeking to export their products and services;
- How effective this support is and whether businesses consider it to be good quality and value for money (the extent to which it addressed their barriers and met their expectations);
- Whether there are any support services which businesses want, but they do not perceive these to be currently available to them.

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https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/737201/HMG_Export_Strategy.pdf

⁶ DIT, 2021, Understanding Medium-Sized Businesses' Exporting Behaviour and the Role of DIT

Methodology and sample

Ipsos MORI conducted 53 qualitative depth interviews with businesses between 1 April and 23 May 2019. Interviews were conducted via telephone.

Businesses were recruited based on their exporting behaviour and geographic location, with quotas set on the type of exports (goods or services), the sector and size of the business (by number of employees), and which markets they were exporting to. Businesses which had not exported in the past 12 months, and those which had not used at least one form of non-Government support were not included. The table below shows the number of participants recruited within each primary quota:

53 Interviews conducted with exporting businesses:

Type of Exports	Goods only	37
	Services only	8
	Equal mix of both goods and services	8
Business Size	Micro or small (0-49 employees)	15
	Medium (50-249 employees)	34
	Large (250+ employees)	4
Region	North East	5
	North West	10
	Yorkshire & the Humber	6
	East Midlands	5
	West Midlands	2
	East of England	9
	South East	6
	South West	5
	London	5
Exporting Market⁷	Western Europe	42
	Eastern Europe / Central Asia	30
	China & Hong Kong	25
	Asia Pacific	25
	South Asia	25
	Middle East	32
	Africa	26
	Latin America	17
	North America	27

⁷ Does not add up to the total number of interviews, as some businesses were exporting to more than one market.

Interpreting the findings

The qualitative interviews were conducted to obtain a spread of views from different types of businesses. Quotations and case studies have been included to provide rich, detailed accounts, as given by participants. Qualitative research is based on non-probability samples, and so its samples are not representative of the overall population. Therefore, the qualitative findings cannot be generalised to the exporting businesses population.

Awareness and use of support services

This chapter explores how aware businesses were of the support services available when seeking to export their products and services and how they found out about such services. It provides evidence on what drove their decisions, which export support services they had used and the barriers they were seeking to address.

Key findings

- Businesses viewed export support as part of general business support (rather than a separate, standalone service).
- A range of channels were used to find out about services, including word of mouth through business contacts, online or via email, signposting, historic use or the service being mandatory for the business.
- Five factors drove decision-making around which services to use:
 - Business need - where businesses needed a service to be able to export;
 - Legal need - where there was a compliance need to take up a service;
 - Lack of in-house expertise - where businesses lacked internal capacity to fulfil a service themselves;
 - Direct contact - businesses were influenced by being approached through personal contact, particularly if that individual offered a service tailored to their needs; and
 - Convenience - businesses could use one provider for different services for ease and to be cost-effective.
- Businesses paid for functional and advisory services to address the barriers identified in the *DIT Export Strategy*, as outlined in the section below. These have been grouped into six main categories: Chambers of Commerce, industry bodies, freight forwarders and shipping agents, market research agencies, private consultancy, and training and seminars.
- The strategic support provided by ITAs is currently not available in one place in the private sector, without charge.

Summary of the barriers to exporting

This chapter refers to the six, key interlinking categories outlined in the DIT Export Strategy.

The DIT Export Strategy identified that lack of knowledge was a common barrier faced by UK businesses. This barrier is defined as a lack of know-how related to exporting and what they need to consider when entering a new market. It also includes a lack of knowledge of where to access support and information, including navigating the processes in place around finance, compliance with standards and regulations, documentation and shipping. A second barrier was a lack of access to networks and contacts. This can range from customers, distributors, or agents.

Other barriers to exporting included access to finance. This is important for businesses to deliver on export contracts and can include access to trade and export finance for working capital or contract bonds. Some businesses needed to raise external funds to finance the large costs associated with exporting. Businesses faced barriers related to their lack of capacity, where there was limited access to the right personnel to effectively do business overseas, or lack of capacity to scale up and meet international demand. Attitudinal barriers referred to attitudes which limited exporting activities including misperceptions about the true costs and benefits to exporting, lack of confidence to pursue overseas sales and believing their product is not in demand. A lack of global awareness of the UK's strengths and capabilities also prevents overseas buyers looking for UK

businesses to enter their value chains. Lastly, there were market access barriers. There were systemic market-specific barriers such as tariff and non-tariff barriers which differ across markets and countries, including intellectual property frameworks and local regulations.

Businesses' recognition of export support

The businesses in this research did not usually recognise export support as a separate, standalone service. They found it difficult to recall which services they had used without prompting, even if they had used more than one. Their confusion stemmed from thinking about these services as part of wider businesses growth and development activities, rather than specific to exporting. This finding has strong implications for the future marketing of the ITA role to businesses. It suggests the ITA role should not be promoted exclusively as 'exporting support', but instead as part of general business support to help organisations develop and grow.

