

**Export Promotion Practitioner  
Consultation**

**Final Report for**

**Scottish Enterprise**



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## Table of Contents

Executive Summary .....	1
Emerging Findings .....	1
1    Background and Approach .....	4
1.1    Background.....	4
1.2    Approach.....	5
2    Consultation Feedback.....	6
2.1    Population overview.....	6
2.2    Respondent profile .....	6
2.3    Barriers to exporting.....	10
2.4    Effectiveness and key success factors .....	18
2.5    Effectiveness of the Export Growth Plan .....	24
2.6    Future challenges and opportunities.....	30
2.7    Team Scotland/Public Sector Trade Support System.....	33
2.8    SOSE specific questions .....	37
2.9    HIE specific questions .....	37
3    Emerging Findings .....	39
Appendix 1: Detailed findings tables.....	42
Appendix 2: Export Promotion Research and Evaluation – Business-facing staff consultation .....	59

## Executive Summary

The Scottish Government is leading an evaluation of export promotion support and services offered to companies in Scotland<sup>1</sup> which is scheduled to report in 2026.

This support is delivered through its partners: Scottish Enterprise (SE), including its international brand Scottish Development International (SDI), Highlands and Islands Enterprise (HIE), South of Scotland Enterprise (SOSE) and Scottish Chambers of Commerce (SCC).

The purpose of the evaluation is to examine the effectiveness and impact of support delivered to companies and identify potential areas of improvement. The evaluation uses a mixed method approach which includes both a practitioner survey and a business survey. This report covers the first of these two formats i.e. the practitioner survey only.

On behalf of Team Scotland partners, Scottish Enterprise commissioned Frontline to undertake this survey of export promotion practitioners across all above mentioned delivery partners.

The commission focussed on gathering qualitative feedback from practitioners via an online survey and one to one consultations. It aimed to capture practitioners' perspectives, including themes and operational insights on a wide range of issues rather than precise quantification of impact or effects of support.

Feedback from export promotion practitioners is a key strand of the Team Scotland export promotion evaluation mixed method approach. As noted, direct feedback from supported businesses will be carried out separately and was not part of this practitioner consultation process. Scottish Enterprise commissioned a similar exercise for export promotion practitioners in 2022.

The survey and consultations were carried out between April and June 2025 alongside a parallel commission for inward investment practitioners which is the subject of a separate report.

## Emerging Findings

The following section summarises the emerging findings and was developed through extensive consultation with business-facing staff across all delivery partners.

Barriers to exporting – lack of knowledge, experience and skills was seen to be the biggest barrier for early stage exporters but less so for existing exporters. Lack of finance or financial support and additional costs was seen to be a barrier to both those new to exporting and those looking to increase exports along with lack of understanding of market opportunities/fit, having the time and resource capability. Building contacts and partnerships was seen as a barrier to existing exporters whilst regulation and legislation was a barrier for early stage exporters.

Changes to exporting barriers in recent years – Brexit was seen as the most significant change. Whilst feedback was sought over the period immediately prior to and after the start of the recent USA tariff changes, tariffs and trade war uncertainties also emerged as a major current change. Both of these factors were seen to impacted on some sectors e.g. food and drink. An increase in wider geopolitical tensions was also identified.

Aspects of international exporting that have become easier to more difficult – whilst technological advancements were seen to make exporting easier a similar number of respondents felt that nothing had become easier. Access to support, advice and education was seen to be beneficial. Areas identified as being more difficult were Brexit, tariffs and trade barriers, geopolitics and market unpredictability and the availability of finance.

Internal company factors affecting the export journey – the main factors included resources (people and money), capacity and capability to scale, skills and experience, investment and access to funds as well as an understanding of how best to exploit opportunities.

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<sup>1</sup> A parallel exercise is also being undertaken for inward investment support.

Impact of the changing global environment – challenges relating to geopolitics, trade barriers and tariffs were seen to be the biggest impact causing uncertainty and reduced confidence. Increases in business costs and changing Net Zero ambitions were also identified as challenging. Opportunities identified included increasing awareness of the need for sustainability and exploring new markets beyond the EU together with new trade agreements.

Export challenges and opportunities in Middle Eastern and Asian markets – the main challenges identified were understanding the markets and culture and access/presence. Opportunities were seen in the growing economies with rising demand for Scottish/UK developed products and technologies.

Legacy effects of Brexit and the pandemic – Brexit was seen to still pose challenges relating to trade agreements and policy changes as well as the increased cost of doing business, anti-British perceptions, staff challenges and reduced access to markets and supply chains. Opportunities identified included diversification following Brexit and the UK being seen as a more attractive market to do business with.

What export support works well across the public sector – the top supports identified were 1:1 in market specialists, funding and grant support, overseas trade events and missions, bespoke support packages and support for strategy development and action plans.

Areas of support that could be improved across the public sector – included funding for delivery providers, providing less online support and more follow up and improving buyer and customer engagement at market events.

Gaps in support – included market access grants and grant writing support, export skill development and multi-year funding.

Combinations and timings of support that are most effective – no particular combinations or timings were identified but respondents felt that a bespoke coordinated approach was beneficial together with in market activities, multi-year funding and strong client management.

Key factors that make a difference – included spending time in market, company senior leadership commitment and ambition with a clear strategy and plan. One to many training and education along with exposure to markets were seen to add most value to new exporters whereas market insights and in market networking and senior level contacts were seen to add most value to existing exporters.

Accessing additional markets/geographies without requiring further support – half of respondents were aware of companies who had utilised their export support learning to access additional markets without the need for further support.

Businesses that “fall-off” support provision – half of respondents agreed that this does happen to some extent and the main reason for this were support requirements exceeding what is available, lack of company preparedness and time of transitioning between supports.

How international export support aligns with and drives innovation and investment – just under half said that it was all ‘interlinked’ and can’t be separated. Others noted that exporting drives/stimulates innovation, investment and revenue as well as providing exposure to new ideas and opportunities.

Alignment of international export support with Scottish Government Trade Vision – whilst the majority of responses indicated positive alignment, some felt that the Trade Vision’s key areas of inclusive growth, sustainability, net zero and good governance were ambitions rather than drivers of export growth.

Additionality/attribution resulting from international export support – scale leading to company growth, new markets, increased sales/revenue/turnover and jobs was seen as the main attribution of support. However, respondents also frequently suggested that timing (i.e. acceleration, faster to market) and higher quality were also a result of export support.

Export Growth Plan (EGP) – just under half described what they thought worked well regarding the EGP approach, noting it supports prioritisation, segmentation (sectoral/markets) and targeting focussed on key exporters. Other areas thought to work well included the shared vision/ambition/goals/objectives/strategy/plan. A similar number provided views on areas for improvement including the need for more flexibility, with it viewed by some as too rigid and a review of classifications or the need for it to be updated regularly. The key differences in the support requirements for new exporters were around market awareness, access, and entry as well as basic education, guidance, and confidence building. For existing exports, it was more around expansion into new markets, sales channels, and partnerships and targeted technical support and issue-specific strategies.

EGP operational delivery – ways in which the EGP has assisted with operational delivery of impactful projects included considering partners wider support, strengthening Team Scotland coordination, improving cross-agency communication, and clarifying messaging.

Evolution of the EGP to combat challenges – views on the ways in which the EGP needed to evolve going forward focused on greater flexibility and responsiveness, improved company classification, proactive and continuous updates and enhanced resourcing and financial support.

Impact of a changing global environment – over half of respondents provided feedback on how the changing global environment for companies has affected choices relating to exporting. The most common being reduced confidence due to geopolitical tensions and Brexit-related challenges.

Challenges and opportunities in the next five years – challenges included a range of external pressures affecting export activity, with the most prominent being geopolitical instability, shifting trade policies, and compliance challenges—creating ongoing uncertainty and risk aversion. Opportunities included targeting specific and emerging markets and sectors, particularly where Scotland holds strategic potential. Leveraging technologies such as AI and digital commerce was seen as essential for competitiveness and reach.

Gaps in current offering – included the importance of practical, growth-oriented support to strengthen export success. Key priorities included buyer introductions, market visits, and entry facilitation to boost international engagement. Equally valued were opportunities for sales and marketing skills development, alongside increased access to investment and investor networks.

Team Scotland/Public Sector Trade Support System – just over half of respondents highlighted strong partnership working, cross-border collaboration, joined-up support, and sector-specific initiatives as key elements of what works well in current export support. A similar number identified key areas for improvement, including duplication and siloed working between agencies, unclear roles and reporting, cluttered support systems, and weak communication across Scotland and UK-level organisations.

Key success factors for an effective trade support ecosystem – included strong collaboration, robust infrastructure, transparent communication, and seamless pathways with shared data as key success factors for an effective trade support ecosystem.

Business awareness of the range of available supports – is thought to be mixed or limited often shaped by prior engagement.

Ease of navigation of business support landscape – the view was that the majority find it difficult or very difficult—often describing it as time-consuming, cluttered, and confusing due to the number of sources. While some noted that websites like the Finding Business Support portal and access to trade specialists or advisors were helpful, these were less frequently mentioned.

# 1 Background and Approach

## 1.1 Background

### 1.1.1 Scotland's export promotion strategy

Scotland's export growth plan, A Trading Nation (hereafter referred to as the Export Growth Plan – EGP) was published in 2019. It recognised that access to international markets and international competition drives business performance, innovation, and productivity growth, thus stimulating economic growth, generating job opportunities and higher living standards, as well as the tax receipts critical for the delivery of public services.

The strategy, utilising evidence on key geographical markets, sectors, and the characteristics of exporting firms, featured a set of actions for the Scottish Government and partners to help reach a target to increase Scotland's international exports as a share of GDP from 20% to 25% by 2029. It also pledged to monitor, evaluate and adjust these actions.

Public sector funded export promotion support is delivered by Team Scotland delivery partners:

- Scottish Government (SG)
- Scottish Enterprise (SE) and its international arm Scottish Development International (SDI)
- Highlands and Islands Enterprise (HIE)
- South of Scotland Enterprise (SoSE)
- Scottish Chambers of Commerce (SCC)

### 1.1.2 Research objectives

Team Scotland commissioned an evaluation of their Export Promotion activities. Specific objectives included:

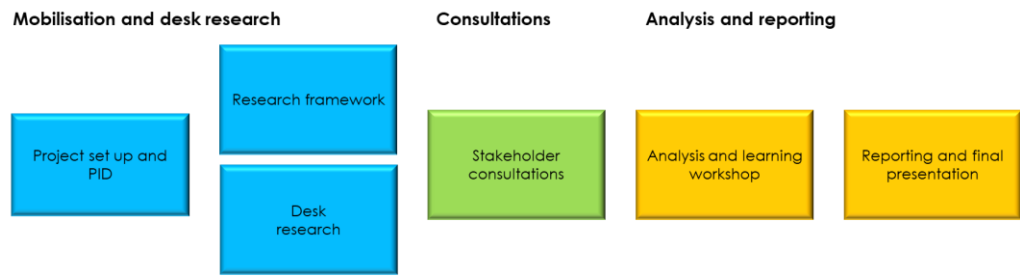
- Views on barriers, challenges and opportunities.
- Views on what works well and less well in delivering export promotion and inward investment support.
- What group(s)/type(s) of businesses are benefitting the most from support, is this the intended group(s)?
- What are the main types of additionality resulting from the support i.e. timing, scale, quality?
- Are there support gaps/support limitations and how could these be addressed?
- What impact do these gaps/limitations have on the ability to support/meet customer needs?
- Do businesses "fall-off" from their support journey, if so, at which point?
- Views on the overall effectiveness of the Scottish Government led Export Growth support.
- Effectiveness of the Team Scotland Delivery Partner approach, including identifying any potential duplication, such as staff time or other aspects.
- Views on "market size" and whether delivery partners are able to support current demand.

SoSE and HIE specific questions are also included. The question sets are provided in [Appendix 2](#).

## 1.2 Approach

The approach to the evaluation followed the three stages outlined in Figure 1.1.

**Figure 1.1: Method Diagram**



The sections that follow provide the analysis of the consultation with staff across Team Scotland partners.

## 2 Consultation Feedback

### 2.1 Population overview

The following section provides an assessment of the feedback received from 79 consultations across SE/SDI (60), HIE (8), SCC (6), SoSE (3) and Scottish Government (2). Table 2.1 presents the full breakdown.

Staff from the partner delivery organisations (SE/SDI, HIE, SoSE and Scottish Chambers) and Scottish Government who are involved in export support were invited to participate in the survey.

The majority of staff participating in the survey are directly involved in delivery of export support, with a number indicating their involvement, also, in innovation and/or investment support.

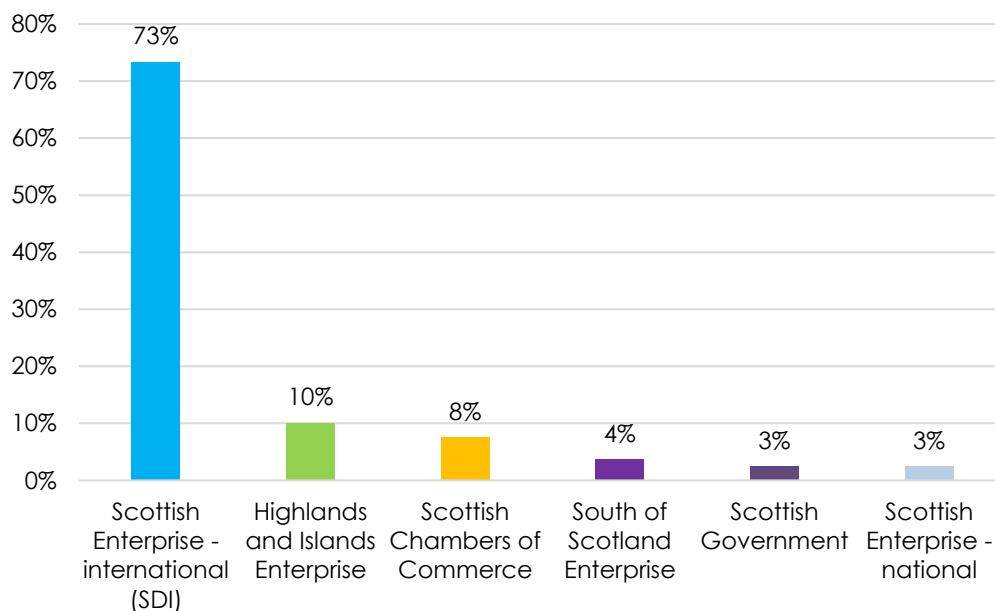
**Table 2.1: Population**

	Scottish Enterprise/ SDI/ Scottish Government	South of Scotland Enterprise	Highlands and Islands Enterprise	Scottish Chambers of Commerce
<b>Consultees</b>	62	3	8	6

### 2.2 Respondent profile

Respondents worked across a range of partner organisations with the majority from SE/SDI. Figure 2.1 shows the breakdown across the partners.

**Figure 2.1: Organisation**



**N=79**

33 respondents were involved in wider business growth support, 70% (23) in innovation and 30% (10) in investment.

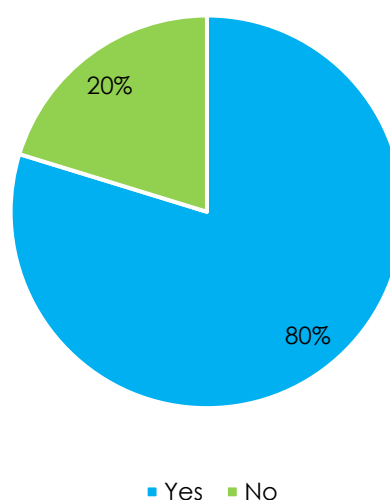
**Table 2.2: Involvement in wider business growth activities**

Innovation	23
Investment	10

## 2.2.1 Business facing

The majority worked in business facing roles (80%, 63).

**Figure 2.2: Business facing**



**N=79**

## 2.2.2 Sectoral coverage

Table 2.3 shows that respondents in direct business-facing roles represented all sectors across the partner organisations.

