



Ministry of Foreign Affairs

CBI Export Coaching Programmes (ECP)

Evaluation of three ECP programmes

Commissioned by the Netherlands Enterprise Agency

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Evaluation of three ECP programmes

Final Report

Nicolette Tiggeloove
Christi Veldhuis-Van Essen

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List of abbreviations

B2B	Business to Business
BSO	Business Support Organisation
CBI	Centre for the Promotion of Imports from developing countries
CSR	Corporate Social responsibility
DGIS	Directorate General International Cooperation of the Netherlands' Ministry of Foreign Affairs
ECP	Export Coaching Programme
EFTA	European Free Trade Association is an intergovernmental organisation for the promotion of free trade and economic integration with four Member States: Iceland, Liechtenstein, Norway and Switzerland.
EIM	EIM Business & Policy Research, part of Panteia bv.
EMP	Export Marketing Plan
EU	European Union, in report often used to report to the various markets within the EU, i.e. the 27 Member States
EUR	Euro (€)
EXPRO	Export marketing training for participants of CBI Export Coaching Programmes (seminar in the Netherlands)
IDH	'Initiatief Duurzame Handel', the Sustainable Trade Initiative
ILO	International Labour Organisation (UN specialized agency in Geneva, Switzerland)
N.A.	Not available
NGO	Non governmental organization
OVI	Objectively Verifiable Indicator
PR	Public relations, i.e. concerned with building or maintaining public image
PSI	Private Sector Investment programme
R&D	Research and Development
SIPPO	Swiss Import Promotion Programme
SWOT	Analysis used to evaluate Strengths, Weaknesses, Opportunities and Threats
TAM	Technical Assistance Mission
ToR	Terms of Reference
USD	United States Dollar (\$)

Executive Summary

The Centre for the Promotion of Imports from developing countries (Centrum tot Bevordering van de Import uit ontwikkelingslanden, CBI) is an agency of the Netherlands Ministry of Foreign Affairs established in 1971 with activities in more than 50 countries. The mission of CBI is to contribute to sustainable economic development in developing countries through strengthening the competitive position of enterprises in these countries and supporting them in accessing markets within primarily EU/EFTA. CBI offers an integrated approach, based on advice, counselling and knowledge management, applicable to companies, business support organisations and governmental authorities.

CBI is financed by the Ministry of Foreign Affairs (Directorate General International Cooperation, DGIS) and about 45-50% of the resources are used for a large series of sectoral Export Coaching Programmes, ECPs.

Within one ECP, some 25-40 selected companies in one specific sector are supported in:

- adapting their company and products to the EU and EFTA market requirements and standards;
- becoming familiar with the EU and EFTA markets and business practices;
- developing an export marketing strategy;
- exporting to the EU and EFTA market;
- consolidate their export position in the EU.

Panteia/EIM was asked to carry out the present evaluation of three ECPs implemented in the period 2006–2011:

- Outerwear Macedonia (1035);
- Food ingredients (1037);
- Home decoration, Accessories & Gifts (1040).

The objective of this evaluation is twofold:

- To render account of the programmes and to analyse the effectiveness and efficiency of the programmes, and to assess whether objectives of the intervention have been reached.
- To produce a top 10 of lessons learned to improve the ECP modules. The ECP programmes consist of the following components:
 - acquisition and selection of companies;
 - audit and action plan;
 - capacity building;
 - market entry;
 - outcome and impact.

The necessary information was collected from:

- documents and official registrations of CBI;
- interviews with CBI programme managers, sector experts and programme stakeholders;
- interviews with importers and exporters;
- an Internet survey among participants in all three sectoral ECPs.

The Internet survey provides information originating from about one third of the 89 delivered (competent) companies¹ across the three ECPs evaluated².

From this survey a mostly positive picture emerges of these three ECPs:

- The average annual total export per company almost doubled to € 664 000 and export to the EU/EFTA markets increased by 34% to € 414 000 in 2011. The average annual realised export to EU/EFTA markets is 6.4 times higher than the ex-post budget per competent company. This is many times higher than the target formulated (the CBI standard for the planned export of ECPs is 2.5 times the price/budget).
- The main new markets within the EU are Germany and Sweden.
- A large majority of the participants report that they have acquired more skills and knowledge with regard to export marketing and development; better general orientation on European markets; better knowledge of characteristics and trends in European markets; and are better prepared for market entry.
- Ease of access to the programme as such might be further increased. But once admitted, companies find it easy to contact the CBI sector experts and companies participate to a large extent to all activities of the ECP.

Studying the CBI testimonials, the following could be concluded with regard to accountability:

Impact

- The Objective Variable Indicator (OVI) scores with regard to the amount of total export (total over the years the companies are participating in ECP) and export to the EU/EFTA for the three programmes are very good. All three ECPs have achieved the targets for total export turnover. The CBI testimonials show a total export turnover of € 18.2 million in 2010 for ECP 1035 Outerwear Macedonia, € 53.2 million in 2010 for ECP 1037 Food Ingredients and € 13.6 million in 2011 for ECP 1040 Home decoration; a total export turnover of € 85 million for the three ECPs. With a total of 89 'delivered' companies, the three ECPs generated an average export turnover per company of € 955 000.³ For ECP 1035 Outerwear Macedonia and ECP 1040 Home decoration the percentages of total export going to EU/EFTA are very high: 100% and 89%. For ECP 1037 Food Ingredients the percentage of total export going to EU/EFTA is below 50%. However, this is not because

¹ In CBI documents objectives are defined in terms of the number of competent enterprises to be delivered. 'Delivered' enterprises are those enterprises that have successfully completed the ECP Programme (are competent) and this number is a (first) token of the CBI having carried out the activities for which the Ministry made the budget available. For the three ECPs being evaluated there are 89 delivered enterprises and these were approached for the Internet Survey. The CBI definition of a competent company is described in an Annex to the Terms of reference: "A company is competent if the selected company has demonstrated to work towards improving the critical action points identified in the export audit, as well as active participation during the programme, i.e. participated in EXPRO, TAM visits and participated in exhibitions" (see Annex I of this Report).