"We hold events and exhibitions overseas. Shipping companies help us with that. I don't know whether that strictly counts as export support."

Businesses that needed support with mandatory processes (such as obtaining certification), felt that they could only get this through specific bodies. Examples included the Medicines and Healthcare Regulatory Agency (MHRA) or documentation approval from their Chamber of Commerce. They did not know of alternative sources and had not looked in to this. Despite low inclination to search for alternative forms of support businesses were confident in their ability to find export support through internet searches, if they needed to do so.

Businesses heard about available support from either direct or indirect signposting. Direct signposting took the form of recommendations from trusted contacts such as suppliers, consultants and trade representatives. This usually occurred after the business had acknowledged that they faced an exporting barrier. Indirect signposting came from cold-calling, emails and newsletters from potential suppliers such as freight forwarders and shipping agents, Chambers of Commerce, and industry regulated bodies. Businesses were unable to recall the specifics of what they had heard, but were aware that these indirect sources were available. This suggests the ITA can build upon the more direct signposting role by raising awareness of the specific paid-for support available, which is important for ensuring those services reach the businesses that need it.

"When I spoke to my Chamber of Commerce Representative about whether it's worth getting Authorised Economic Operator (AEO) status, they directed us to consultants we could use."

Other businesses were aware of export support from their previous experience in the industry. Those that had worked in their industry for many years reported that they had a general awareness of the types of exporting support available. This was because they were more likely to have personal experience of using these throughout their career, or have worked in other companies that have either used or provided export support services. This finding suggests that ITAs could have a role in raising awareness of services among less well-established businesses and those with less expertise and experience.

"I knew about [logistics company] when I took up the current service, but only because I used to work for them."

Where businesses find out about available services

Businesses did not report any issues with finding out what support was available to them. Sources of information are described in this section, with no single channel standing out as the most prominent.

Online

Once a barrier had been identified, businesses would conduct an online search to find out what specific support was available, investigate the quality of that support, and compare costs between suppliers. Online searches were conducted to overcome practical and functional barriers; businesses were less likely to use online searches to help with strategic thinking. For example, one medium-sized Manufacturing business needed to expedite a Chinese visa in a very short timeframe, which they knew usually took a long time. They used a search engine to find providers that could do this quickly, and came across a company which met their requirements so decided to use their service.

Online sources were sometimes indirect, for example by informing businesses of services through emails, either as a cold-contact from a provider or as part of a mailing list subscription.

Networks

Business networks and contacts provided information by word-of-mouth. These contacts could recommend industry-specific support services that they had heard about or used themselves. Networking functions and seminars were also seen as crucial for sharing information on what support services were available to businesses that were similar in size, sector and situation. This allowed businesses to hear first-hand how others were tackling certain barriers that they may also be facing.

“Seminars give the chance to speak with other businesses that perhaps deal with the same problems or have the same issues. So, there’s quite a lot of networking there with local SMEs. That’s the main thing for an SME, because we haven’t necessarily got the skillset like large businesses who have exporting specialists.”

Less commonly, businesses would find out about services through personal contacts. For instance, one business found out about a ‘one-man band’ freight forwarding service from an ex-employee. This provider was able to take care of their exporting from start to finish.

Signposting

As mentioned earlier in the chapter, businesses could find out about export support through direct or indirect signposting from the current providers they were using. Signposting to services could come from direct contacts, such as representatives and consultants, who directed businesses to specific services tailored to their needs. More indirect, less tailored signposting would come from freight forwarders, Chambers of Commerce and industry regulated bodies who would regularly share up-to-date, generic information with businesses on what services could be taken up including seminars, training, network functions and additional logistical services on offer.

Mandatory or historical service

Businesses that used a mandatory exporting service or had used a service for many years could not easily say where they had found out about it. For example, businesses that had been exporting for many years had always used their Chamber of Commerce for mandatory documentation approval. Experienced individuals described these service as something they had ‘always’ known about. Those new to the role reported it as something the business had always done.

“All my working life I’ve seen certificates go through the Chamber of Commerce.”

What drives decision making?

Once businesses were aware of potential sources their decision to pay for and use support was driven by five main factors: operational need, compliance, knowledge gaps, communication and convenience. These factors are explored in turn below.

Business need

Businesses experiencing practical or process-related barriers to exporting needed external support because they did not have the capacity or capability to continue in their export journey without it. Examples included use of a freight forwarder or shipping agent to transport goods. Businesses typically knew about these barriers in advance so they proactively sought out this support to get their exporting off the ground.

Legal compliance

Businesses facing legal or regulatory barriers when exporting needed external support to ensure they were compliant. Examples included obtaining legal documents to be able to export into a certain country. Without this, their exports would not be considered legitimate and compliant. Some businesses sought out legal support proactively, but others only came across this barrier once they had (unsuccessfully) attempted to export. Without having legitimate paperwork in place, they faced delays and additional costs.

