



TPO NETWORK
WORLD CONFERENCE & AWARDS 2010

BUILDING EXPORT SUCCESS

ENHANCING TPO IMPACT IN A CHANGING
GLOBAL ENVIRONMENT

CONFERENCE REPORT



MESSAGE FROM THE EXECUTIVE DIRECTOR

TPOs are essential to both business success and, as multipliers, to the impact of ITC. The TPO Network World Conference and Awards is an opportunity for TPOs to foster partnerships around common needs and aims, leading to the development of new and improved services that enhance export impact for good.

The 2010 TPO Network World Conference and Awards in Mexico City focused on an issue that is common to public trade support institutions worldwide: proving relevance and effectiveness. This year's theme was influenced by the 2008 conference on demonstrating results within the context of benchmarking, and it is especially relevant in this challenging economic environment.

The Conference explored issues such as the transformation in investment and trade worldwide, how TPOs can pursue success in this environment and how to define relevant services that can be offered to SMEs. There were extensive discussions following each session allowing participants to exchange information and provide motivation for future working relationships. ITC was also given a mandate from conference participants to establish a working group, including the 2010 TPO Network Award winners, to draw up a strategy and propose a governance structure to further consolidate the TPO Network.

The 2010 TPO Network Awards recognized excellence in the effective and efficient processes that TPOs must employ to ensure the relevance and quality of their export development service offers. This report highlights the 2010 winners, Mauritius, Brazil and the United Kingdom, who were recognized for the innovation, efficiency and effectiveness of their practices and of their export development services. The report also outlines conclusions from the sessions, which we are sure will contribute to a culture of continuous improvement for your organizations.

I want to express ITC's appreciation to ProMéxico, our host for the 2010 TPO Network World Conference and Awards, for the partnership. The Conference success can be attributed to their hard work, particularly the excellent management of communications and press, which allowed the event to enjoy outstanding coverage by international media. *Muchas gracias, ProMéxico.*

I look forward to seeing you all at the 2012 TPO Network World Conference and Awards hosted by MATRADE in Malaysia.



Patricia Francis
Executive Director, ITC

ACKNOWLEDGEMENTS

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ABBREVIATIONS

| | |
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| CCPIT | China Council for the Promotion of International Trade |
| CEO | Chief Executive Officer |
| CRM | Client relationship management |
| CIDB | Construction Industrial Development Board |
| DC | Developing Country |
| EI | Enterprise Ireland |
| EPC | Kenya's Export Promotion Council |
| FDI | Foreign Direct Investment |
| G3 | Gateway to Global Growth Programme (UK Trade & Investment) |
| GDP | Gross domestic product |
| IADB | Inter-American Development Bank |
| IGEME | Export Promotion Centre of Turkey |
| KPIs | Key performance indicators |
| LDC | Least Developed Country |
| MDGs | Millennium Development Goals |
| MENA | Middle East and North Africa |
| MREPC | Malaysia Rubber Export Promotion Council |
| OECD | Organisation for Economic Co-operation and Development |
| PIMS | Performance & impact monitoring surveys |
| PEIEX | Industrial Extension for Exporting Project (Apex-Brasil) |
| RBM | Results based management |
| REDIBERO | Ibero-American Network of TPOs |
| SIDS | Small Island Developing State |
| SME | Small and medium-sized enterprise |
| TPO | Trade promotion organization |
| TSI | Trade support institution |
| UKTI | UK Trade & Investment |
| WAIPA | World Association of Investment Promotion Agencies |
| WEDF | World Export Development Forum |
| WEF | World Economic Forum |

INTRODUCTION

THE 8TH TRADE PROMOTION ORGANIZATION NETWORK WORLD CONFERENCE AND AWARDS



BUILDING EXPORT SUCCESS – ENHANCING TPO IMPACT IN A CHANGING GLOBAL ENVIRONMENT

A challenging environment for TPOs

'The global economic crisis has increased the pressure on TPOs to demonstrate the value for money they deliver by recording and reporting the impact of their services.'

Ms. Patricia Francis, ITC Executive Director

A focus on global supply and production chains

'In the face of increasing international competition, TPOs must focus on capacity building and export development services. Many companies are being forced to go global because of the competition from foreign companies at home.'

Mr. Jorge Illingworth, Conference Chair,
Senior Employers' Specialist, International Labour
Organization, and former Ecuador Trade Minister

Planning for the future

'The exchange of experiences and ideas at this Conference, as well as ideas for new business opportunities, will allow us to better respond to the needs of the present, and help us to build a more prosperous tomorrow for everyone.'

Mr. Bruno Ferrari, Secretary of the Economy, Mexico

The format of the 2010 TPO Network World Conference followed the same structure as the 2008 Conference, with a combination of plenary and breakout sessions scheduled so that all participants were able to participate in the discussions for each topic presented. Each session followed a standard approach of presentation and engagement of participants in discussions both during and after the sessions.

The breakout panels allowed participants to explore comprehensively critical issues such as: what services should be offered by TPOs and how these services should be delivered; follow-up with clients and, *evaluating the impact of services on clients*, the main theme of the Conference. Past TPO Network Award winners showcased their successful approaches, discussing how to turn today's many challenges into services that deliver value to their clients. TPOs consistently reported on the pressures caused by the increasing demand from stakeholders, clients, governments and other public authorities to demonstrate how they deliver value for money. This led to debates concerning evaluation, performance measurement, and communication channels to report TPO achievements.

Session panels included up to four speakers facilitated by a moderator. In the lead-up to the Conference, each session panel was provided with a series of key guiding questions to respond to. This generated a focused debate among the panellists and the participants. Each session was opened by the moderator who outlined the objectives of the session, providing a framework for the discussions. Speakers were given ten minutes each to discuss their country's experience, based on the key guiding questions. The moderator then invited participants to engage with the panel for a 20-minute debate. In closing the session, the moderator summed up the key points of the presentations and discussions.

An important result emanating from the final session on the future of the TPO Network is that participants agreed to give ITC a mandate to establish a small working group dedicated to determining how best to support the work of the TPO Network to sustain activities between each biennial World Conference. The working group will include the 2010 TPO Network Award winners - Enterprise Mauritius, Apex-Brasil and UK Trade and Investment.

This report describes the objectives of each session and presents the key guiding questions that the panel members were encouraged to respond to in their presentations. It aims to summarize the content and the results of each session. The report concludes with ITC's suggestions for the way forward for the TPO Network in order to establish a framework for Trade Promotion Organizations to work together towards common goals.

RECOGNIZING AND CELEBRATING EXCELLENCE

The TPO Network Awards ceremony held on 14 October recognized excellence in trade support services and celebrated TPOs that demonstrated outstanding performance in the use of innovative and efficient systems and procedures in their export development initiatives. The Awards were given in three country groupings: Small Island Developing States (Mauritius), Developing Countries (Brazil), and Developed Countries (the United Kingdom).

There was no winner in the Least Developed Countries category, which prompted ITC Executive Director Patricia Francis to comment: 'LDCs could benefit from documenting the good work they do for their clients. One critical area is in tracking performance, which could assist them in strengthening their systems to record and report the value they deliver.'

ITC sponsors and manages the TPO Network Awards. This year was the 4th edition of the Awards, which, since the programme's inception, has become a key activity in celebrating the good practices of TPOs which are ITC's main multiplier of services in partner and beneficiary countries. ITC is mandated to assist small and medium-sized enterprises (SMEs) in developing countries to become more competitive in global markets and accomplishes this primarily through its work with its partner TPOs. In this way, ITC and its partners work together to achieve *export impact for good* and contribute to achieving the Millennium Development Goals (MDGs).

A LEGACY OF SUCCESS

This was the 8th in the series of biennial TPO Network World Conference, the international networking event for TPOs. It has been hosted by TPOs for TPOs, in conjunction with ITC, since 1996:

- The 1st Conference in 1996 in Cartagena, Colombia, addressed the impact of the new multilateral trading system in the wake of the creation of the World Trade Organization.
- The 2nd Conference in 1998 in Santiago, Chile, followed with a closer look at trade promotion tools. It concluded with a declaration from the 86 participating TPOs of their commitment to promoting free trade in the new international Order.
- At the 3rd Conference in 2000 in Marrakech, Morocco, participants addressed the challenges of the digital economy and began to review the challenges of public-private partnership and impact assessment.
- The turbulent business environment was the theme of the 4th Conference in Beijing, China, in 2002.
- At the 5th Conference in 2004 in St. Julian's, Malta, participants focused on innovation and practical action as a response to rapid evolutions in global trade.
- The opportunities and challenges for TPOs in global trade were discussed at the 6th Conference in Buenos Aires, Argentina, in 2007.
- The 7th Conference in 2008 in The Hague, the Netherlands, explored key issues for TPOs to remain competitive in the changing international marketplace.
- The 8th Conference in 2010 in Mexico City, Mexico, addressed the theme Building Export Success – Enhancing TPO Impact in a Changing Global Environment.
- The 9th Conference in 2012 will be hosted by MATRADE, Malaysia's External Trade Development Corporation.

A MORE DYNAMIC ROLE FOR TPOs

WELCOME ADDRESS

'Many of you have been facing a key issue that businesses have also been facing – the need to prove your relevance and effectiveness. This conference gives you the opportunity to measure yourself against others, especially in this environment, and build sustainable business – business for the long term.'

Ms. Patricia Francis, ITC Executive Director

The Conference opened with a welcome address by ITC's Executive Director, Patricia Francis, and ProMéxico's Acting General Director, Alfonso Cervantes Sánchez Navarro. A series of keynote speakers delivered speeches that set the scene for the plenary and breakout sessions.

Two years ago, at the 7th World Trade Promotion Organization Conference in The Hague, the Netherlands, the TPO Network met when 'the world was at the beginning of the global credit crisis and no one knew quite how much it would impact the world as we knew it,' Ms. Francis reminded participants. Several trends have emerged since 2008, including:

- The rising importance of emerging markets;
- The need for global governance; and
- An urgent need for sustainable behaviour.

However, amidst this volatility there is opportunity. Signs of regeneration are appearing and sometimes in unlikely places. 'There is cautious optimism, particularly in the developing world,' said Ms. Francis. 'Many businesses, particularly SMEs, have failed because some traditional markets have collapsed. There is confusion about how to get back in the game, how to regain lost ground and how to potentially grow.'

Of paramount importance is to determine how TPOs, both individually and as a group working together, can re-define and fulfil their role in this climate. Ms. Francis outlined the outcomes of the World Export Development Forum (WEDF), which took place in Chongqing, China, where more than 300 participants addressed the following themes: *Adapting to Post-Crisis World Trade Patterns* and *Lessons for Export Development*. A number of key messages emerged, including:

- It is important to think with a long-term perspective.
- Businesses need to strive for value rather than volume.
- Entrepreneurs must integrate themselves into global supply chains.
- Policy-makers must address standards and non-tariff measures at the multilateral level, thereby preventing them from becoming the new trade barriers.
- The financial service industry must provide greater flexibility and more customized services to SMEs and non-traditional customers.
- Technology will be the basis for some businesses to transform and leapfrog competition. This will lead development into a 'new space' in a more competitive environment.
- The private sector must speak with a single voice to be effective.
- Public-private partnerships are critical for success.

There is nothing new about these dynamics, Ms. Francis noted, but what is new is how to play them out for the long-term and sustainably, rather than focusing on short-term gains.

All export-oriented trade support institutions now need to support SMEs by providing them with the tools that enable them to respond to the current environment so they can weather the storm, hone their skills and rise up as strong competitors. Companies and TPOs that have been thinking ahead and are able to respond to new market opportunities are likely to emerge stronger from the global financial crisis.

Few businesses can improve and expand in a vacuum. Ms. Francis underscored the importance of partnerships and networks because of economies of scale, pooling resources and minimizing risk, which leads to increased opportunities and competitiveness. Businesses need information and advice, whether it is about linking into a global supply chain competitively or to better understand policy and standards as a means to enter new markets.

TPOs must also understand important market shifts if they are to advise their clients. Ms. Francis pointed to the research from WEDF keynote speaker Professor Pankaj Ghemawat, of IESE Business School, showing that in 1820, China and India controlled 45% of global GDP and the G7 controlled 25%. In 2000, China and India controlled just 5% of GDP and the G7 45%. By 2050, the pendulum will shift back to 1820, with China and India controlling 45% of GDP and the G7 down to 25%.

'Today is the most important time for TPO networks to learn from each other and translate opportunities for our economies going forward,' Ms. Francis concluded.

A DEEP TRANSFORMATION IN INVESTMENT AND TRADE WORLDWIDE WELCOME ADDRESS

'TPOs must establish efficient and effective measures that encourage economic growth for the benefit of our countries.'

Mr. Alfonso Cervantes Sánchez Navarro,
Acting General Director, ProMéxico

Over the past few years, there has been a 'deep transformation in investment and trade worldwide', Mr. Alfonso Cervantes, Acting General Director, ProMéxico, told participants. He described 'new scenarios' where ITC is being summoned to play a major international role in the global transformation.

'Exchanging views and meeting the challenges [that come with this] are core issues for the success of this event. To this end, the TPO Network Awards are key,' he said.

