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International policies diagnosis summary

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INTERNATIONAL POLICIES DIAGNOSIS **1**

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Government of Navarre

INTERNATIONAL POLICIES DIAGNOSIS 1

The Government of Navarre has recently made a diagnosis of the situation regarding the internationalization of its companies in which a series of elements that need attention and a specific policy definition on the subject of internationalization in Navarre are highlighted.

1. Insufficient number of companies exporting on a regular basis, and slow annual growth (888 companies in 2016) - D
2. Insufficient percentage of internationalized companies. Only 888 companies of approximately 20,800 companies (counting only the companies that have employees) export. The data supposes that only 4.2% of the Navarrese companies are internationalized. - D
3. Exports are concentrated in a few sectors, in few countries and in few companies. Recall that 44% of Navarre export in 2016 corresponds to the automotive sector and 52% of sales are concentrated in five markets. - D
4. Perception of lack of public leadership in the foreign policy of the Regional Community and perception of lack of coordination in the measures and actions of the different public and private entities. - D
5. Lack of visibility of public action in the private sector, and especially in non-internationalized companies. D
6. Limited budgetary resources for public action, in particular as regards grants and aids. D
7. Concentration of Navarra's exports in products of medium-high technological level (71%) O
8. High rate of industrial activity and a large number of competitive and dynamic industrial sectors. - F
9. There is a clear perception of the need to coordinate the action of entities around a common strategic vision. - O
10. Dynamic perception of a competitive and sustainable industrial community with a high level of quality of life. - F
11. Educational level of human resources clearly above the Spanish average - D

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1. KEY DATA

Regional DGP:	18,484 millones de euros[1]
Nª inhabitants:	638,027
Nº of companies:	3,743[2] / 37,983
Number of SMEs in the region:	3,709 (91,9%) / 37,922
Number of micro SMEs (less than 10 people)	2,950 (78,8%)/ 35,648
Exports figure:	8,338.1 million euro
Exports by sectors (%):	Industry and technology, 84,2%; Agrofood, 12,1%; Consumer goods, 3,7%
Exports by countries (%):	France: 16.9% Germany: 15.3% Italy, 7.6% UK: 7.2% Turkey: 4.7% Portugal: 3.9% United States: 3.7% Belgium: 2.8% Mexico: 2.2%
Exports by sectors and countries (%):	(see table below)

Porcentaje de empresas por destino	Unión Europea %	Resto de Europa %	Estados Unidos %	Latino América %	Asia %	África %	Otros %
Alimentación y bebidas	29,05	12,86	14,29	14,29	12,86	7,62	7,62
Metálicas	23,81	8,57	5,71	9,52	4,76	5,71	0,95
Maquinaria	12,86	7,62	7,62	9,05	7,14	7,14	3,81
Vehículos	9,05	4,76	4,76	4,29	5,24	3,33	2,86
Turismo	5,24	2,38	1,43	1,43	1,43	1,90	3,33
Arquitectura	3,33	0,95	1,90	1,90	1,90	0,95	0,48
Eléctrico	2,38	0,95	1,43	1,90	1,90	0,95	0,00
Cuero	1,43	0,48	0,95	0,95	0,00	0,48	0,00
Papel	1,43	0,48	0,48	0,48	0,48	0,95	0,48
Farmacia	0,95	0,00	0,48	0,00	0,48	0,00	0,00
Consultoría	0,00	0,00	0,00	0,48	0,00	0,00	0,48
Total Exportan a:	89,52	39,05	39,05	44,29	36,19	29,05	20,00
No exportan a:	10,48	60,95	60,95	55,71	63,81	70,95	80,00
Total	100,00	100,00	100,00	100,00	100,00	100,00	100,00

Balance of trade (euros):	3,811.6 million euro
RIS3: Which are the sectors included in your regional Smart Specialisation Strategy?	Automotion Health Agrifood Renewables Tourism Cultural and creative Industries
Regional public anual budget for internationalisation policies:	1,247,000 (five calls) TOTAL BUDGET 2017 (including actions in new International Plan): 1,753,000
Which has been the trend of that budget over de last 5 years:	The budget was cut down from 2012 to 2016, but in 2017's the budget has increased.

1. INE. Data according to Industrial Plan / Global data
2. Industry Plan for Navarre, 2017 (INE)

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2. GOVERNANCE	
Is there any Internationalisation Plan in your region?	Yes: the International Plan for Navarre III
If so, who is the leader of this Plan?	Government of Navarre
If so, how long is it designed for?	2017-2020 Previously, 2008-2011; 2013-2016
Key agents responsible for de implementation of SMEs' internationalisation support measures. Describe them.	• Government of Navarre. • ICEX. Spanish agency for internationalisation; it depends on Spanish national Government. • Chamber of Commerce of Navarre. • SODENA. Public company for fostering Invest in Navarra. • CEN. Companies association. • CEIN. Public company for innovation. • AIN. Industry association; contain EEN.
How do all these agents organise their actions in order to coordinate their efforts ?	They signed an agreement to foster internationalisation and to coordinate their actions (2012; Chamber of Commerce, ICEX, CEN, Government of Navarre). They are all included in the coordination committee of the International Plan for Navarre.
How do you manage to reach business managers at the level(municipalities) when they are to support local SMEs	No activities related to municipalities. So far, Internationalisation has not been supported from a municipal level. From 2017, the new International Plan includes several actions in order to work togeteher with municipalities and Regional Development Agencies.
Which aspects in your governance could be improved and why?	The coordination among the different stakeholders in Navarra could be improve in many ways. **Dissemination**. Many SMEs in Navarre don't know the subsidies or programmes develop to foster internationalisation in the Region. Stakeholders should work together in communication and dissemination. **Coordination**. Meassures should go in the same way and, sometimes, institutions seem to follow their own criteria. For instance, when a country has been determined as "critical" but the International Plan, all the agents should work around that country.

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3. POLICIES

A) POLICIES DESIGN CRITERIA

WHICH ARE YOUR CRITERIA TO DESIGN/ORGANISE YOUR POLICIES? *Please, underline, as many as you have*	• Phase of internationalisation. Depending on the phase of internationalisation, we offer different kind of actions. • Sector. Most of the policies in Navarra are not addresses to specifics sectors. Nevertheless, in some subsidies, companies from S3 sectors are prioritized. • Type of company. All the actions are addressed to SMEs. • Country. In some subsidies, companies addressing markets outside EU are prioritized. • Collaboration. Some activities are specifically addressed to companies who work together or collaborate in order to access to international markets.
BRIEF EXPLANATION:	Navarra has some important multinational companies with an important export volume (Volkswagen, Acciona, Gamesa, Cinfa, BSH...). All of them are consolidated and don't need support from public bodies in order to maintain their internationalisation. Consequently, all the public policies are addressed to SMEs. The prevision is to prioritized in the future: ➜ Sectors in the S3. Because of a new regional strategy which focus on 6 strategic sectors. ➜ Strategic markets. The new International Plan for Navarre addressed to several strategic markets and it is due to addressed new actions to these markets.

B) ANALYSIS OF YOUR ACTIONS

The objective is to get information about which kind of supports exist in your region, as well as who is responsible for them and which are the main objectives and characteristics of the measures.

Please, fulfil a template of "annex I" for every action

4. COMMUNICATION STRATEGY

By which means do you try to communicate all these measures to the enterprises in your region?	Direct mailing Social Media: blog, twitter, linkedin Web Press releases and traditional communication strategies.
Is it effective?	It could be improved. In a recent diagnosis, many companies declared not to know the measures taken by the Government regarding internationalisation.
Which aspects in your communication could be improved and why?	Dissemination and coordination with other agents.

5. ACCESS TO THE POLICIES	
By which means do the enterprises contact your organization or other agents to benefit from support measures?	Telephone / mail Some of the companies don't contact, just apply for the subsidies Consultants: sometimes, a consultant contact the Government in the name of an enterprise.
Is it effective?	It could be improved.
Which aspects could be improved and why?	The Government should generate forum or meeting opportunities with the companies in order the enterprise contact directly the government. A good web with the information and online presentation.

6. TRACING	
By which means do you follow supported companies progress in their internationalisation process? (databases, surveys, interviews, etc.)	We have databases with information of the companies, but we don't really track the progress of the company After the calls, the Government launches a survey asking for the results, the experience and aspect to improve. The surveys are qualitative; therefore, the results of the subsidies can not be measured.
Are they effective?	The measures taken are not enough to know whether a policy is working with the beneficiaries.
Which aspects could be improved and why?	A follow up method should be established in order to track the policies result.

7. EVALUATION	
By which means do you evaluate the impact of the policies your region implements?	The policies are evaluated by macroeconomic criteria: number of companies exporting, export figures, etc.
Are they effective?	They could be improved
Which aspects could be improved and why?	Data collection and analysis, interviews with enterprise.

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8. SWOT ANALYSIS
of your regional policies to foster internationalisation in SMEs

Strengths of the support:

- Export profile of the region, moderate growth of exports in 2008-2014.
- Dynamic perception of a competitive and sustainable industrial community with a high level of quality of life.
- High rate of industrial activity and a large number of competitive and dynamic industrial sectors.
- Presence in Navarre of more than 125 multinationals from more than 20 countries that act as a catalyst of change and introduction of innovations.
- Small region with easy access to the administration.
- An existing collaboration among stakeholders though it can be improved.
- Concentration of the supports in S3 sectors and in defined countries, which can be more effective.
- A 4 year planification 2017-2020.
- A participatory diagnosis and definition of PIN 3 strategies and measures.
- Focus on collaboration among enterprises for internationalization.