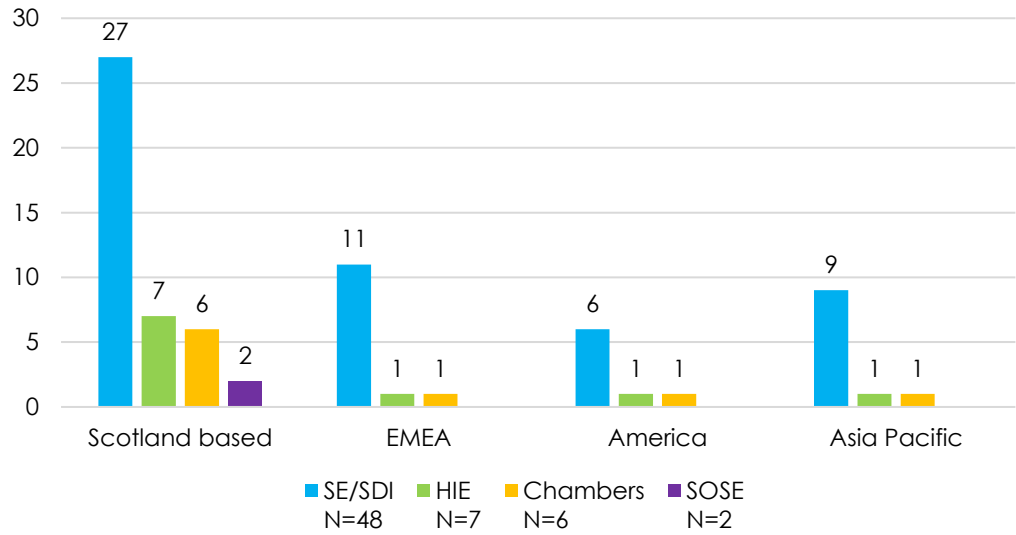
**Table 2.3: Sectoral representation across business-facing respondents**

SE/SDI Sectors		HIE Sectors	
Energy and Low Carbon Transition	10	Technology and Advanced Engineering	5
Science and Technology	21	Food and Drink	6
Consumer industries and Multisector	12	Energy and Low Carbon	6
Global Networks	5	Life Sciences	6
International Trade Services	9	Creative Industries includes Textiles	4
Food and Drink	1	Finance and Business	2
<b>Total answered</b>	<b>48</b>	Tourism	4
SCC Sectors		Construction	1
Engineering and Advanced Manufacturing	4	Sports, Retail and Ecommerce	1
Food and Drink	4	<b>Total answered</b>	<b>7</b>
Energy	4	SOSE Sectors	
Financial and Business Services	2	Technology and Advanced Engineering	1
Technology, Digital and Media	4	Food and Drink	0
Life and Chemical Sciences	2	Energy and Low Carbon	1
Education	2	Agritech	1
Tourism	3	Creative Industries includes Textiles	2
Creative Industries	3	Finance and Business	0
Sector agnostic support	1	Tourism	1
<b>Total answered</b>	<b>6</b>	<b>Total answered</b>	<b>2</b>

### 2.2.3 Business geography served

Figure 2.4 shows the split across each geography.

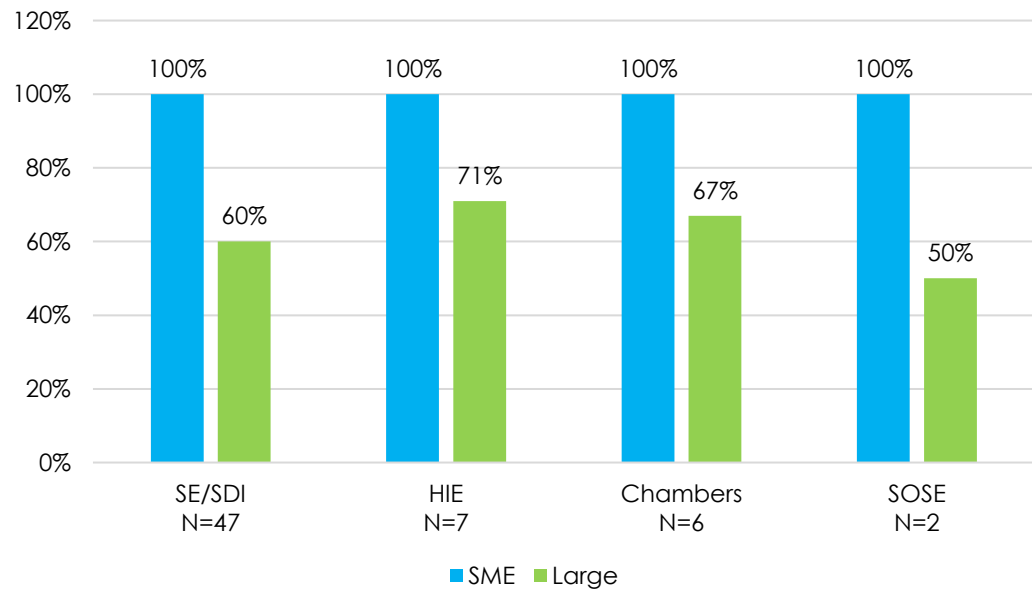
**Figure 2.4: Business geography served**



### 2.2.4 Business size

Respondents worked across a mix of SMEs and large companies. Figure 2.5 shows the breakdown across the partners.

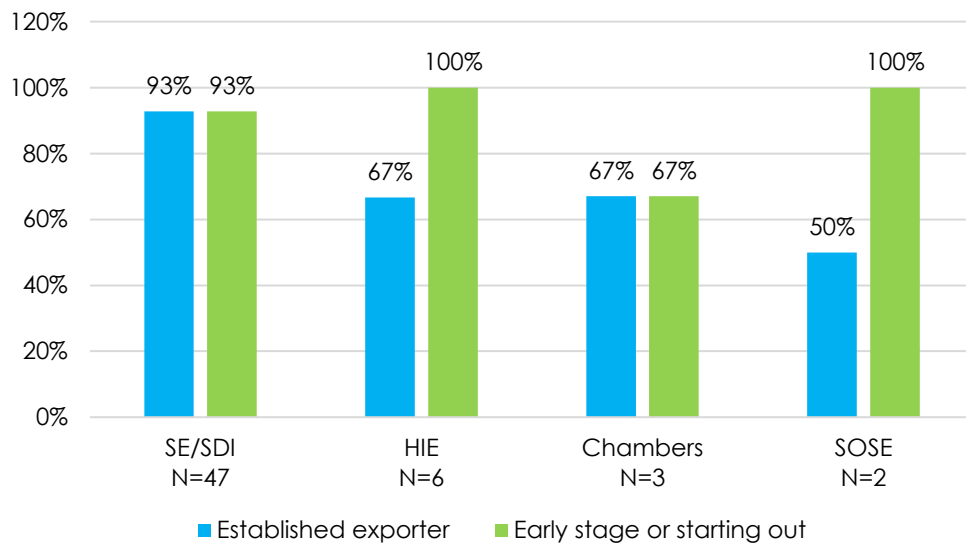
**Figure 2.5: Size of business respondents support**



## 2.2.5 Exporting status

Respondents worked across a mix of established and early stage/starting out exporters. Figure 2.6 shows the breakdown across the partners.

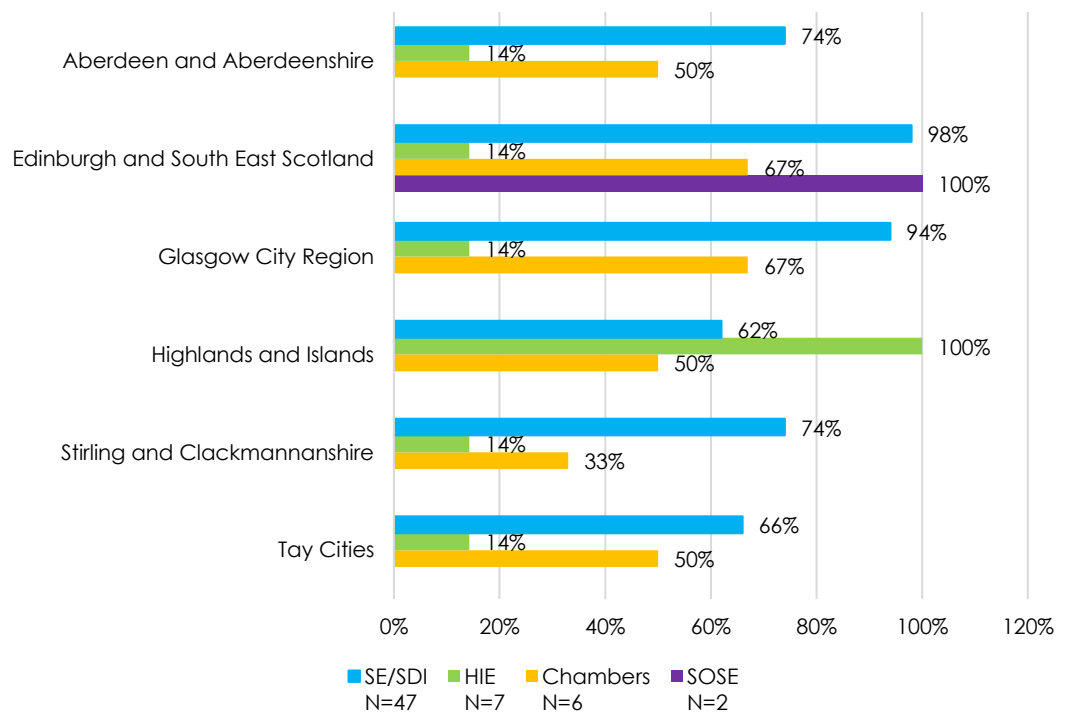
**Figure 2.6: Profile of companies that respondents support**



## 2.2.6 Location of companies

Respondents worked with companies from across Scotland. Figure 2.7 shows the split across each geography.

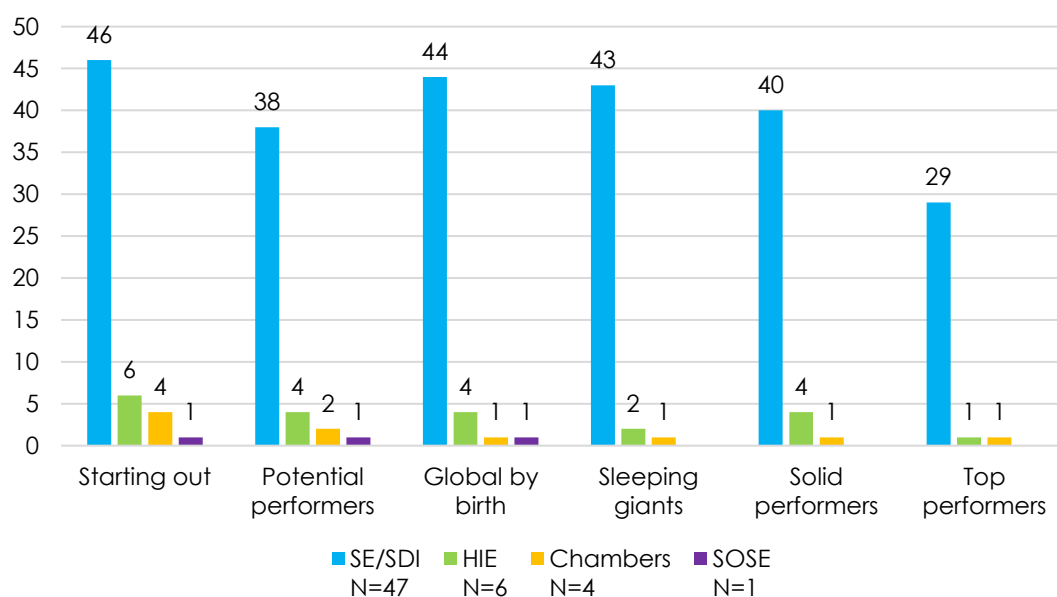
**Figure 2.7: Location of companies supported**



## 2.2.7 EGP category

Respondents from SE/SDI and HIE worked across all EGP categories. Figure 2.8 presents the split per partner.

**Figure 2.8: Business-facing staff EGP category**



## 2.3 Barriers to exporting

The section focused on the following questions:

- What are the biggest barriers to businesses starting to export or significantly increasing their international exports?
  - Starting to export
  - Increasing international exports
- How has this changed in recent years? (Please describe any sector/sub-sector specifics, over last 3 to 5 years)
- What aspects of international exporting have become easier/more difficult for businesses?
  - Easier
  - More difficult
- What company internal factors impact their ability to either start or expand their international exporting journey? (For example: capacity, resources, capability, investment etc)
- How has the changing global environment affected the companies' choices relating to international exporting/exporting plans; what are the challenges; what are the opportunities? (For example, sustainability and net zero, cost of living, rising energy costs, free trade agreements, uncertainties concerning tariffs etc)
  - Challenges
  - Opportunities
- With specific reference to emerging economies including in the Middle East and Asia, what are the export challenges and what are the export opportunities?
  - Challenges
  - Opportunities
- Are there specific legacy effects of either Brexit or the pandemic which represent ongoing challenges or opportunities to exporting which should be considered?

### 2.3.1 Barriers for early-stage exporters

Almost all respondents (97%, 77) provided views on what they saw as the biggest barriers for early-stage exporters. The main themes were:

- Lack of knowledge/experience/skills (36%, 28)
- Lack of finance/financial support/additional costs/currency fluctuations (35%, 27)
- Having the time resource/capacity (29%, 22)
- Lack of understanding of the market/opportunities/product fit (21%, 16)
- Regulation/legislation (21%, 16)

Other barriers identified less frequently included lack of ability to build effective contacts and partnerships, lack of effective strategy, lack of ambition, not knowing where to go for support and navigating trade agreements and tariffs.

*"Lack of knowledge of the mechanics of exporting as well as lack of market knowledge and the complexity of documentation."*

*"Limited access to finance or insurance for exporting activities is a significant obstacle."*

*"Lack of resources for a market like China, including dedicated people, time, market visits, IP protection in place."*

*"Under funding and lack of understanding of what it takes; unrealistic. Unwilling or unable to invest time or money within target geographical market."*

*"The biggest barriers to businesses starting to export include a lack of knowledge and networks in international markets, financial constraints, regulatory challenges, and logistical hurdles. Many businesses struggle with insufficient understanding of foreign markets and difficulty finding business partners abroad."*

### 2.3.2 Barriers to increasing international exports

Almost all respondents (92%, 73) provided views on the biggest barriers for companies already exporting trying to increase international exports. The main themes, which broadly the same as those for new exporters were:

- Lack of finance/financial support/additional costs (36%, 26)
- Lack of understanding of the market/opportunities/product fit (21%, 15)
- Lack of knowledge/experience/skills (19%, 14)
- Having the time resource/capacity (19%, 14)
- Ability to build contacts/partnerships/networks (18%, 13)

Other barriers identified included tariffs and trade agreements, market pressure and instability, regulation/legislation and lack of ambition.

*"Varies with size of company. Micro companies don't have the capital and time to invest. For SMEs it's mostly resource/time to sort out what they don't know. For larger it depends on the market and access, the trading environment has changed."*

*"Money and the right people in the organisation to lead the activity. One person can do many roles which include day to day running of the company, marketing and business development. All of which need a dedicated person to lead in order to drive outcomes and grow."*

*"How to identify the most appropriate/lucrative new markets to target and how to get their products into these markets."*

*"Not understanding the regional differences of large markets - trying to go for a whole country solution – finding representatives and partners they trust."*

### 2.3.3 How barriers have changed in recent years

Comments were received from (77%, 61) of respondents on how barriers have changed over the last three to five years. The main themes were:

- Brexit (48%, 29) – seen as the most significant change (suggesting a large proportion of companies were focusing on EU markets) leading to trade challenges, increased costs and documentation requirements and negative perceptions of the UK
- Tariffs and trade war uncertainties (26%, 16) – it should be noted that feedback was sought over the period immediately prior to and since the most recent USA tariff changes and might not reflect current perspectives
- Sector specific (26%, 16) – respondents suggested that some sectors have been impacted by changes such as Brexit, COVID and the cost of doing business, more than others. Food and drink was the sector most frequently mentioned
- Increase in geopolitical tensions (21%, 13) meaning companies must navigate a more fragmented and unpredictable trade environment – again possibly not reflecting the most recent escalation in tensions
- Increased financial risks i.e. currency fluctuations/constraints/investment challenges (21%, 13)

Other changes identified included increased competition, logistic and supply chain constraints.