Lack in-house expertise

Another key reason for using private sector support was because the business lacked in-house expertise to carry out a service themselves, but needed to make their exporting more efficient. For example, businesses that did not have the capability to conduct market research sought out private sector companies to do this on their behalf. Businesses would also use external training providers to upskill their staff on specific exporting processes.

Direct contact

Businesses preferred to use services where they could contact an adviser face-to-face or over the telephone (rather than services being purely delivered online). They thought that having a direct contact would enable their specific challenges to be addressed more effectively, and the advisor could also point them towards other tailored services that may be of benefit to them. This suggests that while businesses may seek out an ITA for specific issues, there is scope for ITAs to help businesses become more strategic by opening up export possibilities that they had not previously considered.

Convenience

Where businesses were using a provider that offered additional export-related services, they would take up those other services out of convenience and ease. This was particularly the case where the business had an ongoing, trusted relationship with the provider. If a provider offered high quality additional services businesses generally preferred to have their export support in one place. Businesses also considered the perceived return on their investment when deciding which service or services to use.

“We have customers in Nigeria and in Australia who prefer, and it makes it better for us, to use their shipping agents on their own accounts.”

Services businesses were paying to use

Businesses had paid to use services that fulfilled a specific business need as well as for more general advisory support. We have identified six types of service providers. These fall broadly into two groups, either functional support sought in reaction to specific barriers, or functional or advisory support needed for regulatory barriers.

Functional support needed for regulatory barriers

Chambers of Commerce

Businesses across all regions and sectors reported using their local Chamber of Commerce for exporting support. This was largely in relation to getting export documents approved, which was done online through the E-Z Cert website, and allowed them to export to countries with particular customs requirements. Those without a Chamber of Commerce membership were using this service on an ad-hoc basis and reported paying around £30 to £40 per document. Businesses with a membership paid around £100 annually for their subscription, and tended to make use of the additional services and advisory support that the Chamber of Commerce offered.

Additional services included seminars and training, and advice and support from trade representatives. The seminars were seen as having a dual benefit of educating people on areas of exporting as well as providing a networking opportunity to meet like-minded businesses. Their Chamber of Commerce trade representative would act as a direct contact for businesses, offering advice on grants, gaining contacts and setting up meetings, and supporting trade missions. As well as this tailored support, businesses were able to obtain general advice and guidance on exporting such as on trade shows, assistance with form-filling, sending cargo and the logistics of exporting to particular countries.

Overall, businesses sought support from their Chambers of Commerce to address knowledge barriers to exporting. They received support in terms of documentation approval, seminars, training, advice and guidance, and access to Trade Representatives. This support helped them to navigate export processes such as obtaining finance, and being compliant with standards and regulations. Advisory and functional support around shipping to countries with specific requirements helped these businesses to access new or unfamiliar markets.

Industry bodies

Businesses received regulatory and networking support from industry regulated bodies which could be specific to the sectors they were operating in. Industry bodies included the MHRA, the Energy Industry Council, business councils and the Institute of Export and International Trade. Businesses paid these bodies for general export advice specific to their sector, networking events and updates on available training and grant funding. This helped to address business' knowledge of exporting by giving them more information on what they can sell, certification, investigating counterfeit products and ensuring processes were followed. Barriers to forming networks were intended to be addressed by the receptions, conferences and networking opportunities offered by the industry body. Businesses sought to address finance barriers through the practical information on grants and funding available for trade shows provided through the body. The cost of these services varied according to the industry body and the services they offered.

“We are certified by the MHRA which does help us to export. That is from the Government, and we pay for that service. They've always been there in one form or another.”

Functional support sought in reaction to specific barriers

Shipping agents and freight forwarders

Smaller businesses opted for one freight forwarder to take responsibility for the whole export process from start to finish. The freight forwarder would obtain the necessary licences, collect the goods, provide tracking numbers, and complete the correct customs and exporting paperwork. This addressed those smaller businesses' capacity and financial barriers to exporting, as it was more cost-effective and less time consuming for a provider to take care of the process. These businesses also had a limited understanding of the practicalities of exporting, and used freight forwarders to address this knowledge gap. Larger businesses with diverse business needs tended to use different freight forwarders to address multiple barriers. For example, businesses could use one that specialised in dangerous goods or large shipments and another that focused on next-day delivery. This helped to address knowledge issues around the processes of exporting more niche products, with next-day delivery addressing capacity issues by providing a competitive service that the business could not do themselves.