² The results of the Internet survey are based on answers from 31 respondents (response of 32%).

³ Note that the CBI testimonials contain the sum of exports over the years that companies participate in the ECP, whereas the estimates on the basis of the 31 respondents in the Internet survey are that the average annual export turnover per company increased to € 664 000 in 2011.

the target of export value to EU/EFTA is not achieved but because total export is much higher than targeted.

- The OVI scores with regard to additional jobs from the CBI testimonials are far less impressive: for ECP 1040 Home decoration the total number of additional jobs is only 5; for ECP 1037 Food Ingredients no additional jobs were created and for ECP 1035 Outerwear Macedonia the monitoring sheets indicate a loss of 98 jobs per company.

Effect

- The percentage of companies that according to CBI testimonials are realising export to EU/EFTA is high in all three ECPs. In ECP 1035 Outerwear Macedonia 89% of the delivered enterprises export to the EU/EFTA, in ECP 1037 Food Ingredients 79% of the delivered companies are realising export to EU/EFTA and in ECP 1040 Home decoration 74%.

Result

- The CBI testimonials provide high scores for all three ECPs with regard to increase of skills and knowledge and regarding the number of companies having an Export Marketing Plan. ECP 1040 Home decoration and ECP 1037 Food Ingredients show also high scores for the number of enterprises that have acquired leads after trade fairs. However, the target (85% of the delivered companies) for the scoring of a sufficient mark on all clusters of the Export Audit is not achieved.

Efficiency

- The average budget spent per delivered company was almost equal to the targeted budget in ECP 1034 Outerwear Macedonia. However, it was much higher in ECP 1037 Food Ingredients (+28%) and ECP 1040 Home decoration (+40%). This is mainly due to a new CBI method of allocating gross costs, resulting in higher gross costs of ECPs. In addition, the number of competent enterprises delivered for ECP Food Ingredients and ECP Home decoration is much lower than anticipated.

Overall we conclude that the three ECPs obtained most objectives aimed at (OVIs).

Résumé of 5 criteria: relevance, effectiveness, efficiency, sustainability and impact

- *Relevance.* Considering all, it can be concluded that in general the objectives of the ECP activities are consistent with beneficiaries' requirements and local needs. The effects of the interventions make a sustainable contribution to increasing export of most companies participating in the ECPs.
- *Effectiveness.* The percentage of companies that are realising export to EU/EFTA is high in all three ECPs according to the CBI testimonials. From the results of the Internet survey it can be concluded the instrumental aims of the ECP are achieved by a large majority of the participants: more skills and knowledge with regard to export marketing and development; better general orientation on European markets; better knowledge of characteristics and trends in European markets; and being better prepared for market entry.
- *Efficiency.* There's no information available to compare the efficiency of the ECP with alternative approaches to bring about the same outputs. However,

the effects were brought about against much higher costs than anticipated for ECP 1037 Food Ingredients and ECP 1040 Home decoration.

- *Sustainability.* The ECP programmes seem to have sustainable effects on the enterprises. Participants state that they have more skills and knowledge with regard to export marketing and development; better general orientation on European markets; better knowledge of characteristics and trends in European markets; and are being better prepared for market entry. In addition, a majority of the participants invested in export capacity during participation in the ECP and a majority of participants state that their company has improved its CSR performance because of participation in the ECP.
- *Impact.* The wider effects of the export coaching programmes can not be established, especially if most of the data collection in this evaluation concerned participants in the ECP focussing on the effect for their own companies. From the Internet survey it can be concluded that total export of the participating companies after the ECP is almost doubled and export to the EU/EFTA markets increased by 34%. The scores with regard to additional jobs are far less impressive.

Top 10 of lessons learned

Increase efforts to raise awareness: more active PR campaign

Because awareness in developing countries is very limited, there's need to increase the efforts of CBI to become more known in relevant business circles in the selected countries. CBI could do more promotional efforts through commercials, information campaigns and social media. Because word-of-mouth marketing works best, suggestion is to start an alumni network for ECP participants.

Maintain integrated approach: the ECP as a package

Considering the fact the ECP programmes recently adopted a modular approach, it should be seriously monitored whether the essential character of the ECP programme – the high value attached by the participants to most elements and the added value of the combination of various elements – is not lost. Safeguard the link between the different modules.

Improve selection of companies

The selection could be improved to better assess whether the companies can indeed be ready within a few years to enter the European market and that they also have the drive to achieve this. More attention should be paid to 'soft' selection aspects, such as mentality, growth ambitions and personal drive of the entrepreneur.

Evaluation of the Export Marketing Plan (EMP)

Companies should use the EMP as a strategic management instrument, facilitating the planning processes. A lot of companies have difficulty with writing the Export Marketing Plan (EMP). Some respondents suggest an evaluation of the EMP instrument (in combination with the export audit form) to examine how the EMP could better fit the needs of companies. Perhaps a shorter EMP could be sufficient.