Opportunities for improvement:

- There is a clear perception of the need to coordinate the action of entities around a common strategic vision.
- Concentration of Navarra's exports in products of medium-high technological level (71%), which can be easily sold abroad.
- Improvement of cooperation between companies, technological centres and universities as a way to increase commercial and industrial development of existing intellectual property.
- Only 4% of the companies are exporting. Which means there a huge amount of companies potentially international.
- Only 888 companies are regular exporter which means there is a great possibility to improve.
- New PIN 3 with more money and new strategies.
- More government implication.

Weaknesses or gaps in support:

- Lack of visibility of public action in the private sector, and especially in non-internationalized companies
- Lack of public leadership in the foreign policy of the Regional Community and perception of lack of coordination in the measures and actions of the different public and private entities.
- Lack of coordination among stake holders of the internationalization.
- The supports do not cover all the way of the internationalization process. They cover mainly the beginning and the final process before implantation.
- Lack of money for more and stronger measures.
- Lack of personnel in the government for more and stronger activities.

Threatens to becoming more internationalised

- Relocation of companies to developing countries with low labour costs.
- Distance and poor connections to international decision-making centres (difficulties in exporting and attracting investment).
- Changing political and economical environment in some of our objective countries of our policyes.
- Bureaucratic procedures which slow down political implementation.

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HEDMARK
FYLKESKOMMUNE

Hedmark County Council

INTERNATIONAL POLICIES DIAGNOSIS **2**

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1. KEY DATA

Regional DGP:	6 600
Nª inhabitants:	196 190
Nº of companies:	22 199 (14 more than 250 employees)
Number of SMEs in the region:	7 199
Number of micro SMEs (less than 10 people)	20 123 (14 863 no employees, 3 592 1-4 employees)
Exports figure:	Total export 4 103 million NOK
Exports by sectors (%):	Food and tobacco 3,9, Raw material 30,2, Chemical products 5,7, Machinery and other goods 21,3, Other manufactured goods 24,4, Other goods 8,36
Exports by countries (%):	Not available
Exports by sectors and countries (%):	Not available
Balance of trade (euros):	Not available
RIS3: Which are the sectors included in your regional Smart Specialisation Strategy?	Bio economy, Health and Experience Industry
Regional public anual budget for internationalisation policies:	20 million NoK. Funds for Interreg A programme included the department for International relations.
Which has been the trend of that budget over de last 5 years:	Not changed

2. GOVERNANCE

Is there any Internationalisation Plan in your region?	There is no specific regional plan for internationalisation of trade and industry in Hedmark, but there is a plan for Internationalisation of Hedmark County where it's stated that Hedmark County Council should prioritise internationalisation of SMEs.
If so, who is the leader of this Plan?	Hedmark County Council is the leader of the Internationalisation plan for Hedmark County Council.
If so, how long is it designed for?	2015-2020
Key agents responsible for de implementation of SMEs' internationalisation support measures. Describe them.	**Innovasjon Norway** is the main key agents for implementation of support measures towards SME and is the Norwegian Government's and the counties of Norway, most important instrument for innovation and development of Norwegian enterprises and industry. Innovation Norway has 18 regional offices and is owned by the Ministry of Trade, Industry and Fisheries (51%) and the county authorities (49%). Innovation Norway support companies in de veloping their competitive advantage and to enhance innovation. Innovation Norway offers several support measures to SMEs with international ambitions.

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- International Market Advisory (40 offices abroad).
- International network to help Norwegian companies grow abroad (Enterprise Europe Network).
- Global Entrepreneurship Initiative.
- The Business MatchMaking Program.
- Grants.
- Loans (Low risk loans, Innovation loans).
- Seed capital.
- Guarantees.

Norwegian Research Council

The Research Council offer support and grants to encourage Norwegian researchers, companies and research institutions to participate more actively in international collaborative and competitive arenas.

SIVA

Siva is a public enterprise owned by the Norwegian Ministry of Trade and Fisheries. SIVA is a part of the public funding agencies for innovation and work closely with Innovation Norway, the Norwegian Research Council and the Norwegian Patent Office. SIVA invests in real estate and commercial property, reducing the risk for new entrants where a market mechanism makes this particularly demanding. Siva owns innovation companies across the country and develops knowledge and start-up environments, and connects them to regional, national and international networks. SIVA finances a programme for establishment of local incubators. SIVA has invested and is co-owner in 5 local innovation companies (incubators) in Hedmark County.

Local (municipality) business development (first level business development)

First level business development is a support measure managed by the municipalities and aims to support small businesses to find relevant support among above agents.

Hedmark County Council

Hedmark County Council offers indirectly support to SMEs through the support given to incubators, researchers and non-profit business developers/agencies in order for them to participate in EU funded programmes and projects. Hedmark County Council supports and encourages regional and local stakeholders to finance international cooperation between researchers and business in their pursuit for increased innovation and competitiveness by using for Norway available EU funds, such as the Interreg programmes and Horizon 2020. The interreg programme Sweden-Norway priorities competitiveness among SMEs and a major part of the projects focuses on this theme in and in different branches. The support consists both of funds (only Interreg Sv-No) and advice on project development and/or support to identify relevant partnership/partners.

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How do all these agents organise their actions in order to coordinate their efforts ?	To be discussed
How do you manage to reach business managers at the level(municipalities) when they are to support local SMEs	To be discussed
Which aspects in your governance could be improved and why?	To be discussed

3. POLICIES

A) POLICIES DESIGN CRITERIA

WHICH ARE YOUR CRITERIA TO DESIGN/ORGANISE YOUR POLICIES? *Please, underline, as many as you have*	• The phase of internationalisation of the enterprise • The sector • The size of the enterprise • The country • A mixture of (when the policy is designed specifically for the intersection between ex. sector and country)... • The level o f technology of the product • Other: (explain, please) • None
BRIEF EXPLANATION:	

B) ANALYSIS OF YOUR ACTIONS

The objective is to get information about which kind of supports exist in your region, as well as who is responsible for them and which are the main objectives and characteristics of the measures.

Please, fulfil a template of "annex I" for every action

4. COMMUNICATION STRATEGY

By which means do you try to communicate all these measures to the enterprises in your region?	
Is it effective?	
Which aspects in your communication could be improved and why?	

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5. ACCESS TO THE POLICIES	
By which means do the enterprises contact your organization or other agents to benefit from support measures?	
Is it effective?	
Which aspects could be improved and why?	

6. TRACING	
By which means do you follow supported companies progress in their internationalisation process? (databases, surveys, interviews, etc.)	
Are they effective?	
Which aspects could be improved and why?	

7. EVALUATION	
By which means do you evaluate the impact of the policies your region implements?	
Are they effective?	
Which aspects could be improved and why?	

8. SWOT ANALYSIS
of your regional policies to foster internationalisation in SMEs

Strengths of the support:

- Decentralised/centralised.
- Close to support.

Opportunities for improvement:

- Improved awareness about the importance of internationalisation for increased competitiveness.
- A more holistic view on funds available for Internationalisation of SMEs.

Weaknesses or gaps in support:

- Fragmentised.
- Vulnerable – often only one person working/ responsible for the topic on local level.

Threatens to becoming more internationalised

- More internationalised- more vulnerable for economic cycles.

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provincie Overijssel

Province of Overijssel

INTERNATIONAL POLICIES DIAGNOSIS **3**

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1. KEY DATA	
Regional DGP:	
Nª inhabitants:	1.1 million
Nº of companies:	81,784 (105 companies have more than 250 employees)
Number of SMEs in the region:	
Number of micro SMEs (less than 10 people)	73.211 companies (89,5 % of total number of companies)
Exports figure:	
Exports by sectors (%):	Chemical products (40%), Machinery & Transport equipment (17,7%), Manufacturing (12%), Agriculture & Food (8.4%), Mineral fuels (7.4%)
Exports by countries (%):	**Export (including re-export) 2015 x 1 000 000 euro** **Within the EU:** Germany (4,564), France (1,282), United Kingdom (1,453) **Outside the EU:** the United States (816), China (340), rest of world (5,461)
Exports by sectors and countries (%):	
Balance of trade (euros):	Export volume (x 1.000.000 Euro) 20.272 Export share of Overijssel within the Netherlands: 6.7%
RIS3: Which are the sectors included in your regional Smart Specialisation Strategy?	Energy, High Tech & Smart Materials, Chemical, Health (life sciences)
Regional public anual budget for internationalisation policies:	For the years 2017-2019, the budget for export promotion from the Province Overijssel is 2.1 million (Annual budget of 700.000 euro)
Which has been the trend of that budget over de last 5 years:	Compared to previous years, the budget has increased from 100.000 to 700.00 euro per year. This budget increase illustrates the importance of the stimulation of SMEs internationalization.