Where businesses were using freight forwarders and shipping agents for ongoing, repeated processes they tended to have trusted, long-term relationships with them. Businesses reported using established providers such as PSP Worldwide Logistics, DHL, Fedex, TNT, UPS, Expeditors and Schenkers. One small telecommunications business reported using a single consultant freight forwarder to undertake all of their exporting work because this person was a trusted ex-employee of the business. The price of these services varied depending on the shipment. Businesses paid on a per-export basis, which could range from anywhere between £200 and £1,000 depending on the size, type and sensitivity of the goods.

Market research agencies

Businesses used private sector market research to support their export growth. This tended to consist of Excel databases produced by market intelligence providers that contained lists of potential buyers and users within the business' industry in specific markets. The research was used to address market-specific knowledge and networking barriers by giving businesses the contacts needed to enter into new markets. The database would include names, emails, addresses and phone numbers to expand their understanding on who and where to target in other countries. For example, one business commissioned research into the Canadian fuel market while another received a database of buyers to target retail toy customers in other countries.

Businesses had poor recall of which specific organisations were providing these services, although one was able to say that they had used ATEST for insight on consumers in their target market. The price of these services varied according to the level of detail and the volume of contacts provided, but businesses reported that they cost anywhere between £250 and £1,000.

“A couple of years ago we paid for a Buyers' Database...for retail buyers across the world. It wasn't very expensive.”

Private consultants and professionals

Consultancy support was sought by those who did not have the capacity or need to hire someone permanently to provide expertise on a specific exporting barrier. One livestock business paid for international consultants, RH Consultants at Dover, to take responsibility for any goods exported outside of the EU. This was because they did not regularly export outside of the EU so outsourced the exporting paperwork to address their lack of understanding of the process and internal resources to complete this and comply with procedures. Businesses brought in individual consultants on a fixed-term basis for their expertise, including for marketing of their exporting brand and intellectual property to ensure the business' trademark was secure and handled professionally.

To address market-specific barriers to exporting within certain countries, businesses paid for local agents, language and culture specialists and brokers within those markets. Language and culture specialists were sought to address informal market-specific barriers such as cultural attitudes and practices as well as translation. Local agents were usually formally mandated by the company the business was trying to sell their services to, and allowed the business to have representation in the market they were exporting to. Businesses typically paid agents a fee of between 5% and 15% of the sales value. Brokers also enabled businesses to address challenges around forging networks and contacts as they would set up connections with institutions in different markets.

Training and seminar providers

Businesses had used training through their Chambers of Commerce or Government-led training from DIT, or UKTI some years ago and had also paid for private sector training. They paid for face-to-face or online training sessions when they wanted reassurance that their exporting practices were correct, or to address a particular knowledge gap. For example, one business reported that a long-serving employee with exporting expertise was retiring so they needed to commission training for a replacement member of staff. Businesses reported using private sector training organisations such as Mantissa, Strong and Herd, and Salestrong which gave basic overviews and introductions to exporting as well as on more specific areas. Training costs varied from £300 per person to over £1,500 for a 3-day course.

“The training we accessed via Open to Export we funded ourselves in the region of £400. One is a step-by-step guidance on completing customs declarations for our dispatch team to understand what they’re signing for.”

Summary

Awareness of specific exporting support services was generally low and could not be readily distinguished from wider business growth and development practices. There is a role for ITAs to signpost businesses to services and ensure these services are reaching those who need it.

Once businesses were made aware of services, the process of using them were deemed to be relatively straightforward. Decisions on use were influenced by whether there was a business or legal need for the service, their internal resourcing, having a direct contact to communicate with, and convenience.

Experiences of using support services

This chapter explores the experiences of businesses that have paid to use support services. It provides evidence on how effective this support has been at helping businesses to overcome the barriers they face when exporting, and their views on whether the support was good value for money for their business.

Key findings

- A support service was more likely to be thought of as effective if it met the following criteria: achieved an immediate outcome, was relevant and tailored to the business, increased understanding or knowledge, was convenient to use and did not cause delays, was provided in a timely way, aided the businesses in multiple ways, or provided peace of mind.
- Businesses' interpretation of 'value for money' varied by their business needs (often a product of sector and size), the type of support they had used, and the price paid. Broadly, 'value for money' meant a support service which:
 - Delivered the intended outcome, within the agreed budget and time;
 - Was competitively and appropriately priced; *or*
 - Provided a return on investment (even if in the long-term).
- In most cases, businesses were pleased with the support services they had used and considered them to be effective at overcoming barriers and providing value for money. There were a number of instances, however, where businesses did not have such positive experiences and sought an alternative supplier or even decided not to export to that market as a result.
- Businesses found it easier to link value for money and effective support to services which provided a tangible or immediate outcome.
- They were less sure about the value and availability of long-term or more strategic support to their business, and as a result they were less likely to pay more to use these services.