TPOs foster the free exchange of products and goods worldwide. Only through these activities can economic development take place, resulting in a better quality of life for citizens.

Understanding and responding to the complexity of international markets is critical. Mexico has known how to face the many different challenges of the past two years. The country is moving into a pattern of economic growth and has made important progress. 'Mexico is one of the best options to invest in and conduct business worldwide.'

The outlook for growth in GDP is 5% for 2010; international reserves have reached historical levels at US\$ 109 billion. 'We are taking Mexico worldwide and taking Mexico to the world,' he said. To date, exports have experienced a growth rate of 36% over 2009.

'We are firmly convinced that with coordination and promotion of trade we will be the driving force of integration globally,' Mr. Cervantes added. 'We are strengthening our institutional cooperation and are building a more prosperous and fair trade... [ProMéxico is developing an] important vision to anticipate challenges and opportunities for the future.'

He concluded that the TPO Network is the ideal forum to build consensus on strategy for trade, especially for those addressing SMEs: 'I invite all of you to actively participate in this dialogue to exchange views and to achieve the expected results from this event.'

THE MEXICAN ECONOMIC EXPERIENCE FROM 2008-2010 – BUILDING A MORE PROSPEROUS FUTURE FOR EVERYONE

KEYNOTE ADDRESS



'Mexico offers great growth opportunities. This is not happening in the different economies, which have made greater progress, but today are trying to overcome their financial imbalances. We have kept the stability of our economy and can offer possibilities. Mexico is a safe country for investment, which is synonymous with confidence and strength to do business.'

Mr. Bruno Ferrari, Secretary of the Economy, Mexico

Mexico has faced various external shocks over the past two years, which have affected its trade, investment and tourism sectors. However, the country has survived the global economic crisis and is looking towards a bright future. At the same time, it is of utmost importance to seize the opportunities of global economic cooperation.

'We have big challenges to face and overcome and we are still hearing voices calling for protectionism. This will damage the welfare of consumers,' Mr. Bruno Ferrari, Secretary of the Economy, Mexico, told participants. 'It is important to look into how [TPOs] have responded by developing alternative strategies in trade and investment promotion.' He called for a strengthening of economic links to benefit from economies of scale and contribute to the consolidation of worldwide economic recovery.

Mexico is focusing on 'a new development' of its exporting sector, thus increasing the benefit for Mexican enterprises. ProMéxico is also working to increase access of goods and services to the largest and most dynamic markets.

'We believe in the benefits of international trade and foreign investment. This generates one out of five jobs in our country, with wages that are 30% higher than the national average,' he said.

Mexico offers great growth opportunities and has kept its economy stable. It is a safe country for investment, which is synonymous with the confidence and strength to do business, and country risk rates are at historically low levels. More than 720,000 jobs have been created since the crisis and foreign direct investment is up 30% over last year. Other advantages include:

- Proximity to the United States and Latin American countries;
- Record levels of investment in infrastructure in roads, airports and seaports;
- A demographic bonus of a young labour force until 2030;
- Young Mexicans who are better educated for the future;
- Twelve international trade treaties facilitating trade with 44 countries; and
- Reduced import tariffs.

Mexico has a track record of impressive achievements in a myriad of sectors. For example, it is the leading supplier of auto parts in the United States – 1 in 7 parts sold in the United States is manufactured in Mexico. In sectors such as aerospace, electronics and consumer goods, it is growing in importance. The country ranks fourth worldwide in terms of lowest risk for investment in the mining sector.

'We are a country with a future vision and with a promising future that we are building on a daily basis,' Mr. Ferrari told participants.

The focus is 'less on privilege and more on transparency.' The government is promoting economic growth in cities with full human development. The Minister noted that 'Companies should be at the service of the people, not the other way around.'

Mr. Ferrari concluded: 'The exchange of experiences and ideas at this Conference, as well as ideas for new business opportunities, will allow us to better respond to the needs of the present, and help us to build a more prosperous tomorrow for everyone.'

CHALLENGES TO TRADE AND INVESTMENT PROMOTION IN THE CURRENT ENVIRONMENT

KEYNOTE ADDRESS

'In today's new reality, we must adapt and define a new role for TPOs. TPOs have a key role to play in this new scenario of intra-sector trade and global supply chains. The capacity of countries to act collectively is key to address the new challenges faced by countries in the region.'

Mr. Mauricio Borges, Director, Apex-Brasil

Apex-Brasil is one of the most dynamic trade promotion organizations. It also holds the presidency of WAIPA (World Association of Investment Promotion Agencies) and REDIBERO (Ibero-American Network of TPOs).

Mr. Mauricio Borges, Director, Apex-Brasil, told participants that world trade scenarios in 2010 look 'much better' than they did in 2008 and 2009. In this post-crisis scenario, major emerging markets are growing. China and Brazil have rapidly growing domestic consumption and other emerging economies have a high rate of consumer consumption growth due to an expanding middle class.

Today, some 60% of Brazil's population is middle or high income, and 4 million have been lifted out of poverty over the last decade. Global foreign direct investment has been shifting to the South since 2008-2009, seeking more stable investment opportunities.

'In this post-crisis scenario, after a very fast recovery, the emerging markets are pushing the world's growth and teaching the developed countries important lessons concerning financial and institutional stability,' he said.

China, India, Brazil and Mexico are among countries with a continuously high growth rate. 'In this new reality, we must adapt and define a new role for TPOs with a change of strategy,' he said. 'It is no longer a question of selling a product in foreign markets in big quantities, unless we are talking about commodities. We are talking about scale, niches and specialization by adding value.'

Many companies are being forced to go global because of the competition they face from foreign companies at home. In the face of increasing international competition, TPOs need to focus on capacity building and export development services to assist SMEs to be strong competitors in the global supply chain.

Focusing on supply and production chains and specialization increases the importance of regional strategies in trade and investment. The capacity of countries to act collectively in addressing the challenges of international trade is a critical factor for company competitiveness.

'Trade and investment promotion initiatives have a national component, but a growing trend is that decisions are taken considering both local and regional characteristics,' Mr. Borges said. 'Countries within the same region benefit from building mechanisms of collective consultations and joint initiatives

that strengthen economic relations, identify business opportunities with global product and supply chains, and improve the position of their economies in the world market.'

This dynamic must be reflected in the ways TPOs work together. The role of networks of TPOs is to take joint action in export and investment promotion. This has a direct impact on policymaking at the country level. Benefits include centralizing and coordinating information on trade and investment promotion strategies that are relevant for exporters from the region.

Intra-sector trade shows that countries are working together within the same supply and/or production chain, selling different products from the same sector in a complementary manner. A success story is the collaboration between the automotive industries in Mexico and Brazil. The main benefits of this new dynamic include:

- Less volatility within the international trade environment;
- Reduced production costs; and
- Gains in efficiency, productivity and competitiveness.

Under Apex-Brasil's presidency, WAIPA has developed a number of regional cooperation projects. An example is *Why South America?* which brought together ten investment promotion agencies working in common strategic sectors. This only makes sense in a market of 387 million consumers and with an economy reaching US\$ 3 trillion.

TRADE AND DEVELOPMENT CHALLENGES FROM A REGIONAL PERSPECTIVE

KEYNOTE ADDRESS

'TPOs are travelling in an unknown dimension. Despite progress in communication technologies, it is basically a lack of information that severely handicaps companies seeking to operate in international markets.'

Mr. Christian Volpe, Senior Economist,
Inter-American Development Bank (IADB)

Mr. Christian Volpe, Senior Economist, Inter-American Development Bank (IADB), recently published a book on the effectiveness of TPO services in Latin America and the Caribbean. His research is based on surveys conducted from 2007 to 2009 of companies having benefited from those services, among other tools. (*Odyssey in International Markets – An Assessment of the Effectives of Export Promotion in Latin America and the Caribbean*. Inter American Development Bank. September 2010.)

Mr. Volpe told participants that lack of information is a serious barrier to exports. This is particularly true for firms from developing countries involved in trading differentiated goods and services. In this context, TPOs must provide a 'GPS service' – much like the Global Positioning System that provides reliable real-time location information in all weather conditions.

'The simple answer is that we do not know enough,' he said.

For those TPOs that have overcome the information barrier, the next hurdle is how well they perform their roles. 'Export promotion is costly and this is just one use of public sector funding, particularly in times of scarce resources,' Mr. Volpe said. 'To ascertain that these resources are being well invested, it must be first determined whether the policy initiatives they finance have an impact on those variables that support exports.'

Making this determination is the objective of Mr. Volpe's book, the second IADB publication aimed at identifying obstacles Latin American and Caribbean countries face that impede their chances to more effectively integrate into the world economy and to help countries design policies to reduce these obstacles. The book analyzes TPOs in three dozen countries and regions and evaluates the impact of policies on the export outcomes of countries and firms.

He pointed out that strategies currently used by TPOs seem 'too rudimentary' to cope with the challenges imposed by robust impact evaluations. The common practice is to use non-supported firms as a control group in terms of measuring exports, but this is not always reliable due to external factors such as currency exchange and the global financial crisis, among others. Customs data on exports gives information about the performance of firms assisted; client satisfaction surveys are mostly qualitative and only measure satisfaction with services received, but not effectiveness or adequacy of the service.

'In general, with impact evaluation practices there is no reliable estimate from which organizations can take informed decisions,' Mr. Volpe noted.

Based on the statistical information collected by studying firms that have been assisted versus the ones that have not been assisted, Volpe found significant differentials in terms of export performance. Does export promotion help open entirely new markets? The answer is 'yes'.

In cases such as those of Chile and Argentina, the impact of the TPO was greater in supporting SMEs rather than large companies. This suggests that larger firms are more capable of 'going it alone' while smaller firms benefit more from trade promotion due to their relative scarcity of resources.

In cases such as that of Colombia, ad hoc services that provide a comprehensive support programme to the enterprises *from a to z* were clearly more effective than isolated actions or services. This suggests that comprehensive and specialized support programmes to develop enterprise competitiveness are more significant than simply providing information on markets and their access conditions or organizing trade shows or buyer-seller meetings. Developing enterprise competitiveness yields higher returns than doing traditional trade promotion alone.

A major finding is that the return on export promotion is 'highly variable' across the continent, due to variables such as the structure of TPOs from the region and the TPO's presence abroad – especially their size and number of representations. In addition, opening a TPO office rather than embedding services within a diplomatic mission has more impact in terms of diversifying exports and the number of closed sales.

This means TPOs do not necessarily need offices abroad, but specialized TPO offices are five times more effective than non-specialized ones. This is a result of products being increasingly more complex and specialized, thus requiring more specialized staff to promote them and identify the right markets.

COMPETITIVENESS IN LATIN AMERICA – A VIEW

PLENARY SESSION

'Latin America, as a region, has the greatest openness to the world, particularly with the weighted tariff. But trade within the region is very limited. This is a great opportunity in the midst of an international crisis that [typically] leads us to look for more markets. Sometimes these markets are in the neighbouring region.'

Professor Víctor Umaña, Researcher,
INCAE Business School

Latin America's competitiveness is important when it comes to reviewing the role and responsibilities of TPOs in their respective countries. There are many definitions of 'competitiveness': this concept is based on various factors drawing on the level of productivity of a country. More productivity leads to higher returns on investments and more income is generated. As a result, the country enjoys more prosperity.

There are many determinants of a country's competitiveness, and all are quite complex to assess: access to education, training of human resources, transparency of regulations and policies, labour division, level of investment in infrastructure, access to credit and capital, etc.

The World Economic Forum (WEF) produces the annual *Global Competitiveness Report*, a comparative analysis across 139 countries using indices based on indicators calculated for all countries. The Report is based on 12 main pillars to create an index of competitiveness, and analyses, among other issues, the relationship between GDP per capita and the global index of competitiveness. INCAE is closely involved in the production of the WEF Report on Latin America and the Caribbean. Professor Víctor Umaña, Researcher, INCAE Business School, described the results of the most recent Report.

The main findings for Latin American countries are homogenous. All countries appear to have a stable level of competitiveness, although only one country is among the top 50 rated in the Report. The level of regional integration varies across Latin America, with several obstacles, including logistics and customs and regulatory procedures, which negatively impact the general level of the countries' competitiveness. At the same time, the Latin American region is one of the most open in the world for trade and investment. The attractive investment environment and fiscal prudence continue to be the main attributes of most countries.

There is much work to be done to enhance the competitiveness of countries in Latin America. TPOs play a critical role. They should promote openness and regional integration, both key drivers of competitiveness. For example, tariff barriers have been decreasing in most countries of the region over the last five to ten years.

As Professor Umaña explained, tariffs across the region are low: 'Tariffs are low, at less than 8% for all countries. Yet despite this aggressive tariff reduction, trade in the region is limited.' A major barrier cited by CEOs interviewed for the Report is customs procedures. At the same time, it is important to ensure that non-tariff measures do not become obstacles to trade. TPOs have a crucial role to play in the

promotion of increased efficiency of customs and trade regulations to enhance competitiveness in the region.