*"The biggest barrier for new and inexperienced exporters is Brexit. Many SMEs were exporting to Europe but gave up due to the extra export documentation and/or European buyers' negative perception of the UK leaving the EU."*

*"A lot has changed: Covid, Brexit, the cost of doing business and "trade Jenga" at the moment, geopolitics and protectionist policies – plus a shift in power, some countries are becoming more important."*

*"Geopolitics and the macro environment are more challenging, including Brexit, Covid, tariffs – companies have not planned for things going wrong or are not putting in the time/resources to proactively combat the challenges."*

*"Funds are tougher in Science and Tech, always see turnover in companies, but recent investment and banking barriers mean access to funds is tougher. This forces a bigger need to be revenue generating earlier on, and being international is essential but takes time and money."*

#### 2.3.4 Aspects of international exporting that have become easier or more difficult

Aspects of international exporting that have become **easier** were identified by 71% (56) respondents. A third (29%, 16) felt that technological advancements, the use of online platforms (for example video conferencing or sales via platforms such as Facebook, Instagram, TikTok), digitalisation (for example, automated customs systems can speed up parts of the export process, and targeted digital marketing) and e-commerce had made things easier. A similar number (27%) felt that nothing had become easier. The main themes were:

- Technological advancements/use of online platforms/digitalisation/ecommerce (29%, 16)
- Nothing has become easier (27%, 15)
- Access to support/advice/education/information (20%, 11)

*"Advancements in digital technology have streamlined certain aspects of international trade. Scottish companies now benefit from improved online market research tools and more efficient digital communication channels."*

*"There is now more advice and regulatory support to businesses from Government and the various agencies involved."*

Aspects of international trading that have become **more difficult** were identified by 80% (63) respondents with themes reflecting the barriers and challenges identified above in Section 2.3.3:

- Brexit impacts/trading with EU (19, 30%)
- Tariffs/trade barriers (16, 25%)
- Geopolitics/market unpredictability (16, 25%)
- Availability of finance for exporting/increased costs (15, 24%)

### 2.3.5 Internal company factors that affect the export journey

Internal company factors that affected the export journey were identified by (91%, 72) respondents. The main themes identified were:

- Resources – including people/money (69%, 50)
- Capacity/ability to scale (51%, 37)
- Skills/capability/experience (47%, 34)
- Investment and access to funds (38%, 27)
- Knowledge/understanding/awareness of opportunities and how best to exploit them (24%, 17)
- Defined strategy/vision (15%, 11)
- Commitment/ambition/motivation (13%, 9)

Other factors included risk tolerance, lack of competitiveness, unrealistic expectations around for new business growth and no in- market presence.

*"The main thing is budget/resource. Exporting is expensive due to the higher level of risk involved. Apart from that, companies need the capacity to meet a greater demand, the expertise to sell internationally and manage exports, and a well-defined strategy."*

*"Strategy and implementation of an export plan including budget allocation, commitment from the leadership team and in-house expertise."*

*"Company ambition is key to everything. Those who get it right, it's in their DNA, they have a strategic plan, they research and tackle the market with purpose."*

### 2.3.6 Impact of the changing global environment on company exporting decisions and plans – challenges and opportunities

When asked about what **challenges** the changing global environment was having on company exporting decisions and plans, 84% (66) respondents provided comments. It was generally agreed that challenges caused uncertainty and reduced confidence. Exporting decisions were also impacted by higher costs influencing purchasing and hiring considerations. The main themes were:

- Geopolitics/trade barriers/tariffs – leading to uncertainty, risk and reduced confidence (71%, 47)
- Increasing business costs i.e. energy, labour and taxation (44%, 29)
- Net Zero – changing international ambitions, commitment and lack of clarity around targets (24%, 16)
- Difficulties in keeping up with changing government rules, policy and regulations (14%, 9)

*“Net zero is interesting, companies are confused about what that means, in the public sector so many supports are reliant on companies demonstrating a net zero plan etc. without realising the impact on companies.”*

*“The dynamic global environment has introduced considerable uncertainty. Brexit has reshaped trade rules, resulting in higher tariffs and new non-tariff compliance and documentation barriers that affect key sectors.”*

*“The rise of cost of living has affected the purchasing power of people. The demands for high-value/premium products have decreased. The investment in new products will often not provide the levels of payback needed to support outlay.”*

*“Some companies choose not to export as too complex, no longer profitable due to rising costs of exporting (increased costs of manufacturing goods etc). Reduced global growth rates, and reduced consumer demand.”*

In terms of **opportunities** arising from the changing global environment, 71% (56) of respondents gave comments. The main themes were:

- Increasing awareness/need for sustainability/net zero open opportunities for new products and services (34%, 19)
- Expanding/exploring new markets i.e. beyond the EU (29%, 16)
- New free trade agreements/trade deals (23%, 13)
- e-commerce/digitisation/social media/AI lowering barriers to entry (14%, 8)

*"The increasing global awareness of the requirement for sustainability practices and net zero goals have given companies operating in this space an opportunity to gain market share as legislative mandates have stipulated that businesses must do more by reducing their scope emissions."*

*"The emphasis on sustainability and net zero targets opens up markets for green energy and renewable technology companies—a strength for many Scottish enterprises."*

*"Starting to see companies reduce reliance on single markets."*

*"New FTAs and the pursuit of bespoke bilateral trade deals by both the UK and Scottish governments may eventually ease some tariff burdens."*

*"Digital trade, e-commerce and digital platforms have lowered entry barriers, enabling even small businesses to export globally."*

### 2.3.7 Export challenges and opportunities in Middle Eastern and Asian markets

More specifically export challenges and opportunities relating to Middle Eastern and Asian markets were explored. **Challenges** relating to exporting to these markets were identified by 68% (54) respondents with the main themes being:

- Understanding market/culture/language/policy/regulations (41%, 22)
- Access – travel, visas, in-market connections and presence (33%, 18)
- Competition – from local business and other international exporters (11%, 6)
- Timescales for success – longer timelines than other markets (11%, 6)

*"Emerging economies often have rapidly evolving regulatory frameworks and cultural complexities that can present steep learning curves for Scottish exporters."*

*"Time difference and language, it takes longer to get somewhere – so there are high costs to get there – this is tricky."*

*"Competition -local businesses and other international exporters often dominate these markets, making it harder to establish a foothold."*

*"Very different negotiating culture, speaking from experience, Middle East deals taking years to complete, business in India featuring endless, and unrealistic negotiation."*

**Opportunities** for exporters in Middle Eastern and Asian markets were identified by 61% (48) of respondents. The main themes were:

- Growing economies/rising incomes/higher budgets/growing demand (23%, 11)
- Demand for Scottish/UK developed products/technologies (19%, 9)
- High demand for certain sectors/products (13%, 6) such as life sciences, renewables, tech, healthcare, food & drink and education sectors

*"These markets also offer considerable growth potential, and export stats reflects this. Rising middle-class incomes and an increasing demand for quality products play to the strengths of many Scottish companies, products and services."*

*"Demand for luxury products backed by strong Scottish provenance and services from reputable Scottish academic partnerships etc".*

*"Brand Scotland highly regarded in these markets as premium. Strong background heritage story and sustainability is also highly regarded and in these markets making Highlands and Islands products a good fit and attractive."*

### 2.3.8 Legacy effects of Brexit and the pandemic – challenges and opportunities

**Challenges** relating to either the legacy effects of Brexit or the pandemic were identified by 71% (56) of respondents. The most frequently mentioned challenges related to Brexit were:

- Trade agreements/policies, legislation changes (43%, 24)
- Increased cost of doing business (25%, 14)
- Anti-British attitude/perception difficult to trade with (14%, 8)
- Staff/resource challenges (14%, 8)
- Reduced market access/supply chains/logistics (14%, 8)

The main theme relating to the pandemic was decreased demand for certain products/change in consumer buying which was mentioned by three (5%) people. A further three (5%) respondents felt there were no legacy effect challenges.

**Opportunities** relating to either the legacy effects of Brexit or the pandemic were identified by 49% (39) respondents. Whilst 15% (3) felt there were no opportunities, those that were mentioned fell into the following main themes, again mostly relating to Brexit:

- Brexit – diversification/exploring new markets (18%, 7)
- UK seen as a more attractive market to do business with (15%, 5)
- Benefits from trade agreements/tariffs (13%, 5)
- Sector specific i.e. Life Science, Healthcare, Sustainability, Net Zero (10%, 4)

*"Brexit has prompted UK businesses to explore non-EU markets more aggressively. This diversification can lead to new opportunities and reduce dependency on a single market i.e. SE Asia."*

*"If you consider what is happening in the world now then US and Europe are becoming closed off and the UK perhaps more attractive market."*

*"Massive opportunities in vaccine manufacturing companies off the back of pandemic. A few companies' trading forecasts are very healthy, a real opportunity for Scottish strengths in life sciences."*

## 2.4 Effectiveness and key success factors

The section focused on the following questions:

- In addressing market failures and helping companies to achieve their international export aspirations and deliver impact – in terms of public sector support and other support:
  - What works well and why?
  - What works less well and why?
- Are there any gaps within the support offered to companies that impacts on their export aspirations? If yes, what are they?
- Are there any combinations and timings of support that are effective in leading to increased international exports and economic impact?
- What are the key factors that ultimately make a difference to increased international exports (at company, sectoral and economy levels)?
- Depending on the different stages of the exporting journey ie from new to existing exporters, are there any differences in what works best i.e. delivers the most value?
- Are there situations where support “fall-offs” for businesses on their exporting journey i.e. businesses that still require ongoing support but for whatever reason fail to access this support? If so, where is this most likely?
- Are you aware of any examples where, following international export support, companies have used this learning to access additional markets/geographies without requiring further support?
- How does international export support ‘work’ with and drive innovation and investment and vice versa?
- How does international export support align with the Scottish Government’s Trade Vision which includes key areas of inclusive growth, wellbeing, sustainability, net zero and good governance. Which of these can help drive export growth? And how?
- What are the main types of additionality/attribution resulting from the support? .....for example timing (eg accelerating companies’ international growth), scale (eg implementing bigger projects, increased export sales), quality (eg doing things more efficiently or to a higher quality)

### 2.4.1 What export support works well across public sector

Areas of export support seen to work particularly well across the public sector were identified by 74% (59) respondents. The main themes were:

- 1:1 in market specialists – networks, insight, advice, guidance (37%, 22)
- Funding/grant support e.g. IGS (27%, 16)
- Overseas trade events/missions (24%, 14)
- Tailored bespoke support package (22%, 13)
- Support for strategy development and action plans (19%, 11)
- Introductions and connections (15%, 9)

*"Our global footprint and positioning of market specialists means that we have the knowledge and networks to support companies. We see companies saying that has more value than money."*

*"Additional support at events. In energy, the Scotland branding at events is very impactful and combining that with tailored support such as meet the buyers, 1:1 introductions, visits, roundtables, webinars are usually very valuable to our companies."*

*"Having a package of support – raising awareness, sharing insights, encouraging certain markets and then having a plan/strategy with other bespoke supports (1:1, 1:many or digital) plus support to get them out to market and meet the right people."*

*"Strategy development, technical export assistance, export plan formulation and additional grants such as International Manager for Hire complete the toolkit and are vital to provide a rounded and comprehensive package of support."*

#### 2.4.2 Areas of support that could be improved across the public sector

Suggestions for areas of support that could be improved were made by 71% (56) of respondents. The main themes that emerged were:

- Lack of funding for delivery providers i.e. SE, HIE, SDI/timebound support (21%, 12)
- Level of support not fit for purpose i.e. too much online and no follow-up (13%, 7)
- Lack of buyer/customer engagement at market events/missions (11%, 6)

*"On/off nature of grant support is difficult. Less reliability of grants makes it difficult for trade specialists who are trying to do forward planning with companies."*

*"Our funding model, funds running dry before the financial year ends."*

*"Businesses may find it challenging to take next steps after a successful initial visit due to a lack of ongoing strategic guidance, funding support, or local representation options."*

*"A lot of support for new and early-stage exporters is often self service digital when these exporters often need some 1-2-1 support to get them on the right exporting path when all is new to them and they are unsure of where to start."*

### 2.4.3 Gaps in support

Gaps in the support provided were identified by 63% (50) of respondents. The areas most frequently mentioned were:

- Market access grants/ grant writing support – increased value/volume (16%, 8)
- Export skills development (14%, 7)
- Multi-year funding (10%, 5)

*“As long as I can remember the IGS grant has been the same amount. It hasn't kept up with inflation. Also, offering less in some cases and more in others would give our trade teams more flexibility to tailor the offers.”*

*“Being able to offer more as part of a strategic project. For example, with a £9,000 grant this is helpful, but it is very transactional it does not allow me to support a company through a 6-to-12-month international strategy/plan.”*

*“I am finding that more of the companies I have known for a while are starting to seriously look at exporting goods directly themselves, but they do not have the experience on all the exporting procedures to do it themselves or get it right first time.”*

### 2.4.4 Combinations and timings of support that are more effective

When asked if there were any particular combinations or timings of support that were more effective 62% (49) responded. No particular combinations or specific timings stood out but the areas most frequently mentioned were:

- Bespoke/package of support/coordination of activities e.g. ACE model which connects government challenges with a diverse range of companies and acknowledges the varying stages of maturity and capabilities within the innovation landscape (20%, 10)
- In market activities/engagement/buyer meetings (20%, 10)
- Multiyear funding – limit stop/start nature support (16%, 8)
- Strong client management and in market advice/trade advisors e.g. Export Advisory Service (12%, 6)

*“Planning a year in advance with companies that are looking to exhibit at events, as a lot of events occur in April, May and June. Companies need to book space well in advance. I feel that there are missed opportunities supporting these companies currently.”*

*“An integrated support offering is key for a company's sustainable growth including growing their exports. From helping develop their international strategy and to prioritise on key opportunities, helping them innovate and providing funding and advice and guidance on adapting their products and services, to helping companies access opportunities and getting to market i.e. grants/introduction to international buyers and partners.”*

*“The ability to combine different activity that supports building or bringing in expertise (specialist support) alongside in-market visibility/promotion has the biggest impact.”*

#### 2.4.5 Key factors that make a difference

Key factors that make a difference to increased international exports were identified by 67% (53) of respondents. Those most frequently mentioned related to internal business factors:

- Spending time in market/market engagement/immersion/understanding (26%, 14)
- Senior leadership commitment, understanding (17%, 9)
- Ambition with strategy and plan (17%, 9)

Identifying and sharing market opportunities, contacts, market understanding and insight within and across support providers was a factor identified by 8 (15%) of respondents.

*"Companies have to get out to market and be willing to commit to spending time in that market. There is a belief that a company goes to an event once and gets exports. Markets want to see companies establishing themselves in the market and be immersed. Resource challenges and costs associated with that. Companies underestimate this."*

*"For companies the two biggest factors are having a management team who are internationally ambitious and driven to succeed, and the availability of external help and advice when required and this being readily available."*

*"A strategic approach so they are properly resourced to fulfil orders/partnerships as they happen; being prepared to take on investment; being prepared to take a risk; understanding that others have done this and are happy to share their experience; appreciating that they don't know everything and it's ok to ask."*

#### 2.4.6 Factors that deliver most value to those new to exporting and existing exporters

When asked what factors delivered most value depending on the different stages of the exporting journey (new or existing), 54% (43) people responded. The most frequently mentioned factors for **new exporters** were:

- One to many training/education workshops/advice/programmes to prepare for export (35%, 15)
- Exposure to market/market engagement/brokering connections (26%, 11)

The most frequently mentioned factors for **existing exporters** were:

- Market insights/new market opportunities (21%, 9)
- Top quality in-market networking VIP/senior level contacts (16%, 7)

16% (7) felt that bespoke support was required no matter what stage of the exporting journey companies were at.