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2. GOVERNANCE	
Is there any Internationalisation Plan in your region?	With regard to the development and execution of internationalization policy, the province of Overijssel only has a facilitating role. In addition, the province makes use of existing policy with its instruments like European subsidy programs, European lobby and investment programs; this new policy will be added to existing policy. This internationalization policy bridges the gap between the current internationalization policy, which lacks a trade focus, and the needs of SMEs based on their experiences with export barriers. A successful implementation of the internationalization policy therefore depends on the support of various stakeholders for this policy. The province of Overijssel aimed at involving the regional companies, the education institutes and semi-governmental institutions in defining the supportive instruments of the internationalization policy for SMEs. In 2016, an expert group with representatives and stakeholders of SMEs and education institutes contributed to the multiannual policy *"#in Overijssel innoveert en internationaliseert"* (Overijssel innovation and internationalization) on the topic of international trade support. The province of Overijssel made Oost NV, the development agency of the Eastern-Dutch region, responsible for the design and execution of the operationalization of this policy. This resulted in the working program "GO4Export" which has been operational since May 2017.
If so, who is the leader of this Plan?	The province of Overijssel is the leader of the development of the internationalisation policy. The province made Oost NV" responsible for the operationalization of this plan.
If so, how long is it designed for?	2017-2019
Key agents responsible for de implementation of SMEs' internationalisation support measures. Describe them.	**Stakeholders in "GO4 Export" are:** ▪ World Trade Center Twente. ▪ Education: two Universities of Applied Sciences (Saxion and Windesheim) and the University Twente. ▪ Novel-T: innovation network High tech start ups. ▪ MKB Deventer: Association for SMEs in the region Deventer. ▪ VNO-NCW Midden/MKB Nederland: Employers (both SMEs and larger companies) (FME/Metaalunie) Association for metal sector. ▪ VMO: Association of manufacturing industry. ▪ Kennispoort: Innovation Network in the region Zwolle.
How do all these agents organise their actions in order to coordinate their efforts ?	As a member of the expert group, the stakeholders defined the activities of this plan together with the help of the province Overijssel. Under the coordination of Oost NV, the group will meet 6 times per year in order to discuss and monitor the planning of their activities.
How do you manage to reach business managers at the level(municipalities) when they are to support local SMEs	The stakeholders of the expert group, with their relations with business managers in the sub regions, form an "export hub" in the province Overijssel so that the province has access to the local SMEs.
Which aspects in your governance could be improved and why?	

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3. POLICIES

A) POLICIES DESIGN CRITERIA

WHICH ARE YOUR CRITERIA TO DESIGN/ORGANISE YOUR POLICIES? *Please, underline, as many as you have*	• The province of Overijssel used the following criteria to develop and organize the international trade policy: • The policy should focus on SMEs and encourage their export activities. • The policy should connect with the trade barriers and problems SMEs face in their export processes. • The province only facilitates and gives Oost NV the responsibility to execute and coordinate the policy. • The policy aims to improve the cooperation between SMEs and between SMES and education (national and international). • All sectors are involved in the policy, no target sectors. • The policy should lead to a multiannual working plan with a simple administrative structure. • The policy connects with the existing facilities and products on national level. • The policy aims to enlarge and extend the existing regional knowledge and facilities of the Province Overijssel.
BRIEF EXPLANATION:	

B) ANALYSIS OF YOUR ACTIONS

The objective is to get information about which kind of supports exist in your region, as well as who is responsible for them and which are the main objectives and characteristics of the measures.

Please, fulfil a template of "annex I" for every action

4. COMMUNICATION STRATEGY

By which means do you try to communicate all these measures to the enterprises in your region?	• By means of a web portal which contains all the national, regional and local internationalisation (export) instruments. • By means of joint network events and workshops for regional SMEs. • By means of the websites of the individual key agents of "GO4Export". • By means of the website of Oost NV and the Province of Overijssel. • By means of mailings to SMEs related to activities.
Is it effective?	
Which aspects in your communication could be improved and why?	

5. ACCESS TO THE POLICIES	
By which means do the enterprises contact your organization or other agents to benefit from support measures?	We expect companies to contact the province Overijssel and the other agents by means of the websites, mailings and by personal contacts during network events and workshops for regional SMEs. For all the activities of the GO4Export plan, specific communication and PR.
Is it effective?	
Which aspects could be improved and why?	

6. TRACING	
By which means do you follow supported companies progress in their internationalisation process? (databases, surveys, interviews, etc.)	We included a yearly evaluation study on the internationalisation process of supported SMEs in the “GO4Export”plan. The evaluation study will be done by an external independent experienced researcher. In addition, after each activity the satisfaction of the participating companies is measured. This is done by the key agents responsible for the specific activity.
Are they effective?	
Which aspects could be improved and why?	

7. EVALUATION	
By which means do you evaluate the impact of the policies your region implements?	The evaluation study also measures the impact of the “GO4Export”on the region by means of monitoring job creation and export growth of SMEs. The evaluation study will be done by an external independent experienced researcher.
Are they effective?	
Which aspects could be improved and why?	

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Värmland County
Administrative Board

Värmland County Administrative Board (VCAB)

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1. KEY DATA

Regional DGP:	
Nª inhabitants:	279 334 (2016)
Nº of companies:	40 042 (2016)
Number of SMEs in the region:	39 728 (2016)
Number of micro SMEs (less than 10 people)	37 876 (2016)
Exports figure:	
Exports by sectors (%):	
Exports by countries (%):	Norway 17%, Germany 13%, China 8%, Italy 5%. Close to 70 per cent of Sweden's exports are destined for the EU's internal market.
Exports by sectors and countries (%):	One of the most important sectors in Värmland is the Paper Province (cluster on Forest-based Bioeconomy) and mechanical engineering industry.
Balance of trade (euros):	2 072 687 euro
RIS3: Which are the sectors included in your regional Smart Specialisation Strategy?	VÄRMLAND'S SPECIALISATIONS The analysis and prioritisation work of VRIS3 has produced five areas for smart specialisation, all with one or more industrial directions, as well as the first specialisation which is to be included in the other specialisations. The first and transverse specialisation is: ■ Value-creating Services The five subsequent specialisations in order of priority are: ■ Forest-based Bioeconomy ■ Digitalisation of Welfare Services ■ Advanced Manufacturing and Complex Systems ■ Nature, Culture and Place-Based Digitalised Experiences ■ System Solution with Photovoltaics
Regional public anual budget for internationalisation policies:	
Which has been the trend of that budget over de last 5 years:	

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2. GOVERNANCE	
Is there any Internationalisation Plan in your region?	Sweden has a national export strategy and we also have a general strategy for Värmland which includes the topic SMEs and internationalisation.
If so, who is the leader of this Plan?	The Government.
If so, how long is it designed for?	The Swedish export strategy's main goal is to have EUs lowest rate of unemployment until 2020.
Key agents responsible for de implementation of SMEs' internationalisation support measures. Describe them.	The Enterprise Europe Network Sweden – the largest network of contact points providing information and advice to EU companies on EU matters, in particular small and medium enterprises. EKN – is commissioned by the government to promote Swedish exports and the internationalization of Swedish companies by insuring export companies and banks against the risk of non-payment in export transactions, thereby enabling them to conduct more secure export transactions. Business Sweden – helps Swedish companies reach their full international potential and foreign companies to invest and expand in Sweden by offering strategic advice and hands-on support. The Chamber of Commerce and Industry – offers skills related to customs regulations, export documents and trade procedure issues to enterprises. ALMI Business Partner is working with companies and their development, and is also the host organization for EEN. County Administrative Board of Värmland – stimulates business in small and medium enterprises in a number of ways in order to bring about financially sustainable development and increased employment. The Swedish Agency for Economic and Regional Growth – promote growth in Sweden by increasing and strengthening the competitiveness of companies, by facilitating entrepreneurship and creating attractive environments for companies in the regions and builds networks facilitate cooperation and finance efforts to boost economic growth. IUC- Industriellt Utvecklings Centrum- is a merger of IUC Wermland AB and the non-profit association Stål & Verkstad. IUC Wermland is owned by the industry and has about 40 shareholders and is one of 16 regional companies in the Swedish IUC network. Stål & Verkstad is a member-owned association with about 70 Värmland companies as owners.
How do all these agents organise their actions in order to coordinate their efforts ?	In Team Sweden – is an umbrella for all Sweden´s government agencies, boards and companies currently working on export promotion initiatives for Swedish businesses.

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How do you manage to reach business managers at the level(municipalities) when they are to support local SMEs	The government (Team Sweden) has been setting up several regional export centres in the country, to facilitate companies that want to export and to increase the possibilities of working proactively for an increased internationalisation, among the county´s companies. The regional export centre includes representatives of all the key agents described above.
Which aspects in your governance could be improved and why?	Some of the small networks works from bottom-up perspective. The SMEs addresses their goals/problems and the networks works with these questions e.g. skills development.

3. POLICIES

A) POLICIES DESIGN CRITERIA

WHICH ARE YOUR CRITERIA TO DESIGN/ORGANISE YOUR POLICIES? *Please, underline, as many as you have*	• The phase of internationalisation of the enterprise. • The sector. • The size of the enterprise. • The country. • A mixture of (when the policy is designed specifically for the intersection between ex. sector and country)... • The level o f technology of the product. • Other: (explain, please) • None.
BRIEF EXPLANATION:	

B) ANALYSIS OF YOUR ACTIONS

The objective is to get information about which kind of supports exist in your region, as well as who is responsible for them and which are the main objectives and characteristics of the measures.

Please, fulfil a template of "annex I" for every action

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4. COMMUNICATION STRATEGY	
By which means do you try to communicate all these measures to the enterprises in your region?	The way we work, we are in contact with a large number of small and medium enterprises trough other important agents who work with support and development of these enterprises (such as all municipality of Värmland, in each they have a division who works for developing enterprises in different ways, and ALMI). They are an important channel of information directly to the enterprises. We also believe that all key agents working with internationalisation in the regions keep up with each other so we can serve the enterprises in the best way we can. We all work to promote profitable business and economic development.
Is it effective?	
Which aspects in your communication could be improved and why?	