The effectiveness of support services

Businesses generally found it easier to describe a support service as being 'effective' if it provided an immediate or tangible outcome (such as transporting a product overseas or providing certification and licensing). However, perceptions were more complex when it came to other types of service, including more strategic support. The research found evidence of seven criteria which influenced the extent to which a support service was described as 'effective':

- achieved an immediate outcome
- was relevant and tailored to the business,
- increased understanding or knowledge,
- was convenient to use and did not cause setbacks,
- was provided in a timely way,
- aided the businesses in multiple ways,
- provided peace of mind.

This section explores these seven criteria in turn.

Achieving an immediate outcome

Support services which provided businesses with tangible or immediate outcomes were generally seen as more effective than those which did not. Examples included freight forwarding services which transported a product to the intended destination, or Chamber of Commerce services which delivered the certification or license that the business needed to be able to export. These types of services were seen to be straightforward, easy to use and helped businesses to progress their exports. Businesses that had used them were generally positive about their experiences and felt these services were effective. There was evidence that businesses had some inertia when using these services for the first time and were reluctant to pay higher fees associated with smaller providers. However, positive experiences and convenience led to businesses becoming willing to pay more money to continue using these types of services.

“Rather than going cheap-cheap, we want to make sure that the quality of service and next-day delivery is actually spot on. We'd rather pay a bit of a premium to make sure we get quality.”

Receiving relevant and tailored support

Businesses had good experiences of using support, and felt these were more effective when the services were relevant to their industry and size and tailored to their needs. This typically included databases of clients or agents which successfully generated sales or helped businesses find customers who were interested in their product. As an example, a Wholesale retailer in the East of England had paid €300 to access a database containing names and contact details of potential buyers. They spoke positively about how the service had enabled them to find retailers who were willing to invest money in their target market.

“We were introduced to the in-trade representative who gave us loads of great advice and had lots of contacts. He really helped us in our exporting business.”

More generic types of services were felt to be of little benefit and so businesses tended to be least satisfied with them. For example, a market research agency in London had used a lead-generating agency to support with building awareness of their brand overseas. However, they found that the agency did not have sufficient industry knowledge and contacts, and their trade shows and conferences were not effective. This business felt that investing in specialist consultants would have been more effective. Another business had paid to access a database of potential retailers, but found many of the contact details to be out of date and unusable.

Increasing knowledge and understanding

Support providers who spent time communicating with businesses and educating them about the complexities of trade were more appealing. Businesses which had used Chamber of Commerce services or advisory support spoke positively about these if they had gained knowledge as a result, and were able to apply that knowledge to future activities. This was particularly important for those seeking to find out more about the basics of exporting, their target market, or any trade restrictions that could affect their strategy. As an example, a manufacturing business in the North East spent time with a representative from their Chamber of Commerce who explained their paperwork requirements and the relevant restrictions for shipping goods to the Middle East. As a result, this business felt upskilled with regards to issues such as licensing, export terminology and obtaining documentation. Businesses described this improved knowledge as being ‘extremely helpful’ and ‘very good’, particularly if it helped to ease such processes in the future.

“If we ever ask [our Chamber of Commerce] more complicated questions then they're not the best. I think they're more paper-pushers than exporting experts. But for what we need them for, they're fine.”

Similarly, an IT business in the West Midlands had paid a consultant to provide market intelligence on a prospective market. This intelligence meant the business decided not to progress with exporting to Canada, saving them time and money in the long run.

"It was incredibly useful because it stopped wasting resources. We found Canada would be a very different market...they didn't need the level of information processing we provide. It helped us rule out Canada as a prospective market."

Being convenient and without setbacks

Businesses that had experienced setbacks and delays were less likely to describe the support services they had used as being effective, whilst those who felt the services were convenient to use generally had better experiences. Businesses that had used freight forwarding services and had not encountered delays or problems felt this support was 'very effective'. Similarly, a construction business in the East of England had paid to use Chamber of Commerce services to gain document certification, which was convenient as it could be done online.

"It's only the really decent shipping companies that manage to get everything to Nigeria without it being destroyed. People complain about the cost, as they are expensive, but they are very good."

On the other hand, a higher education business in the South East had paid to use brokerage services in various markets to set up connections with institutions overseas who could also connect them to prospective students. They had encountered many issues with the broker, particularly around transparency over payments and the broker not being adequately qualified or vetted. This had caused them delays and additional costs.

Being timely

Delays were a common complaint among service users. Those who were able to resolve their problems and access the service in a timely way were most positive about their experiences. For example, a manufacturing business in Yorkshire and the Humber had accessed private sector training services to upskill their staff around the basics of exporting. They liked this support as it was local to them, accessible, and timely. In comparison, this business felt that Government-led training would be provided less frequently, and staff would need to travel as the training would only be provided in one location. Other businesses preferred services to be readily available, and wanted to receive prompt responses to their calls and queries.