Latin America's challenges in enhancing competitiveness are similar from one country to another, including:

- Red tape and bureaucracy exacerbate unstable policies and policy variability across the region;
- Limited access to financial services stifles innovation;
- There is a need for a better trained workforce and capacity building;
- Rigid labour regulations make it difficult for companies to operate;
- The risk of crime and corruption is a major problem for companies and society in general; a handful of Latin American countries rank at the bottom in terms of the effect that organized crime and violence plays on the capacity to do business;
- Insufficient protection of intellectual property rights hampers innovation.

'There is a role for TPOs to understand domestic trade liberalization processes and communicate them. TPOs should focus on how to better communicate the value chain of products and inputs necessary to increase companies' productivity,' Professor Umaña added, noting that inter-regional trade should be focused on as a key step to diversify markets and products.

TPOs can also support and promote technological innovations in their countries as many governments are investing more in research and development.

THE WHAT AND HOW OF TPO SERVICES

WHAT SERVICES SHOULD TPOS DELIVER TO ENSURE SUCCESS IN THE CURRENT ENVIRONMENT?



BREAKOUT SESSION 1

'The end result of export is not export in itself, but is holistic development... and we should be able to demonstrate this development.'

Bruno Hug De Belmont

Moderator

Mr. John McCarthy, Principal, Leisure Partners, Mexico

Panel members

Mr. Bruno Hug De Belmont, Manager, Investment Projects, REDIEX Paraguay

Mr. Avi Hefetz, CEO, Israel Export and International Cooperation Institute

Ms. Delaine Morgan, Vice-President, Export Development and Business Generation, Jamaica Promotions Corporation – JAMPRO

The experience of selected TPOs is critical to understanding how they have tackled the new business environment in relation to their client companies and the services they provide to address their clients' needs. This session aimed to identify the mechanisms these TPOs employed to identify the needs of their client SMEs in the current environment, prioritize those needs and determine what services could be delivered in response. This discussion aimed to determine how much the global economic crisis has shaped the changes in TPOs' service portfolios. The key guiding questions suggested to the TPOs were:

- How do you identify the needs of your SME clients?
- How do you identify services that could be delivered based on those needs?
- How do you prioritize those services and decide which to deliver?
- Have you identified improvements to either of those mechanisms for your organization?
- What would be the key lessons learned to be shared with the other members of the TPO Network for them to replicate and emulate?

Mr. John McCarthy, Principal, Leisure Partners, Mexico, opened the session by pointing to the challenges TPOs face in supporting SMEs to stay in operation, and to get new SMEs into the market and operational. He underscored the importance of the strategic role of government in making things happen.

'We're hearing from three countries, with similar populations but with quite different profiles: Paraguay is landlocked; Jamaica is an island; Israel is *politically* landlocked,' he said. 'Their respective GDPs range from US\$ 1,000 to US\$ 28,000 per capita.'

REACH FURTHER AND BE MORE FLEXIBLE

Mr. Bruno Hug De Belmont, Manager, Investment Projects, REDIEX Paraguay, described Paraguay's National Plan for Export, created in 2003, which aims to increase exports and attract investment to help boost Paraguay's economic and social development. He said there are no perfect models and each country must understand its own identity and vulnerabilities. He also noted that economic development has been seen as a privilege that some Latin American countries had not been entitled to. But economic development is a right, and its essential elements are democracy and freedom.

During the crisis, REDIEX focused on ensuring a solid financial basis to operate from, relying on funding from international sources (IADB, especially) and the central government. The next step was to assess which of its service areas were most effective to increase overall efficiency, especially in attracting investment.

Paraguay also identified sectors that have a higher impact on their exports and where the country could lead. The identification of sectors with a high export potential gave birth to custom-made development and promotion projects agreed with the private sector through sector working groups (Mesas Sectoriales in Spanish). These projects are jointly implemented by the private sector, REDIEX and other government agencies to increase the competitiveness of the producers and promote participation of these sectors in international markets.

Results thus far include 15 projects approved by the IADB – which will fund 60% of project expenditures, while the private sector will fund the remaining 40%. Of these projects, one has already concluded, two are being implemented, and 13 are about to start. Overall investment in these projects totals US\$ 950,000. Achievements thus far include opening up the market for the produce sector (with specific reference to a market in Rio de Janeiro, Brazil), many seminars and data deployment, reinforced by strong relations with IADB and multilateral organizations.

He concluded by emphasizing the need for TPOs to be flexible and dynamic, and to evaluate their work systematically to be able to respond well to new needs.

A MULTI-PRONGED STRATEGY

Mr. Avi Hefetz, CEO, Israel Export and International Cooperation Institute, described Israel's export situation and how the Israel Export and International Cooperation Institute has responded to the global crisis. The current status is positive for Israel; with macroeconomic indicators showing GDP per capita at US\$ 29,000 and exports at 79.3% of GDP – showing that the crisis has had a relatively small effect. As the country has few natural resources, Israel has invested in a 'culture of innovation'. Investment levels are now the highest in the world – 4.5% of GDP annually.

At the outset of the crisis, Israel convened a committee to focus on the issues and to define appropriate responses. It launched a multi-pronged strategy. Israel Export and International Cooperation Institute looked for new and diversified markets, reassessed traditional markets and assisted in trade promotion. The focus was on the latter, including paying close attention to planning, pre-sales and after sales meetings.

Established 42 years ago as a public-private joint venture, the Israel Export and International Cooperation Institute has a mandate for export promotion and export development that is focused on the needs of smaller companies. The key areas where support services are needed include finding new markets for technology industries, assisting consumer goods industries to do business in traditional markets, and promoting Israeli business on a broad level. In addition, all exporters need skills to support them at exhibitions, access to good business data and a better understanding of the Internet.

As a TPO, Israel Export and International Cooperation Institute has focused its work in two ways. First, by market – Brazil, China, India, then Mexico, Viet Nam and Korea; second, by sector – homeland security, medical, water, telecommunications, and fine foods. This means it can focus on better serving its clients by knowing the customer's needs and habits, both from a data and a non-quantitative perspective. An important innovation has been to employ local consultants to provide information on existing and potential markets.

ALIGNING SERVICES WITH RESOURCES AND PRIORITIZING

Ms. Delaine Morgan, Vice-President, Export Development and Business Generation, Jamaica Promotions Corporation – JAMPRO, explained that JAMPRO was created in 1988 and is fully funded by the Government of Jamaica, with the mandate to stimulate and facilitate development in key sectors. Main client groups include registered and aspiring exporters as well as domestic and foreign investors.

In Jamaica, the impact of the crisis resulted in the contraction of key traditional markets, non-traditional exports fell by 43%, and a decline in remittances and tourism. These issues, coupled with Jamaica's high debt, have placed the country in a borrowing relationship with the International Monetary Fund for US\$ 1.27 billion.

To meet these challenges, JAMPRO launched needs assessment and client surveys, created a national export strategy, and consulted with trade support networks. In addition, JAMPRO has been consulting with enterprises and the private and public sectors to prioritize and select the services to be delivered. The agency then identified how these services aligned with its human and financial resources, and reviewed the services of other business support providers to identify gaps.

In this way, JAMPRO was able to prioritize the services it really needs to focus on. As a further refinement, JAMPRO sees this process as a means to assess and monitor the impact of particular services on export sales over time. Examples of services JAMPRO has delivered include setting up export centres, conducting enterprise diagnostics and assessments, providing financial and management support services, developing cluster and sector initiatives, holding numerous workshops and distributing guides to SMEs.

JAMPRO has also made structural changes and improvements to processes. It has separated export promotion from export development to better respond to the demand with the supply of services. JAMPRO has created a solid client base, intensified client servicing as well as revamped the means to communicate to clients through a client relationship management system, SMS technology and a more interactive website. A G30 programme is also being implemented to concentrate on companies most likely to export and to give them intensive support.

Key lessons include intensifying client servicing – staying in touch; continuously assessing what is happening globally; engaging key stakeholders in strategic planning; and ensuring JAMPRO continually evolves based on needs identified within the export community. JAMPRO must remain relevant and have impact in this environment.

IN CONCLUSION

Mr. McCarthy summed up the key points of the session:

- TPOs need to focus, selecting sectors and markets and services as priorities.
- Understand your clients – restructure your TPO to serve these clients, and ensure you have up-to-date, deep and good quality information on them – and for them.
- Communicate to clients, regularly and with timely information.

HOW TO DISTRIBUTE TPO SERVICES?

BREAKOUT SESSION 1 CONTINUED

Moderator

Mr. Friedrich von Kirchbach, Director, Division of Country Programmes, ITC

Panel members

Mr. Noharuddin Nordin, Chief Executive Officer, MATRADE, Malaysia

Mr. Yu Ping, Vice Chairman, China Council for the Promotion of International Trade – CCPIT

Mr. Mauricio Borges, Director, Apex-Brasil

TPOs face the challenge of deciding if and how to distribute their services in a proactive manner. In some cases, and based on their mandate, resources and position, TPOs decide to take a passive role and wait for requests to come in. In other cases, TPOs decide to take a more proactive stance and establish mechanisms to distribute their services to their target clients through different channels.

This session aimed to generate discussions and share practices concerning the processes and criteria used to make the decision to distribute one or more services and on how the channels of distribution are selected.

Three TPOs described their strategic decisions on how to cope with the economic crisis and shared views on how best to distribute services across challenging environments and heterogeneous client bases. The following key guiding questions were shared with the panel members to guide their presentations:

- Why did you decide to distribute your services?
- How did you identify the mechanism you are currently using to distribute your TPO services?
- How do you manage that distribution mechanism? Do you follow up on what they are doing and how they are faring? How frequently?
- What results have you achieved that make it worthwhile to continue using the current mechanism?
- Have you identified any potential areas of improvement to more effectively distribute the service?
- What are the key practices that could be shared with other members of the TPO network who are contemplating new channels for distribution or looking for ways to improve their current mechanisms?

A CLIENT-CENTRIC APPROACH

'To gain the confidence of industry to become our partner we are working with clients from A-to-Z and we follow up to see if the market is receptive. We want to create a closer relationship with industry to develop a full range of services from the beginning.'

Mr. Noharuddin Nordin, Chief Executive Officer, MATRADE

In Malaysia, MATRADE has a mandate that comprises both export promotion and export development activities. For a number of reasons, MATRADE has decided to distribute its services directly, using a network of five regional offices in country and 40 offices abroad comprising 35 trade offices and five marketing offices. These offices collect information to be distributed among client companies in Malaysia and produce promotion and support services for exporters when abroad.

MATRADE's own network of offices also benefits from a very well-developed network of trade support institutions across the country as a means to distribute their services. MATRADE partners with other government organizations as well as private sector organizations and associations, such as the Construction Industrial Development Board (CIDB) or the Malaysia Rubber Export Promotion Council (MREPC) to design and develop programmes targeted at supporting the development of exporters' competitiveness and their products abroad. These activities, designed and carried out in partnership with other organizations, are delivered through the private sector partners.

MATRADE recently restructured to sharpen its focus on export promotion activities, exporter development, trade and market information (its most important service), and trade advisory services and support. Importantly, MATRADE is now focused more on needs and expectations and is concentrating on the supply side rather than the market side.

'Our presumption of who our clients are has changed,' Mr. Noharuddin Nordin, Chief Executive Officer, MATRADE, Malaysia, explained. 'They come to us knowing what they want to export. They ask us, "What do I need to do to export?" Under the new structure we service different companies with different levels of export readiness. We restructured by sectors and are no longer market oriented.'

This client-centric approach is expected to support MATRADE in realizing the Government's ambition to become a developed country by 2020 under Malaysia's New Economic Model and Economic Transformation Programme. In addition, MATRADE is focusing on new clients. For example, MATRADE is supporting women entrepreneurs under its exporters' development service. Development grants are being given to SMEs, which can recoup 50% of the cost of export initiatives.

SERIOUS MEASURES, REMARKABLE RESULTS

'We worked with relevant agencies to organize companies to sell to domestic consumers. The goods were of high quality and the prices were competitive... It was a good way to build brands and boost domestic demand.'

Mr. Yu Ping, Vice Chairman, China Council for the Promotion of International Trade – CCPIT

In the case of China, CCPIT has a network of regional offices commensurate with the size and diversity of the country itself. The organization has over 700 offices in China and overseas, through which it distributes professional services to thousands of companies. These services encompass both trade promotion and trade development services, from trade information collection and dissemination, to consultancy services to improve internal company procedures.

Nevertheless, the country has not come through the global financial crisis unscathed. It has experienced shrinking external demand, over-capacity in some sectors and unemployment. This has required from CCPIT an increase in the service delivery to its client companies to assist them in identifying new markets for their products, including emphasis on market research, and trade promotion activities. Somewhat paradoxically, given its mandate to promote trade, CCPIT has also strongly emphasized the domestic market as a destination for products traditionally being exported.

CCPIT is aggressively pursuing trade fairs and sector exhibitions to help companies in integrated sectors such as textiles and electronics to diversify their export markets. China is also focusing intensely on African markets, specifically in certain sectors relating to infrastructure development and other service activities. To develop the domestic market as a target for local producers, CCPIT created a series of roadshows in targeted regions to expose domestic consumers to products being manufactured in China to world market standards. This exercise has boosted domestic consumption and has paid huge dividends.