#### 2.4.7 Accessing additional markets/geographies without requiring further support

Just over half (54%, 22) of the 53 who responded were aware of companies who had utilised their export support learning to access additional markets without further need for support. Examples of this were provided by 34% (14) with the following breakdown of total responses:

- Yes, aware of instances – provided an example (14, 34%)
- Not aware of instances/examples (12, 29%)
- Yes aware – no example provided (8, 20%)
- Some do, some don't access additional markets (6, 15%)
- They will need more support to access additional markets (5, 12%)

*"Encouraging examples include in the technology and green energy sectors, where early, intensive support has equipped companies with the in-house expertise needed to continuously adapt."*

*"This feels like the natural end point of support to me, and I'm pleased to say I've witnessed several instances of this."*

*"A local distillery has a very experienced team and have established themselves as an international brand but still have regular contact with SDI as they are always open to new opportunities and this has proved to be a very successful way of operating."*

*"No. companies will always come up against a variety of situations that they need our help at some point. Not always in a vast critical game changing way."*

#### 2.4.8 Businesses that "fall-off" support provision

Staff were asked for their views on whether there were situations where businesses do not continue to take up support on the exporting journey and where this "fall-off" tends to occur. 57% (45) responded with 24 (53%) agreeing that it does happen to some extent. The following was mentioned most frequently:

- Support requirements exceed what is available/do not meet needs/limited grant/products/services (18%, 8)
- Reduced company effort/preparedness/commitment/engagement (11%, 5)
- Transitioning between supports e.g. Business Gateway to SDI (11%, 5)

*"Often established companies need to do 'more of the same' to continue to grow but are limited by cashflow and/or budgets."*

*"Too often, companies are supported through a particular time-bound initiative but then allowed to 'drop off'."*

*"Post the early stage support they are left to, as one company told me, 'fumble along'. It's a difficult one as the early-stage companies require more in depth support and currently our organisation or partners for that matter are not in a position to extend it from what I see."*

## 2.4.9 How international export support aligns with and drives innovation and investment

Links between export support, innovation and investment were described by 50 (63%) of respondents. The main themes identified were:

- All interlinked/can't separate/continuous loop (46%, 23)
- Exporting drives/stimulates innovation/investment/revenue (20%, 10)
- Exporting provides exposure to new ideas and opportunities (14%, 7)
- Innovation/new product development needed to stay competitive in international/new markets (10%, 5)

*"They go hand in hand – if you are not exporting you won't be innovative. If you are exporting you are open to so many new ideas and need to be more competitive otherwise you won't be successful, it drives you to innovate. All the evidence points to a strong connection between the two."*

*"Targeted export support and promotion acts as a catalyst for innovation by enabling and encouraging companies to upgrade/update or innovate on their products and services and to showcase them internationally, increasing exposure and demand. In turn, this innovation attracts further investment as companies demonstrate their ability to compete globally, creating a cycle of modernisation and increased market share."*

## 2.4.10 Alignment of international export support with Scottish Government Trade Vision

Views on how international export support aligns with the Scottish Government Trade Vision were provided by 62% (49) respondents. Whilst the majority of responses indicated positive alignment 12% (6) felt that the Trade Vision's key areas of inclusive growth, sustainability, net zero and good governance were ambitions rather than drivers of export growth. The main themes were:

- Partially aligns (20%, 10)
- It aligns/fully aligned (18%, 9)
- Supports Scottish company credibility (18%, 9)
- Supports/showcases Scotland as a credible nation (16%, 8)
- It is/they are ambitions/aspirations rather than drivers of export growth (12%, 6)
- Trade Vision key areas seen as general good company practice (10%, 5)

*"It does and it doesn't. We live in a world where government policies determine what companies/countries produce and who they sell to. From the time that the Trade Vision was produced, we live in a very different world and things have changed dramatically so to some degree it is a bit dated."*

*"The top line ambitions work but the real world application feels further away."*

*"The trade vision resulted in the fossil fuel policy, so it's very much aligned – no longer allowed to support gas and oil, now only transition and renewables."*

*"I'm not sure those things in of themselves will drive growth, they will help position a company to be robust and resilient and help make them good employers and the type of companies you want to support and promote. None on their own are an individual driver."*

#### 2.4.11 Additionality/attribution resulting from international export support

When asked what were the main types of additionality/attribution arising from the support provided, 62%, (49) provided a response. They were given the example of additionality relating to acceleration, scale and quality and 29% (14) identified attribution in all of these areas.

The most frequent responses were:

- Scale – e.g. company growth, new markets, increased sales/revenue/turnover, jobs (39%, 19)
- Time – e.g. acceleration, faster to market (37%, 18)
- All – acceleration, scale, quality (29%, 14)
- Quality – e.g. productivity and innovation, productivity, reduces mistakes/risk (22%, 11)

*“For us the focus is helping companies to be able to do things much faster. Getting companies to win its first customer faster, supporting companies to scale and to do it with international innovation and investment. The driver is around increased sales; all support is focused on driving trade sales and pounds into Scottish economy.”*

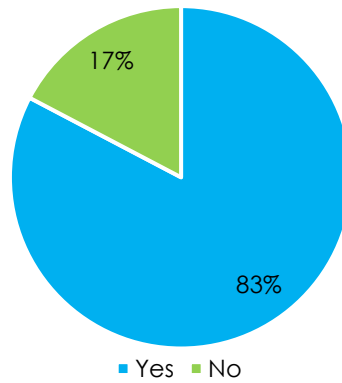
*“Timing - export support can accelerate a company's international growth, helping businesses enter foreign markets sooner than they otherwise would have. For example, providing market intelligence or fast-tracking compliance with international standards enables quicker market entry.”*

## 2.5 Effectiveness of the Export Growth Plan

The section focused on the following questions:

- Is the focus of the Export Growth Plan an effective approach to growing Scotland's exports?
- What works well and why?
- What works less well and why?
- What are the key differences in the support requirements of new exporters versus existing exporters as they progress along their respective exporting journeys?
- To what extent has the Export Growth Plan impacted the identification and prioritisation of international trade support needs?
- To what extent has the introduction of the Export Growth Plan assisted with operational delivery of impactful projects ie has it helped Team Scotland partners do things better and with a greater benefit and impact? If not, why not?
- To what extent has it been necessary for the Export Growth Plan to evolve to address any challenges such as those associated with Brexit and areas such as cost of living and energy increases?
- Is there a difference in effectiveness of support between the pre-Export Growth Plan activities and the current support approach?
- How does the Export Growth Plan need to evolve going forward?

83% (43) of respondents felt that the EGP is an effective approach.



**N=52**

### 2.5.1 EGP – what works well

Just under half (46%, 36) of respondents described what they thought worked well regarding the EGP approach. The main themes were:

- Supports prioritisation/segmentation(sectoral/markets)/targeting/focussed on key exporters (61%, 22)
- Shared vision/ambition/goals/objectives/strategy/plan (17%, 6)
- Trade and in-market specialists/deep knowledge/1 to 1 support (17%, 6)
- Framework for support/guidance/information/data (11%, 4)

*“Forces us to consider grading of businesses – to segment them and meet their requirements better, this will help drive better success.”*

*“Strategic vision and having a clear focus on exports.”*

*“Providing additional support through 1:1 advice from trade specialists in Scotland and/or in-market support can help organisations achieve a significantly increased level of exports within 2-3 years.”*

*“Providing financial and informative guidance support.”*

### 2.5.2 EGP – what could be improved

Just over half (52%, 41) of respondents suggested areas for improvement. Suggestions most frequently mentioned were:

- Need for more flexibility - too rigid/no fit with niche sectors (24%, 10)
- Need for classification to be reviewed - wrong targets (24%, 10)
- Need for an update - out of date/not updated regularly enough (17%, 7)
- Lack of fit with partner/government policy/strategy/new areas of focus (12%, 5)

*“Rigidity around categorisations – doesn't always reflect that disruptive indigenous Scottish companies can have a disproportionate impact on local economy. Doesn't allow for companies that simply do not want to engage with export support.”*

*“The classification itself is limited and not that correct. Need to update regularly.”*

*“Data probably not the most up to date. Needs to be refreshed to move with the times e.g. no definition of what renewables are, the categories have changed. It's not a live document.”*

*“EGP seems to have been overtaken with several other plans and strategies. Not even sure what it is any more (used to be about targeting larger companies but that changed).”*

### 2.5.3 EGP – differences in support needs – new and existing

When asked what the key differences in the support requirements are for new versus existing exporters, 60% (47) responded. The top themes for each included:

- Existing – widening exposure/new markets/sales channels/partners (22%, 11)
- Existing – niche/targeted/technical support/issue specific strategies (22%, 11)
- New – market awareness/access/entry (28%, 14)
- New – basic education/guidance, capacity/capability building/confidence building (26%, 13)

*Existing “Need insights into diversifying to new regions or deepening their presence in existing markets. Advanced market intelligence, trend analysis, and access to wider international networks.”*

*Existing “Some new intros, but often more a focus on how we can increase awareness for their brand/products through targeted activities and events.”*

*New “Understanding the fit of their product/service with their target market. This is fundamental.”*

*New “Require more basic guidance (e.g. the commitment and resource required). They also require more strategic help (where do they want to target and why).”*

#### 2.5.4 Impact of the EGP on support needs

Over half (59%, 47) of respondents provided comments on the extent to which the Export Growth Plan impacted the identification and prioritisation of international trade support. In addition to “don't know” (19%, 9), the main themes were:

- Supports resource prioritisation/allocation/our focus (21%, 10)
- Helps identify/target/raise awareness/companies we want to work with (13%, 6)
- There is impact to some extent (13%, 6)

*“EGP is a good approach helping to make the decision where support will probably be most effective. It helps to categorize and focus effort of support.”*

*“The Plan has sharpened sector specific and country-specific targeting.”*

#### 2.5.5 Impact of the EGP on operational delivery

Slightly over half (54%, 43) of respondents commented on the extent to which the introduction of the Export Growth Plan has assisted with operational delivery of impactful projects i.e. helped Team Scotland partners do things better and with a greater benefit and impact. Responses tended to focus on how it helped with delivery. The key themes were:

- Helped – considers partners' wider support/helps Team Scotland/stronger communication across agencies/clarity of messaging (16%, 7)
- Helped – right support/right time/streamlining/improved delivery/focus resources/target markets (16%, 7)

*“EGP as an internal program, has assisted the delivery of projects to some extent.”*

*“It has enabled clarity of messaging across the public sector and with partners.”*

*“It prioritises products and services to assist with the stage companies need support for.”*

#### 2.5.6 Evolution of the EGP to combat challenges

Just under half (49% 39) commented on the extent to which it has been or is necessary for the EGP to evolve to address any challenges (i.e. those associated with Brexit and areas such as cost of living and energy increases). Key themes included:

- Was necessary to evolve/be flexible – priority markets/programme development/impact of global challenges (33%, 13)
- Don't think its evolved/support and focus unchanged/strategy unchanged (18%, 7)
- Brexit continues to be an issue (15%, 6)
- Needs to be updated/more regular updates/quicker updates (15%, 6)

*"It has had to focus on trying to mitigate those challenges to maintain/ recover exports instead of focussing solely on growth."*

*"The approach is much the same as it was 5 years ago yet the world has moved on and not sure the strategy has evolved."*

*"Brexit is still an issue for companies. Companies looking at exporting to Europe for the first time do not know how to navigate their export journey."*

*"A pressing need for more regular updates or ability to flex to external factors (pandemic, conflict etc)."*

### 2.5.7 Difference in effectiveness of support pre-EGP

Respondents were asked if there has been a difference in the effectiveness of support provided before the EGP compared to what is delivered currently. Out of the 34% (27) responded, a third stated that they did not know of any difference. The other most frequent responses were:

- Yes there is a difference – fewer sectors receive support/more focused support now (22%, 6)
- No fundamental change/no difference (19%, 5)
- Yes there is a difference – more effective now (11%, 3)

*"Potentially we have seen more focus in some areas. Seen increased investment in some areas because of the profile coming from the plan."*

*"More effective with EGP support, targeted approach vs just taking a shot."*

*"I don't think how we support companies has fundamentally changed."*

## 2.5.8 Evolution of the EGP in the future

Comments were received from 49% (39) of respondents on how the EGP needed to evolve going forward. The main themes were:

- Needs to be more flexible, adaptable, regular updates/reviews – aligned to global changes e.g. trade, tariffs, sectors, markets, geopolitical landscape (38%, 16)
- More frequent review of company classification (17%, 7)
- More proactive updates/constant review (12%, 5)
- Increased resources/financial support for priorities including in-market and rural/fragile areas (10%, 4)

*“Needs to take account of world trends and to recognise that one size doesn't fit all; different sectors have different needs/priorities and a range of company sizes.”*

*“The classification of companies needs to be checked regularly and in short intervals.”*

*“Constant review to make sure it remains relevant.”*

*“If this is a critical economic tool, we need to double the resources involved - we are very low indeed on the benchmark of exporting index if we exclude one product, and we do not have natural routes to export for all our potential exporters.”*

## 2.6 Future challenges and opportunities

The section focused on the following questions:

- How has the changing global environment for companies affected choices relating to exporting?
- What are the challenges – in the next 5 years?
- What are the opportunities – in the next 5 years?
- What types of support do you think companies need that is not currently being offered?

### 2.6.1 Impact of a changing global environment

Over half of respondents (59%, 47) provided feedback on how the changing global environment for companies has affected choices relating to exporting. The most common themes are outlined below:

- Geopolitics/trade war/tariffs – uncertainty/wariness, risk, reduced confidence (32%, 15)
- Brexit – negative perceptions of the UK/impact EU market access (21%, 10)
- Ease of doing business/low barriers to entry driving market targets (17%, 8)

Some other themes included:

- Increasing business costs – less money to invest in expansion/exporting and people
- Diversifying export destinations – less focus on a single geography and efforts to de-risk
- Net zero – changing international ambitions and commitments, lack of clarity from the Scottish and UK Governments
- Brexit – restricting labour movement and negatively impacting specific sectors i.e. food

*“Company decisions to engage in export will depend on the global economic situation which is currently not encouraging given the geopolitical situation about energy, conflicts, inflation, tariffs discussions.”*

*“Political and economic challenges. Increased energy costs and restrictions on movement of labour across EU.”*

*“Companies have lost export markets due to Brexit. Companies looking to alternative markets outside Europe. Trump's tariff wars might offer some opportunities for our companies whose products could replace US items in disenchanted markets.”*

*“Significant challenges including Brexit and changing Tariffs has impacted export choices. Unpredictable trading landscape can make businesses feel anxious.”*

*“Dramatically changed and constantly changing. Companies aren't looking at markets close to home such as Europe but more where there is greater ease of doing business regardless of culture and language. It's so competitive so companies must be quicker to get to market.”*

## 2.6.2 Challenges and opportunities in the next five years

Respondents (66%, 52) provided feedback on the **challenges** they expect to see within the next five years. The most common themes were:

- Geopolitics, trade policies, trade agreements, and compliance – causing uncertainty, risk aversion, and continuous flux (65%, 34)
- Tariffs (29%, 15)
- AI integration, application, and impact on jobs (13%, 7)
- Increasing costs and inflation, including travel to markets outside the UK (13%, 7)
- Lack of financial support and difficulty raising finance (10%, 5)
- Overcoming trade barriers, outcomes of Brexit, and increased cost of doing business linked to these (10%, 5)
- Decrease in labour supply, skills shortages, and an ageing population (10%, 5)

*“Doing business with the USA and other markets with challenging political landscapes.”*

*“Trade barriers in general. More governments and countries are becoming inward-facing and prioritising local purchasing and smaller supply chains. The cost to export will increase.”*

*“Regulatory Changes – evolving trade policies and stricter compliance requirements have increased the complexity of exporting.”*

*“Politics, tariffs and a customer base that may be struggling.”*

*“AI – how will this impact on information sources as global customers consume information about Scottish products and services?”*

*“Increasing costs/inflations. Ageing population/decrease in birth rate affecting labour. Uncertain geopolitical issues.”*

*“To get the global economies stabilised. To overcome the trade barriers that result from Brexit.”*

*“Access to skills, access to critical raw materials and supply chain.”*

Other areas mentioned included: energy transition/climate change/emergency and how that is changing purchasing habits (i.e. demand for more locally produced), access to/strains on supply chain, material shortages, staff cost increases and focus on buying local – lower carbon footprint/being more self-sufficient.