5. ACCESS TO THE POLICIES	
By which means do the enterprises contact your organization or other agents to benefit from support measures?	Mostly by phone or our website. Local meetings with networks, banks, municipalities, organizations and sometimes also regional meetings with the same actors.
Is it effective?	Yes, the personal meetings are very important especially from the companies' perspective. The companies often want to have a name/person/contact who can answer their questions.
Which aspects could be improved and why?	

6. TRACING	
By which means do you follow supported companies progress in their internationalisation process? (databases, surveys, interviews, etc.)	We are involved trough out their internationalisation project in these cases we are a part of it economically. We have a database of all enterprises we worked with, we do surveys for keeping up with the effectiveness of the economic support we give, and – in some cases – we do deep interviews.
Are they effective?	It´s often difficult to get a good number of replicants to the surveys, and the deep-interviews is extremely resource-intensive.
Which aspects could be improved and why?	

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7. EVALUATION	
By which means do you evaluate the impact of the policies your region implements?	The Swedish Agency for Economic and Regional Growth do follow up the policies linked to their economic instrument.
Are they effective?	The economic instrument The Swedish Agency for Economic and Regional Growth has is very effective in our region.
Which aspects could be improved and why?	

8. SWOT ANALYSIS
of your regional policies to foster internationalisation in SMEs

Strengths of the support:

- National level: National regulation governs regional level (SFS2015:210/211) (National level important in Sweden as we have very small regions).
- National regulation governs (meaning that we have a toolbox with different forms of support in which all players have the same rules of play.
- Economic assistance - State funding for business development / internationalisation (consultants, internationalisation checks).
- Well established loan system for business development/startups.
- EEN (Enterprise Europe Network) supports businesses with Information, matchmaking.
- Business Sweden (Swedish trade and invest Council) has an international network for matchmaking and support.
- EKN (The Swedish Export Credit Agency) supports businesses with financing.
- Sweden has a National Export Strategy.
- Regional level: Värmlandsstrategin – We have a common (general) strategy for the region (which means that priorities have already been made).
- Approximately SEK 29 million/year of regional development funds goes directly to SMEs.
- Several major players in Värmland have international strategies.
- Verksamt Värmland (verksamt.se/varmland) Verksamt.se is a collaboration among several Swedish government agencies, for those who is considering to start, are starting, already running or want to develop or will close a company in Sweden.

Opportunities for improvement:

- National level: Digitization a great opportunity for internationalization.
- Think bigger – not only Norway and Germany (which are Sweden's most important exporting countries).
- Regional level: Regional export center in progress.
- Värmland has many immigrants who have their international networks - take advantage of these networks!
- We see that more and more women are beginning to think about internationalization.
- Infrastructure towards our neighbor Norway can be much better.
- Academy for Smart Specialisation (A collaboration between Region Värmland and Karlstad University.
- Project level: The Cross-border project "Border Opportunities" will hopefully give us more knowledge and experiences regarding internationalization between Sweden and Norway.

■ Good cooperation between various actors in Värmland means that you are in control of each other and that it does not matter which player the companies are contacting. ■ Värmland has a well-established network with expertise (both private and public actors) ■ Värmland has great knowledge of non-EU trade (e.g. The Border Service Sweden-Norway "Grensetjänsten Sverige-Norge" is located on the border between Värmland and Hedmark). ■ Project level: Regional development funds for project cooperation benefit companies in Värmland in the long term) and provide the opportunity to develop, test and get new contacts. ■ VCAB has great experiences in different EU-programmes (Transnational, Interregional and Cross-border programmes).	
Weaknesses or gaps in support: ■ National level: Lack of funding. ■ Regional level: Distribution of funds between different organisations in Värmland which means small pots for each organisation. ■ Lack of coordination of available funds. ■ Few women in a leading position who internationalize (those who internationalize are men at age 40+). ■ Värmland is at the bottom of the country when it comes to broadband access. ■ Project level: Difficult for SMEs to cooperate as partners in international projects/EU-programmes.	**Threatens to becoming more internationalised** ■ National level/Regional level: A turbulent world (problems with trust in other countries etc.) ■ Brexit. ■ Too many rules/too much bureaucracy. ■ Expensive to establish business in another country. ■ Lack of good infrastructure. ■ Formal border barriers. ■ Mental barriers. ■ Language problems. ■ Project level: Lack of interest among SMEs to cooperate in international projects.

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HAJDÚ-BIHAR MEGYEI
KERESKEDELMI ÉS
IPARKAMARA

CHAMBER OF COMMERCE AND INDUSTRY OF HAJDÚ-BIHAR

Chamber of Commerce and Industry of Hajdú-Bihar County (CCI_HBC)

INTERNATIONAL POLICIES DIAGNOSIS **5**

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1. KEY DATA

Regional DGP:	HB: 4,293 M EUR, ÉA:10,397 M EUR (2015)
Nª inhabitants:	HB: 534,974, ÉA: 1,474,383 (2016)
Nº of companies:	HB: 29,339, ÉA: 70,355 (2014) (KSH, regisztrált gazdasági szervezetek száma 2016. dec. 31. 103,640)
Number of SMEs in the region:	see table below

Excluding individual proprietorship	2012	2013	2014
0 - 9	20,259	20,125	19,659
10 – 49	1,253	1,257	1,213
50 – 249	217	213	213
250 -	29	29	32
Total	**21,758**	**21,624**	**21,117**

(KSH)
77,919 individual propietorships

Number of micro SMEs (less than 10 people)	19,659 (KSH, 2014) + 77,919 individual proprietorships
Exports figure:	93,046 M EUR (KSH, 2016, national data)
Exports by sectors (%):	see table below

Year / M EUR (current prices)	**2016**
Food, beverages, tobacco	6 584
Crude materials	2 084
Fuels, electric energy	1 712
Manufactured goods	28 985
Machinery and transport equipment	53 681
Total	**93 046**

(KSH, 2016, national data)

Exports by countries (%):	EU28: 79% / EU15: 57% / EU13: 22% / Outside the EU: 21% / Asian countries: 6% / American countries: 5% / Total: 100% *(KSH, 2016, national data)*
Exports by sectors and countries (%):	see table below

Country	2016		
	BALANCE	IMPORTS	EXPORTS
	value, million EUR	value index, previous year = 100.0%	
Total	**9 934,7**	**101,5**	**102,9**
Europe	**11 097,7**	**101,9**	**103,1**
Austria	–901,4	98,4	102,2
Belgium	–248,2	101,3	102,0
Bulgaria	642,8	99,3	104,5
Croatia	861,7	109,5	98,9

Czech Republic	–239,3	103,8	109,3
Denmark	53,0	106,4	101,1
Finland	56,1	99,9	102,3
France	390,7	98,2	106,3
Germany	3 603,9	102,5	103,9
Ireland	–322,3	125,5	107,6
Italy	432,8	106,9	105,4
Netherlands	–1 144,8	109,9	97,6
Poland	–835,4	102,4	111,6
Portugal	136,3	109,6	113,9
Romania	2 096,2	100,5	96,2
Russia	–929,4	72,1	93,5
Serbia	666,3	116,3	102,3
Slovakia	143,6	102,6	101,7
Slovenia	–214,7	106,8	107,4
Spain	1 428,6	110,8	96,4
Sweden	335,3	103,9	103,6
Switzerland	235,8	99,0	100,0
Turkey	1 076,2	103,5	97,4
Ukraine	294,1	107,8	110,5
United Kingdom	2 040,4	103,5	103,3
Asia	**–4 616,9**	**98,8**	**104,9**
China	–2 365,2	101,9	124,8
Hong Kong	–387,5	117,8	104,4
India	–176,2	104,5	86,8
Israel	176,0	81,8	107,3
Japan	–518,7	109,0	95,6
Korea, Republic of	–460,2	69,3	99,2
Malaysia	–153,6	90,2	102,8
Singapore	–222,8	132,6	98,8
Taiwan	–422,1	97,0	105,5
United Arab Emirates	173,7	44,0	93,9
Africa	**786,2**	**96,5**	**90,3**
South Africa	172,5	97,6	87,0
America	**2 242,5**	**103,5**	**99,4**
Brazil	9,0	89,3	70,0
Canada	136,0	81,2	92,1
Mexico	357,6	115,0	108,1
United States	1 429,2	105,3	98,8
Australia and Oceania	**425,2**	**85,3**	**103,8**
Australia	375,4	85,9	102,9

(KSH, 2016, national data)

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Balance of trade (euros):	see table below

M EUR	Total	from this:			
		EU15	EU13	Asian countries	American countries
Import	83 111	46 922	17 956	10 038	2 295
Export	93 046	53 074	20 864	5 421	4 538
Balance of trade	9 935	6 152	2 908	-4 617	2 243

(KSH, 2016, national data)

RIS3: Which are the sectors included in your regional Smart Specialisation Strategy?

Sectoral priorities:

1. Healthy society and wellbeing
2. Advanced technologies in the vehicle and other machine industries
3. Clean and renewable energies
4. Sustainable environment
5. Healthy local food
6. Agricultural innovation

Horizontal Priorities:

1. ICT (infocommunication technologies) & Services
2. Inclusive and sustainable society, viable environment

Regional public anual budget for internationalisation policies:

Please, include only public budget and if possible, personal expenses separately.

As Hungary is a centralised country the budget for internationalization is on national level. 6 convergence regions of the 7 regions of Hungary can apply for the same funds of SME internationalisation.