Mid-term monitoring and evaluation by organising feedback

CBI might consider strengthening evaluation by arranging regular general feedback rounds after one and/or two years in the ECP programmes. At the level of the participating companies, action plans could be reassessed. Participating enterprises and experts could indicate items that might need attention in the second half of the programme. At the programme level, programme managers could ask sector experts for feedback.

Implementation of monitoring and evaluation tools

CBI has designed a comprehensive set of monitoring indicators for ECP programme management. Monitoring should be strengthened by actual and full implementation of the monitoring tools. Providing all relevant internal CBI documents and monitoring information on the programmes right at the start of the desk research, could enhance the evaluation.

My CBI

Suggestion is to create an account for each participating company that is user-friendly and clearly organized: 'My CBI'. This should give a clear overview of the ECP activities in the various years and what information CBI would like to receive and when. For the purpose of monitoring, CBI could send the participating companies a link to a form and ask them to fill in data on exports, jobs etc.

More relevant contact moments

Suggestion is to create multiple contacts with the participating companies. The first visit of the sector expert should be an open conversation and have enough time for introduction to the company, further information about the ECP and presentation of the enterprise. Possibly, a follow-up visit could be arranged to carry out an export audit and action plan. Suggestion is to split the introduction visit and the export audit because of the tension between the objectives. More frequent visits should be organized for a more integrated support of business processes.

Strengthening cooperation with other organizations

CBI could strengthen cooperation with other organizations, both in the selected developing countries and in the Netherlands. PUM consultants could be used for acquisition and selection. In addition, it is useful to involve local consultants, for example SIPPO¹ consultants, already before start of the ECP. Furthermore, CBI could strengthen cooperation with Dutch Embassies, EVD (market intelligence, matchmaking and the PSI programme²), IDH³ and NGOs.

Realistic approach of sustainability

Increasing demand for sustainable products means that it's important for companies to incorporate CSR into their business models. Recently, CBI added a CSR cluster to the export audit. Some respondents state that a proper balance should be maintained between CSR requirements and business practices. This calls for a realistic approach of sustainability.

¹ Swiss Import Promotion Programme (SIPPO).

² Private Sector Investment programme (PSI).

³ IDH the Sustainable Trade Initiative

1 Introduction

1.1 CBI

The Centre for the Promotion of Imports from developing countries (Centrum tot Bevordering van de Import uit ontwikkelingslanden, CBI) is an organisation established in 1971 and is an agency of the Netherlands Ministry of Foreign Affairs with activities in more than 50 countries. CBI has been established to foster the objectives set in the framework of the international development programme of the ministry. CBI has the following main competences: advice, counselling and knowledge management. At its website, www.cbi.eu, CBI presents itself as follows:

“Over the last 40 years, we have opened the doors of European trade to thousands of exporters in developing countries. We offer a needs-driven approach to both exporters as well as their business support organisations (BSOs) and governmental authorities. We focus on the link between producing exporters and European buyers. We contribute to strengthening the competitive position of exporters sustainably, assisting them in trading on the European markets.”

The mission of CBI is formulated as follows:

“CBI contributes to sustainable economic development in developing countries through the expansion of exports from these countries.”

Strengthening the competitive position of enterprises in these countries is instrumental to achieve this goal. In order to accomplish its mission, CBI concentrates on five core services. These are:

- 1 Export coaching programmes (topic of this evaluation); which are multi-year programmes for enterprises wishing to export to the EU and/or EFTA.
- 2 BSO development programmes; which concerns Capacity Development for intermediate organisations that support exporters to export to the EU.
- 3 Training programmes; which consist of seminars and workshops on exporting to the EU for exporters, staff of intermediate organisations and commercial attachés.
- 4 Market Intelligence; which concerns provision of all the information to keep exporters and staff of BSOs in step with the very latest developments on the EU market.
- 5 Company database; A database of companies CBI has coached to become competent exporters to the EU.

CBI intends to foster sustainable export developments that are socially responsible and ecologically just. Corporate Social Responsibility (CSR) is a leading principle in all CBI activities: the responsibility of an organisation for the impacts of its decisions and activities on society and the environment, through transparent and ethical behaviour.

This implies respecting compliance with international standards, more in particular the relevant ILO agreements and the European requirements regarding consumer safety, health aspects and environmental quality. These requirements are both market and regulatory driven. The aim of CBI is to cooperate

with enterprises that want to comply with and improve on these requirements and standards.

As an agency of the Ministry, CBI is financed from the national budget. CBI is instrumental in bringing about the so-called 'operational objective' of the Development Cooperation Programme of the Netherlands, i.e. to strengthen the business climate in developing countries and the competitive position of businesses in those countries.

1.2 The Export Coaching Programmes (ECPs)

To strengthen the competitiveness of companies from developing countries on the EU and EFTA markets CBI runs different programmes, for example:

- sectoral export development; Export Coaching Programmes (ECPs)
- Business Support Organisations (BSO) development;
- market information;
- training.

A large share of its resources is spent on the numerous ECPs. Numerous both because of the wide scope of sectors covered and because of the frequency with which successful programmes are often quickly followed by a new ECP in the same sector.

Activities within the framework of ECPs are implemented in cooperation with trade support agencies in the developing countries and with importing businesses in Europe. CBI mainly tries to achieve the goals formulated by strengthening the business capabilities of the enterprises in the developing countries.

The participating enterprises are supported in:

- adapting their company and products to the EU market requirements and standards;
- becoming familiar with EU markets and business practices;
- developing an export marketing strategy;
- familiarise themselves with European business cultures and ways to promote their company and products at European trade fairs;
- exporting to the EU market;
- consolidate their export position in the EU.