Over half (56%, 45) of respondents provided perspectives on the **opportunities** they expect to see within the next five years. The main themes were:

- Specific/emerging markets/sector opportunities (28%, 13)
- Leveraging tech like AI and digital commerce (24%, 11)
- Tariffs and trade agreements (22%, 10)
- Building on Scotland's reputation/positive image/focusing on key areas (20%, 9)

*"Identifying emerging trends and being forerunners in presenting new products to meet those trends e.g. no-low alcohol trend."*

*"Technology advances in the next 5 years – leveraging tech like block chain and AI will help to transform business and not just tech businesses. Can improve efficiencies across the trade ecosystem. Huge in terms of impact on business."*

*"Trade Agreements between UK and major export partners."*

*"Free trade agreements could provide major opportunities. Also, the development of clean energy sectors could make Scotland a leader globally."*

*"Continuing global demand for premium Scottish goods and services and technology solutions."*

*"For Scotland to showcase better what our capabilities are to make a difference."*

Other areas of focus included: advances in technology and innovation across sectors, products, and services; diversification into energy, energy security, renewables, and sustainability; climate change and the climate emergency; providing tailored support to companies and fostering a supportive in-market environment; and improving international relationships (e.g. EU/UK, UK/US).

### 2.6.3 Gaps in current offering that will be needed by companies

Over half (58%, 46) of respondents provided views on what support companies need that is not currently being offered. Suggestions were varied with the main themes being:

- Buyer introductions/market visits/market entry/engagement (17%, 8)
- Sales/marketing skills development/training (15%, 7)
- More investment support/introductions to investors (15%, 7)
- Support for running and funding a business (15%, 7)

*"More opportunity to connect directly with international buyers."*

*"Increased supports for in market exposure either digital or preferably direct face to face Missions."*

*"More training in the challenges they will face; incentives to export."*

*"Sales skills is a big one – have intermittent support around export finance support, stabilising that would be a huge support for companies."*

*"Deeper strategic and marketing support/guidance. More pitching support."*

*"More help on the investment side of things both in Scotland and overseas."*

*"More 'meet the investors' type of events."*

*"Financial support to ensure they have someone dedicated to exports/brand ambassador in market."*

Other areas identified included: increasing the number of overseas and in-market specialists; more streamlined, integrated, and deeper support; enhanced support for scaling businesses; more one-to-one support; expansion of support tools such as an online supply chain directory, trading opportunity portal, and productivity tools; and support for the climate emergency and green technology.

## 2.7 Team Scotland/Public Sector Trade Support System

The section focused on the following questions:

- How effective is the wider public sector export support system in Scotland? (e.g. partnership working including at a UK level (eg FCDO and DBT), communication across services, duplication across services, customer journey from one service to another, links to other types of support e.g. innovation, investment).
  - What works well and why
  - What works less well and why
- What are the key success factors for an effective trade support ecosystem?
- How aware are businesses in Scotland of the range of export supports available?
- How easy is it for businesses to navigate the export support ecosystem (e.g. Enterprise Agencies, The Scottish Chambers, Business Gateway, Department for Business and Trade etc).

### 2.7.1 What works well

Just over half of respondents (51%, 40) provided comments on what works well. This included:

- Partnership working/relationships/collaboration/referrals/leveraging resources (43%, 17)
- Access to partners including beyond Scotland e.g. DBT/UK, Embassy/FCO (25%, 10)
- Signposting/joined up support (13%, 5)
- Sector specific support e.g. Scotland F&D Partnership, Fintech Scotland (10%, 4)

13% (5) were of the opinion that Team Scotland/Public Sector Trade Support System does not work well.

*"I think it is all about behaviours and people. I have a great relationship with partner organisations and believe the more resource and different resource we can give to a company the better."*

*"Introduction of DBT Scotland based staff and office has improved communication and awareness of opportunities available for businesses in the region."*

*"Cross referrals work well. May have a company looking to a market we don't have a resource in, that gets handed over to DBT, proving seamless level of support."*

*"There is too much support from too many entities. Nobody (even internally) understands all of it, let alone our companies."*

*"The Community approach works well, for example, our Sports Tech companies know each other and will assist in opening markets and doors."*

## 2.7.2 What could be improved

58% (46) of respondents suggested areas for improvement. The main themes were:

- Duplication/inconsistency/competition/lack of partnerships e.g. DBT v SDI/working in silos (49%, 23)
- Cluttered/confused support including grants – for business and internal public sector provision (30%, 14)
- Lack of clarity of role/reporting processes/metrics across partners/who delivers what (19%, 9)
- Communication between organisations – across Scotland and UK level (15%, 7)

*“Duplication of services, or no clarity in what the roles are of each of the partners.”*

*“The landscape is exceptionally busy and confusing with an ever-growing array of supports and organisations delivering these supports.”*

*“No clarity in what the roles are of each of the partners.”*

*“It remains somewhat disjointed in areas such as communication across services and the overall customer journey.”*

## 2.7.3 Key success factors for an effective trade support ecosystem

Key success factors for an effective trade support ecosystem were identified by 61% (48) of respondents. The main themes were:

- Strong partnerships/relationships/collaboration – non-competitive, shared goals/ambition/clarity on who does what (31%, 15)
- Good infrastructure – digitalisation, streamlined, connected, peer support/networks/learning from experience e.g. GlobalScots (21%, 10)
- Clear communication – transparency, openness (19%, 9)
- Clear pathways/seamless transitions/shared datasets and measurements (17%, 8)

Other success factors included coordination and alignment – lack of duplication, flexibility/agility – tailored support/sector specific support and focus on company needs/those that need support.

*“Good open transparent conversations with partners, understanding the partners role and how this links.”*

*“Digitally enabled, streamlined and interconnected. We need a common data set to help make decisions and give insights. Embed the ecosystem with other ecosystems e.g. finance and skills.”*

*“Communication and sight of what each other are doing.”*

*“Clear criteria for accessing support and reduction in duplication across services. All UK Agencies having a 'no wrong door' policy.”*

*“Coordination and alignment of resources to avoid duplication.”*

*“Tailored support, accounting for the specific needs of businesses (e.g., SMEs vs. large enterprises), maximises impact.”*

## 2.7.4 Business awareness of the range of available supports

When asked how aware they thought businesses are of the range of export supports available, just over half (54%, 43) of responded. Over a third (37%, 16) said it was varied/mixed/depends on previous engagement/interaction, 30% (13) said not very aware, with 16% (7) believing this was due to a lack of awareness raising/communication. Just (12%, 5) felt businesses were well aware.

*"While I think awareness is growing – particularly among larger enterprises— smaller businesses and start-ups often remain less informed."*

*"In my experience not aware at all. That's why the industry groups can be useful in sharing more."*

*"Enhanced marketing and outreach initiatives, particularly via digital channels, could improve overall visibility and uptake of available support."*

*"Most of them do. They are busy people but we have good business support now. We hold surveys and panels."*

## 2.7.5 Ease of navigation of business support landscape

57% (45) of respondents commented on the ease of navigating the export support ecosystem (e.g. Enterprise Agencies, The Scottish Chambers, Business Gateway, Department for Business and Trade etc). The majority (62%, 28) felt it was difficult or very difficult. Other most frequently mentioned comments were:

- Time consuming/overwhelming/cluttered/too many sources/confusing (18%, 8)
- Websites help e.g. Finding Business Support portal (13%, 6)
- Trade specialists/account managers/advisors help (13%, 6)

*"It can be confusing to clients if partners are not cross referring to other partner support which could benefit businesses. There should be no wrong door for businesses to access support and correct signposting from all partners."*

*"The FindBusinessSupport website helps to navigate this and is a great resource. It would be good to drive more traffic to this."*

*"If a company has a key account manager, from Enterprise Agencies or Local Authorities, then these key individuals can signpost for further help."*

## 2.8 SOSE specific questions

The section focused on the following questions:

- How does SOSE trade support work alongside SDI support?
  - What works well and why?
  - What works less well and why?
- Are there any activities/current gaps/sectoral focus which make an important contribution to trade support in the SOSE region which don't currently appear to fit with SDI trade priorities and SE missions?

### 2.8.1 *How SOSE trade support works alongside SDI support*

3 staff answered the SOSE specific questions. Over half (2) commented on how SOSE trade support works alongside SDI support. One believed they could do better while the other felt there were 'good relationships'.

### 2.8.2 *What works less well*

When asked what does not work so well, only one person commented stating that they had only recently put a manager responsible for export on the team.

### 2.8.3 *Activities/current gaps/sectoral focus which do not fit with SDI trade priorities and SE Missions*

Only one person commented on where they felt the current gaps were in terms of fit with SDI trade priorities and SE Missions. Feedback mentioned aspirations, size of business and energy transition – a good fit on hydrogen but less focus on exporting.

## 2.9 HIE specific questions

The section focused on the following questions:

- How does HIE trade support (Go Global, Export Advisory Service) work alongside SDI support?
  - What works well and why?
  - What works less well and why?
- Are there any activities/current gaps/sectoral focus which make an important contribution to trade support in the HIE region which don't currently appear to fit with SDI trade priorities and SE missions?

### 2.9.1 *How HIE trade support (Go Global, Export Advisory Service) works alongside SDI support*

8 staff answered the HIE specific questions. All commented on how the HIE trade support (Go Global, Export Advisory Service) works alongside SDI support. Comments included:

- Supports HIE pipeline development/readiness for SDI support (3)
- HIE/SDI integrates well/good ecosystem/gap plugging/complementary support (4)
- Good signposting between SDI/HIE e.g. SDI Prepare to Export/HIE EAS (2)
- Good in market support e.g. Go Global (4)

### 2.9.2 *What works less well*

Over half (5) provided comments on areas felt to work less well:

- Application process/evidence requirement onerous (1)
- Support is not effective standalone, needs everyone to feed in (1)
- Mis match in support available (1)
- Lack of cash/revenue funds to support potential exporters (1)
- All good (1)

2.9.3 *Activities/current gaps/sectoral focus which make an important contribution to trade support in the HIE region which do not currently appear to fit with SDI trade priorities and SE Missions*

All (8) responded. Feedback included:

- Lack of revenue grant funding (1)
- Formal mentoring programme (1)
- Support for some sectors that don't fit Missions eg creative industries, aquaculture (3)
- Financial support for in market events and trade shows (1)
- Change to more of a business sector rather than sector focus (1)
- International manager for hire (1)
- No gaps (2)

### 3 Emerging Findings

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

Barriers to exporting – lack of knowledge, experience and skills was seen to be the biggest barrier for early stage exporters but less so for existing exporters. Lack of finance or financial support and additional costs was seen to be a barrier to both those new to exporting and those looking to increase exports along with lack of understanding of market opportunities/fit, having the time and resource capability. Building contacts and partnerships was seen as a barrier to existing exporters whilst regulation and legislation was a barrier for early stage exporters.

Changes to exporting barriers in recent years – Brexit was seen as the most significant change. Whilst feedback was sought over the period immediately prior to and after the start of the recent USA tariff changes, tariffs and trade war uncertainties also emerged as a major current change. Both of these factors were seen to impacted on some sectors e.g. food and drink. An increase in wider geopolitical tensions was also identified.

Aspects of international exporting that have become easier to more difficult – whilst technological advancements were seen to make exporting easier a similar number of respondents felt that nothing had become easier. Access to support, advice and education was seen to be beneficial. Areas identified as being more difficult were Brexit, tariffs and trade barriers, geopolitics and market unpredictability and the availability of finance.

Internal company factors affecting the export journey – the main factors included resources (people and money), capacity and capability to scale, skills and experience, investment and access to funds as well as an understanding of how best to exploit opportunities.

Impact of the changing global environment – challenges relating to geopolitics, trade barriers and tariffs were seen to be the biggest impact causing uncertainty and reduced confidence. Increases in business costs and changing Net Zero ambitions were also identified as challenging. Opportunities identified included increasing awareness of the need for sustainability and exploring new markets beyond the EU together with new trade agreements.

Export challenges and opportunities in Middle Eastern and Asian markets – the main challenges identified were understanding the markets and culture and access/presence. Opportunities were seen in the growing economies with rising demand for Scottish/UK developed products and technologies.

Legacy effects of Brexit and the pandemic – Brexit was seen to still pose challenges relating to trade agreements and policy changes as well as the increased cost of doing business, anti-British perceptions, staff challenges and reduced access to markets and supply chains. Opportunities identified included diversification following Brexit and the UK being seen as a more attractive market to do business with.

What export support works well across the public sector – the top supports identified were 1:1 in market specialists, funding and grant support, overseas trade events and missions, bespoke support packages and support for strategy development and action plans.

Areas of support that could be improved across the public sector – included funding for delivery providers, providing less online support and more follow up and improving buyer and customer engagement at market events.

Gaps in support – included market access grants and grant writing support, export skill development and multi-year funding.

Combinations and timings of support that are most effective – no particular combinations or timings were identified but respondents felt that a bespoke coordinated approach was beneficial together with in market activities, multi-year funding and strong client management.

Key factors that make a difference – included spending time in market, company senior leadership commitment and ambition with a clear strategy and plan. One to many training and education along with exposure to markets were seen to add most value to new exporters whereas market insights and in market networking and senior level contacts were seen to add most value to existing exporters.

Accessing additional markets/geographies without requiring further support – half of respondents were aware of companies who had utilised their export support learning to access additional markets without the need for further support.

Businesses that “fall-off” support provision – half of respondents agreed that this does happen to some extent and the main reason for this were support requirements exceeding what is available, lack of company preparedness and time of transitioning between supports.

How international export support aligns with and drives innovation and investment – just under half said that it was all 'interlinked' and can't be separated. Others noted that exporting drives/stimulates innovation, investment and revenue as well as providing exposure to new ideas and opportunities.

Alignment of international export support with Scottish Government Trade Vision – whilst the majority of responses indicated positive alignment, some felt that the Trade Vision's key areas of inclusive growth, sustainability, net zero and good governance were ambitions rather than drivers of export growth.

Additionality/attribution resulting from international export support – scale leading to company growth, new markets, increased sales/revenue/turnover and jobs was seen as the main attribution of support. However, respondents also frequently suggested that timing (i.e. acceleration, faster to market) and higher quality were also a result of export support.

Export Growth Plan (EGP) – just under half described what they thought worked well regarding the EGP approach, noting it supports prioritisation, segmentation (sectoral/markets) and targeting focussed on key exporters. Other areas thought to work well included the shared vision/ambition/goals/objectives/strategy/plan. A similar number provided views on areas for improvement including the need for more flexibility, with it viewed by some as too rigid and a review of classifications or the need for it to be updated regularly. The key differences in the support requirements for new exporters were around market awareness, access, and entry as well as basic education, guidance, and confidence building. For existing exports, it was more around expansion into new markets, sales channels, and partnerships and targeted technical support and issue-specific strategies.

EGP operational delivery – ways in which the EGP has assisted with operational delivery of impactful projects included considering partners wider support, strengthening Team Scotland coordination, improving cross-agency communication, and clarifying messaging.

Evolution of the EGP to combat challenges – views on the ways in which the EGP needed to evolve going forward focused on greater flexibility and responsiveness, improved company classification, proactive and continuous updates and enhanced resourcing and financial support.

Impact of a changing global environment – over half of respondents provided feedback on how the changing global environment for companies has affected choices relating to exporting. The most common being reduced confidence due to geopolitical tensions and Brexit-related challenges.

Challenges and opportunities in the next five years – challenges included a range of external pressures affecting export activity, with the most prominent being geopolitical instability, shifting trade policies, and compliance challenges—creating ongoing uncertainty and risk aversion. Opportunities included targeting specific and emerging markets and sectors, particularly where Scotland holds strategic potential. Leveraging technologies such as AI and digital commerce was seen as essential for competitiveness and reach.

Gaps in current offering – included the importance of practical, growth-oriented support to strengthen export success. Key priorities included buyer introductions, market visits, and entry facilitation to boost international engagement. Equally valued were opportunities for sales and marketing skills development, alongside increased access to investment and investor networks.

Team Scotland/Public Sector Trade Support System – just over half of respondents highlighted strong partnership working, cross-border collaboration, joined-up support, and sector-specific initiatives as key elements of what works well in current export support. A similar number identified key areas for improvement, including duplication and siloed working between agencies, unclear roles and reporting, cluttered support systems, and weak communication across Scotland and UK-level organisations.