'We took serious measures and achieved remarkable results,' said Mr. Yu Ping, Vice Chairman, China Council for the Promotion of International Trade – CCPIT. China's trade volume in 2009 was US\$ 2.2 trillion (down 14% on 2008 figures). From January to July 2010, China's trade hit US\$ 1.62 trillion, up 40% on 2009. China is the world's number two trading and importing country – proof that CCPIT measures have been effective.

However, he recognized that there are still many problems in China's trade: foreign-invested enterprises occupy too great a share of total export volume, while the core competitiveness of export enterprises must be increased to help them diversify their market and product portfolios, and SMEs lack market readiness and the ability to identify and develop markets for their products.

He noted that China is a 'trading giant in quantity rather than quality'. To solve this and other problems, it is important to improve China's trade service system and assist export enterprises in improving their competitiveness in the international market. China's policy support for trade has taken firm shape, but the service support system for trade is still in need of perfection, particularly for services in market information and research, financing, assistance in dispute solutions, professional counselling, and the protection of intellectual property rights'.

CCPIT has already embarked upon the improvement of these export development activities. It has worked with domestic regions, supporting a focus on exports in key sectors according to the region's economic characteristics, and has strengthened its own capacity to carry out market research and development activities. Furthermore, it is investing in developing a network of advisers and consultants who can provide support to SMEs to strengthen their competitiveness.

Nevertheless, CCPIT acknowledges the importance of sharing experiences and learning from other organizations in order to enhance its own capacity to strengthen SMEs. 'In this regard, CCPIT would like very much to learn from other TPOs their successful experiences and practices,' he added.

A MIXTURE OF INFORMATION AND PROJECT MANAGEMENT

For many small companies, the first contact is via our website or a call centre. This is a valuable learning experience for them. Smaller companies think they know what they need, but often a personal meeting helps us to understand what they need.'

Mr. Mauricio Borges, Director, Apex-Brasil

Apex-Brasil was created in 1998 as a public-private partnership. Mr. Mauricio Borges, Director, Apex-Brasil, noted that Apex-Brasil is 'the most important partner of Brazilian companies' when it comes to

internationalization at all levels. The agency supported 10,363 companies and 74 sectors in 2009, and works in many complementary areas:

- Promotion of exports of Brazilian products and services;
- Support for the internationalization of Brazilian companies;
- Strengthening the image of Brazil; and
- Attracting foreign direct investments into Brazil.

Mr. Borges described the agency's 'client-focused vision', noting that its new institutional vision focuses on structure, products and client needs.

The contact with companies is typically carried out through a multiplicity of mechanisms, including a contact centre and the Apex-Brasil website, but also through a network of trade associations located in the different states in Brazil.

Nevertheless, first contacts are typically via the website or call centre. 'Sometimes there is no need to make further contact; however, once we understand their needs and want to move forward, eye-to-eye contact is very important,' he said. 'Most important is the function of listening.'

The first step in this client-centric approach is diagnosing the initial situation of the group of companies in terms of their competitiveness and level of internationalization to prepare a series of customized interventions from the available portfolio of services. This customized programme identifies the desired objective and establishes a working programme by means of an agreement with the group of enterprises.

Apex-Brasil deploys project managers for sectors, regions and countries. The service is delivered by 'cross information', starting by sectors, and then by countries and regions. 'It's a mixture of information and project management,' Mr. Borges explained. Brazil is moving from client-oriented service distribution to providing differentiated packages that respond to the needs of the target group.

The distribution of these bundles of services takes place through a variety of mechanisms. The use of trade and exporters associations in the different states is one, and more recently there has been an increase in the use of universities and research centres that provide consultants and multipliers to strengthen service delivery to SMEs in joint programmes.

Given the emphasis on client-centric development of services and activities, the selection of the distribution channels needs to be consistent and needs to ensure the right services are delivered to the clients when they are able to better consume them.

IN CONCLUSION

Mr. Friedrich von Kirchbach, Director, Division of Country Programmes, ITC, noted that the three TPOs – MATRADE, CCPIT and Apex-Brasil – have different business models, but share certain characteristics, including:

- Identifying a client base that is export ready, rather than SMEs in general;
- Being client-centric – it is essential to be in 'listening mode';
- Having a clear focus on market development;
- Streamlining operations by cooperating with other institutions to achieve economies of scale and delivering the right services to the companies that need them;
- Having a primary focus on sectors rather than markets and within sectors to help companies move forward; and
- Focusing on quality rather than quantity.

FOLLOWING UP WITH CLIENTS TO ENSURE IMPACT

FOLLOWING UP WITH CLIENTS SERVED



BREAKOUT SESSION 2

Moderator

Mr. Anders Aeroe, Acting Deputy Executive Director, International Trade Centre

Panel members

Ms. Susan Haird, Deputy Director, United Kingdom Trade and Investment – UKTI

Mr. Jorge Sequeira, CEO, Procomer, Costa Rica

Mr. Cengiz Turkey, Chief, Corporate Communications, Export Promotion Centre of Turkey (IGEME)

Nearly all TPOs record feedback from their clients following the delivery of services as it is a critical activity for assessing if the benefits the clients received were as expected and if the service is achieving its desired impact. This session aimed to stimulate discussions about the practices employed by TPOs to evaluate the satisfaction and reaction of their clients and, more importantly, how they track the medium- to long-term benefits that come about due to the quality and nature of the service.

Panellists were asked to discuss the mechanisms and methodologies they used to carry out the evaluations and to determine if they were satisfactory for collecting the measures they need to report on. The key guiding questions provided to them were:

- How do you follow up with clients once they have received the services?
- How is this follow-up carried out specifically? Does your organization carry out surveys, interviews, quantitative follow-ups or a combination of all of these tools?
- Does your organization follow up with clients over a period of time, tracking the key moments when expected results should take place?
- Have you identified improvements to any of the above-mentioned mechanisms?
- What would be the key lessons learnt that could be shared with the other members of the TPO Network for them to replicate and emulate?

The moderator opened the session by noting that evaluating the results of services is an area of challenge for all TPOs, yet RBM (results based management) must be implemented in a meaningful way for organizations to achieve their goals.

TRANSPARENT MEASUREMENT DRIVES PRODUCTIVITY

Ms. Susan Haird, Deputy Director, United Kingdom Trade and Investment – UKTI, described UKTI's *Project Impact Measurement System (PIMS)*, which helps UKTI to understand the strengths, quality and performance of its services.

The follow-up with clients is achieved by having excellent client records detailing who received what help, when, where and how; quantitative surveys of both users and non-users; more in-depth qualitative studies covering particular topics; and time series data analysis, which involves tracking clients' performance over time against comparison groups of non-users using independent data sources.

She summarized key findings of UKTI's client surveys. UKTI made a difference in the following key ways: overcoming barriers to new overseas business; gaining access to customers, business partners and information not otherwise available; improving profile or credibility overseas; understanding of the competitive environment; and overseas marketing strategies. This enabled exporters to gain the confidence to explore or expand in an overseas market or markets. Research identified the benefits of their services:

- Firms of all sizes benefit from overcoming barriers to new markets, for example, by gaining access to contacts and networks not otherwise available; raising profile and credibility in a new market; and overcoming legal or regulatory issues;
- Innovative SMEs are the most likely to benefit from learning effects, such as an improved marketing strategy, improved products, and changed behaviour to upgrade their approach;
- High financial impact is difficult to predict; no consistent market or profile characteristic predicts incidence of high benefits;
- Most clients are innovative SMEs at a 'tipping point' on a growth trajectory. However, some large clients also report substantial additional sales not achievable without UKTI's help.

UKTI now has five years of consistent PIMS data, allowing robust comparison of quality and impact across services and over time. Transparent measurement has helped to drive productivity: a total of 15,000 businesses supported, and £2.5 billion additional profit generated three years ago. In 2010 that rose to 23,600 businesses supported and £5 billion of additional profit for customers and £35 billion of additional exports, a ratio of £19 for every £1 the UK spends on trade promotion. This model is replicable for following up with clients, which is transferable to other TPOs.

BETTER UNDERSTANDING CLIENTS' NEEDS

Mr. Jorge Sequeira, CEO, Procomer, Costa Rica, described how Procomer had established an ISO 9001-2008 certified system five years ago for customer satisfaction evaluation, which covers most of Procomer's services. Several methods are used for evaluation depending on the service provided:

- Evaluation forms to 100% of the customers after receiving a service;
- Yearly external customer satisfaction survey involving thousands of customers;
- Internal semi-annual customer satisfaction surveys; and
- Monthly follow-up at managers' meeting and quarterly reports and action plans to work on continuous improvement.

Procomer's ultimate strategic objective is to establish a true customer-centric, integrated knowledge management system to follow up on the exporter's full life cycle, as well as to optimize their communication and relationship with customers by:

- Developing and maintaining a single, integrated customer information database;
- 'Remembering' everything they learn on each interaction with their customers;

- Knowing their customers and understanding their specific needs to follow up and assist them throughout the full cycle.

A centralized client relationship management (CRM) system will enable Procomer to have a centralized customer database; identify and understand who its customer is; enable tailoring of services and follow-up according to customers' needs; simplify communication; and allow for targeting specific audiences based on their sector, needs and preferences. By better understanding their clients, they can assist them through the full cycle.

USING FEEDBACK FOR PLANNING FUTURE PROJECTS

Mr. Cengiz Turkay, Chief, Corporate Communications, Export Promotion Centre of Turkey (IGEME), noted that IGEME acts under the auspices of the Undersecretary of the Ministry of Foreign Trade in Turkey. It was established in 1960 as a non-profit public organization to promote Turkish exports. IGEME's clients are Turkish exporters, especially SMEs.

IGEME's *Trade Information Service* (TIS) was initiated in 2004, and located in the organization's library, which is the unique library for official trade information in Turkey. This service provides standardized, classified, and the most up-to-date and reliable trade information in the shortest possible time period.

Evaluation has focused on IGEME's Trade Information Service. A questionnaire was sent to clients by e-mail and placed on the website. The questionnaire sought to understand customer needs and their opinions about IGEME's electronic trade information services. To gather information about the outcomes of current services to better plan future projects was another goal of the survey.

IGEME received about 400 responses and the evaluation revealed that its TIS has provided reliable information, it is up-to-date as well as a rich content information source, it offers trade opportunities, and has provided timely response to customers. However, the evaluation also revealed a number of areas where improvements are required, for example, concerning IGEME's website design. As a follow-up to evaluation, IGEME undertook a number of concrete actions:

- The website was redesigned in 2008 to meet client needs;
- The blog, IGEME Export Diary, was launched April 2010;
- IGEME started using Twitter (<http://twitter.com/igeme>) in August 2010 to reach customers via new channel;
- IGEME launched a new project, Exporters' Info-line, expected to be completed by end of October 2010.

Note: The key messages from Breakout Session 1 are included in the key messages from Breakout Session 2.

EVALUATING IMPACT OF SERVICES ON CLIENTS

BREAKOUT SESSION 2 CONTINUED

Moderator

H.E. Pan Sorasak, Secretary of State, Ministry of Commerce, Cambodia

Panel members

Mr. Jim Maguire, Manager, Export Marketing, Enterprise Ireland
Mr. Kyoo Nam Lee, Regional Director, Latin America, KOTRA, Korea
Mr. Prakash Beeharry, Chief Executive Officer, Enterprise Mauritius

A key concern of TPOs is their responsibility to verify that their services are having a positive impact on their target clients. This means that the nature and quality of their services should ultimately be contributing to increased competitiveness and ultimately to the growth of sustainable exports of their country. Furthermore, TPOs are required to report their effectiveness to different stakeholders, including their own boards, governments, public authorities and audit committees, as well as client and sector groups.

Satisfying the needs of these audiences is complex as they often have different requirements. However, nearly all are demanding to know the impact of the TPO's support services over and above output and other efficiency measures. This means mechanisms must be implemented to measure the results of services reported by the clients, rather than the activities of TPOs.

TPOs are challenged to find an adequate solution to the reporting needs of their stakeholders as well as to their own need to compare the results of their services from year to year. TPOs currently employ a range of assessment methodologies that vary in sophistication and effectiveness. Standardizing the procedures for measuring and reporting the impact of not-for-profit organizations offering trade support services would assist TPOs in comparing the effectiveness of their own services over a period of time and also with the services of other TPOs.

This session aimed to share practices, procedures and mechanisms to identify appropriate quantitative and qualitative measures used for different types of services and the different tools used to record the measures, (e.g. questionnaires, surveys). Panellists were provided with the following questions to guide the development of their presentations:

- How does your organization report to its stakeholders on the effectiveness of its services and activities?
- Has your organization identified a clear chain of activities and events leading from the services delivered by your organization to the final desired impact on the client SMEs?
- How does your organization evaluate and measure progress achieved by these clients in terms of the desired result (is it quantitative or qualitative and based on what measures or references?); what type of indicators are used to carry out that measurement?
- Have you identified improvements to the mechanisms used for your organization to identify the appropriate measures and tools used for recording impact?
- What would be the key lessons learnt to be shared with the other members of the TPO Network for them to replicate and emulate?