Lately more funds become available for internationalization, most of the calls are for 2 years, with no yearly limit. That is why the annual budget is hard to estimate, mainly at regional level.

Which has been the trend of that budget over de last 5 years:

5 years ago the support of internationalisation was only the support of participation at EU calls and of course the EEN services.

For now, the Széchenyi 2020 includes many forms of financial support (non-refundable, loans and mix beside mentoring), which are to strengthen the internationalization of the SMEs.

In Hungary the call EDIOP 1.3.1 focuses on the support of the internationalization of the micro, small and medium sized enterprises, in the framework of the Economic Development and Innovation Operative Program (EDIOP) 2014-20. EDIOP 1.3.1., after having recognized the shortage of the financial, human and information resources of the Hungarian SMEs, is willing to support the appearance of companies on new markets by ensuring effective foreign marketing activities, participation on international exhibitions, B2B events, and fairs. It also targets to ensure the required knowledge for participating successfully the market competition. The call also supports consultations, elaboration of market researches and studies, supporting the export capability of the companies. Due to recent conditions of the above mentioned call SMEs can apply with own project proposals and receive a support with an intensity of maximum 50%, dependent on the company size and

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	the location. The main beneficiaries of the call are SMEs with value and export growth potential. Through their development they can also get connected to local, national but most preferably to international networks, meanwhile also intensifying their participation. The duration of a single project is maximum 24 months.

2. GOVERNANCE	
Is there any Internationalisation Plan in your region?	Hungary has a National Smart Specialization Strategy, which was prepared based on county level (NUTS3) consultations. http://nkfih.gov.hu/szakpolitika-strategia/intelligens-szakosodasi-strategia-s3
If so, who is the leader of this Plan?	Ministry for the National Economy (National Research, Development and Innovation Office)
If so, how long is it designed for?	2014-20
Key agents responsible for de implementation of SMEs' internationalisation support measures. Describe them.	Ministry for the National Economy National Research, Development and Innovation Office Chambers of Commerce and Industry …
How do all these agents organise their actions in order to coordinate their efforts ?	meetings strategy
How do you manage to reach business managers at the level(municipalities) when they are to support local SMEs	
Which aspects in your governance could be improved and why?	

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3. POLICIES

A) POLICIES DESIGN CRITERIA

WHICH ARE YOUR CRITERIA TO DESIGN/ORGANISE YOUR POLICIES? *Please, underline, as many as you have*	• <u>The phase of internationalisation of the enterprise</u>. • <u>The sector</u>. • <u>The size of the enterprise</u>. • The country. • A mixture of (when the policy is designed specifically for the intersection between ex. sector and country)... • The level o f technology of the product. • Other: (explain, please) • None.
BRIEF EXPLANATION:	The Economic Development and Innovation Operational Programme (GINOP) is the flagship Programme among the EU funded Hungarian development schemes. Its objective is to boost employment and innovation during the 2014- 2020 EU fiscal period. The main objectives of the OP are: economic expansion based on sustainable, high added value production and high employment, improvement of competitiveness and promotion of the Hungarian industrial sector.

B) ANALYSIS OF YOUR ACTIONS

The objective is to get information about which kind of supports exist in your region, as well as who is responsible for them and which are the main objectives and characteristics of the measures.

Please, fulfil a template of "annex I" for every action

4. COMMUNICATION STRATEGY

By which means do you try to communicate all these measures to the enterprises in your region?	There is a central webpage palyazat.gov.hu at which all the calls are available without any difference to all. Of course many events are organised and the responsible people make presentations, too. Project development offices and other institutions are to make the calls public, too.
Is it effective?	
Which aspects in your communication could be improved and why?	

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5. ACCESS TO THE POLICIES	
By which means do the enterprises contact your organization or other agents to benefit from support measures?	The central office of the calls is the Széchenyi Programme Office. There is a phone number or personal and e-customer service can be used. Before the publication of the calls, the calls can be commented by anybody.
Is it effective?	
Which aspects could be improved and why?	

6. TRACING	
By which means do you follow supported companies progress in their internationalisation process? (databases, surveys, interviews, etc.)	A so- called 'Annual Evaluation Plan' is prepared every year about the Hungarian Operational Programmes, based on EU and governmental regulations. The plan is made by external evaluator, contracted by the Ministry. The plan includes three types of evaluation: comprehensive assessment, evaluation of thematic objectives and program- specific reviews. The plan examines the effectiveness, efficiency and impact of the OPs, its thematic objectives and defined policy instruments. The plan also contains evaluations of the implementation and institutional structure and gives recommendations. Apart from the 'Annual Evaluation Plan', the Ministry can order comprehensive analyses carried out by external experts.
Are they effective?	
Which aspects could be improved and why?	

7. EVALUATION	
By which means do you evaluate the impact of the policies your region implements?	A so- called 'Annual Evaluation Plan' is prepared every year about the Hungarian Operational Programmes, based on EU and governmental regulations. The plan is made by external evaluator, contracted by the Ministry. The plan includes three types of evaluation: comprehensive assessment, evaluation of thematic objectives and program- specific reviews. The plan examines the effectiveness, efficiency and impact of the OPs, its thematic objectives and defined policy instruments. The plan also contains evaluations of the implementation and institutional structure and gives recommendations. Apart from the 'Annual Evaluation Plan', the Ministry can order comprehensive analyses carried out by external experts. The evaluations are based on document analysis, questionnaire, interview, case study, focus group test, data analysis, control group and counterfactual impact evaluation.
Are they effective?	
Which aspects could be improved and why?	

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REGIONE BASILICATA

Basilicata Region

INTERNATIONAL POLICIES DIAGNOSIS **6**

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1. KEY DATA

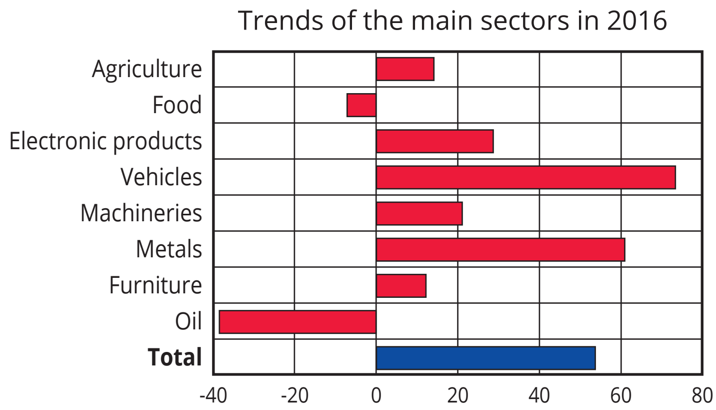
Regional DGP:	11,201 (2015)
Nª inhabitants:	570,365 (Istat, 2016)
Nº of companies:	
Number of SMEs in the region:	Smes registered in 2016 at the Chamber of Commerce: 2633 Smes registered : 52627 ■ Agriculture: 18,005 ■ Industry: 4132 ■ Construction: 6070 ■ Commerce: 12381 ■ Services: 12024 ■ Otther: 15
Number of micro SMEs (less than 10 people)	0-9 employees = 61,995 (88.5%) 10-49 employees = 6,535 (9%)
Exports figure:	see table below
Exports by sectors (%):	see chart below
Exports by countries (%):	SEE TABLE IN 'Balance of trade'

Exports figure:

Periods	Exports - value (Mil Eur)						
	Territory: Italy						
	South Italy	South					
		Abruzzo	Molise	Campania	Puglia	Basilicata	Calabria
Q1-2016	7704	2033	209	2373	1871	1133	85
Q2-2016	8083	2140	124	2610	1969	1131	109
Q3-2016	7568	1957	97	2372	1959	1079	104
Q4-2016	8175	2036	96	2642	2114	1172	115
Q1-2017	7752	2057	98	2442	2038	1014	104
Q2-2017	8108	2196	103	2653	2029	1020	107

Source: Istat

Exports by sectors (%):



Source: Bank of Italy, 2016

Exports by sectors and countries (%):

Value of regional exports of the main sectors for target markets (thousands of Euros)

ENGINEERING

	migliaia di euro	% su totale	variaz. assolute 2014	variaz. assolute 2015
Germania	36.218	16,8	33.729	-3.734
Malta	28.635	13,3	229	28.283
Regno Unito	17.338	8,0	5.227	10.190
Polonia	12.729	5,9	23.691	-11.962
Repubblica ceca	11.570	5,4	-351	11.308
Spagna	11.165	5,2	3.863	6.631
Belgio	8.599	4,0	1.249	-772
Paesi UE (27)	178.444	82,8	102.178	44.570
Paesi europei extra-UE	13.636	6,3	1.550	-306
Paesi extra-europei	23.532	10,9	11.607	-23.290
totale generale	215.611	100,0	115.336	20.975

CHEMISTRY/RUBBER/PLASTICS

	migliaia di euro	% su totale	variaz. assolute 2014	variaz. assolute 2015
Germania	15.012	17,6	-10.774	4.096
Stati Uniti	13.125	15,4	4.146	117
Paesi Bassi	9.701	11,4	1.444	5.136
Cina	6.872	8,1	4.673	-195
Regno Unito	6.169	7,2	-2.644	718
Francia	6.075	7,1	-2.388	-488
Polonia	4.554	5,3	-530	-1.040
Paesi UE (27)	55.710	65,4	-17.387	8.128
Paesi europei extra-UE	2.551	3,0	898	-1.900
Paesi extra-europei	26.971	31,6	7.150	1.984
totale generale	85.232	100,0	-9.340	8.212