Key success factors for an effective trade support ecosystem – included strong collaboration, robust infrastructure, transparent communication, and seamless pathways with shared data as key success factors for an effective trade support ecosystem.

Business awareness of the range of available supports – is thought to be mixed or limited—often shaped by prior engagement.

Ease of navigation of business support landscape – the view was that the majority find it difficult or very difficult—often describing it as time-consuming, cluttered, and confusing due to the number of sources. While some noted that websites like the Finding Business Support portal and access to trade specialists or advisors were helpful, these were less frequently mentioned.

## Frontline

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## Appendix 1: Detailed findings tables

### Biggest barriers for early stage exporters

Theme	%	No of responses
<b>Lack of knowledge/experience/skills</b>	<b>36%</b>	<b>28</b>
<b>Lack of finance/financial support/additional costs/currency fluctuations</b>	<b>35%</b>	<b>27</b>
<b>Having the time/resource/capacity</b>	<b>29%</b>	<b>22</b>
<b>Lack of understanding of the market/opportunities/product fit</b>	<b>21%</b>	<b>16</b>
<b>Regulation/legislation</b>	<b>21%</b>	<b>16</b>
<b>Ability to build contacts/partnerships/networks</b>	<b>12%</b>	<b>9</b>
<b>Market entry/accessibility</b>	<b>12%</b>	<b>9</b>
Lack of effective strategy	9%	7
Lack of ambition	8%	6
Risk adverse	8%	6
Tariffs/trade agreement	8%	6
Customs	6%	5
Not knowing where to go for advice	6%	5
Brexit	5%	4
Lack of confidence	4%	3
Geopolitical tensions	4%	3
Happy with the status quo/don't want to leave comfort zone	4%	3
Procurement/supply chain uncertainty/logistics	4%	3
Demand/scale of opportunity	4%	3
Cultural barriers	3%	2
Competition	1%	1
IP protection	1%	1
Other	5%	4

### Biggest barriers for companies already exporting

Theme	%	No of responses
<b>Lack of finance/financial support/additional costs</b>	<b>36%</b>	<b>26</b>
<b>Lack of understanding of the market/opportunities/product fit</b>	<b>21%</b>	<b>15</b>
<b>Lack of knowledge/experience/skills</b>	<b>19%</b>	<b>14</b>
<b>Having the time/resource/capacity</b>	<b>19%</b>	<b>14</b>
<b>Ability to build contacts/partnerships/networks</b>	<b>18%</b>	<b>13</b>
<b>Tariffs/trade agreement/trade barriers</b>	<b>14%</b>	<b>10</b>
<b>Market pressure/market development/instability</b>	<b>11%</b>	<b>8</b>
<b>Regulation/legislation</b>	<b>11%</b>	<b>8</b>
<b>Lack of ambition</b>	<b>10%</b>	<b>7</b>
Competition	8%	6
Risk adverse	7%	5
Brexit	7%	5
Scalability	7%	5
Messaging/brand recognition	4%	3
Policy	4%	3
Lack of effective strategy	4%	3
Procurement/supply chain uncertainty/logistics	4%	3
Country specific challenges	3%	2
Prioritisation of markets	3%	2
Geopolitical tensions	3%	2

Route to market	3%	2
Commitment	3%	2
Demand/scale of opportunity	3%	2
Need technical help	1%	1
Move from agents to company controlled	1%	1
Cultural barriers	1%	1
Other	10%	7

#### How barriers have changed over the last three to five years

Theme	%	No of responses
<b>Brexit – seen as the most significant change (suggesting a large proportion of companies were focusing on EU markets) leading to trade challenges, increased costs and documentation requirements and negative perceptions of the UK</b>	<b>48%</b>	<b>29</b>
<b>Tariff/trade war uncertainties</b>	<b>26%</b>	<b>16</b>
<b>Sector specific – respondents suggested that some sectors have been impacted by changes such as Brexit, COVID and the cost of doing business, more than others. Food and drink was the sector most frequently mentioned</b>	<b>26%</b>	<b>16</b>
<b>Increase in geopolitical tensions meaning companies must navigate a more fragmented and unpredictable trade environment</b>	<b>21%</b>	<b>13</b>
<b>Increased financial risks/constraints/investment challenges</b>	<b>21%</b>	<b>13</b>
<b>Unpredictable global markets/ongoing economic challenges</b>	<b>13%</b>	<b>8</b>
<b>Increased competition</b>	<b>10%</b>	<b>6</b>
<b>Logistic and supply chain constraints</b>	<b>10%</b>	<b>6</b>
Increased complexity in entering new markets	8%	5
Lack of labour/skills/expertise/knowledge	8%	5
Reluctancy to look at other markets	7%	4
Changes in consumer demand/buying habits	7%	4
Technological advances	7%	4
Return to in person/in-market requirements	7%	4
No change	5%	3
Improved market knowledge/relationships	5%	3
Growth in some sectors	3%	2
Increased confidence through market expertise and support	3%	2
Moving away from EU markets	3%	2
Government policy implications	3%	2
Improvements in business confidence	2%	1
Improvements in education/myth busting	2%	1
Increase in SMEs looking to export/declining/maturing domestic market	2%	1
Progression of marketing and sales reach	2%	1
Climate change impacts	2%	1
Innovation challenges	2%	1
Power shift	2%	1
Abundance of Government Programmes	2%	1
Post COVID slump	2%	1
COVID closures	2%	1
Other	8%	5

### Aspects of international exporting that have become easier

<b>Easier</b>		
<b>Code</b>	<b>%</b>	<b>No of responses</b>
technological advancements, the use of online platforms for example video conferencing or sales via platforms such as Facebook, Instagram, TikTok), digitalisation (for example, automated customs systems can speed up parts of the export process, and targeted digital marketing)	29%	16
Nothing	27%	15
Access to support/advice/education/information	20%	11
Prospecting/making contacts	14%	8
Market access/FTAs	11%	6
Increased interest/demand/opportunities for some products and services	9%	5
Business and product exposure	4%	2
Don't know	4%	2
Brexit impacts	2%	1
Other	7%	4

### Aspects of international trading that have become more difficult

<b>More difficult</b>		
<b>Theme</b>	<b>%</b>	<b>No of responses</b>
<b>Brexit impacts/trading with EU</b>	<b>30%</b>	<b>19</b>
<b>Tariffs/trade barriers</b>	<b>25%</b>	<b>16</b>
<b>Geopolitical market/market unpredictability</b>	<b>25%</b>	<b>16</b>
<b>Availability of finance for exporting/increased costs</b>	<b>24%</b>	<b>15</b>
<b>Navigating legislation/regulations</b>	<b>19%</b>	<b>12</b>
<b>Administration requirements</b>	<b>17%</b>	<b>11</b>
<b>Market access/routes to market</b>	<b>10%</b>	<b>6</b>
<b>Policy changes</b>	<b>10%</b>	<b>6</b>
Supply chain disruptions/availability/maturity	8%	5
Increasing competition	8%	5
Everything	8%	5
Access to talent/skills	6%	4
Building relationships/lack of personal connections	3%	2
Increasing/changing customer demand	3%	2
Strategy planning	3%	2
Competing ambitions	3%	2
Business uniqueness	3%	2
Lack of sector specific support	2%	1
The pace of change/technology	2%	1
Power shift	2%	1
Custom duties/levies	2%	1
Other	13%	8

## Internal company factors that affected the export journey

Theme	%	No of responses
<b>Resources – including people/money</b>	<b>69%</b>	<b>50</b>
<b>Capacity/ability to scale</b>	<b>51%</b>	<b>37</b>
<b>Skills/capability/experience</b>	<b>47%</b>	<b>34</b>
<b>Investment and access to funds</b>	<b>38%</b>	<b>27</b>
<b>Knowledge/understanding/awareness of opportunities and how best to exploit them</b>	<b>24%</b>	<b>17</b>
<b>Defined strategy/vision</b>	<b>15%</b>	<b>11</b>
<b>Commitment/ambition/motivation</b>	<b>13%</b>	<b>9</b>
Risk adverse	8%	6
Lack of innovation/competitiveness	7%	5
Unrealistic expectations	6%	4
No in-market presence	6%	4
View the support ecosystem as cluttered/don't access the right support	4%	3
Culture	4%	3
Availability of labour supply	4%	3
Confidence	3%	2
Lack of market prioritisation	1%	1
Bureaucracy	1%	1
Availability of suitable property for growth	1%	1
Difficulty finding local partners	1%	1
Lack of digital infrastructure	1%	1
Product variables	1%	1
Operational structure/efficiency	1%	1

## Impact of the changing global environment on company exporting decisions and plans – challenges and opportunities

Challenges		
Theme	%	No of responses
<b>Geopolitics/trade barriers/tariffs – uncertainty, risk, reduced confidence</b>	<b>71%</b>	<b>47</b>
<b>Increasing business costs</b>	<b>44%</b>	<b>29</b>
<b>Net zero – changing international ambitions/commitment/lack of Scot/UK gov clarity</b>	<b>24%</b>	<b>16</b>
<b>Rising cost of living affecting consumer purchasing decisions</b>	<b>15%</b>	<b>10</b>
<b>Difficulty keeping up with changing Gov rules/policy/regulations</b>	<b>14%</b>	<b>9</b>
Market access limitations	6%	4
Increased competition	3%	2
Other	9%	6

Opportunities		
Theme	%	No of responses
<b>Increasing awareness/need for sustainability/net zero</b>	<b>34%</b>	<b>19</b>
<b>Expanding/exploring new markets</b>	<b>29%</b>	<b>16</b>
<b>New free trade agreements/trade deals</b>	<b>23%</b>	<b>13</b>
<b>e-commerce/digitisation/social media/AI</b>	<b>14%</b>	<b>8</b>
Scotland's energy transition/sustainability experience/reputation	7%	4
Public sector support	5%	3
Opportunities in health and wellbeing	5%	3
Diversification	4%	2
Legislation/regulation	2%	1

Collaboration	2%	1
None	2%	1
Demand for provenance and quality products	2%	1
Other	11%	6

### Export challenges and opportunities in Middle Eastern and Asian markets

<b>Challenges</b>		
<b>Theme</b>	<b>%</b>	<b>No of responses</b>
<b>Understanding market/culture/language/policy/regulations</b>	<b>41%</b>	<b>22</b>
<b>Access – travel, visas, in market connections/presence</b>	<b>33%</b>	<b>18</b>
<b>Cost/currency fluctuations</b>	<b>30%</b>	<b>16</b>
<b>Competition</b>	<b>11%</b>	<b>6</b>
<b>Political considerations/instability</b>	<b>11%</b>	<b>6</b>
<b>Time to success</b>	<b>9%</b>	<b>5</b>
Logistics	9%	5
Don't know	6%	3
IP protection	4%	2
Product fit	4%	2
Changing consumer demands/requirements	4%	2
Human rights	2%	1
Past perceptions of being difficult	2%	1
Less public sector resource in this area	2%	1
Lack of funding	2%	1
Lack of expertise	2%	1
In-market requirement	2%	1
Supply	2%	1
National security	2%	1
Sustainability/climate change implications	2%	1
Other	7%	4

<b>Opportunities</b>		
<b>Theme</b>	<b>%</b>	<b>No of responses</b>
<b>Growing economies/rising incomes/higher budgets/growing demand</b>	<b>23%</b>	<b>11</b>
<b>Demand for Scottish/UK developed products/technologies</b>	<b>19%</b>	<b>9</b>
<b>High demand for certain sectors/products</b>	<b>13%</b>	<b>6</b>
<b>Country specific opportunities</b>	<b>10%</b>	<b>5</b>
<b>Good in-market networks and support</b>	<b>10%</b>	<b>5</b>
Well-funded markets/powerful companies	6%	3
Infrastructure/technology improvements	6%	3
Scottish sustainability/renewables credentials	6%	3
Demand for innovative solutions	6%	3
Large population/market size	6%	3
Free trade agreements	6%	3
Good logistic routes	4%	2
Don't know	4%	2
Willingness to engage	2%	1
Once established, moves quickly	2%	1
Other	6%	3

## Legacy effects of Brexit/the pandemic – challenges and opportunities

Challenge	%	No of responses
<b>B-trade agreements/policies, legislation changes</b>	<b>43%</b>	<b>24</b>
<b>B-cost of doing business</b>	<b>25%</b>	<b>14</b>
<b>B-anti-British attitude/perception/difficult to trade with</b>	<b>14%</b>	<b>8</b>
<b>B-staff/resource challenges</b>	<b>14%</b>	<b>8</b>
<b>B-reduced market access/supply chain/logistics</b>	<b>13%</b>	<b>7</b>
B-delays in products	4%	2
B-lack of interest in premium grocery sector	4%	2
B-more consolidated number of exporters	2%	1
B-increased focus on buying local	2%	1
P-decreased demand for certain products/change in consumer buying	5%	3
P-more risk adverse	2%	1
P-working from home makes sales difficult	2%	1
P-vulnerabilities in the supply chain	2%	1
P-need for digitisation	2%	1
P-reduced capacity to respond	2%	1
P-some transcontinental business activities not resumed	2%	1
Yes	9%	5
None	5%	3
Cost of living	4%	2
Reduced ambition	2%	1
Reduced budgets	2%	1
Continued instability	2%	1
Don't know	2%	1
Other	13%	7

Opportunities	%	No of responses
<b>B- diversification/exploring new markets</b>	<b>18%</b>	<b>7</b>
B – in country set up costs	3%	1
P-more face-to-face interaction	3%	1
<b>None</b>	<b>15%</b>	<b>6</b>
<b>Seen as a more attractive market</b>	<b>15%</b>	<b>6</b>
<b>Benefits from trade agreements/tariffs</b>	<b>13%</b>	<b>5</b>
<b>Sector specific i.e. Life export support works well across public sector Science, Healthcare, Sustainability, Net Zero</b>	<b>10%</b>	<b>4</b>
Businesses more resilient/accessing support	5%	2
EU still main exporter market	5%	2
e-commerce/digital pace of change/different ways of working	3%	1
Yes	3%	1
Don't know	3%	1

## Export support works well across public sector

Theme	%	No of responses
<b>1:1 in market specialists – networks, insight, advice, guidance</b>	<b>37%</b>	<b>22</b>
<b>Funding/grant support e.g. ISG</b>	<b>27%</b>	<b>16</b>
<b>Overseas trade, events, missions</b>	<b>24%</b>	<b>14</b>
<b>Tailored bespoke support package</b>	<b>22%</b>	<b>13</b>
<b>Support for strategy development and action plans</b>	<b>19%</b>	<b>11</b>
<b>Introductions and connections</b>	<b>15%</b>	<b>9</b>
Training and education	8%	5
Hybrid support – F2F, 1:1, 1:many, online	7%	4
GlobalScots	5%	3
HIE specific support – Export Advisory Service	5%	3
Integrated support offering across agencies	3%	2
Other	19%	11

## Areas of support that could be improved across the public sector

Theme	%	No of responses
<b>Lack of funding for delivery providers/timebound support</b>	<b>21%</b>	<b>12</b>
<b>Level of support not fit for purpose i.e. too much online and no follow-up</b>	<b>13%</b>	<b>7</b>
<b>Lack of buyer/customer engagement at market events/missions</b>	<b>11%</b>	<b>6</b>
Cluttered/competitive landscape – difficult to navigate	9%	5
Lack of reliable funding/grants	9%	5
Support too generic	9%	5
Low level of grant funding	7%	4
Too much bureaucracy – complex applications/claims	5%	3
Duplication across provision	4%	2
Viewed as resource intensive	4%	2
Needs more partnerships	4%	2
Lack of clarity on segmentation for engagement	2%	1
Products/programmes not up to date/reflective of changing economic challenges	2%	1
Mismatch between partner offering and needs of ATN	2%	1
Getting right/forward thinking companies on board/low company commitment	2%	1
Support too central belt focussed	2%	1
Don't know	2%	1
<b>Other</b>	<b>38%</b>	<b>21</b>