H.E. Pan Sorasak, Secretary of State, Ministry of Commerce, Cambodia, opened the session by talking about the daily challenges faced by TPOs when assisting in increasing the competitiveness of their client enterprises and supporting them to increase exports. TPOs also must address two key issues in their efforts to set up effective impact evaluation systems: identifying ways to assess whether they fulfil their official mandate, which may vary according to the TPO, and whether they are effectively addressing client needs.

MOVING FROM MEASURING INPUT TO MEASURING IMPACT

Impact can only be measured through quantitative and qualitative analysis of a client's export outcomes and how these relate to services delivered by TPOs. The attribution of results to TPO activity is a challenge for all, according to Mr. Jim Maguire, Manager, Export Marketing, Enterprise Ireland, noting Enterprise Ireland (EI) is no exception, despite the organization's extensive client management systems.

Mr. Macguire described the real impact of Ireland's export drive. While most people will not know it as they travel back home, all of them will 'fly Irish' – the specialized fabric on aircraft seats will very likely have been made in Ireland, the software to ensure efficient fuel management in flight will be Irish, and the formatting of all movies for the on-board entertainment system will have been done in Dublin.

Enterprise Ireland aims to achieve €4 billion in exports in 2010, segmented by market and sector. EI is present in 14 markets in the world through 31 offices and works with 3,000 companies, of which 800 are key clients. EI defines targets at country level, and then identifies companies that may contribute to achieving this objective and works together with them.

Its *client support system* (CSS) tracks impact and records every transaction with clients. It is an online tool that allows staff to track each project and each client. Information is completed by an annual client survey that has a 75% response rate.

However, he says there is no magic bullet in assessing the entire impact of their work. Like other TPOs, they find it is highly difficult to link their contribution to an actual export value. Also, different stakeholders have diverse objectives and measures: clients, the board, and ministries have different expectations, so alternative measures may be necessary. However, the overall €4 billion export value target remains.

The challenge is to move from input reporting – such as how many buyers met, how many missions, and trade fairs – to output reporting. EI also recognizes that clients value support from their TPO, which may not necessarily lead to export. For example, a decision not to enter a new market based on a trade mission, or the opportunity to network among Irish companies as part of a trade event.

DIAGNOSTIC PROCESS – THE 3CS MODEL

When clients don't come to see us – we are happy that they have graduated.'

Mr. Prakash Beeharry, Chief Executive Officer,
Enterprise Mauritius

Mr. Prakash Beeharry, Chief Executive Officer, Enterprise Mauritius, told participants that the relationship with the client throughout the lifecycle of the client's export activity is crucial to successful measurement and reporting. In some smaller economies, this means engagement pre-export to determine a client's trade development needs and what interventions are required. Enterprise Mauritius' client base is multisectoral, multi-scale and has a differentiated market focus. Most of its clients are domestic-oriented enterprises that do not know what their needs are.

The organization uses a 3C model – *Competitiveness Enhancement* (CE), *Product Conformity* (CP) and *Market Connectivity* (CM) to assess their work. Enterprise Mauritius uses this model to assess where, what and how services are required – a diagnostic process to customize a client plan.

The assessment measures a project's success over the short and the long term and is impact-based, not input-based. It uses an engagement process that defines what the needs and expectations are,

going both ways. It builds mutual commitments with shared understanding based on face-to-face contact.

MEASURING IMPACT THROUGH CHANGES IN BUYER BEHAVIOUR

While export outcomes for a nation's enterprises are the bottom line, it is also important to measure the impact of services delivered to business partners and buyers from other countries. Mr. Lee noted that KOTRA developed a more aggressive strategy during the global financial crisis that led to stronger targeting of buyer engagement rather than client servicing. This has led to enhanced results in 2009, with KOTRA's client performance up 1% against a total national export decline of 13%.

KOTRA, established in 1962, has 1,365 employees and offices in 99 cities in 74 countries. The organization sees the crisis as an opportunity and takes an aggressive approach to finding new markets. Today, it offers more services that reach further than before. The organization is expanding and focusing on new markets, which is a change in business strategy as it had previously focused solely on Korean companies. Now it is finding global companies and trying to address their needs, helping Korean companies to enter foreign companies' value chains.

KOTRA is doing this through a sectoral strategy where Korean companies have a competitive advantage, such as in the emerging biotech industry. The organization also focuses on events such as the *Buy Korea* exhibition and participates in more international events.

Impact is measured using a *do, check, act and plan* strategy, with regular monitoring of different elements of the strategy on a weekly, monthly and annual basis. On an ad hoc basis, KOTRA also monitors client services and aims for constant improvement. In developing business partners, it aims for quantitative and qualitative improvement, both through numbers and impact. In 2009 the organization saw an increase in clients and export value, despite the crisis, which shows that the strategy is working.

Presenting TPOs agreed that there is an opportunity to better share evaluation reports among sister TPOs from the countries involved in a specific trade promotion activity. Speakers also noted that clients value some services that do not necessarily lead to export outcomes, such as networking with enterprises from their own countries. This type of activity must also be considered when designing evaluation processes.

KEY MESSAGES FROM BREAKOUT SESSIONS 1 & 2

- All TPOs must respond to a range of reporting needs from stakeholders. Because their reports are scrutinized intensively by governments, audit agencies, public authorities and policy agencies, recording instruments and procedures for identifying, developing and collecting measures must be in place to generate relevant reports and thereby demonstrate the TPO's value to these different audiences.
- The quality of client information and records is critical to understanding needs and performance.
- Satisfaction surveys for quantitative and qualitative results are universally used.
- Information is frequently collected immediately after interaction, but longer term follow up is valuable.
- The ability to track tangible business results through certifications and export receipts is very helpful, but only some countries are able to obtain this information;
- Good quality performance measurement drives performance improvement especially if organizational and staff KPIs are aligned.

TURNING CHALLENGES INTO SERVICES

PLENARY SESSION



Moderator

Mr. Anders Aeroe, Acting Deputy Executive Director, ITC

Panel members

Mr. Matanda Wabuyele, CEO, Export Promotion Council Kenya – EPC

Mrs. Pilar Lozano, Director of International Cooperation, Proexport Colombia - Proexport

Mr. Jack Stephens, Group General Manager, International, New Zealand Trade and Enterprise – NZTE

All TPOs have faced critical moments in the recent past that have challenged the way they do business. In some cases these moments have come as a result of cumulated external shocks, social difficulties or government decisions. In this session, past TPO Network Award winners were invited to discuss what kinds of service offers they have developed in response to the changing needs of their clients caused by the current crisis. They were invited to discuss the mechanisms they used to match services to the needs, how they ensured the service reached the client, and what kind of evaluation they conducted to assess the performance of the service.

Two representatives from the 2008 TPO Network Awards winners and one from 2006 shared their experiences with the participants. The key guiding questions suggested to them for shaping their presentations were:

- What were the most salient characteristics of the critical moment your organization faced?
- What impact did this critical moment have on the needs of your target clients?
- What was the impact on the resources of your organization?
- How did your organization address those challenges on resources and from your clients?
- What mechanisms were put in place to identify the impact of these new services?
- Have these services proven to be effective?
- Have you identified improvements that may be needed to the relevant mechanisms?
- What are the key practices that could be shared with other members of the TPO Network who are working to improve their service to provide solutions for the recent needs of their clients brought about by the crisis?

The global economic recession, which is still affecting many countries, has added new or increased demands on most TPOs, motivating them to review their service offers for relevance and effectiveness to support SMEs in their current challenges and to assess what they can do within their budgets.

'The recession has confirmed the key role of TPOs, reflected in the increased demand for their services and for advice on how to tackle the impact of the crisis and globalization in general,' Mr. Aeroe, Acting Deputy Executive Director, ITC told participants. 'This impact has led to decreased demand, but has also increased the importance of emerging markets regionally and globally. This means companies need to be competitive to seize these emerging market opportunities and the related value chains.'

A STRATEGIC ORIENTATION ALONG KEY NATIONAL POLICIES

A partnership approach to export development and promotion incorporating donors, development partners and local business and public sector partners has been introduced with the aim of developing smart networks to deliver sustainable services to the export sector.'

Mr. Matanda Wabuye, CEO, Export Promotion Council
Kenya – EPC

Mr. Wabuye of Kenya's Export Promotion Council (EPC), one of the winners of the 2008 TPO Network Awards, gave an overview of the impact of the economic crisis on countries in Africa and on Kenya's export trade.

He pointed out that most OECD economies had contracted, with their combined growth in real GDP estimated at -3.5% in 2009, from 0.6% in 2008. Africa was affected by its integration into the global economy through trade, foreign direct investments, development assistance and remittances. The continent was mostly affected due to its reliance on primary commodity exports, especially to OECD countries. The crisis dampened earnings from commodity exports due to falling prices. As a result, the continent recorded a slowed real GDP growth rate of 1.9% in 2009 compared to 5.2% in 2008.

Mr. Wabuye said that Kenya's economic performance registered a lower growth rate of 1.6% in 2008 compared to 7.0% in 2007 but recovered slightly in 2009 to register 2.9% growth. As a result, the EPC was indirectly impacted by these developments – firms were forced to contract to stay afloat and many new investments were shelved.

The EPC decided to review its strategic orientation in line with key national policies – the Kenya Vision 2030, the Private Sector Development Strategy, and the Millennium Development Goals. A portfolio of targeted export promotion initiatives was introduced including diversification and expansion of Kenya's export offerings through product development and test-marketing, a renewed focus on regional markets and increased use of opportunities arising from the country's various trade preferences under regional and international agreements.

EPC also developed a market and product prioritization framework that involved categorizing Kenya's markets into four tiers to select markets for targeted promotional initiatives where products were mapped and prioritized to priority markets.

The agency now offers an *Integrated Export Market Development Programme* consisting of an *Export Readiness Assessment* to identify areas of need, *Product Development and Adaptation* to develop products that meet international standards, *Capacity Building* to enhance the competitiveness of SMEs, and e-marketing of SME products through the use of ICT tools.

Kenya's economy is on a recovery path and the result of this initiative contributed to its 2.6% economic growth in 2009.

A KNOW YOUR CLIENT PRINCIPLE

Our main strategy to overcome the global financial crisis has been promote, promote, promote.'

Ms. Pilar Lozano, Director of International Cooperation, Proexport Colombia - Proexport

Ms. Pilar Lozano, Director of International Cooperation, Proexport Colombia – Proexport, introduced the four basic principles of Columbia's Proexport business model:

1. Developing a trusted, value-driven relationship with entrepreneurs based on the *know your client* principle. This level of trust and perception of value addition ensures that the agency is able to get key intelligence from companies as required.
2. A systematic selling process involving sound knowledge of Colombia's products and services.
3. Results-oriented compensation based on results – wages and compensation are based on goals achieved.
4. Expansion at low cost – rolling out of Colombia's TPO services worldwide based on the value for money, high impact/least cost principle.

'The challenging business environment forced Proexport to re-examine our operational model and as a result, we reorganized roles and responsibilities to be able to deliver the level and quality of services demanded by our clients,' she said.

The main strategy used by Proexport, one of the winners of the 2004 TPO Network Awards, to overcome the economic crisis is consistent and continuous promotion of *brand Colombia* targeted at investors in key markets to maintain Colombia's presence on the FDI radar. In tourism it is a comprehensive programme that addresses the perception of safety in Colombia combined with a focused promotional programme to attract clients from the more resilient corporate tourism market. To boost exports, Proexport increased the number of trade promotion activities and held in-country roundtables and business meetings on market diversification and value-added niches.

Proexport receives direct feedback from exporters on its impact, through a certification system where exporters testify to the agency's effectiveness and rate and rank its services. Colombia also benchmarks itself with other Latin American competitors in terms of the three key indicators: FDI, tourism and exports.

Proexport reports that FDI is three times more than it was nine years ago; exports have tripled in the same period; and tourism also recorded success, growing in 2009 by 10.2%, in contrast to world tourism which declined by 4% the same year.

FINE-TUNING AND TAILORING SERVICES

We decided to stay close to clients onshore and clients' customers offshore. We learned a great deal from the Asian crisis in the late 1990s, when we stopped shipping to Asia. We decided this wouldn't happen again – we work hard with our clients' customers to maintain close relationships.'

Mr. Jack Stephens, Group General Manager, International, New Zealand Trade and Enterprise – NZTE

Mr. Stephens, Group General Manager, International, New Zealand Trade and Enterprise, pointed to the challenges New Zealand faces in connecting to global markets – its geographic isolation and distance from main markets, its relatively small size, its heavy dependence on agriculture, and the

country's reliance on one key exporter that represents 20% of all agricultural exports. NZTE also faced pressure from political changes, which required NZTE to justify its budget and services.

Unlike many other countries, however, New Zealand was partially shielded from the full effect of the economic crisis because its main markets are Australia and China, two economies that emerged from the period in a relatively better state than others. 'As a result of the resilience of our main markets and the strategies NTZE adopted, New Zealand has emerged relatively unscathed. GDP is projected to grow at 3%, but domestic demand is down as consumers choose to save as opposed to spend,' he said.

Mr. Stephens noted that the agency's attention was directed to fine-tuning its services and products to address the key issues for New Zealand's exporters onshore and offshore, and which services should be developed to meet their needs. This analysis resulted in tailoring services for both groups of clients.