Most programmes follow a step-by-step approach¹. From the programme documents of the various ECPs, the structure as shown in Table 1 emerges.

¹ This set-up of the programmes has been adjusted in 2010. Presently, new ECPs are implemented and accounted for in a different way. The ECP now consists of 6 modules: (1) Business Audit and Action Plan; (2) Business Development; (3) Export Capacity Building; (4) (Voluntary) Certification; (5) Market Entry Regional and (6) Market Entry EU. Enterprises will not always have to go through all the modules.

Table 1 Example of structure ECP programme

Stages	Activities
1. Selection of companies	1. Pre-selection based on application forms
2. Technical assistance	2. Export audit
	3. Action plan
	4. Long distance assistance (final selection)
	5. Second visit expert (TAM)
3. Capacity building	6. Preparatory e-learning for EXPRO
	7. EXPRO seminar (in the Netherlands)
4. Market entry	8. Exhibiting at Trade Fair (max. 3 times)
	9. Other B2B activities carried out by CBI

Source: Panteia, 2012.

Apart from its own staff members, CBI has at its disposal a network of external sector and export marketing & management experts which, by contract, provide technical and marketing assistance, coaching and training for the target group and assist in producing adequate export market information.

1.3 The evaluation of the Export Coaching Programmes

In order to monitor whether the activities implemented in the framework of the ECPs by CBI are actually contributing to the overall aims set out above and to see whether suggestions for improvement of the set up and implementation of the programmes can be formulated ECPs are generally evaluated one year after completion of the programmes. Panteia/EIM was asked to carry out the present evaluation of three ECPs implemented in the period 2006-2011. In 2011-2012, Panteia/EIM carried out the evaluation of five ECPs: mobile equipment parts; engineering products; subcontracting; medical devices and laboratory equipment; and pharmaceutical products. The final report of the evaluation of five ECPs was completed in February 2012.¹

The objective of this evaluation of three ECPs is twofold:

- To render account of the programme and to analyse the effectiveness and efficiency of the programmes, and to assess whether objectives of the intervention have been reached.
- To produce a top 10 of lessons learned to improve the ECP modules.

Panteia/EIM was requested to evaluate three sector programmes that ran from 2006 to 2011:

- Outerwear Macedonia (1035);
- Food Ingredients (1037);
- Home decoration, Accessories & Gifts (1040).

¹ Panteia/EIM, *CBI Export Coaching Programmes (ECP); Evaluation Report 5 sector programmes*, February 2012, Koos van Elk, Zoetermeer.

Table 2 below shows the number of participants that completed the programme, the so-called delivered enterprises, distributed among the three ECPs and the target countries.

Table 2 Delivered enterprises in three ECPs 2006–2011

Country	1035	1037	1040	Total
Colombia		4	5	9
Ecuador		5	2	7
Kenya			2	2
India		5	7	12
Indonesia		1	4	5
Ghana			1	1
Macedonia	22			22
Pakistan		5		5
Peru		2	2	4
Bolivia		4		4
Sri Lanka		1	3	4
South Africa			4	4
The Philippines			4	4
Tanzania			1	1
Uganda		2	3	5
Total	22	29	38	89

Source: Testimonies of Competences received from CBI.

1.4 Structure of the report

The setup of this report is as follows. In Chapter 2 the methodology and the activities implemented in the framework of this evaluation are described. Chapter 3 presents an overview of results and conclusions per ECP on accountability mainly based on CBI testimonials and supported by findings from the Internet survey among participating companies. Chapter 4 focuses on the main learning questions concerning relevance, impact, sustainability, effectiveness and efficiency and presents the top 10 of lessons learned. Based on the major lessons learned, recommendations for improvement are formulated.

Chapter 5 provides the Bibliography and the 9 annexes provide background information such as the Terms of Reference (I), Questionnaire of the Internet Survey (IV) and Results of the Internet Survey (V).

2 Set-up and implementation of the evaluation

2.1 Objective

As mentioned in the introduction, the objective of this evaluation is twofold:

- To render account of the programme and to analyse the effectiveness and efficiency of the programmes, and to assess whether objectives of the intervention have been reached.
- To produce a top 10 of lessons learned to improve the ECP modules.

2.2 Main research questions

The main learning questions concern relevance, effectiveness, efficiency, sustainability and impact as described in the Terms of Reference (Annex I).

In Table 3 the research questions are grouped for the five IOB criteria.

Table 3 Research questions

Relevance
1. To what extent has the programme contributed to the local needs and priorities as stated prior to the programme?
2. Have the right products, countries, participating companies and counterparts been chosen in relation to the objectives of the programme?
3. To what extent did the effects of the intervention make a sustainable contribution to increasing export of the participating companies? Would they have started export to Europe without participation in the programme?
4. How is its consistency of the programme with other policy instruments? To what extent does it duplicate or overlap with other Dutch policy instruments?
Effectiveness
5. Have the ECP components been executed in an effective manner? What is the added value of each component? Should there be more coherence? Were there more effective alternative approaches? What are the critical success factors of the ECP programme?
6. Which aspects of programme management were the most effective in the context of goal attainment?
7. If companies have not been able to export to Europe, what are the driving forces behind this outcome?
8. To what extent have European importers been involved in the ECP programme in an effective manner? Was the programme capable to generate a sufficient number of relevant business contacts with European buyers?
9. To what extent has quality and performance of the external experts contributed to the outcome of the programme?