AGRO-FOOD

	migliaia di euro	% su totale	variaz. assolute 2014	variaz. assolute 2015
Germania	27.872	33,4	-1.139	6.087
Regno Unito	15.976	19,1	701	997
Spagna	4.515	5,4	-1.650	3.771
Paesi Bassi	4.170	5,0	-894	1.537
Francia	3.613	4,3	370	-25
Irlanda	2.649	3,2	23	396
Stati Uniti	2.137	2,6	68	132
Paesi UE (27)	71.870	86,1	-2.339	14.880
Paesi europei extra-UE	3.552	4,3	-3.228	347
Paesi extra-europei	8.023	9,6	-538	30
totale generale	83.445	100,0	-6.105	15.256

FURNITURE

	migliaia di euro	% su totale	variaz. assolute 2014	variaz. assolute 2015
Francia	11.365	20,0	-445	1.054
Belgio	10.580	18,6	474	-10
Regno Unito	6.633	11,7	573	2.285
Germania	6.391	11,3	-1.225	-1.225
Israele	3.842	6,8	789	361
Stati Uniti	2.937	5,2	15	1.750
Corea del sud	2.370	4,2	-406	-377
Paesi UE (27)	40.612	71,6	-1.559	2.475
Paesi europei extra-UE	1.203	2,1	-1.143	-895
Paesi extra-europei	14.933	26,3	4.917	-3.259
totale generale	56.748	100,0	2.215	-1.679

Source: Istat, 2015

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Balance of trade (euros):

FOREIGN TRADE
(millions of euro and percentage changes on the corresponding period)

	EXPORT			IMPORT		
		VARIATIONS			VARIATIONS	
	2016	2015	2016	2016	2015	2016
EU Countries	**2159**	**161,6**	**3**	**1547**	**166,2**	**0.2**
Euro Area	1579	138,1	7.9	682	98,9	1.4
France	488	246,2	5.6	104	77,5	4.9
Germany	407	84,9	5.9	249	135,9	-7.4
Spain	260	172,8	53.4	165	80,4	33.6
Other EU Countries	580	238,6	-8.5	865	260,6	-0.7
UK	409	449	-1.4	22	29,5	45.4
Non EU Countries	**2356**	**143,4**	**179.1**	**771**	**413,6**	**-9.7**
Other Countries in Central and Eastern Europe	25	15,6	47.6	19	-20,7	330.3
Other European Countries	93	62,6	-65.4	52	11,6	17.4
Turkey	42	36,1	-76.1	44	11,6	10.3
North America	1954	862,1	449.3	347	1066,5	-36.3
USA	1908	819,3	489.5	346	1065,8	-36.3
South And Central America	16	-15,2	47.8	238	2914,6	60.9
Asia	170	-1,3	165.8	114	67,7	2.9
China	8	-9,7	-10.7	51	65	-6.2
Japan	90	324,8	801.6	0	-61,4	-57.3
EDA* (Asian Dynamic Economies)	28	-27,9	244.4	53	65,9	32.2
Other Extra Europe Countries	98	143,2	-23.9	1	-56,9	-25.5
TOTAL	**4515**	**156,1**	**53.5**	**2318**	**221,4**	**-3.3**

RIS3: Which are the sectors included in your regional Smart Specialisation Strategy?

Regional public anual budget for internationalisation policies:

Which has been the trend of that budget over de last 5 years:

Almost all of the expansion of the export is attributable to the automotive, whose production mainly focuses on the FCA plant in Melfi. In 2016 the share of the total area of regional exports rose from 73 to 82 % In other sectors, exports showed a different trend: sales of electronics, metals, agricultural and furniture products have increased while crude oil prices have been reduced.

The increase in regional exports was mainly concerned with the United States, the main one automotive market, and Asia.

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2. GOVERNANCE	
Is there any Internationalisation Plan in your region?	No, the plan 2017-2019 is not yet finalised. However, the main goals will be: 1. Improve the policy instrument – ERDF Operational Programme Basilicata 2014-2020. 2. Improve the performances in reaching new international markets for SMEs.
If so, who is the leader of this Plan?	Basilicata Region – Department Development Policies and Work-Internationalisation Office.
If so, how long is it designed for?	
Key agents responsible for de implementation of SMEs' internationalisation support measures. Describe them.	■ Basilicata Region- Department Development Policies and Work-internationalisation Office in charge of the Internationalisation Plan and of the SPRINT desk (Regional Office for the Internationalization of Enterprises) that is the operational tool that supports the Basilicata Region in its economic internationalization process and is born with the aim of providing a one-stop shop to support the regional companies that wish to look to foreign markets (at the moment, it is under a process of renovation) . ■ Sviluppo Basilicata spa: local development agency of the Basilicata region (and in house proving company of the Region), only as managing authority of Regional internationalization projects (such as Mapping Basilicata) or through EU cooperation projects . ■ Chamber of Commerce of Potenza – FORIM (Office within the Chamber of Commerce). Its mission is to foster the intersection between business demand, market offer, and supply. Forim has the role of planning and implementing all initiatives aimed at promoting, stimulating, and supporting the processes. The objective is to provide support and assistance to local SMEs in their internationalization processes.
How do all these agents organise their actions in order to coordinate their efforts ?	Apart from special projects, there is not a structured coordination
How do you manage to reach business managers at the level(municipalities) when they are to support local SMEs	There are no activities related to municipalities. Internationalisation has not been supported from a municipal level.
Which aspects in your governance could be improved and why?	A higher level of coordination and integration of the subjects dealing with internationalisation processes considering that Basilicata is a little region

3. POLICIES

A) POLICIES DESIGN CRITERIA

WHICH ARE YOUR CRITERIA TO DESIGN/ORGANISE YOUR POLICIES? *Please, underline, as many as you have*	The entrepreneurial system is mainly characterized by **micro**, **small**, and **medium-sized enterprises**, family owned and under-capitalized, with specialized production based on <u>traditional sectors</u> and therefore more exposed to competition from emerging markets. They have a **very low propensity to internationalization** and also because of their size they often have **limited access to credit**. The **entrepreneurial density**, measured by the ratio of active businesses and residents, remains structurally **low** in Basilicata, below both the national average and that of the South of Italy. Only in recent years, a greater **propensity to entrepreneurship in young people** seems timidly emerge. **As a result, some actions must been undertaken:** ▪ **scouting**, economic institutional **missions** both outgoing and incoming, and / or partnership events in coordination with the relevant central administrations abroad, ▪ implementation of the services provided by the **Sprint desk** (http://www.sprintbasilicata.net/) in order to support the internationalization of companies, ▪ implementation of the network of **info points** and of the functions of **'Antenna Brussels'**, ▪ an adequate c**ommunication campaign**.
BRIEF EXPLANATION:	**Elements to foster internalization processes:** • **supporting the processes of integration and cooperation** between businesses, through reorganization and development of networks, support programs for investment in innovation; • **encouraging forms of cooperation between the players of the system:** the aim is to accompany the production system to build a system that can cope with the complexity • **increasing networks and synergies:** because only in networks the small business can increase its efficiency, becoming more flexible and creative. <u>The strategy is the transition from spontaneous networks to networks designed 'ad hoc'</u> and for this reason forms of business aggregations will be encouraged.

B) ANALYSIS OF YOUR ACTIONS

The objective is to get information about which kind of supports exist in your region, as well as who is responsible for them and which are the main objectives and characteristics of the measures.

Please, fulfil a template of "annex I" for every action

4. COMMUNICATION STRATEGY	
By which means do you try to communicate all these measures to the enterprises in your region?	• Direct mailing. • Social Media: blog, facebook, twitter, instagram. • Web. • Press releases and traditional communication strategies.
Is it effective?	It could be improved because many companies do not pay attention to mailing or post on social media
Which aspects in your communication could be improved and why?	Dissemination and coordination with the Chamber of Commerce and other public and private entities in charge on internationalisation acidities

5. ACCESS TO THE POLICIES	
By which means do the enterprises contact your organization or other agents to benefit from support measures?	Telephone / emails or apply for subsidies when calls are open for specific internationalisation projects.
Is it effective?	It could be improves.
Which aspects could be improved and why?	Improving meeting opportunities with the companies organised by 'category associations' and the responsible body in charge of the specific measure.

6. TRACING	
By which means do you follow supported companies progress in their internationalisation process? (databases, surveys, interviews, etc.)	At the present, we only have databases with information of the companies without verifying or tracking their internationalisation process.
Are they effective?	Not sufficient.
Which aspects could be improved and why?	A follow up method should be implemented in order to verify the policies result with a monitoring and evaluation system.

7. EVALUATION	
By which means do you evaluate the impact of the policies your region implements?	The number of companies exporting and the export figures are the main criteria.
Are they effective?	Not at all.
Which aspects could be improved and why?	Data collection and interpretation and analysis, interviews with mSMes in order to better understand their needs.

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8. SWOT ANALYSIS of your regional policies to foster internationalisation in SMEs	
Strengths of the support: ■ Important Industries (automotive, chemical, mineral, agro food). ■ Research Institutions (Spatial Observation, Environment, Energy). ■ Natural resources: oil & water and for renewable energies. ■ Human potential to exploit.	**Opportunities for improvement:** ■ Strategic position; ■ Funds from EU & royalties. ■ Exportation of quality agro food products in the emerging markets. ■ Creation of a European technology network on the earth observation and risk prevention.
Weaknesses or gaps in support: ■ Interior depressed areas; ■ poor local market; ■ low rate of infrastructures; ■ small number of big companies ■ decline of traditional manufacturing (sofa, textile, construction) for high emerging counties concurrency; ■ difficulty to credit access; ■ low R&D investments and employment; ■ low attractiveness for FDI and SMEs internationalizations; ■ low internationalization.	**Threatens to becoming more internationalised** ■ high level of unemployment; ■ young industrial base; ■ decreasing of EU funds.