Strategies also included the launch of CEO Auditoriums which address key business principles such as: how to manage cash flow; better understanding customers; how to recognize issues related to the downturn and address them directly; and how to leverage supply chains drawing on experiences from other countries. The response to these CEO Auditoriums was the development of a new suite of NZTE services to address the issues identified by stakeholders, including:

- A new range of credit support services was developed.
- A new client management segmentation model was adopted that enabled NZTE to identify 500 firms from a population of 3,000 that would qualify for full export service support;
- Client engagement plans were developed and reviewed with the client every six months;
- Better use was made of the intelligence gleaned from NZTE's 37 offices overseas, leading, for example, to the development of financing schemes that reflected the gaps in the exporting markets
- An online business generation system for SMEs was launched.

NZTE also introduced a more hands-on approach to interacting with its clients, including adopting a more face-to-face approach and a service where NZTE represented clients overseas if they were unable to do so themselves. A bespoke export market assistance service was introduced, drawing on the expertise and the services of New Zealand's senior business people to help companies with market entry strategies. A corporate 360-degree diagnostic tool was introduced, which allows customers to come up with ideas for TPO improvements.

ProMéxico and other TPOs enquired about the best approach to assess account managers. NZTE advised that its account managers were also sector specialists, which ensured that their engagement with clients was based on their areas of expertise as well as their account management responsibility. Proexport uses an account management approach that is also sector focused but emphasized that its account managers are also required to be market specialists. Ms. Lozano explained that account managers are required to interact with clients along every stage of the export value chain to provide expert service at all levels.

TPOs were interested in the tools used to assess the effectiveness of overseas representation, and the strategies deployed to determine the most effective services to offer in overseas offices. Proexport selects its overseas offices based on sector and market analysis. It establishes the size of the offices by determining the type and size of companies and the services required by them in the respective markets. Kenya works through its foreign trade offices, but plans to set up offices abroad in the future.

In moving forward, the previous TPO Network Award winners all revealed that they now plan to introduce measurement tools that will better reflect the impact of their overseas offices on the economy. In the interim, Colombia uses the same key performance indicators (KPIs) as those used on-shore, including the number of deals closed and number of new deals.

IN CONCLUSION: RE-THINKING IN THE WAKE OF THE GLOBAL RECESSION

Mr. Aeroe concluded: 'We have certainly seen that the recession had an impact on the strategies of the TPOs and has made them re-think their service offering and related efficiencies, and return on investments.' He pointed to the following conclusions:

- It is possible to measure the impact of TPO activities although it is not easy. Client feedback is a necessary related vetting mechanism;
- There is a common shift of focus among TPOs from measuring activities to outcome and impact;
- Results based management (RBM) helps TPOs implement systems – what you measure is what you get;
- It pays to be selective in deciding which services to provide; a thorough focused approach towards selected individual companies with the most export potential pays off;
- Keep trade facilitation simple for it to sit well with companies and for it to be affordable.

STRENGTHENING THE TPO NETWORK

PLENARY SESSION



'Networks will only work when the people participating are committed and will make the compromises necessary to attend the meetings. Networks are about trust, friendship and personal contacts.'

Mr. Ricardo Estrada, CEO, CORPEI

'One of the things CzechTrade would like to see in any new network is a working group of experts. In the European Trade Promotion Organization this worked very well and was successful.'

Mr. Ivan Jukl, Managing Director, CzechTrade

Moderator

Mr. John Gillies, Senior Officer, TS/DBIS, ITC

Panel members

Mr. Ricardo Estrada, CEO, CORPEI

Mr. Ivan Jukl, Managing Director, CzechTrade

Participants debated on how best to strengthen the TPO Network and how to sustain activities between the biennial TPO Network World Conference and Awards. Currently, there is a patchwork of TPO networks operating in diverse geographical regions. Participants focused on how to identify practical ways to strengthen the capacities of the global network as well as regional networks.

Mr. Gillies, Senior Officer, TS/DBIS, ITC, noted that regional network architectures are still evolving to meet the needs of their members. 'These differences are also evident across the global *network of networks*, with implications for network governance structures, programme development, service delivery and performance monitoring,' he explained. 'The need to prove relevance and value to stakeholders has been an overarching theme for this conference. Organizational architecture matters for export promotion. This can be said for TPOs and for the network itself.'

Mr. Estrada, CEO, CORPEI, described the evolution of REDIBERO, the Ibero-American Network of TPOs, which was launched in 1999. The network has a revolving chair and an associative structure. WAIPA – the World Association of Investment Promotion Agencies – is different in that it has an affiliation fee and a formal structure.

'It's important to discuss whether or not we need another network. Some people don't have the time to participate and there are many existing networks, including ITC's World Export Development Forum,' he pointed out. Mr. Estrada asked participants to consider the following questions:

- Why do we need to create or to participate in a new network?
- What value added can I provide or receive? Some will benefit more than others but all should benefit.
- Do I have the time to participate?
- Do I have the resources? There is a cost of participating in the events of the networks. Can we invest in all events or do I have to focus?
- Are our regional and intra-regional networks working? If not, should we get involved in something bigger and more complex?
- Should we first strengthen the regional networks? If there are no regional networks, should we create them first?
- Should it become a network of networks?
- How do we integrate all members of each network?

Mr. Estrada then asked participants to consider the structure, membership and possible actions for a new network – benchmarking, best practices, lessons learned, training workshops, seminars, support and consultancy work. He suggested, 'As the guiding light of the TPO Network, ITC's role could be that of a permanent chair.'

Mr. Jukl, Managing Director, CzechTrade, agreed with Mr. Estrada's proposal that a new network be comprised of the CEOs of existing national, sub-regional and regional TPOs. 'If we go with CEOs we can make decisions at the conference. We also then have a chance to create a prestigious and relevant think tank. The higher the level of conference, the higher prestige you have,' he said.

Mr. Jukl told participants CzechTrade would like to see a working group of experts. 'This works very well in the European TPO Network,' he said. 'We are satisfied with current set-up of TPOs, but the most important thing is commitment. If we have committed partners, we can be sure members will participate in activities throughout the year and we can contribute to events not only by hosting, but by providing expertise.'

Tatiana Lipovetskaia Palermo, International Relations Coordinator for Apex-Brasil, which currently holds the rotating presidency of both REDIBERO and WAIPA, described the differences between the two in terms of structure and governance. 'It is difficult to say whether it is better to have a formal structure. REDIBERO has an informal structure, but the level of emotional commitment among the members is so great that we are doing quite well,' she said.

Han Meiqing, Deputy-Director General of CCPIT's Department of International Trade, said the networks across China came together organically in response to specific regional needs. 'Our strategy to deal with the issues we are discussing here is that we use flexibility to solve problems. We do not have the strategies to deal with our diversified networks. Given China's 30 regional administrations, we have to use the TPOs' adaptability, which is the key to our survival,' he explained.

In response to a question regarding the need to give African countries more support to meet the challenges faced by exporters of raw materials, Ms. Aicha Pouye, Director of ITC's Division of Business and Institutional Support, responded: 'Africa must take charge and identify what support it needs. Numerous organizations and associations exist across the continent, but participation is low.'

There has also been interest expressed to create networks to link MENA countries as well as to bring together Eastern Europe and Asia. Mr. Friedrich von Kirchbach, Director, Division of Country Programmes, ITC, pointed out: 'If we are going to have a world TPO network, then let's ensure that it

lives up to its name and that regions where there is no network participate. There is a lot of interest to create a MENA region. There is a clear demand for coordination, consultation and for a platform within the region. In addition, there is no network linking Eastern Europe and Central Asia.'

Mr. Gillies asked participants to consider how the TPO Network should develop in the lead up to the next conference in 2012. He proposed a working group be created. Participants agreed and gave ITC a mandate to establish a small working group under an informal advisory board comprised of the 2010 TPO World Network Award Winners – Mauritius, Brazil and the United Kingdom. Apex-Brasil supported the proposal for the working group and agreed to be an active participant.

ITC committed to draft a terms of reference to send to TPO Network members for input. The terms of reference will develop options for network governance and a draft work plan to be presented in the context of upcoming regional network meetings attended by the working group. TPO Network members were asked to advise ITC of any regional events or technical meetings and annual general meetings to enable the working group to roll out activities between now and the next TPO Network World Conference and Awards in 2012, to be hosted by Malaysia.

CONFERENCE CLOSING

PLENARY SESSION

CONCLUSIONS

TPOs MUST KEEP PACE WITH CHANGE

'If we keep doing the same thing the same way, we should expect to get the same results. TPOs must keep pace with the world around us. It's changing faster and faster.'

Mr. Jorge Illingworth, Conference Chair

'There is a strong trend towards regional collaboration. This is fundamental because TPOs must cooperate and work together if they are to meet new challenges in the new world scenario.'

Mr. Alfonso Cervantes Sánchez Navarro, ProMéxico

'TPOs are more relevant than ever before. They must reinvent themselves in a constantly changing environment. It's important that in times of crisis we take advantage of the opportunity to make changes – to do things that are difficult to do in times of prosperity.'

Ms. Patricia Francis, ITC

Panel members

Mr. Jorge Illingworth, Conference Chair, Senior Employers' Specialist, International Labour Organization and former Ecuador Trade Minister

Mr. Alfonso Cervantes Sánchez Navarro, Acting General Director, ProMéxico

Ms. Patricia R. Francis, Executive Director, International Trade Centre (ITC)

Two days of intensive discussion and debate brought together 150 representatives from trade promotion organizations, government and private business support organizations, related government ministries, regional trade promotion organizations, and international and national development agencies interested in trade capacity development.

Participants exchanged experiences, knowledge and best practices, while focusing on practical solutions to stimulate export-led economic growth. The result was a deeper understanding of the shifting global trade terrain and a compass to navigate the territory ahead.

The Conference Chair, Mr. Illingworth, Senior Employers' Specialist, International Labour Organization and former Ecuador Trade Minister, noted that no one country had been spared the effects of the global economic crisis; however, some had been hit harder than others. The same is true for sectors; recovery is uneven, but for the most part, markets are recovering.

'No crisis is worth going through if you do not get something good out of it,' he told participants. 'A first and hard learned lesson is that it is not business as usual anymore.'

Crisis typically creates space for opportunity. Yet, while emerging markets – such as Asia and Latin America – are pushing export growth worldwide, it is important not to underestimate the regional and domestic dimension of trade. Regional strategies in trade and investments are key, particularly in critical industries along supply and production chains.

At the same time, specialization increases the relevance of regional strategies in trade and investment. The capacity of countries to act collectively in addressing the challenges of international trade is a driver of companies' competitiveness.

Countries within the same region benefit from building mechanisms of collective consultations and joint initiatives that strengthen economic relations, identify business opportunities with global supply chains, and improve the position of their economies in the world market.

This dynamic must be reflected in the ways TPOs work together. The role of TPO networks is to take joint action in export and investment promotion, which has a direct impact on policymaking at the country level. 'TPOs should be more active than in the past to try and have a more direct impact in policy-making or reform at the country level,' Mr. Illingworth stated.

Benefits of regional collaboration include centralizing and coordinating information on trade and investment promotion strategies that are relevant for exporters. TPOs are revamping their information gathering systems, recognizing that lack of information is a serious barrier to exports.

However, information alone is not enough – it must be transformed into knowledge, for example, market intelligence. This is particularly important for developing country firms that are involved in trading differentiated goods and services.

TPOs are moving towards a client-centric approach. They are now, more than ever, in a *listening mode*, enabling them to respond on time and efficiently with demand-driven, needs-based, value-adding, sector-specific services.

'Developing a close, trusting relationship with clients could definitely help in the information gathering process needed for TPOs to measure their impact,' Mr. Illingworth said. To this end, client relationship management systems are crucial for an effective and efficient response to clients.

In the face of increasing international competition, TPOs need to focus on capacity building and export development services. Many companies are being forced to go global because of the competition from foreign companies at home. At the same time, TPOs must also focus on better positioning companies within global supply and production chains of products and services.

Much work needs to be done to measure the impact of their services on export-led growth. A strong and effective TPO Network is crucial for sharing successes and failures in this critical area. 'There is no one-size-fits-all measuring impact system, but our experience in sharing processes definitely could help in the design of a system that fits individual TPOs,' he said.

One point of the compass for TPOs when charting future directions could be to consider Mr. Illingworth's paraphrase of Albert Einstein's famous quote: *Insanity is doing the same thing over and over again and expecting different results.*

The host of the 2010 TPO Network World Conference and Awards, Mr. Cervantes, reminded participants that the challenges of developing trade extend beyond borders, and in many instances should be tackled regionally. TPOs are constantly building their capacities to better service clients' needs and today more than ever they must follow up on business outcomes through initiatives such as monitoring certification and export outcomes.

'We need to focus on our customers' needs to have a clear course for developing our markets,' he said. 'It is also important to concretize regional cooperation so that TPOs can be enriched through collaboration.'

Ms. Francis told participants that TPOs are more relevant than ever before. 'They must reinvent themselves in a constantly changing environment. It is important in times of crisis that we take advantage of the opportunity to make changes – to do things that are difficult to do in times of prosperity,' she said. 'We must keep pace with the world around us.'