Efficiency
10. To what extent have the ECP components been executed in an efficient manner? Were there more efficient alternative approaches?
11. Was the Logical Framework Approach designed well, both in structure and content?
12. Was the planning of the ECP realistic and adequate?
13. How do actual expenditures relate to the programme budget and the outcome?
14. Is the ratio visits by sector experts to the outcome in balance? Would more visits lead to better outcomes? How could more visits improve the uptake of the companies?
Sustainability
15. To what extent are the companies likely to continue their export activities?
16. Have companies invested in export capacity? If so, how much and what type of investment was made?
17. Is the sustainability of the outcome of CBI interventions safeguarded? What has been done in the programme to ensure sustainability?
18. What is the assessment of the CSR effects (human rights, labour standards, environmental issues and fair trade issues) at the level of the participating companies?
Impact
19. To what extent have the achieved effects (outcomes) contributed to broader, more far-reaching objectives?
20. Has the ECP led to employment growth? What kind of employment?
21. Has the ECP led to increase of turnover?

Source: Panteia, 2012.

2.3 Methodology and implementation

Panteia/EIM has fully aligned the methodology with the IOB criteria for evaluation, following the IOB edition "Evaluation policy and guidelines for evaluations".¹

The main research questions with regard to the accountability part are related to the extent to which the different objectives set for the three ECPs in the respective 'Start document' of each programme are indeed achieved. The assessment indicators used are listed in Box 1 on the next page.

¹ See IOB Evaluation policy and guidelines for evaluations
<http://www.minbuza.nl/bijlagen/producten-en-diensten/evaluatie/iob/iob-evaluation-policy-and-guidelines-for-evaluations.html>

Box 1 Assessment indicators

- Number of competent enterprises delivered¹.

For impact (effect of use of capacity):

- Total export turnover for the group as a whole
- Number of companies with additional annual export turnover (specified average per competent company)
- Percentage of total export to EU/EFTA
- Export turnover to EU/EFTA, for the group as a whole
- Export turnover to EU/EFTA, average per company
- Number and percentage of companies active on new export markets (of which EU/EFTA)

For effect (use of capacity):

- Number and percentage of companies realising export during the programme (of which to EU/EFTA)

For result (capacity transfer):

- Number and percentage of the participating companies indicating that skills and knowledge increased as a result of participation
- Number and percentage of companies scoring a sufficient mark on all clusters of the Export Audit
- Number and percentage of companies having an Export Marketing Plan
- Number of companies having leads (after trade fair)
- Number of leads per company
- Of which to EU/EFTA

Other information:

- Additional jobs, for the group as a whole
- Additional jobs, average per company
- Total programme budget
- Total budget per delivered company

Source: CBI.

The target values of the indicators are determined in the individual starting documents for each ECP. The target values and the actual achieved values are presented in a series of tables in Section 3.3.

Panteia started preparing for the evaluation in the second half of August 2012. The Panteia team implemented the following activities (described in more detail in Plan of Action, shown in Annex III):

1. Initial discussions and briefing by staff of CBI.

¹ In CBI documents objectives are defined in terms of the number of competent enterprises to be delivered. 'Delivered' enterprises are those enterprises that have successfully completed the ECP Programme (are competent) and this number is a (first) token of the CBI having carried out the activities for which the Ministry made the budget available (see footnote 1 on page 8).

2. Desk research, covering amongst others: website CBI; starting documents of the three ECPs, former evaluation of ECP etc. (see Bibliography in Chapter 5).
3. A series of interviews were held with staff of CBI: the programme managers of the three ECPs concerned.
4. A series of interviews with stakeholders and CBI sector experts working for the three ECPs.
5. Additional interviews concerning extra input from involved importers.
6. Internet survey among enterprises that participated in the three ECPs (September 2012). 99¹ enterprises were invited to participate. To maximise response three reminders were sent.
7. Analysis and report drafting.

2.4 Limitations

This evaluation study has certain limitations that need to be taken into account when considering the findings of the study. Firstly, desk research was based on the relevant internal documents of the three ECPs. The following documents would be provided to the research team: 'Start document' for each ECP; 'Slot document' for each ECP; interim report for each ECP; data on exporters that have participated in the ECPs; two past evaluation reports of ECP programmes; review and summary of CBI evaluations 2003-2009. However, for all three ECPs no final documents were available.

Interim reports were only available for ECP 1037 Food Ingredients and ECP 1040 Home decoration, Accessories & Gifts. Besides, it is useful to note that these interim reports were no full evaluation studies. The interim report for ECP Food Ingredients was based on interviews held with 9 companies at SIAL 2008 fair and with 2 companies at HI/NI in Paris in November 2008. The interim report for ECP Home decoration was based on interviews held with 15 companies at the Ambiente fair in February 2008.

As regards the results of the Internet survey, it is important to note that the group of enterprises that have participated is rather small. A small population size means that the confidence intervals are rather large.

¹ 89 companies with a testimony of competence, and 10 companies which have completed most of the programme.

3 Overview of results and conclusions per programme on accountability

3.1 Introduction

This chapter focuses on accountability. Section 3.2 presents relevant information with regard to accountability obtained from participating companies via the Internet survey. The remaining information from the Internet survey that is more relevant to the learning questions is presented in Chapter 4. Finally, Section 3.3 presents information with regard to accountability coming from CBI registrations.

3.2 Results from Internet survey regarding accountability

3.2.1 Introduction

Full details from all questions of the Internet survey are provided in Annex IV. The survey results that are related to the accountability aspect are described in this section, see Table 4 below for an overview of the response of the Internet survey by country and ECP. It should be realised that the 89 'delivered' companies shown in Table 2 plus 10 extra companies were invited to participate. This implies that the survey mostly presents information from companies that have been declared 'competent'. The results are based on answers from 31 respondents (response of 32%). The distribution of these 31 respondents is shown by country of origin and ECP in Table 4 below.