Providing wider benefits

Support services that offered wider benefits were popular among businesses. Wider benefits included helping to develop their export strategy, saving time or money, and improving market access. As an example, a manufacturing business in the West Midlands was offered advisory support by their Chamber of Commerce. As well as providing advice, their in-trade representative was able to support the business on a trade mission, put them in contact with grant providers and agents in the target market. The business felt that this helped to open doors, especially as the local agent was able to facilitate entry to a trade fair, set up meetings with prospective clients and provide a translator to help with discussions.

Those who had positive experiences of using paid-for support felt this could have been improved if the provider was able to supply add-on services. For example, a business that had used freight forwarding services wanted the provider to also assist with customs paperwork or provide insurance for large goods transportation.

Providing peace of mind

Businesses spoke positively of providers who they could trust and who took away the worry of exporting. They were also more likely to use these services again in the future. There was evidence that many businesses regularly used the same freight forwarding company to collect and transport their goods, provide tracking services, and deal with any customs paperwork. These businesses felt that exporting would be tricky and time-consuming without their usual provider.

“It’s extremely useful – it takes away the worry, we know it's done correctly and the correct commodity codes are used. We know it's been delivered. For us it's as easy to send something to the UK as it is abroad using him.”

There was evidence that some businesses had built close working relationships with their providers over time. These providers also provided advisory support, by informing businesses when certain tasks were not possible within timeframes or budgets, and by highlighting any potential risks.

Value for money

Businesses' interpretation of 'value for money' varied by their business needs (often a product of sector and size), the type of support they had used, and the price paid. Broadly, 'value for money' meant a support service which:

- a) Delivered the intended outcome, within the agreed budget and time;
- b) Was competitively and appropriately priced; *or*
- c) Provided a return on investment (even if in the long-term).

These criteria were interlinked and a support service needed to meet at least two of these before it could be considered 'value for money'.

Delivering the intended outcome

Businesses agreed to pay for a service with an expectation of what it would deliver. In these cases, 'value for money' meant a service that delivered or exceeded what was expected, and importantly, that this was done on time and to budget. As an example, a freight forwarding service which delivered the product to its destination on time and undamaged, was thought to be 'good value for money'.

Businesses tended to seek support when they could not overcome a barrier in-house or with the resources that were available to them. Therefore, if the support service offered a solution to this barrier it was considered to be 'value for money'. This was more common for businesses that had sought specialist advice or support (for example, Human Resources support as part of a support package from their Chambers of Commerce or a specialist marketing consultant).

However, not all businesses had positive experiences. A telecommunications business in the East of England used two separate freight forwarders to transport either large goods or dangerous goods. Whilst they have had positive experiences with transporting low-risk items, they were less satisfied with the support received around high-risk items. The business felt that the provider needed to improve their account management processes and escalation processes. Specifically, they found that the service centre was based too far away, and staff were not able to resolve their queries in a timely way. The business has not changed their provider as a result, however, as they feel they have a limited choice of providers that can deliver dangerous goods to certain markets.

Being competitively and appropriately priced

It was common for businesses to seek out support services that were competitively and/or appropriately priced. The price paid needed to be appropriate to the outcomes. Businesses were, for example, unlikely to speak positively about services that cost thousands of pounds yet only helped to generate hundreds of pounds' worth of business. Similarly, competitive pricing meant that the support service was either unique, or priced lower than what other suppliers could offer. Businesses typically had low awareness of alternative services, however, and so most found it difficult to compare costs between providers.

Package services encompassing a range of different types of support, such as Chamber of Commerce subscriptions and exporting agents, were seen to be better value for money. As an example, a Chamber of Commerce representative put a manufacturing business in contact with an overseas agent. This agent was proactive and supported the business on trade missions, facilitated entry to tradeshows and meetings with prospective clients, and provided a translator for these meetings. Businesses that experienced these package services liked the long-term and tailored support (which was similar to services already provided by some ITAs), and felt it would have been more expensive to pay for all these services individually.

However, some businesses had used services which they felt were not appropriately priced. A market research agency in London sought support from a lead-generating agency to help overcome barriers around marketing, brand awareness and client relationships. In the initial stages, the business was hoping that the agency would provide well-qualified leads but now felt that the agency was very demanding on their time and did not act autonomously. In time the business decided to stop using these services and instead recruited a marketing consultant, who had relevant industry expertise and was able to build a network of agents in the target market. After the six-month placement was complete the business then brought that skillset in-house.

Providing a return on investment

This criterion was more important when businesses used less tangible services, such as access to trade shows, conferences or databases of agents and clients. If the businesses could directly attribute a sale or contact with clients or agents in the target market to the support service, it was thought to be good value for money. Therefore, support services which were relevant and tailored to their business were more likely to be considered value for money. Importantly, businesses were interested in long-term outcomes as well as short-term outcomes, and so the support service did not necessarily have to achieve a return on investment immediately. In addition, the return did not necessarily need to be in terms of sales. Other positive outcomes included reducing costs, making the business legally compliant, or reducing delays such as stops at customs.