An important trend that emerged during the Conference is the tendency of TPOs to focus on export-ready SMEs to boost economic growth for their countries. 'It may be easier to go for the low-hanging fruit of targeting export-ready or exporting SMEs, but do not forget our obligation to economic development and to working with companies that need your support,' cautioned Ms. Francis.

The 2010 TPO Network Conference and Awards followed ITC's World Export Development Forum (WEDF), which took place 9-12 September in Chongqing, China, where more than 300 participants addressed the theme, 'Adapting to Post-Crisis World Trade Patterns, and Lessons for Export Development'. Ms. Francis noted that a number of WEDF's conclusions resonated with discussions over the past two days.

'Businesses need to strive for value rather than volume and it is time to work out how to participate in global supply chains,' she concluded. 'It is important to think with a long-term perspective rather than focusing on the short term.'

2010 TPO NETWORK AWARDS – MEET THE WINNERS

DELIVERING REAL VALUE



'These Awards recognize TPOs that understand where the opportunities are and think about innovative ways to motivate companies to go after export markets. These winners are tackling the growing challenges of today's increasingly competitive marketplace and the effects of the global economic recession. They are delivering real value to their customers.'

'Success today also depends on understanding the nuances of supply chains and how you can fit into a global supply chain. Business is no longer focused solely on end-to-end production – it's about being part of a whole. Globalization is creating more opportunities to do this.'

Patricia Francis, ITC Executive Director, International Trade Centre

The Gala Dinner traditionally sets the background for the TPO Network Awards Ceremony. Before dinner and the ceremony, Patricia Francis addressed the audience with the following message:

'On this auspicious occasion, over dinner, I would like to address one of the main reasons why we are all here – that is to reduce poverty and create wealth through supporting and promoting exports.'

While our institutions seek to promote exports – and rationalize import bills in some cases – we all understand that this surely cannot be a goal in itself.

Trade promotion as a mainly publicly funded activity is about achieving macro-economic goals such as stability and growth – and the link to the macro-economy is direct because exports are the most important way to finance imports. This is not a developing country phenomenon. We all know the US has launched an ambitious Export Plan and the new UK Government has stressed the importance of transforming their foreign service into a force for commerce.

This 'export determinism' holds true even when there are substantial other inflows, including direct and portfolio foreign investment, remittances or ODA – all of which can be volatile and are often not sustained.

Without exporting, countries cannot achieve the degree of specialization that makes the most of their resources – people, land, capital and governance. Nearly always, FDI will have to be part of the equation – to secure markets, to assure the quality of products and deploy the right technology.

Even a large country, such as our host country Mexico, still has relatively small domestic markets. But export development is particularly important for low income economies and small island states, such as the Country I come from, Jamaica.

Within small markets we risk realizing neither scale nor specialization, and as economist and philosopher Adam Smith taught us, economic efficiency can be achieved through specialization and through scale.

At ITC we have long been aware that development will not be achieved without developing exports of goods and services. That's why we adopted our credo 'Export Impact for Good'.

But we can all recite instances where we find 'export impact for bad'.

We all have read about growing inequality, industries and livelihoods threatened, communities marginalized and high levels of unemployment blamed on greater openness to trade.

Yet, there is a powerful lobby arguing strongly in favour of the gains of globalization and integration, with key proponents in Washington at the World Bank and other institutions.

At ITC we felt the need to have a fresh look at the relationships between exports and poverty reduction.

We found that we had to start with reviewing some of the World Bank estimates, because we felt their analyses tended to overstate the gains of globalization.

Why? Well, many of their studies use *per capita GDP* as an indication of income.

But across developing countries we know that most of the growth gains will need to be invested – in infrastructure and human capital, roads and schools. Hence much of the growth gains will simply not translate into household income and consumption.

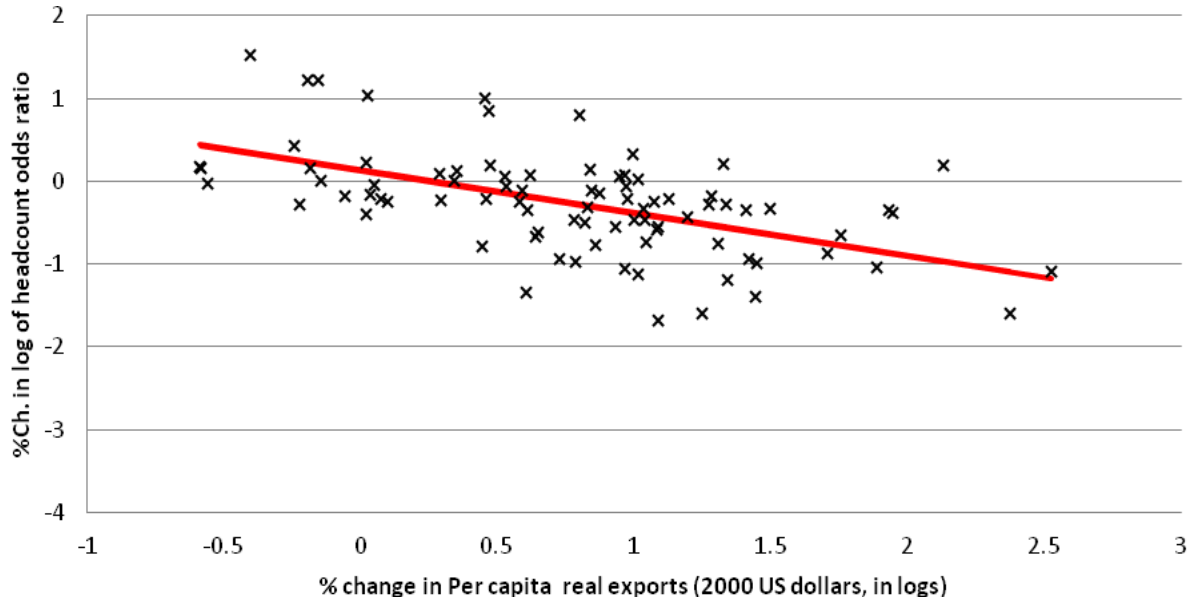
Furthermore, we know that inequality is increasing, with the gains from globalization captured by high-income earners, while many poor households see few direct benefits.

As a result, per capita GDP as a measure tends to systematically overestimate the gains accruing to poor households.

At ITC we use household survey data to determine poverty reduction – that is, it is actually observed rather than determined by assumption. The results will be presented in our flagship report on '*Market Access, Transparency and Fairness in Global Trade*,' which we will launch later this year.

Looking at the data for 88 developing countries over a twenty-five year period, we conclusively demonstrate that export growth has indeed reduced poverty. Below is the key slide, linking exports and poverty reduction; a higher per capita real export correlates with lower poverty incidence – the downward slope is beyond dispute.

Figure 1: Headcount Poverty and Per Capita Real Exports – pooled data 1990 and 2005 (\$2/day poverty line)

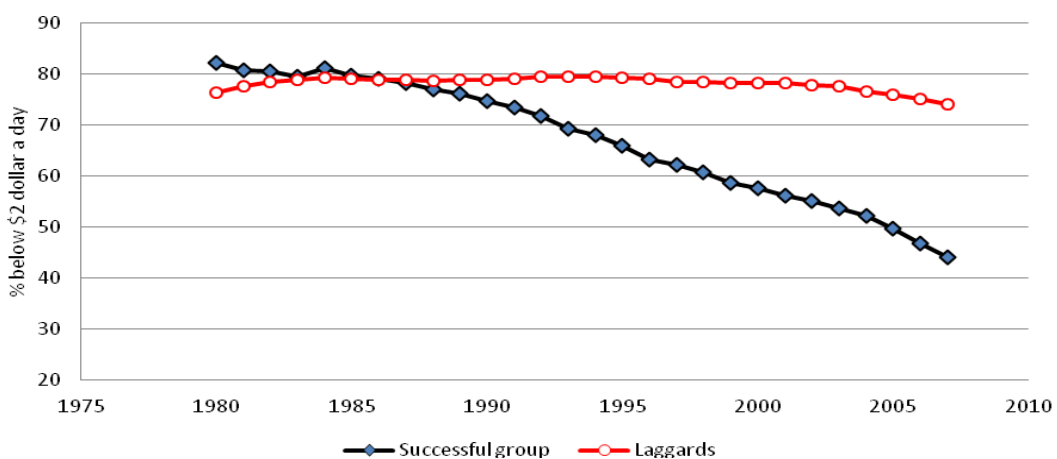


At ITC we prefer to use the 2 \$ a day poverty line as the benchmark for poverty – it is still quite a modest living standard.

Some successful countries reduced their poverty incidence from a situation of mass poverty, with more than 80 per cent of the population not realizing \$ 2 dollar a day, to around 40 per cent – halving poverty. China is one of them and has moved from over 90 per cent in 1980 to below 40 today.

But others have lagged behind and many countries have yet to escape from mass poverty.

Figure 2: Headcount poverty trends, successful country group vs. lagging countries, 1980-2005



However, for quite a number of developing countries the linkage is weak – it has mainly worked in the BRICS and a few other cases.

What about Mexico – now a Member of the OECD?

For Mexico, the headcount of persons below \$2 per day has certainly fallen – from about 16 per cent to about 12 percent over the last two decades. But it wasn't a straight line – poverty increased in the mid-90s before it started to fall again during the past decade.

For countries at the higher levels of development, such as Mexico, we of course emphasize the importance of redistributive policies – social insurances and specific employment schemes can make a great deal of difference.

But for most LDCs the resources for redistributive policies are simply not available. It is export or perish.

In our report we also show that for every \$ 100 dollars imported by OECD countries, only about \$ 4 accrues as income of poor households in developing countries. Of this \$ 4 dollars only about 15 cents accrues to poor households in LDCs – small wonder that poverty reduction in these countries is not happening fast enough.

Improved market access of developing countries remains the key to the door that unlocks wealth and reduces poverty. This improved market access is especially important for goods and services that involve low-income households.

Market access is core business for the WTO, through successive rounds of trade negotiations and also for ITC, as a technical agency of both the UN and the WTO.

Overall we find that tariff structures faced by LDCs trying to access OECD markets have improved markedly after the Uruguay Round of trade negotiations, although much more will need to be done to ensure lower tariffs on bilateral trade between developing countries, especially those in the same regions.

And of course tariff peaks and tariff escalations - charging more for processed products - still prove a formidable challenge to developing countries that wish legitimately and appropriately to diversify away from exporting raw materials to processed goods, thereby increasing their value added.

But it is the non-tariff barriers that are proving the most difficult to overcome.

In official terms, we refer to non-tariff measures or NTMs. Not every measure is a barrier. Most often the intent behind these measures is not to protect markets or industries, but is in response to legitimate concerns from consumers in importing countries about the safety and quality of their imports.

However, a measure can easily become a barrier - and it is here where the devil is in the detail. Along with other agencies, we have developed a comprehensive, exhaustive new classification of NTMs.

We identify as many as 256 measures. These include technical measures, such as Sanitary and phyto sanitary provisions (SPS) and technical barriers to trade (TBT), but also non-technical measures, such as pre-shipment inspection, licences, government procurement restrictions, rules of origin and a host of others.

At ITC we launched a programme to survey how these 256 measures impact export performance of companies.

Coming out of our research and surveys are two fundamental messages. First and foremost, market access remains an absolutely critical issue and hence we need progress in trade negotiations, including the Doha Development Agenda; we need export development to boost poverty reduction.

Second, market access begins at home! Yes, certainly there are obstacles and barriers in the destination markets and transparency and predictability about them needs to be improved. But a great

deal of the NTBs – non tariff barriers to trade – that your companies report can be solved through the right institutions and policies at home.

In Conclusion

What I wish to conclude with is that your institutions will have to make their mark in this field. This is why we are devoting this TPO Network Conference to impact and quality of TPO service delivery. To achieve Export Impact for Good you need to align your trade policy, export strategies and development agendas. This is what is being promoted under the WTO Aid for Trade initiative and we encourage you to become more proactive in ensuring trade delivers the positive development impact we know it can achieve.'

GLOBAL AWARDS RECOGNIZE EXCELLENCE IN EXPORT DEVELOPMENT INITIATIVES

Outstanding national efforts to boost export performance earned global awards at the biennial 8th Trade Promotion Organization Network World Conference and Awards, presented on 14 October 2010 in Mexico City. The TPO Network Awards recognize excellence in trade support services and celebrate TPOs that demonstrate outstanding performance in the use of innovative and efficient processes and systems in their export development initiatives. The winners of the TPO Network Awards for 2010 are:

Mauritius: Best Trade Promotion Organization from a Small Island Developing State (Enterprise Mauritius)

'The proximity of markets is a problem, so we have to leverage our every strength. We focused on SMEs to help them maximize their internal capacities. As with most Small Island Developing States, we derive beauty and strength from our smallness. At the same time, it's important to maintain an image of quality.'