Table 4 Response Internet survey by country of origin and ECP (number of respondents)

Country	1035	1037	1040	Total
Bolivia		2		2
Colombia			1	1
Ecuador		1		1
Indonesia			3	
India		3	5	8
Kenya			1	1
Macedonia	7			7
Pakistan		1		1
Philippines			1	1
South Africa			2	2
Tanzania			1	1
Uganda		1	2	3
Total	7	8	16	31

Source: Panteia, 2012.

In a number of sub sections the survey results with regard to the following subjects are reported:

- Access to ECP and its experts and actual participation in the various elements of the ECP. Some additional information on Export Marketing Plan and participation in International Trade Fairs in Europe.

- Additional export (difference between export before and after the ECP) and additional jobs reported by the participating companies and the extent to which these results are attributed to the ECP by the respondents. Also specific additional export markets (countries) accessed are reported.
- The type of business activities to which the ECP has contributed and the overall effect of participating in the ECP in the view of the respondents, i.e. more export, earlier export etc.
- The ideas of the respondents with regard to nine statements, e.g. *'because of the participation in the ECP we now have more product diversification'*.
- The investments in export capacity during participation in the ECP.
- Finally, the results are presented of the ideas of the respondents with regard to four different aspects of Corporate Social Responsibility.

3.2.2 Access and Participation

Less than one quarter of respondents feel it is rather difficult to get access to the ECP, 50% feel ease of access is average; 17% find it easy and 7% very easy. Once admitted to the programme, the large majority of the participants find it easy (53%) or very easy (40%) to contact the CBI sector experts (sum 93%).

For 11 activities generally organised within the ECPs, the respondents in the Internet survey indicated whether they actually used these services:

- Export audit during initial visit of CBI consultant at the start of the programme (used by 93% of respondents)
- During initial visit of CBI consultant, analysis of strong and weak points of enterprise and provision of technical support (83%)
- Action Plan developed after initial visit (83%)
- Long-distance assistance and coaching from CBI consultant (70%)
- Second visit by CBI expert to enterprise, Technical Assistance (80%)
- Export training Programme (EXPRO Netherlands), etc. (80%)
- Exhibit at trade fair in Europe (collective CBI stand) (87%)
- Exhibit at trade fair for 2nd or 3rd time supported by CBI (67%)
- After trade fair receive assistance from CBI to solidify and expand business contacts (70%)
- Accessing the website of CBI for market information (60%)
- Matchmaking activities carried out by CBI (B2B) (40%)

So a large majority of the interviewed companies used most of the ECP services provided. Some interesting results are:

- Although 93% of respondents report the initial visit of the CBI consultant at the start of the programme to do the export audit, only 83% indicate that they actually received analyses of strong and weak points of the enterprise and provision of technical support during this visit.
- In general the activities of the ECPs were utilised somewhat more often compared to the five ECPs evaluated last year.
- It seems that extra effort has been put in two services: 70% of respondents received assistance from CBI to solidify and expand business contacts after trade fairs, an increase of 25% compared to last year's evaluation of the five ECPs. Besides, the survey results report an increase of 22% regarding matchmaking activities carried out by CBI (40%). This is partly due to the different approach that was taken for the 1035 Outerwear Macedonia pro-

gramme, where matchmaking activities were a major part of the programme.

From the evaluation of five ECPs in 2011, it became clear that many participants felt that Business-to-Business (B2B) activities¹, such as matchmaking events, buyer seller meetings etcetera were missing. Also guidance from a distance and more in particular assistance to solidify and expand business contacts after the trade fairs might be a relatively weak point according to the participants of the ECPs evaluated in 2011. These aspects received more attention within the three ECPs in this evaluation, in particular in ECP 1035 Outerwear Macedonia, see Box 2.

Box 2 Business-to-Business activities in ECP Outerwear Macedonia: Showrooms and buyer missions

Already in an early phase of the ECP Outerwear Macedonia, B2B activities were developed. The garment industry in Macedonia is large and Macedonia is a very attractive sourcing destination, but most European buyers have never heard of it. The new Showroom concept, a highly concentrated miniature trade fair, was received well by participants. The garment Showrooms in Rotterdam and Copenhagen offered an opportunity to introduce the Macedonian participants to buyers, presenting their companies and their products. To support the match making with EU fashion garment buyers, CBI also organised buyer missions to Macedonia. Interested buyers could choose themselves which and how many days to come to Macedonia. They receive a customized programme of factory visits.

Focussing on two specific elements, export marketing plan and trade fairs, the following results were obtained:

- 20 out of 30 (67%) of respondents state to have an Export Marketing Plan (EMP)². This result is lower than was the case for the five ECPs evaluated in 2011 (84%).
- 90% of these enterprises developed the EMP because of the participation in the ECP (30% fully; 45% ECP contributed a lot and 15% ECP contributed somewhat). All of these 20 enterprises have implemented the EMP (35% fully and 65% partly).

¹ It should however be noted that in several programmes activities are undertaken that are classified as 'business to business', without the participants always realising this. Examples: make European importers aware of potential suppliers (CBI participants at trade fair), provide information to CBI experts on potential European buyers etc.