However, some businesses felt they had not received sufficient return from a service they had paid for. For example, a wholesale trader in the East of England had paid to access a database of buyers in their target market which they did not consider to be good value for money. The database did not lead to any sales and the contact details became out of date very quickly. As a result they pursued a different strategy which they felt would be less risky, which was to showcase their products at tradeshows. Although it increased their costs, this strategy was more effective at generating sales as the business was able to meet customers face-to-face, develop relationships and demonstrate their products.

Summary

Perceptions of value for money were relative to the return businesses were getting from the services they had used. Businesses found it easier to think about the value for money of more tangible services or those with an immediate outcome, and so were more likely to feel these were worth paying for. Businesses were less sure about whether long-term or more strategic support

would be beneficial or effective. There is a case for ITAs to play a role in highlighting the importance and benefits of more strategic support to businesses, to help them make the right choices, as if businesses cannot see the value of using this type of support they are less likely to pay for it.

Desired export support services

This chapter outlines unmet demand reported by businesses, and considers the role for the ITA in brokering these types of services.

Key findings

- The businesses interviewed for this study were all established exporters who felt comfortable and confident in their ability to export. Many were not seeking additional advice or support but felt that, if needed, they could access this easily.
- However, businesses were able to identify areas where they would like additional support:
 - Information and guidance around how to prepare for the EU exit;
 - Credit lines for compulsory services, such as Chamber of Commerce approval for documentation;
 - Financial support and guidance for those seeking to export, including tax breaks/relief;
 - Information and guidance on market-specific issues or on exporting processes.
- The research also identified a gap in terms of more strategic support for businesses to identify support services they could benefit from. There is a role for ITAs to help businesses think differently about exporting, by encouraging them to reflect and think more strategically about their exporting approach. ITAs could then help connect businesses to export support services to meet their newly identified needs. It was suggested that webinars or online chat facilities, or even regular face to face meetings could be a useful way to deliver this support.

Gaps in provision of export support services

The businesses interviewed for this study were all established exporters who felt comfortable and confident in their ability to export. Many were not seeking additional advice or support but felt that, if needed, they could access this easily.

“Normally if we've got an issue we'll find someone who can help us. We're a global business so sometimes if we don't have the expertise on-site we can find it within the organisation on other sites. We'll talk to people and they can either help us out or point us in the right direction.”

Nonetheless they felt there were some types of additional support which could benefit them.

Information on EU-Exit

At the time of interviewing, the terms of the UK's withdrawal from the EU had not been agreed. Exporting businesses wanted clarity and certainty about how the withdrawal would affect them, so that they could make any required changes and keep their clients informed. Businesses reported that the uncertainty was affecting relationships with existing and new clients, both within and outside of the EU. However, businesses did not feel they could proactively seek information on the EU-Exit until the final outcome was known as they did not want information which could become outdated.

Businesses felt that government would be the most legitimate and accurate source of information about EU-Exit. They did not expect to pay for this information. Businesses who relied on shipping agents and freight forwarders to manage the export process for them expected that these organisations would also manage any changes to the process after EU-Exit, and were willing to pay a fee for this type of support. Businesses that were most concerned about changes after EU-

Exit were willing to pay for an advisor to visit and audit their current processes and advise them on what they would need to change.

"I can't see the point in paying privately for someone to tell you exactly the same as what the Government are going to tell you".

Credit lines for export support

Businesses using Chambers of Commerce for export support services, including document validation required to export goods, reported that they needed to pay upfront for these. Businesses felt that exporting could be an expensive process and that being able to access credit for Chamber of Commerce services could make this process easier and more affordable in the short term.

Financial advice and support

Given the expense associated with exporting, particularly at the outset, businesses wanted support to help address this initial investment barrier. Smaller businesses cited access to grants and other forms of funding.

Businesses whose products required a large investment and took a long time to get to market, or who exported to risky markets, found it hard to access finance from banks due to the associated risk or long term nature of the investment. This was also the case in sectors where demand was subject to extreme seasonal or annual fluctuations. Businesses in this position expressed a desire for more accessible or specialist finance to help them weather shorter term financial fluctuations, as they felt there could be a significant reward if they were able to do so. This included financial incentives for those seeking to export, such as tax relief.

Businesses also wanted financial advice and guidance, for example on how to open a bank account in a foreign currency and how to estimate documentation costs.

Information on exporting

Businesses were keen to see support aimed at increasing their knowledge of export processes. They felt a succinct exporting manual would be helpful for those seeking to start exporting or grow their exports in new markets. It was important that this information was easy to understand and available in one place, ideally online. Specific topics they wanted information on included: VAT, shipping, overseas agents, trade credit, finance, product liability, and insurance.

"What's missing from my point of view is a beginner's guide to exporting. If you were starting from afresh you just wouldn't know where to start."