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Department of the Economy for Northern Ireland (DfE)

INTERNATIONAL POLICIES DIAGNOSIS **7**

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1. KEY DATA

Regional DGP:	**£34.4** billion (2015) GVA Source: ONS
Nª inhabitants:	**1.852** Million (as at 30th June 2015, NISRA)
Nº of companies:	**70,055** (VAT and/or PAYE registered businesses in 2016, Source: NISRA, Interdepartmental Business Register (IDBR))
Number of SMEs in the region:	**6,535** (Businesses with 10-49 employees, Source: NISRA, Interdepartmental Business Register (IDBR))
Number of micro SMEs (less than 10 people)	**61,995** (Businesses with 0-9 employees, Source: NISRA, Interdepartmental Business Register (IDBR))
Exports figure:	**£9.1** billion in 2015 (NISRA, Broad Economy Sales and Exports Statistics (BESES))
Exports by sectors (%):	The latest results from the Broad Economy Sales and Exports Statistics (BESES) publication for 2015 show that the manufacturing sector is by far the largest export sector for Northern Ireland accounting for 60% of total exports. See **Annex A** for details of External Sales.

2015

	INDUSTRIAL SECTOR	Exports by industry section (£m)	% of Total
A	Agriculture, Forestry And Fishing	21	0.2
B	Mining And Quarrying	31	0.3
C	Manufacturing	5,489	60.3
D	Electricity, Gas, Steam And Air Conditioning Supply	29	0.3
E	Water Supply; Sewerage, Waste Management And Remediation Activities	109	1.2
F	Construction	232	2.5
G	Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles	1,758	19.3
H	Transportation And Storage	295	3.2
I	Accommodation And Food Service Activities	*	*
J	Information And Communication	477	5.2
L	Real Estate Activities	*	*
M	Professional, Scientific and Technical Activities	335	3.7
N	Administrative And Support Service Activities	263	2.9
P - S	Others	58	0.6
	TOTAL EXPORTS	**9,106**	**100**

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Exports by countries (%):	The latest results from the Broad Economy Sales and Exports Statistics (BESES) publication for 2015 show that the EU as a whole was Northern Irelands largest export market in 2015 with 58% of all exports of goods and services going to the EU. See **Annex A** for details of External Sales.

Broad destination 2015 (£m)	ROI Sales (£m)	REU Sales (£m)	ROW Sales (£m)	Exports (£m)
Total Value	3,377	1,927	3,803	9,106
Value as a % of total	**37%**	**21%**	**42%**	**100%**

Exports by sectors and countries (%):

INDUSTRIAL SECTOR		ROI Sales (%)	REU Sales (%)	ROW Sales (%)	Exports (%)
A	Agriculture, Forestry and Fishing	0.1	*	*	0.2
B	Mining and Quarrying	0.3	*	*	0.3
C	Manufacturing	14.7	14.3	31.3	60.3
D	Electricity, Gas, Steam and Air Conditioning Supply	*	*	*	0.3
E	Water Supply; Sewerage, Waste Management and Remediation Activities	0.2	0.5	0.5	1.2
F	Construction	1.9	0.5	0.1	2.5
G	Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	13.7	2.6	3.0	19.3
H	Transportation and Storage	1.7	1.2	0.4	3.2
I	Accommodation and Food Service Activities	*	*	*	*
J	Information and Communication	1.4	0.2	3.6	5.2
L	Real Estate Activities	*	*	*	*
M	Professional, Scientific and Technical Activities	1.2	0.8	1.8	3.7
N	Administrative and Support Service Activities	1.2	0.7	0.9	2.9
P - S	Others	0.3	0.2	0.2	0.6
	TOTAL	**37.1**	**21.2**	**41.8**	**100.0**

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See **Annex A** for details of External Sales.

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Balance of trade (euros):	NI Exports = £8.4 (€9.4) billion NI Imports = £7.3 (€ 8.2) billion As of Quarter 2, 2017 Source UK Regional Trade Statistics https://www.uktradeinfo.com/Statistics/RTS/Pages/default.aspx
RIS3: Which are the sectors included in your regional Smart Specialisation Strategy?	Agri-food technology Advanced manufacturing and materials ICT Sustainable Energy Life & Health Sciences, Connected Health
Regional public anual budget for internationalisation policies:	Please, include only public budget and if possible, personal expenses separately.
Which has been the trend of that budget over de last 5 years:	

2. GOVERNANCE	
Is there any Internationalisation Plan in your region?	1. Export Matters – March 2016 2. International Trade Plan
If so, who is the leader of this Plan?	1. Department for the Economy 2. Invest NI
If so, how long is it designed for?	1. Long term Strategy with targets out to 2025
Key agents responsible for de implementation of SMEs' internationalisation support measures. Describe them.	• Invest NI • Intertrade Ireland • NI Councils • NI Chamber of Commerce
How do all these agents organise their actions in order to coordinate their efforts ?	The Northern Ireland Exports Strategy establishes a framework to ensure that providers of export support work collaboratively and seek to minimise duplication where possible.
How do you manage to reach business managers at the level(municipalities) when they are to support local SMEs	InvestNI local managers are overseen through a regional office network consisting of 5 offices. Other providers of export support are sufficiently locally based that central oversight is not required.
Which aspects in your governance could be improved and why?	There could be a strengthening between international policy development and operational delivery. Stronger governance in place to ensure that duplication of support provision is reduced.

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3. POLICIES

A) POLICIES DESIGN CRITERIA

WHICH ARE YOUR CRITERIA TO DESIGN/ORGANISE YOUR POLICIES? *Please, underline, as many as you have*	• The phase of internationalisation of the enterprise. • The sector. • The size of the enterprise. • The country. • A mixture of (when the policy is designed specifically for the intersection between ex. sector and country)... • The level o f technology of the product. • Other: (explain, please) • None.
BRIEF EXPLANATION:	All of the above criteria are essential in the design of policies, tailoring requirements to the needs of the market and type of business requiring support.

B) ANALYSIS OF YOUR ACTIONS

The objective is to get information about which kind of supports exist in your region, as well as who is responsible for them and which are the main objectives and characteristics of the measures.

Please, fulfil a template of "annex I" for every action

4. COMMUNICATION STRATEGY

By which means do you try to communicate all these measures to the enterprises in your region?	Exporting and increased internationalistion is promoted nationally throughout the UK, as a result this message is also conveyed to NI businesses. UK companies benefit from a unique new 5 year programme presenting real-time export opportunities that businesses can apply for online. This is part of a move to get 100,000 additional companies exporting by 2020. Exporting is GREAT is part of the GREAT campaign. It presents live export opportunities to businesses, across a range of media outlets and digital channels. Hundreds of these export opportunities, with a potential total value of more than £300 million, are hosted on a new platform, www.exportingisgreat.gov.uk, with many more set to come online each month. Whilst there is no marketing campaign about NI businesses thinking more globally/exporting, Invest NI has a substantial marketing budget and spend on the likes of television and radio - this tends to promote the existence of the support organisation generally (as opposed to specific export supports) and calls to action would-be entrepreneurs. The support organisations in Northern Ireland all use similar mechanisms for communicating about their export supports i.e. social media (facebook, twitter), emails (through CRM system) and website updates. To varying degrees, newspaper advertisements are also placed at the national and local level e.g. Chamber of Commerce takes a one page advertisement in the Daily Mirror newspaper on a monthly basis.

	There is also an e-platform that collates all supports – www.nibusinessinfo.com, which has an 0800 telephone number (answered by Invest NI centralised business support team since circa four years ago) that sifts and signposts companies accordingly (between their local Council, Enterprise NI, Chamber of Commerce and Invest NI). Each support organisation has a database of companies, with postal and electronic addresses held for 1,000s of companies. The communication strategy differs by organisation – for example, Invest NI only targets its existing client base, Councils only target businesses in their locality and the Chamber (which is a membership-based organisation) does not strongly market its programmes due to oversubscription and perceived brand strength.
Is it effective?	The advent of social media and enhanced digitalisation has reduced the cost of communicating on a one-to-many basis; with there no longer being a need for hard copy fliers, postage, etc. The challenge is ensuring that the correct person within the organisation is targeted i.e. not the HR person, the sales development person and that they are not bombarded with irrelevant information i.e. targeted and tailored.
Which aspects in your communication could be improved and why?	A number of the organisations are acutely aware of the need to make a step change to their digitalisation strategy.

5. ACCESS TO THE POLICIES

By which means do the enterprises contact your organization or other agents to benefit from support measures?	Enterprises have access to the websites of all support organisations, within which there is varying levels of detail of the supports available. Through the aforementioned databases the enterprises receive timely and targeted information about forthcoming events e.g. market visits and are invited to contact the support organisation for further details and/or application. There is also the aforementioned www.nibusinessinfo.com e-platform that seeks to collate real time programme information.
Is it effective?	To an extent, but there is recognition that enterprises are confused by the breadth of the support and are not necessarily clearly navigated to the most suitable support through a joined-up, dynamic platform or approach. At a more macro level, companies are not clear what “space” each support organisation sits within i.e. clarity as to eligibility criteria and the pathway of support for a company, whether they are micro or small, new or established, etc.
Which aspects could be improved and why?	Better clarity and transparency as to where best a company should develop a relationship with a business development body. Provision of strategic support pathways for companies by genres e.g. by size, sector, sales levels, etc. There is recognition that this is an area that could be improved upon – the nibusinessinfo website is not optimised in its user friendliness or ease of navigation with respect to gaining insights into available export development supports.