² The following remark from the evaluation of the five ECPs in 2011 still applies here: "It also happens that companies already have their own ways of preparing their plans. These plans might be more informal in nature and being prepared by the CEO's office and retained with him or her, passing on information to concerned persons on a need to know basis. Companies may consider this plan to be a confidential document and hesitate to give away information. The ideas on the true purpose and nature of an EMP might need to be brought out more effectively during the EXPRO and participants have to be convinced about the EMP being a practical and 'live' document rather than an 'exercise' for training purposes. Insistence on receiving a copy of the EMP by the European Expert and its periodical updated version will bring in more seriousness and appreciation of the practical value of the document." Panteia/EIM, Koos van Elk, 2012.

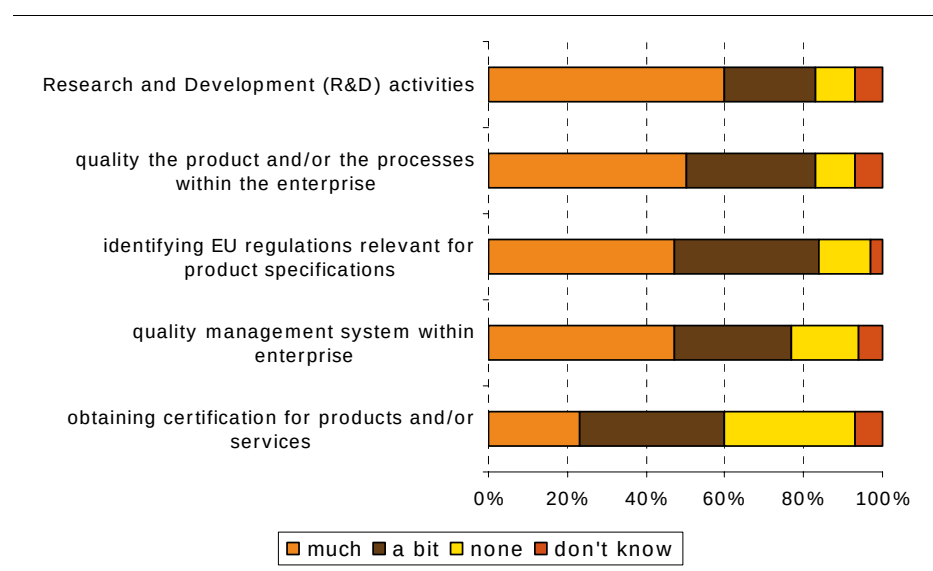
- 25 out of 30 respondents exhibited at a trade fair in Europe in the framework of the ECP. 20 respondents exhibited 2 or more times in the framework of the ECP.

These results show that having participated in a trade fair holds for more than 80% of the participating enterprises, whereas having (developed) an Export Marketing Plan is true for two thirds but not for all enterprises and again a large majority of participants attribute having this EMP either wholly or partly to the ECP. As 35% of these enterprises state that the EMP is actually fully implemented, it is clear that this is a rather satisfying result. Some improvements are still possible, since for 65% of the enterprises with an EMP this is only partly the case.

3.2.3 The contribution made by the ECPs (impact)

In the survey 14 instrumental aims of the ECPs were assessed by the respondents. The enterprises indicated to which extent the ECP contributed to these aspects. In Figure 1 the aspects contributing to the quality of the product and management are displayed.

Figure 1 The extent to which the ECP contributed to the quality of the product or management of the participating company (%)



Source: Internet Survey Panteia 2012.

The respondents state that the ECP contributed much to R&D activities and the quality of the product and processes within the enterprise. The ECP contributed least to obtaining certification for products and/or services of the exporters. Considering the growing importance of CSR in international value chains, this might be an aspect to look into for future ECPs¹.

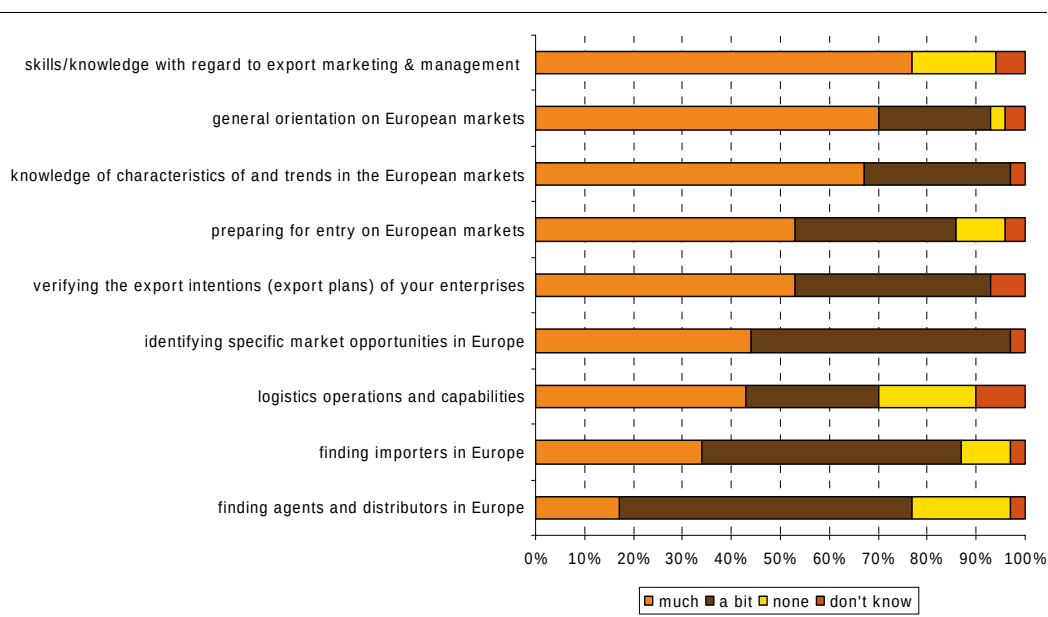
In Figure 2, on the following page, several aspects on the quality of marketing, export skills and knowledge are displayed. Respondents were in particular enthusiastic about the contribution of the ECP to development of "skills and

¹ The need for certification may vary depending on the sector.

knowledge regarding export marketing and management”, “general orientation on the European markets” and “knowledge of characteristics of and trends in the European markets”.