## Gaps in the support

Theme	%	No of responses
<b>Market access grants/wider grants/grant writing support – increased value/volume</b>	<b>16%</b>	<b>8</b>
<b>Export skills development</b>	<b>14%</b>	<b>7</b>
<b>Multi-year funding</b>	<b>10%</b>	<b>5</b>
No gaps/lots of support available	6%	3
Support for non-priority sectors/geographies – beyond ATN	6%	3
Increased awareness of what is already on offer – company and internal/Team Scotland level	6%	3
Scaling support	4%	2
Increased 1 to 1 support	4%	2
Increased flexibility of programme delivery/online provision	4%	2
Digital trade	4%	2

Lack of support for SME, small, micro businesses	4%	2
Don't know	2%	1
Increased peer networking	2%	1
Less structured market visits	2%	1
Consistency of offering	2%	1
More detailed pre readiness assessment	2%	1
Supporting fewer companies/increased prioritisation (not a gap per se)	2%	1
International manager for hire	2%	1
Professional mentoring	2%	1
Other	26%	13

### Combinations and timings of support that are more effective

Theme	%	No of responses
<b>Bespoke/package of support/coordination of activities e.g. ACE model</b>	<b>20%</b>	<b>10</b>
<b>In market activities/engagement/buyer meetings</b>	<b>20%</b>	<b>10</b>
<b>Multiyear funding – limit stop/start nature support</b>	<b>16%</b>	<b>8</b>
<b>Strong client management and in market advice/trade advisor e.g. Export Advisory Service</b>	<b>12%</b>	<b>6</b>
Specific programmes to start – ISW, Market Booster, Prepare to Export	8%	4
Clear strategy/plan at the outset/company readiness	6%	3
Getting companies to market	6%	3
Pre-event support/linking country courses to trade missions	4%	2
Training/strategy development/export skills	4%	2
Varies by company/sector	2%	1
Advanced planning/early research	2%	1
Don't know	2%	1
<b>Other</b>	<b>20%</b>	<b>10</b>

### Key factors that make a difference

Theme	%	No of responses
<b>Business – spending time in market/market engagement/immersion/understanding</b>	<b>26%</b>	<b>14</b>
<b>Business – senior leadership commitment, understanding</b>	<b>17%</b>	<b>9</b>
<b>Business – ambition with strategy and plan</b>	<b>17%</b>	<b>9</b>
Business – export readiness – capability, capacity, financial resource, equity set up	9%	5
Business – developing partnerships	6%	3
Business – streamlining supply chains	4%	2
<b>Team Scot – identifying and sharing market opportunities/contacts, sharing market understanding/insight</b>	<b>15%</b>	<b>8</b>
Team Scot – supporting sectors aligned to economies/growing global trends	9%	5
Team Scot – unified support	6%	3
Team Scot – bespoke support	6%	3
Team Scot – promotion/awareness	4%	2
Team Scot – providing access to sector/meet the buyer events	4%	2
Team Scot – providing access to sector/meet the buyer events	4%	2
Team Scot – early stage support	4%	2
Team Scot – knowledge of subsectors	4%	2
Team Scot – minimise disruption of tariffs	2%	1
Team Scot – clear, simple, on demand support	2%	1
Team Scot – ambition, knowing what success looks like	2%	1
Team Scot – awareness of investment models	2%	1
Proactive, supportive government	8%	4

Funding/investment to minimise risk	6%	3
<b>Other</b>	<b>15%</b>	<b>8</b>

#### Factors that deliver most value to those new to exporting and existing exporters

Theme	%	No of responses
<b>New – one to many training/education workshops/advice/programmes to prepare for export</b>	<b>35%</b>	<b>15</b>
<b>New – exposure to market/market engagement/brokering connections</b>	<b>26%</b>	<b>11</b>
New – 1:1 intensive support/handholding	9%	4
New – market research/insights	7%	3
New – company readiness/SLT buy in	5%	2
New – Product/service positioning	2%	1
<b>Existing – market insights/new market opportunities</b>	<b>21%</b>	<b>9</b>
<b>Existing – Top quality in-market networking VIP/senior level contacts</b>	<b>16%</b>	<b>7</b>
Existing – intensive 1:1/tailored/strategic support	9%	4
Existing – support/networking beyond Scotland – British Embassy/Foreign Office/DBT referral	7%	3
Existing – support/networking beyond Scotland – British Embassy/Foreign Office/DBT referral	7%	3
Existing – financial support	7%	3
Existing – scaling approach/support	5%	2
Existing – access to GlobalScots	2%	1
<b>Bespoke support</b>	<b>16%</b>	<b>7</b>
Sector specific/market opportunities, advice, guidance	9%	4
Other	5%	2

#### Accessing additional markets/geographies without requiring further support

Theme	%	No of responses
Yes, aware of instances – provided an example	34%	14
Not aware of instances/examples	29%	12
Yes – no example provided	20%	8
Some do, some don't access additional markets	15%	6
They will need more support to access additional markets	12%	5
Other	2%	1

### Businesses that “fall-off” support provision

Theme	%	No of responses
<b>Yes – definitely/it happens/to some extent</b>	<b>53%</b>	<b>24</b>
<b>Support requirements exceed what is available/do not meet needs/limited grant/products/services</b>	<b>18%</b>	<b>8</b>
<b>Reduced company effort/preparedness/commitment/engagement</b>	<b>11%</b>	<b>5</b>
<b>Transitioning between supports e.g. Business Gateway to SDI</b>	<b>11%</b>	<b>5</b>
Too difficult for the company/exporting not for them (at this time)	9%	4
Support not on demand due to annualised/limits of support/funds	7%	3
Poor experience/not realising the value of support	7%	3
Loss of contact/relationship in the company e.g. company growing quickly/personnel changes	7%	3
No fall offs	7%	3
Lack of specific in market/sector knowledge/insight/contacts	4%	2
Lack of support for small companies	4%	2
Other business demands e.g. lack of resources/too busy, investment priorities, scaling up	4%	2
<b>Don't know</b>	<b>7%</b>	<b>3</b>
Less active support by account managers	2%	1
Under represented founders – unrealistic trade mission criteria for them	2%	1
Too many organisations supporting this/cluttered support landscape	2%	1
Other	13%	6

### How international export support aligns with and drives innovation and investment

Theme	%	No of responses
<b>All interlinked/can't separate/continuous loop</b>	<b>46%</b>	<b>23</b>
<b>Exporting drives/stimulates innovation/investment/revenue</b>	<b>20%</b>	<b>10</b>
<b>Exporting provides exposure to new ideas and opportunities</b>	<b>14%</b>	<b>7</b>
<b>Innovation/new product development needed to stay competitive in international/new markets</b>	<b>10%</b>	<b>5</b>
Innovation and productivity is critical for exporting	6%	3
Funding and support drives innovation by minimising risk	2%	1
SE/SDI internally – investment and innovation not linked	2%	1
Other	14%	7

### Alignment of international export support with Scottish Government Trade Vision

Theme	%	No of responses
<b>Partially aligns</b>	<b>20%</b>	<b>10</b>
<b>It aligns/fully aligned</b>	<b>18%</b>	<b>9</b>
<b>Supports company credibility</b>	<b>18%</b>	<b>9</b>
<b>Supports/showcases Scotland's credibility</b>	<b>16%</b>	<b>8</b>
<b>It is/they are ambitions/aspirations rather than drivers</b>	<b>12%</b>	<b>6</b>
<b>General good company practice</b>	<b>10%</b>	<b>5</b>
Trade vision drives how SE/SDI operates	8%	4
Small companies don't have the resource to implement	8%	4
Sustainability – can be onerous for business – hard to measure/demonstrate	6%	3
It does not align	6%	3
Provides guidance on the right markets to engage with e.g. human rights	4%	2
Areas allow identification of suitable companies/products	4%	2
Net zero – an asset for energy transition sector	4%	2

Was a different world when introduced	4%	2
Dependent on what the customer/market needs	4%	2
Well being and inclusivity more aligned with inward investment	2%	1
Some misalignment with SE corporate strategy and Missions approach	2%	1
Net zero – can restrict/sceptic markets	2%	1
Should not be a prerequisite for support	2%	1
Other	24%	12

#### Additionality/attribution resulting from international export support

Theme	%	No of responses
<b>Scale – e.g. company growth, new markets, increased sales/revenue/turnover, jobs</b>	<b>39%</b>	<b>19</b>
<b>Time – e.g. acceleration, faster to market</b>	<b>37%</b>	<b>18</b>
<b>All – acceleration, scale, sales, quality</b>	<b>29%</b>	<b>14</b>
<b>Quality – e.g. productivity and innovation, productivity, reduces mistakes/risk</b>	<b>22%</b>	<b>11</b>
Other	16%	8

#### What works well

Theme	%	No of responses
<b>Supports prioritisation/segmentation(sectoral/markets) /targeting/focussed on key exporters</b>	<b>61%</b>	<b>22</b>
<b>Shared vision/ambition/goals/objectives/strategy/plan</b>	<b>17%</b>	<b>6</b>
<b>Trade and in market specialists/deep knowledge/1 to 1 support</b>	<b>17%</b>	<b>6</b>
<b>Don't know</b>	<b>11%</b>	<b>4</b>
<b>Framework for support/guidance/information/data</b>	<b>11%</b>	<b>4</b>
It doesn't work/its not effective (including HIE/SoSE)	8%	3
Team Scotland approach	6%	2
Supports decision-making	6%	2
Operationalisation	6%	2
Flexibility/adaptability of approach	3%	1
Data driven	3%	1
Other	22%	8

#### What could be improved

Theme	%	No of responses
<b>Not flexible enough/too rigid/too narrow – no fit with niche sectors</b>	<b>24%</b>	<b>10</b>
<b>Wrong targets/lists, classification needs reviewed</b>	<b>24%</b>	<b>10</b>
<b>Out of date/not updated regularly enough</b>	<b>17%</b>	<b>7</b>
<b>Lack of fit with partner/government policy/strategy/new areas of focus</b>	<b>12%</b>	<b>5</b>
Don't know	7%	3
Out of date data/lack of data	7%	3
Poor fit with company needs	7%	3
Not joined up enough/partnership working challenging	7%	3
Negatively impacts on SMEs/too focussed on larger companies	5%	2
Lack of return of investment across partners	2%	1
Doesn't help build export pipeline	2%	1
Lack of or too generic communication	2%	1
Staff unwilling to let go of old model/companies	2%	1
No grant support	2%	1
Other	29%	12

## Differences in support needs – new and existing

Theme	%	No of responses
Both – advice/finance/access	4%	2
<b>Existing – Widening exposure/new markets/sales channels/partners</b>	<b>22%</b>	<b>11</b>
<b>Existing – Niche/targeted/technical support/issue specific strategies</b>	<b>22%</b>	<b>11</b>
Existing – Majority had one to one support	6%	3
<b>New – Market awareness/access/entry</b>	<b>28%</b>	<b>14</b>
<b>New – Basic education/guidance, capacity/capability building/confidence building</b>	<b>26%</b>	<b>13</b>
<b>New – Constant/intensive support/hand holding</b>	<b>14%</b>	<b>7</b>
<b>New – Access to finance/resources</b>	<b>12%</b>	<b>6</b>
New – Majority now have one to many/online	6%	3
New – Help goal setting/targeting	2%	1
No difference/similar requirements	6%	3
Don't know	4%	2
<b>Other</b>	<b>36%</b>	<b>18</b>

## Impact of the EGP on support needs

Theme	%	No of responses
<b>Supports resource prioritisation/allocation/our focus</b>	<b>21%</b>	<b>10</b>
<b>Don't know</b>	<b>19%</b>	<b>9</b>
<b>Helps identify/target/raise awareness/companies we want to work with</b>	<b>13%</b>	<b>6</b>
<b>To some extent</b>	<b>13%</b>	<b>6</b>
Time-bound delivery plan/sound framework/useful tool	9%	4
Ensures right support at right time	9%	4
Not focussing on right companies/too focused on large companies/limited support for early stage/must move beyond ATN	4%	2
Don't think so/it hasn't	4%	2
Yes but...	4%	2
Limited market and company base supported	4%	2
Not fit for purpose for HIE/SoSE	4%	2
Company targets now out of date	2%	1
Not in a good way	<b>2%</b>	1
Made it work	2%	1
Good market focus	2%	1
Led to confusion	2%	1
Need to further develop the delivery model/needs more exposure/move beyond digital	2%	1
Other	34%	16

## Impact of the EGP on operational delivery

Theme	%	No of responses
<b>Helped – Too a large extent</b>	<b>19%</b>	<b>8</b>
<b>Helped – Considers partners' wider support/helps Team Scotland/stronger communication across agencies/clarity of messaging</b>	<b>16%</b>	<b>7</b>
<b>Helped – Right support/right time/streamlining/improved delivery/focus resources/target markets</b>	<b>16%</b>	<b>7</b>
Helped – Other	9%	4
Helped – Too some extent	9%	4
Helped – Gives more leverage/access wider funding/unlock resources	5%	2
Helped – Helped drive export agenda	5%	2
Helped – Widened types of companies we work with/support where others would not	5%	2
Helped – Other	9%	4
Why not – Lack of company fit with supported sector	7%	3
Why not – Less consistency across Team Scotland partners/too many plans/lacks leadership	7%	3
Why not – Waste of time/burdensome	5%	2
Why not – Target companies don't need support/missed opportunities in emerging markets	5%	2
Why not – Lacks local flexibilities/too central belt focused	2%	1
Why not – Watered down resources	2%	1
<b>Why not – Other</b>	<b>12%</b>	<b>5</b>
<b>No/not sure it has</b>	<b>23%</b>	<b>10</b>
<b>Don't know</b>	<b>21%</b>	<b>9</b>

## Evolution of the EGP to combat challenges

Theme	%	No of responses
<b>Was necessary to evolved/be flexible – priority markets/programme development/impact of global challenges</b>	<b>33%</b>	<b>13</b>
<b>Don't think its evolved/support and focus unchanged/strategy unchanged</b>	<b>18%</b>	<b>7</b>
<b>Brexit continues to be an issue</b>	<b>15%</b>	<b>6</b>
<b>Needs updated/more regular updates/quicker updates</b>	<b>15%</b>	<b>6</b>
More companies to work with/now includes starting out	5%	2
Partners evolved to make it work	3%	1
Incorporated sector export plans	3%	1
Other policy areas cover cost of living/energy increases	3%	1
Doesn't answer the question	3%	1
Importance of evaluation	3%	1
Minor changes	3%	1
Other	21%	8

## Difference in effectiveness of support pre-EGP

Theme	%	No of responses
<b>Don't know</b>	<b>33%</b>	<b>9</b>
<b>Yes – fewer sectors receive support/more focused now</b>	<b>22%</b>	<b>6</b>
<b>Yes – more effective now</b>	<b>11%</b>	<b>3</b>
Yes – changed segmentation targets	7%	2
Yes – increased partnership working/delivery	7%	2
Yes – less support for SMEs now	4%	1
Yes – more reactive pre plan	4%	1
Yes – better specialist advice	4%	1
<b>Not fundamentally changed/no difference</b>	<b>19%</b>	<b>5</b>
Continued focus on 1 to many/Growing the export base	7%	2
More aligned to EGP	4%	1
More early stage support	4%	1
Other	<b>7%</b>	<b>2</b>

## Evolution of the EGP in the future

Theme	%	No of responses
<b>Needs to be more flexible, adaptable, regular updates/reviews – aligned to global changes e.g. trade, tariffs, sectors, markets, geopolitical landscape</b>	<b>38%</b>	<b>16</b>
<b>More frequent review of company classification</b>	<b>17%</b>	<b>7</b>
<b>More proactive updates/constant review</b>	<b>12%</b>	<b>5</b>
<b>Increased resources/financial support for priorities including in market and rural/fragile areas</b>	<b>10%</b>	<b>4</b>
Don't know	7%	3
Inclusion of company feedback	7%	3
More links/better relationships with wider strategies/policies/government	5%	2
Plan less /do more	2%	1
It doesn't/already working well	2%	1
More for scale ups/starting out	2%	1
Less strategies/policies	2%	1
Align with SE Missions	2%	1
<b>Other</b>	<b>14%</b>	<b>6</b>