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6. TRACING	
By which means do you follow supported companies progress in their internationalisation process? (databases, surveys, interviews, etc.)	All organisations use a CRM system, many of which have recently been upgraded to allow better user capabilities in terms of tracking behaviours and monitoring KPIs e.g. BCC, the Chamber and Invest NI have recently invested in Microsoft Dynamic to allow better information to be accessed about enterprises. For example, what support they have availed, staff levels, turnover, export levels, etc.
Are they effective?	These systems are only bedding down at present but it is anticipated that their effectiveness will manifest in better insights to how customers are growing and trends in the segment or sector. Tracking also takes place in the guise of post project evaluation; whereby enterprises are asked to estimate the monetised impact of the support.
Which aspects could be improved and why?	The value of the Microsoft Dynamic system lies in how well the organisation invests in training staff to data mine and link the data to responses. It does not appear that there is any dedicated resources to periodically interrogate these systems to inform strategic direction; with access/use somewhat limited to operational staff e.g. account manager. Only VAT registered or incorporated businesses have a centrally held reference code that is publically accessible. However, a sizeable number of enterprises in the region are micro businesses that either do not necessarily exceed the threshold for VAT registration (turnover in excess of £80,000) or they chose not to trade as a company. The classification of these companies between support organisations is not consistent and it is not centrally known which support organisation is supporting which enterprise. A unique reference code would potentially be useful to allow more holistic tracking of enterprises, particularly useful if a "trusted partner" approach is implemented.

7. EVALUATION	
By which means do you evaluate the impact of the policies your region implements?	All support organisations follow the UK Treasury guidance on evaluating and appraising support programmes. This tends to happen on a cyclical basis and considers value for money informed by an assessment of the costs, impact (increased sales) and additionality (what would have happened anyway); with due consideration given to operational weaknesses or opportunities for refinement.
Are they effective?	Yes, it is widely considered as best practice, albeit that there are always recognised difficulties in linking the export development support to positive outcomes – for example, whilst a trade show may have given rise to a number of in-country contacts, it does not in itself generate sales, which are likely reliant on follow up visits, etc.
Which aspects could be improved and why?	Insights as to how to link cause and effect of export development supports.

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8. SWOT ANALYSIS
of your regional policies to foster internationalisation in SMEs

Strengths of the support:

1. Northern Ireland has a strong track record and experience in supporting SMEs, with export development support being implied across all supports (given the small home economy) and explicit in the trade suite of supports that includes best practice e.g. market visits, trade fairs, etc.
2. Robust appraisal and evaluation cycle around programmes of support ensures that incremental changes and/or improvements are made to long term support structures.
3. Evidenced impacts and returns on investment in terms of increased sales at programme level.
4. The Exports Forum provides a solid platform to provide and oversee the wider export support ecosystem. Importantly it draws support from business and industry to provide a company perspective as to how to improve export support interventions.
5. There is a wide range of support provision which is available to companies at various stages of their internationalisation journey. e.g. mentoring, workshops, trade missions, strategic advice
6. There are a number of specific interventions that have been cited as being particularly strong:
    - FUSION - Innovation at heart of business practice and/or product – leading to export.
    - GO DUTCH – hands on intervention. Industry lead through process of getting to market – can see how to implement for other markets & scale
    - Council mentoring programme, tailored individual support

Opportunities for improvement:

1. Operational desire to eliminate duplication to be built upon by implementing structures within which to do so. Suggestions of moving to a “trusted partner” approach between the support organisations where there is clarity of strategic positioning of each and full endorsement and cross referral of enterprises (as per Export Matters). Any such referral system would need to be informed by definitions as to what constitutes an early exporter vis-à-vis an experienced exporter; as well as eligibility criteria for support types.
2. Digitalisation strategy implementation –represents an exciting and overdue step change to engagement e.g. online application.
3. Opportunity to learn how best to dovetail the export strategy with general growth/scaling strategy of support organisations within an economy like Northern Ireland; and to understand the structure of support organisations in delivering on such strategies.
4. Better holistic explanation to enterprises as to what it should expect from export development supports; so to educate them of the journey being embarked upon as opposed to viewing the trips in isolation and feeling let down by the absence of short term gains.
5. There is an opportunity for greater coordination of events/trade missions and greater collaboration/communication to reduce duplication – using Exports Forum.
6. Layering of support e.g. Mentoring (via Councils) leading on to Trade Accelerator Voucher (via ITI).
7. Repositioning of provision e.g. Export Skills Workshops in INI move to Councils.
8. Potential for a ‘FUSION lite’, a short version of the successful FUSION programme – innovation and build on pathway to success.
9. Visual Tool– export readiness model Recognition e.g. first time innovator. Portal – single point for NI businesses with clear signposting.
10. How to identify export readiness.

How to define this

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Weaknesses or gaps in support:	Threatens to becoming more internationalised
1. Acknowledged duplication between support organisations e.g. a number of trade missions supports available into GB markets. 2. Difficulty in mapping supports due to the number of supports from various sources e.g. formerly local government consisted of 26 organisations (this has been reduced to 11 in the past 18 months). 3. Whilst there is a newly developed export strategy, it is in its infancy and therefore there continues to be a lacking of a strategic framework and associated road map to achieve ambitious targets with respect to increased export sales and increased first time exporters. 4. Lack of clarity in provision and signposting. Difficult for clients to distinguish between general and export support. 5. Gaps: • Strategic planning advice. • Clarity required – categorisation/ experience and matching to relevant support. • Clarity required - where to go based on size of business. • For small business – help with communications, etc. • Risk of duplication e.g. trade missions and events. • NI business culture. 6. Data – gaps are being identified, misalignment, etc.	1. Financial constraints as to the level of investment available through central government funding to address market failures. 2. The unknowns around Brexit for Northern Ireland companies. 3. Difficulty in linking cause and effect between trade support and increased sales. 4. Overcoming resource constraints within micro companies that do not have the in-house marketing or sales support structures and/or finance to operationally support or fund external growth.

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ANNEX A

Exports and External Sales by Sector

Industrial Sector	Exports (£m)	Exports Euros (€m)	% of total	External Sales (£m)	External Sales (€m)	% of total
Agriculture, Forestry and Fishing	21	24	**0.2**	28	32	**0.1**
MIning and Quarrying	31	36	**0.3**	106	122	**0.5**
Manufacturing	5,489	6,309	**60.3**	14239	16,366	**62**
Electricity, Gas, Steam and air conditioning supply	29	33	**0.3**	45	52	**0.2**
Water supply, Sewerage, Waste management and remidial activities	109	125	**1.2**	174	200	**0.8**
Construction	232	267	**2.5**	1780	2,046	**7.8**
Wholesale and retail trade, Repair of motor vehicles and motorcycles	1,758	2,021	**19.3**	3384	3,890	**14.7**
Transportation and storage	295	339	**3.2**	935	1,075	**4.1**
Accommodation and food activities	*	*	*	*	*	*
Information and communication	477	548	**5.2**	833	957	**3.6**
Real estate activities	*	*	*	*	*	*
Professional, Scientific and technical activities	335	385	**3.7**	762	876	**3.3**
Administrative and support service activities	263	302	**2.9**	492	565	**2.1**
Others	58	67	**0.6**	98	113	**0.4**
Total	**9,106**	**10,466**	**100**	**22,955**	**26,384**	**100**

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External Sales by Country and Sector

Industrial Sector	GB Sales (€m)	ROI Sales (€m)	REU Sales (€m)	ROW Sales (€m)	External Sales (%)
Agriculture, Forestry and Fishing	0.0	0.1	*	*	0.0
MIning and Quarrying	0.3	0.1	*	*	0.0
Manufacturing	38.1	5.8	5.7	12.4	62.0
Electricity, Gas, Steam and air conditioning supply	0.1	*	*	*	0.0
Water supply,Sewerage, Waste management and remidial activities	0.3	0.1	0.2	0.2	1.0
Construction	6.7	0.8	0.2	0.1	8.0
Wholesale and retail trade, Repair of motor vehicles and motorcycles	7.1	5.4	1.0	1.2	15.0
Transportation and storage	2.8	0.7	0.5	0.2	4.0
Accommodation and food activities	*	*	*	*	*
Information and communication	1.6	0.6	0.1	1.4	4.0
Real estate activities	*	*	*	*	*
Professional, Scientific and technical activities	1.9	0.5	0.3	0.7	3.0
Administrative and support service activities	1.0	0.5	0.3	0.4	2.0
Others	0.2	0.1	0.1	0.1	0.0
Total	**60.0**	**15.0**	**8.0**	**17.0**	**100**

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Exports and External Sales by Country

Broad Destination (2015)	ROI Sales (€m)	REU Sales (€m)	ROW Sales (€m)	GB Sales (€m)	External Sales (%)
Total Value	3,881	2,215	4,371	15,917	26,384
Value as % of total	15%	8%	17%	60%	100%

Exports and External Sales by Country

Broad Destination (2015)	ROI Sales (€m)	REU Sales (€m)	ROW Sales (€m)	Exports (%)
Total Value	3,881	2,215	4,371	10,467
Value as % of total	37%	21%	42%	100%