Market-specific information on exporting

Businesses reported that information about exporting to a particular market was in a number of different places and it was time consuming to collate all of the information required. They wanted the information to be in one place, and to cover: demographics; the market for their product / service; barriers to access; local laws and customs; documentation required; local suppliers and ideally contacts. Businesses also wanted support finding legitimate contacts in markets they wanted to export to and a way of assessing the legitimacy of these. It was felt that this could help businesses make decisions about entering new markets more easily. They also wanted up to date, accurate and accessible information on commodity codes.

Strategic support services

Businesses looked for support with specific barriers when they had made a decision to export. However, they were less likely to consider elements of exporting they did not know about, meaning they had a fairly narrow view of the opportunities available to them. They were less likely to consider the benefits of strategic export support services. However, businesses that were receiving this type of support, for example through their Chambers of Commerce, found it incredibly valuable. One business reported working with a trade representative through their Chambers of Commerce who was highly proactive in arranging regular meetings to discuss their export strategy and putting them in touch with relevant contacts around the world. He arranged for them to visit Japan and ensured they were able to meet the right people when they were there. The business paid for this trip but felt that without the support of the trade representative it would have been much less valuable. This support also helped them think about their exporting opportunities in a more strategic way.

Businesses were focused on their current approach to exporting and so were not necessarily thinking about all available opportunities. At the end of each interview, businesses were asked about other types of support they may benefit from which they were not currently using. Although businesses said they were happy with their current export performance and approach, by the end of the interview there were examples of businesses requesting specific services which are already available but which they had not considered previously. This suggests that the process of reflecting on their approach to exporting had helped businesses start to think differently about the types of support they needed.

Types of support requested by businesses which were already available were: support with paperwork and forms; market research and analysis; contact databases; export training; networking and exhibition opportunities and marketing support.

Businesses were unaware that help with their exporting strategy was available or could be beneficial for them, and so were unlikely to seek it out. This means it will need to be offered to them proactively. There may also be a reluctance to pay for this support as it is less tangible and may not have an immediate outcome. At the same time, it was important to businesses that strategic advice was impartial.

"I would like it to be from someone impartial, because if you go to a third party you've always got at the back of your mind 'are they making money out of providing all these documents?' With the Government, I don't mind paying a fee because it covers their costs and is not a profit-making opportunity."

Summary

This suggests that there is a role for ITA support to help businesses think differently about exporting, by encouraging them to reflect and think more strategically about their export performance. ITAs could then help connect businesses to export support services to meet their newly identified needs. It was suggested that webinars or online chat facilities, or even regular face to face meetings could be a useful way for ITAs to broker this support.

Conclusions and recommendations

This research has provided evidence on what support is offered to businesses, how useful or relevant this support is (that is, the quality) and how much this support costs. This section presents our recommendations for what role ITAs should take in the future.

- Businesses did not usually recognise the services they had used as 'support to export', but instead as 'support to help grow the business'. DIT should consider framing advice and support offerings for businesses as 'support with growing the business' or equivalent, to increase their appetite for it.
- Businesses were seeking out support to help them overcome specific, practical barriers to exporting. This already exists in the private sector. However, businesses lack awareness of available services and associated costs outside of those they have already used. DIT should collaborate with providers, signpost businesses to these, and help to identify the most suitable provider to reduce costs and improve their experiences.
- Businesses are not seeking support to inform their decision-making. There seems to be a role for the ITA in helping businesses understand whether more strategic service offerings will be suitable or effective to ensure they can grow their exports. This could involve, for example, explaining the benefits of more strategic support in terms of opportunities, costs and long-term impact. In addition, ITAs should continue to provide high level or consultative support to aid planning and decision making.
- Businesses are not aware of issues they do not already know about. While digital and online support can answer specific questions, it cannot provide strategic thinking. As a result, it can narrow businesses' thinking. DIT should continue to provide vital strategic or consulting support to help businesses plan their export activities and growth. The support needs to be tailored and relevant. Face to face meetings, telephone calls or emails are the best channels to provide this.
- Previous research has identified a need for free support at an early stage to avoid putting businesses off. Businesses are more willing to pay for services at a later stage, once the risks are more manageable. DIT should ensure that free support is available to those who need it at early stages, but could be put off by risky investments.
- The price they are willing to pay for a service will depend on the business need, legal obligation, convenience, and availability of information. They are likely to pay more for a service if they recognise its long-term benefits or perceive it to make exporting easier, and less likely to pay for support that does not feel tangible. DIT could encourage investors and lenders to provide financial support for riskier or long-term exports.
- There are gaps in the market for support on EU-Exit, credit for day to day importing activities and long-term finance. Collaboration with Chambers of Commerce that are already providing some of these services will help to ensure this reaches those who need it.

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. We are a specialised government body with responsibility for negotiating international trade policy, supporting business, as well as developing an outward looking trade diplomacy strategy.

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