## Impact of changing global environment

Theme	%	No of responses
<b>Geopolitics/trade war/tariffs – uncertainty/wariness, risk, reduced confidence</b>	<b>32%</b>	<b>15</b>
<b>Brexit – negative perceptions of the UK/impact EU market access</b>	<b>21%</b>	<b>10</b>
<b>Ease of doing business/low barriers to entry driving market targets</b>	<b>17%</b>	<b>8</b>
Government rules/policy/regulations	6%	3
Increasing business costs – less money to invest in expansion/people	6%	3
Diversifying export destinations/less focus on single geography/derisk	6%	3
Close to home focus/rUK	6%	3
Net zero – changing international ambitions/commitment/lack of Scotland/UK	4%	2
Government clarity	4%	2
Need to be more adaptable/agile	4%	2
Brexit – restricting labour movement	4%	2
Brexit – negative impact on certain sectors	4%	2
Competing business priorities	2%	1
Slow down/lack of export activity	<b>2%</b>	<b>1</b>

No effect	2%	1
Other	17%	8

#### Challenges and opportunities in the next five years

Challenges	%	No of responses
<b>Geopolitical/trade policies/trade agreements/compliance – uncertainty, risk aversion, continuous flux</b>	<b>65%</b>	<b>34</b>
<b>Tariffs</b>	<b>29%</b>	<b>15</b>
<b>AI integration/application/impact of jobs</b>	<b>13%</b>	<b>7</b>
<b>Increasing costs/inflation/including travel to market outside UK</b>	<b>13%</b>	<b>7</b>
<b>Lack of financial support/hard to raise finance</b>	<b>10%</b>	<b>5</b>
<b>Overcoming trade barriers/outcomes of Brexit/increased cost of doing business linked to these</b>	<b>10%</b>	<b>5</b>
<b>Decrease in labour supply/skills shortages/ageing population</b>	<b>10%</b>	<b>5</b>
Energy transition/climate change/emergency	8%	4
Access to/strains on supply chain	6%	3
Material shortages	6%	3
Staff cost increases	4%	2
Focus on buying local – lower carbon footprint/being more self sufficient	2%	1
Same as now/current challenges/more of the same or something like this	2%	1
None	2%	1
<b>Other</b>	<b>35%</b>	<b>18</b>

Opportunities	%	No of responses
<b>Specific/emerging markets/sector opportunities</b>	<b>28%</b>	<b>13</b>
<b>Leveraging tech like AI and digital commerce</b>	<b>24%</b>	<b>11</b>
<b>Tariffs and trade agreements</b>	<b>22%</b>	<b>10</b>
<b>Building on Scotland's reputation/positive image/focusing on key areas</b>	<b>20%</b>	<b>9</b>
Technology/innovation advances – across sectors/products/services	9%	4
Diversification into energy/energy security, renewables, sustainability etc	9%	4
Climate change/emergency	7%	3
Providing tailored support to companies/supportive in market environment	4%	2
Improving relationships e.g. EU/UK, UK/US	4%	2
Difficult to say due to uncertainties	4%	2
<b>Other</b>	<b>30%</b>	<b>14</b>

#### Gaps in current offering that will be needed

Theme	%	No of responses
<b>Buyer introductions/market visits/market entry/engagement</b>	<b>17%</b>	<b>8</b>
<b>Sales/marketing skills development/training</b>	<b>15%</b>	<b>7</b>
<b>More investment support/introductions to investors</b>	<b>15%</b>	<b>7</b>
<b>Support for running and funding a business</b>	<b>15%</b>	<b>7</b>
Increase in overseas/in market specialists	9%	4
More streamlined/integrated support/deeper support	9%	4
Sector specific	9%	4
Support for scaling businesses	7%	3
More 1 to 1 support	7%	3
Expansion of support tools e.g. online supply chain directory, trading opportunity portal, productivity tools	7%	3
None/no more	7%	3
More early stage support	7%	3

Digitisation of support offerings/more open source	<b>4%</b>	<b>2</b>
Support with international expansion strategy	4%	2
Less competing factors in the market/less cluttered	4%	2
Support for climate emergency/green tech	4%	2
Real life experience	2%	1
Support for under-represented groups/founders	2%	1
Mental health support	2%	1
Continued links to rUK	2%	1
Competitiveness	2%	1
Showcasing Scotland	2%	1
Mentoring programme	2%	1
Staff hire	2%	1
Support for horizon/opportunity scanning	2%	1
Incentives to export	2%	1
Support for service export	2%	1
<b>Other</b>	<b>15%</b>	<b>7</b>

### Team Scotland – What works well

Theme	%	No of responses
<b>Partnership working/relationships/collaboration/referrals/leveraging resources</b>	<b>43%</b>	<b>17</b>
<b>Access to partners including beyond Scotland e.g. DBT/UK, Embassy/FCO</b>	<b>25%</b>	<b>10</b>
<b>Sign posting/joined up support</b>	<b>13%</b>	<b>5</b>
<b>Doesn't work well</b>	<b>13%</b>	<b>5</b>
<b>Sector specific support e.g. food and drink export partnership, Fintech Scotland</b>	<b>10%</b>	<b>4</b>
Early stage funding and support e.g. EAS, Go Global grants, Find Business support	3%	1
First points of contact e.g. trade advisors, in market specialists	3%	1
Don't know	3%	1

### Team Scotland – What could be improved

Theme	%	No of responses
<b>Duplication/inconsistency/competition/lack of partnerships e.g. DBT v SDI/working in silos</b>	<b>49%</b>	<b>23</b>
<b>Cluttered/confused support including grants – for business and internal public sector provision</b>	<b>30%</b>	<b>14</b>
<b>Lack of clarity of role/reporting processes/metrics across partners/who delivers what</b>	<b>19%</b>	<b>9</b>
<b>Communication between organisations – across Scotland and UK level</b>	<b>15%</b>	<b>7</b>
Lack of transition/referral pathways between supports and delivery providers	4%	2
Differences in geographical needs of companies across Scotland	4%	2
Internal knowledge of the variety of support available/varies across Business Gateways	2%	1
Reduced budgets – impacting staff and services	2%	1
Lack of digitalisation across support provision	2%	1
<b>Other</b>	<b>13%</b>	<b>6</b>

## Key success factors for an effective trade support ecosystem

Theme	%	No of responses
<b>Strong partnerships/relationships/collaboration – non-competitive, shared goals/ambition/clarity on who does what</b>	<b>31%</b>	<b>15</b>
<b>Good infrastructure – digitalisation, streamlined, connected, peer support/networks/learning from experience e.g. GlobalScots</b>	<b>21%</b>	<b>10</b>
<b>Clear communication – transparency, openness</b>	<b>19%</b>	<b>9</b>
<b>Clear pathways/seamless transitions/shared datasets and measurements</b>	<b>17%</b>	<b>8</b>
<b>Coordination and alignment – lack of duplication</b>	<b>15%</b>	<b>7</b>
<b>Flexibility/agility – tailored support/sector specific support</b>	<b>13%</b>	<b>6</b>
<b>Focus on company needs/those that need support</b>	<b>13%</b>	<b>6</b>
<b>Clearly defined organisation/partner roles</b>	<b>10%</b>	<b>5</b>
Credibility/in market expertise – organisations and people	8%	4
Awareness of variety of supports available/clarity of offering	6%	3
Addressing market failures	2%	1
Multi year support	2%	1
<b>Other</b>	<b>4%</b>	<b>2</b>

## Business awareness of range of available supports

Theme	%	No of responses
<b>Varies/mixed/depends on previous engagement/interaction</b>	<b>37%</b>	<b>16</b>
<b>Not very aware</b>	<b>30%</b>	<b>13</b>
<b>Lack of awareness raising/communication</b>	<b>16%</b>	<b>7</b>
<b>Well aware</b>	<b>12%</b>	<b>5</b>
Aware but confused – lack of clarity/complicated landscape	9%	4
Don't know	7%	3
Information is available online	5%	2
Less aware if not working with us	5%	2

## Ease of navigation of business support landscape

Theme	%	No of responses
<b>Difficult/very difficult</b>	<b>62%</b>	<b>28</b>
<b>Time consuming/overwhelming/cluttered/too many sources/confusing</b>	<b>18%</b>	<b>8</b>
<b>Websites help e.g. Finding Business Support portal</b>	<b>13%</b>	<b>6</b>
<b>Trade specialists/account managers/advisors help</b>	<b>13%</b>	<b>6</b>
<b>Easy/easier</b>	<b>11%</b>	<b>5</b>
Mixed/varies	9%	4
Don't know	4%	2
Other	2%	1

## Appendix 2: Export Promotion Research and Evaluation – Business-facing staff consultation

This questionnaire has been developed jointly with Scottish Enterprise (SE), Scottish Development International (SDI), Highlands and Islands Enterprise (HIE), South of Scotland Enterprise (SOSE) and the Scottish Chamber of Commerce, therefore questions have been tailored to cover all organisations. Please click [here](#) for Frontline's Privacy Policy.

The survey has been set up so you don't have to complete all in one go. However, to do this there are some ground rules:

The survey has been set up so you don't have to complete all in one go. However, to do this there are some ground rules:

1. You must use the same link and same hardware – ie if you start on your PC/laptop then you need to use this again, or progress will be lost.
2. If you want to complete over multiple occasions, then please ensure you click the next button at the bottom of the page you are answering the questions on even if you need to stop halfway through a section, this is the only way progress on that page will be saved – note you can always go through the survey by using the back/next button at anytime
3. To move between pages you need to use the back/next buttons embedded in the survey – do not use the back/forward arrows in your browser this may take you out of the survey and your progress could be lost.
4. Also, do not clear your cache if you haven't completed the survey as this is where the cookies are held that allow you to save your progress.
5. Finally, if you click done at the end of the survey, you will not be able to go back into it, so make sure you have finished. If you click done by mistake and still have something to add, please forward any additional information by email to Danielle.

If you require any help with completing this questionnaire or have any questions, please contact: [Danielle.shaw@frontlinemc.com](mailto:Danielle.shaw@frontlinemc.com).

Name:

Organisation:

Scottish Enterprise – national

Scottish Enterprise - international (SDI)

Role/position:

1. Involvement in wider business growth activities (check all that apply)

Innovation

Investment

Other business growth activities

2. What is your experience of and involvement in public sector provision of international export support?

3. Are you directly business facing? (EG working direct with companies or through programme activities)

Yes (if yes please go to Q4)

No (if no, please go to Q5)

4. Please describe the profile of companies you work with (check all that apply):

Sector	Exporting status
Energy and Low Carbon Transition <input type="checkbox"/>	Established exporter <input type="checkbox"/>
Science and Technology <input type="checkbox"/>	Early stage or starting out <input type="checkbox"/>
Consumer industries and Multisector <input type="checkbox"/>	Location of companies you work with
Global Networks <input type="checkbox"/>	Aberdeen and Aberdeenshire <input type="checkbox"/>
International Trade Services <input type="checkbox"/>	Edinburgh and South East Scotland <input type="checkbox"/>
Other <input type="checkbox"/>	Glasgow City Region <input type="checkbox"/>
Geography	Highlands and Islands <input type="checkbox"/>
Scotland based <input type="checkbox"/>	Stirling and Clackmannanshire <input type="checkbox"/>
EMEA <input type="checkbox"/>	Tay Cities <input type="checkbox"/>
Americas <input type="checkbox"/>	EGP category
Asia Pacific <input type="checkbox"/>	Starting out <input type="checkbox"/>
Size of Companies you work with	Potential performers <input type="checkbox"/>
SME <input type="checkbox"/>	Global by birth <input type="checkbox"/>
Large <input type="checkbox"/>	Sleeping giants <input type="checkbox"/>
	Solid performers <input type="checkbox"/>
	Top performers <input type="checkbox"/>

### Barriers and Challenges

5. a. What are the biggest barriers to businesses starting to export or significantly increasing their international exports?

Starting to export	
Increasing international exports	

b. How has this changed in recent years? *(Please describe any sector/sub-sector specifics, over last 3 to 5 years)*

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c. What aspects of international exporting have become easier/more difficult for businesses? *(Please describe any sector/sub-sector specifics)*

Easier	
More difficult	

6. What company internal factors impact their ability to either start or expand their international exporting journey? *(For example: capacity, resources, capability, investment etc)*

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7. How has the changing global environment affected the companies' choices relating to international exporting/exporting plans; what are the challenges; what are the opportunities? *(For example, sustainability and net zero, cost of living, rising energy costs, free trade agreements, uncertainties concerning tariffs etc)*

Challenges	
Opportunities	

8. With specific reference to emerging economies including in the Middle East and Asia, what are the export challenges and what are the export opportunities?

Challenges	
Opportunities	

9. Are there specific legacy effects of either Brexit or the pandemic which represent ongoing challenges or opportunities to exporting which should be considered?

Challenges	
Opportunities	

### Effectiveness and Key Success Factors

10. In addressing market failures and helping companies to achieve their international export aspirations and deliver impact – in terms of public sector support and other support:

- a. What works well and why?

- b. What works less well and why?

11. Are there any gaps within the support offered to companies that impacts on their export aspirations? If yes, what are they?

12. Are there any combinations and timings of support that are effective in leading to increased international exports and economic impact?

13. What are the key factors that ultimately make a difference to increased international exports (at company, sectoral and economy levels)?

14. Depending on the different stages of the exporting journey ie from new to existing exporters, are there any differences in what works best i.e. delivers the most value?

15. Are there situations where support "fall-offs" for businesses on their exporting journey i.e. businesses that still require ongoing support but for whatever reason fail to access this support? If so, where is this most likely?

16. Are you aware of any examples where, following international export support, companies have used this learning to access additional markets/geographies without requiring further support?

17. How does international export support 'work' with and drive innovation and investment and vice versa?

18. How does international export support align with the Scottish Government's Trade Vision which includes key areas of inclusive growth, wellbeing, sustainability, net zero and good governance. Which of these can help drive export growth? And how?

19. What are the main types of additionality/attribution resulting from the support?  
 .....for example timing (eg accelerating companies' international growth), scale (eg implementing bigger projects, increased export sales), quality (eg doing things more efficiently or to a higher quality)

## Effectiveness of the Export Growth Plan

20. Is the focus of the Export Growth Plan an effective approach to growing Scotland's exports?

Yes

No

a. What works well and why?

b. What works less well and why?

c. What are the key differences in the support requirements of new exporters versus existing exporters as they progress along their respective exporting journeys?

d. To what extent has the Export Growth Plan impacted the identification and prioritisation of international trade support needs?

e. To what extent has the introduction of the Export Growth Plan assisted with operational delivery of impactful projects ie has it helped Team Scotland partners do things better and with a greater benefit and impact? If not, why not?

f. To what extent has it been necessary for the Export Growth Plan to evolve to address any challenges such as those associated with Brexit and areas such as cost of living and energy increases?

g. Is there a difference in effectiveness of support between the pre-Export Growth Plan activities and the current support approach?

h. How does the Export Growth Plan need to evolve going forward?

### HIE Specific (only asked to those within HIE)

21. How does HIE trade support (Go Global, Export Advisory Service) work alongside SDI support?

a. What works well and why?

b. What works less well and why?

22. Are there any activities/current gaps/sectoral focus which make an important contribution to trade support in the HIE region which don't currently appear to fit with SDI trade priorities and SE Missions?

**SOSE Specific (only asked to those within SOSE)**

23. How does SOSE trade support work alongside SDI support?

c. What works well and why?

d. What works less well and why?

24. Are there any activities/current gaps/sectoral focus which make an important contribution to trade support in the SOSE region which don't currently appear to fit with SDI trade priorities and SE Missions?

**Future Challenges and Opportunities**

25. How has the changing global environment for companies affected choices relating to exporting?

a. What are the challenges – in the next 5 years?

b. What are the opportunities – in the next 5 years?

26. What types of support do you think companies need that is not currently being offered?

**Team Scotland/Public Sector Trade Support System**

*How effective is the wider public sector export support system in Scotland? (e.g. partnership working including at a UK level (eg FCDO and DBT), communication across services, duplication across services, customer journey from one service to another, links to other types of support e.g. innovation, investment).*

27. What works well and why

a. What works less well and why

b. What are the key success factors for an effective trade support ecosystem?

c. How aware are businesses in Scotland of the range of export supports available?

d. How easy is it for businesses to navigate the export support ecosystem (e.g. Enterprise Agencies, The Scottish Chambers, Business Gateway, Department for Business and Trade etc).

**Thanks for your support.**