Prakash Beeharry, CEO Enterprise Mauritius

Brazil: Best Trade Promotion Organization from a Developing Country (Brazilian Trade & Investment Promotion Agency - Apex-Brasil)

'This award means a lot. There is pressure for continuous achievement, which is also a responsibility. For us, success depends on a continuous learning process, based on listening, being part of the process and understanding what we have to improve in our service delivery.'

Mauricio Borges, Director, Apex-Brasil

United Kingdom: Best Trade Promotion Organization from a Developed Country (UK Trade & Investment - UKTI)

'For UKTI, measuring impact is all-important. This helps us identify gaps in services for experienced SME exporters who could achieve benefits by expanding into new markets – a key tipping point for exporters. We also found that a service was needed to help innovative SMEs grow their businesses.'

Susan Haird, Deputy Chief Executive, UK Trade & Investment

RUNNERS-UP

Armenia – from a developing country (Armenian Development Agency - ADA)

Hungary – from a developed country (Hungarian Investment and Trade Promotion Agency - ITD Hungary)

SPECIAL MENTION

Malaysia – from a developing country (Malaysia External Trade Development Corporation – MATRADE)

Australia – from a developed country (Australian Trade Commission – Austrade)

WHY THE AWARD?

ITC's TPO Network Awards are open to trade support institutions that are the officially recognized national organization for trade promotion. The 2010 TPO Network Awards – Excellence in Export Development Initiatives – focused on the key processes required to offer an effective export development initiative and on the overall impact of the initiative. The key areas assessed were:

- Determining the needs for the export development initiative;
- Performance monitoring of the initiative; and
- The assessed effectiveness of the initiative.

Applicants were assessed on one specific export development initiative that illustrated how an individual or group of SMEs was assisted in strengthening its competitiveness and as a result entered or re-entered the global market as a strong competitor. The Adjudicating Panel was chaired by ITC Executive Director Patricia Francis and included senior representatives from the 2008 TPO Network Award winners' organizations.

The categories for the 2010 Awards were: Small Island Developing State, Least Developed Country (LDC) Developing Country, and Developed Country. For the 8th TPO Network Awards there were several applications from LDCs; however, no award was granted in this category. ITC recognizes that TPOs from LDCs could benefit from documenting the good work they do for their clients. One critical area is in tracking performance. ITC is committed to working with LDCs to better measure and report the value they deliver.

WINNERS' SHOWCASE

MAURITIUS – SMALL ISLAND DEVELOPING STATES AWARD

Enterprise Mauritius recently moved from focusing its efforts as a trade support and trade promotion organization to a fully fledged trade development organization. As such, it focuses on the competitiveness of developing SME. Enterprise Mauritius developed and applied the 3 Cs model to allow it to better position its service portfolio with the needs of the clients and deliver these services at appropriate times.

The 3 C's model covers three broad areas – *Competitiveness Enhancement*, *Product Conformity* and *Market Connectivity* – which together encompass the generic needs of all enterprises. The 3 Cs model engages stakeholders such as government ministries, the chamber of commerce, industry associations, and public institutions. The model is explained in detail so that all involved share the same vision and understand the mechanisms needed for implementation, monitoring and conducting assessments.

Competitiveness Enhancement focuses on diffusing technology, developing enterprises, providing working capital and sourcing clean energy. *Product Conformity* provides support for upgrading product quality, standards and packaging. *Market Connectivity* involves surveys of markets with export

potential, business meetings, international trade fairs, and financial assistance to companies exploring foreign markets.

Success for SMEs

Enterprise Mauritius tested and used the 3 Cs model in three case studies:

- *New market development for SMEs in the Swedish market.* This project supported Mauritian SME clothing manufacturers in developing export opportunities in Sweden. Between 2006 and 2009, exports of clothing to Sweden grew from less than 2 million rupees to nearly 10 million rupees.
- *Demystifying the United States market for SMEs.* This project sought to help Mauritian agro-processing and textile companies penetrate the United States market. Between 2008 and 2009, exports by large enterprises increased 21%, while SMEs, without prior United States export experience, realized 69% growth.
- *Preparedness of SMEs to export to the European Union market.* Enterprise Mauritius created an action plan to inform and prepare SMEs to meet new European Union product regulations. The European Commission commended Enterprise Mauritius and provided funding. In 2008, not a single Mauritian SME was exporting to the European Union. By June 2009, three SMEs were regularly exporting processed food to France with a value of nearly 5 million rupees.

BRAZIL – DEVELOPING COUNTRY AWARD

The Brazilian Trade & Investment Promotion Agency (Apex-Brasil) recently launched the *Industrial Extension for Exporting Project (PEIEX)*, a strategic initiative to build the export capacity of Brazilian SMEs. PEIEX enhances competitiveness of Brazilian companies by engaging a broad network of institutions and consultants to help entrepreneurs identify critical challenges, and improve business processes and operations in areas such as management, marketing, human resources, financing, production and international trade.

An integrated strategy

PEIEX is part of Apex-Brasil's integrated strategy to foster internationalization of Brazilian companies. Its main objective is to increase the number of Brazilian exporting companies. Its target clientele are companies that are not yet exporting or those beginning to export.

PEIEX develops numerous initiatives in areas such as market information, export qualification and promotion, positioning and image promotion, and internationalization support. All these services are interlinked in a well designed system. This allows companies from various sectors, different sizes and levels of business development to find the appropriate Apex-Brasil services.

PEIEX is a crucial element in Apex-Brasil's strategy. It has had a significant impact on the competitiveness of companies in Brazil, preparing them to face the challenges of both domestic and international markets.

Continuous evaluation and monitoring of outcomes and results characterizes PEIEX's methodology. There is already evidence of remarkable impact on Brazilian companies using PEIEX's services. Improvements have been seen in such areas as sales, profits, markets, infrastructure, human resources, management, production and marketing. Surveys show that 243 Brazilian companies have reported 458 improvements or positive impacts in their resources, capabilities and/or competitiveness.

UNITED KINGDOM – DEVELOPED COUNTRY AWARD

UK Trade & Investment (UKTI) helps companies do business in overseas markets and brings high-quality investments into the UK. Its *Gateway to Global Growth Programme* (G3) supports UK SMEs that are already exporting in growing their businesses by entering new and more challenging markets.

The G3 programme has a specific target group – innovative SMEs with two to ten years of export experience. These companies needed a new approach to export support that recognized the changes in the international business environment that have occurred over the last ten years.

G3 offers a single route to a range of guidance and support services to take these companies to a higher level of international success. It uses private and public sector consultants to deliver support, guidance, specialist training and action planning. Solutions are often complex and require specialist information and skills. Help to exporting SMEs from G3 is always tailored to the specific needs of the individual company.

A real success for UKTI's clients

UKTI's independent evaluation of G3 shows that the programme has been highly successful. *Performance & impact monitoring surveys* (PIMS) found that 1,200 SMEs participated in G3 in the first 12 months. Sixty-seven percent of these companies improved their business performance, and 80% increased productivity and competitiveness.

UKTI has five years of consistent PIMS data, allowing robust comparison of quality and impact across services and over time. Transparent measurement has helped to drive productivity: 15,000 businesses supported and £2.5 billion additional profit generated three years previously. In 2010 this had risen to 23,600 businesses supported and £5 billion of additional profit for customers and £35 billion of additional exports, a ratio of £19 for every £1 the UK spends on trade promotion.

Quality and satisfaction ratings for G3 are at 88% and 81%, respectively. In its first year, G3 was already amongst UKTI's best performing services. At a time when overseas business has grown ever more competitive, G3 has been a real success for UKTI's clients.

TPO NETWORK AWARDS WINNERS BOOKLET

Following each edition of the TPO Network Awards, ITC publishes a booklet in three languages showcasing the achievements of the winning TPOs. The *TPO Network Awards Winners Booklet* will be printed in hard copy as well as launched on the TPO Network website in the first quarter of 2011.

APPENDIX: Conference Evaluation

The following is the statistical evaluation of the participants' response to the evaluation survey.

| | | Excellent | | | | | Poor | | | | Replies |
|--------------------------------|--|-----------|-----|------|------|-----|------|----|----|----|---------|
| | | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | | |
| Overall event success | | | | | | | | | | | |
| 1 | What is your overall evaluation of the Conference? | 11% | 37% | 37% | 15% | - | - | - | - | 27 | |
| 2 | Has your knowledge about different mechanisms for assessing impact improved as a result of the conference discussions? | 18% | 30% | 30% | 14% | 4% | 4% | - | - | 27 | |
| 3 | How would you rate what you have learnt during the Conference as to the practical implementation when selecting your service portfolio and distributing your services? | 18% | 14% | 44% | 8% | 12% | 4% | - | - | 27 | |
| 4 | How would you describe the level of dialogue with participants from other countries? | 18% | 40% | 15% | 22% | 4% | - | - | - | 27 | |
| Conference organization | | | | | | | | | | | |
| 5 | How do you rate the management and organization of this workshop by the host TPO (ProMéxico)? | 19% | 37% | 11% | 11% | 15% | - | 7% | - | 27 | |
| 6 | How do you rate the location (Mexico City, Mexico)? | 12% | 44% | 24% | 11% | 8% | - | - | - | 25 | |
| 7 | How do you rate the Conference facilities (Camino Real Polanco)? | 18% | 18% | 44% | 8% | 8% | 4% | - | - | 27 | |
| 8 | How do you rate the accommodation at your Conference hotel? | | | | | | | | | | |
| | Camino Real Polanco Mexico | 13% | 18% | 27% | 27% | 10% | 5% | - | - | 22 | |
| | Fiesta Americana | - | - | 100% | - | - | - | - | - | 1 | |
| | Four Seasons | - | - | - | - | - | - | - | - | 0 | |
| | Other: _____ | - | - | - | 100% | - | - | - | - | 1 | |
| 9 | How do you rate the simultaneous interpretation in Spanish? | 25% | 50% | 25% | - | - | - | - | - | 8 | |
| | How do you rate the simultaneous interpretation in French? | 33% | 67% | - | - | - | - | - | - | 3 | |
| | How do you rate the simultaneous interpretation in English? | 7% | 38% | 31% | 12% | 7% | - | - | 7% | 16 | |

| | | Excellent | | | | | Poor | | | Replies |
|---|--|-----------|-----|-----|-----|-----|------|----|----|---------|
| | | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | |
| Please evaluate the usefulness / quality of the Conference sessions/events - Day 1 | | | | | | | | | | |
| 10 | Keynote session: a) The Mexican Economic Experience 2008-2010 Mr. Bruno Ferrari, Secretary of Economy, Mexico | 8% | 20% | 36% | 28% | 8% | - | - | - | 25 |
| 11 | Keynote session: b) Challenges to Trade and Investment Promotion in the Current Environment - Mr. Mauricio Borges, Director, Apex-Brasil | 15% | 19% | 31% | 27% | 4% | 4% | - | - | 26 |
| 12 | Plenary 1 - Impact of TPO Services in Latin America Mr. Christian Volpe, Senior Economist, IADB | 8% | 23% | 23% | 19% | 19% | - | 4% | 4% | 26 |
| 13 | Plenary 2 – Competitiveness in Latin America Professor Victor Umaña, Researcher, INCAE Business School | 8% | 15% | 27% | 35% | 15% | - | - | - | 26 |
| 14 | Break out session 1a) What services should TPOs deliver to ensure success in the current environment? | 4% | 42% | 19% | 27% | 8% | - | - | - | 26 |
| 15 | Break out session 1b) How to distribute TPO services? | 4% | 48% | 24% | 24% | - | - | - | - | 25 |
| 16 | Plenary session – Turning challenges into services – sharing experiences of the past TPO Network Awards winners | 16% | 28% | 32% | 12% | 12% | - | - | - | 25 |
| 17 | Presentations by prospective hosts of 9 th TPO Network Conference | 20% | 16% | 24% | 36% | 4% | - | - | - | 25 |
| 18 | World TPO Awards 2008 Gala Presentation & Dinner | 35% | 31% | 31% | 4% | - | - | - | - | 23 |

| | | Excellent | | | | | | Poor | | Replies |
|---|--|-----------|-----|-----|-----|-----|---|------|---|---------|
| | | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | |
| Please evaluate the usefulness / quality of the sessions/events, Day 2 | | | | | | | | | | |
| 19 | Break out session 2a) Following up with clients served | 19% | 50% | 19% | 4% | 8% | - | - | - | 26 |
| 20 | Break out session 2b) Evaluating impact on clients of services | 17% | 42% | 17% | 16% | 8% | - | - | - | 24 |
| 21 | Presentations by the 2010 TPO Network Award winners | 9% | 26% | 35% | 17% | 13% | - | - | - | 23 |
| 22 | Plenary session- Strengthening the TPO Network | 14% | 36% | 18% | 27% | 5% | - | - | - | 22 |
| 23 | Conference closing – Summary, Mr Jorge Illingworth, Conference Chair, Former Ecuador Trade minister, Ecuador | 12% | 38% | 44% | 6% | - | - | - | - | 16 |
| 24 | Conference closing – Closing remarks, Mr Alfonso Sanchez Navarro, Acting General Director, ProMéxico and Ms. Patricia Francis, Executive Director, ITC | 21% | 36% | 43% | - | - | - | - | - | 14 |

FOR FURTHER INFORMATION, PLEASE CONTACT



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