The ECPs contributed least to “finding agents and distributors in Europe”, “finding importers in Europe” and “logistics operations and capabilities”. From the suggestions for improvements of the respondents, calls are made for increasing B2B activities and getting more assistance with finding importers, implying that specifically these aspects need more attention. See Annex V for the full list of suggestions for improvements.

Figure 2 The extent to which the ECP contributed to the quality of marketing and export skills and knowledge (%)



Source: Internet survey Panteia, 2012.

Considering all activities of the Export Coaching Programme (ECP), respondents were also asked to describe the overall effect of participating in the ECP on the export activities on European markets:

- 10% No immediate effect (export to Europe would have taken place with or without this support).
- 3% Would not have started export to Europe without this support.
- 14% Started export to Europe earlier because of this support.
- 76% Having more export to Europe because of this support.
- 14% Other effect¹.

Enterprises could give more than one answer. The group stating that they would not have started export to Europe without this support is much smaller (3%) compared to the participants from the evaluation of five ECPs in 2011

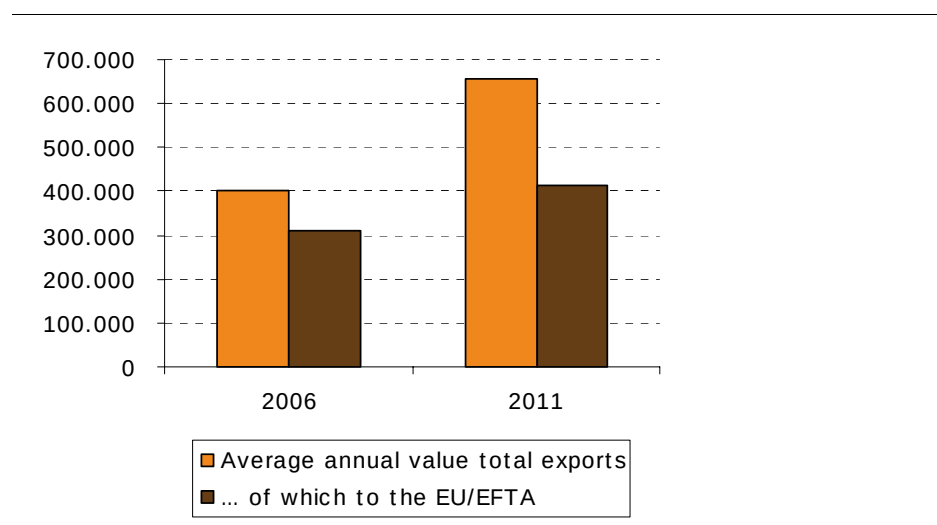
¹ 3 respondents provided the answer 'other'. They stated to have learned a lot (systematic approach to export, the latest trends en requirements of European buyers) and learned how to make the most of exhibiting their products.

(18%). A much stronger effect, however, is having more export to Europe because of this support (76% versus 31% in 2011).

The main indicator of the impact of the programme is of course the actual increase in exports. The respondents indeed report an increase during participation in the ECP programme. The average annual total export across all three ECPs reported by participants is just over € 382 000 before participating in the ECP and € 664 000 after participating in the ECP, so 74% higher, see Figure 3.

The average export to the EU and EFTA is reported to have increased somewhat less. At the start of the ECPs, export was about € 309 000 on average per interviewed enterprise across all three ECPs and was 34% higher at € 414 000 in 2011¹. The smaller increase of export to the EU is probably influenced by the impact of the financial crisis. In addition, it should be noted that the average export value to the EU/EFTA was already high at the start of the ECPs. Therefore, CBI could consider to further improve the selection of companies.

Figure 3 Exports (total and to EU/EFTA) before and after ECP (N=26, N=20)



Source: Internet Survey Panteia, 2012.

In the CBI Terms of reference Annex I (see page 58) it is stated that the CBI standard for the planned export is 2.5 times the price, thus the CBI investment per company. This means that the total value of the realised export to the EU/EFTA markets should be 2.5 times the average budget spent per company.

¹ These comparisons are based on survey results comparing reported annual exports before and after participating in ECP. The CBI testimonials concern the sum of the export turnover from the year the CBI intervention started until one year after completion of the programme (source: CBI definition of competent company, Terms of Reference, Annex I). See also Annex 5 in Facet report (Review and Summary of CBI evaluations 2003-2009, Triodos-Facet, October 2009) that concludes that CBI testimonials give an about four times higher estimate of additional annual export turnover compared to results from questionnaires from different evaluators of 7 ECPs. However, it is not clear to which extent the differences are caused by CBI testimonials referring to total export from start of ECP till one year later and not to additional, annual exports. The Facet report only suggests one explanation for the differences noted: respondents might have more trust in CBI and its experts than in evaluators (researchers they are not familiar with). See Facet p.23, 24 and 39.

Table 5 shows that the average cost per competent company across the three ECPs is € 65 139, so the average annual export to EU/EFTA reported above of € 414 000 is 6.4 times higher than the ex-post price (compared to the CBI standard set as: total export to EU/EFTA for the years from the start year of the intervention until one year after completion of the programme being 2.5 times higher as the price¹ (See Annex I). But it should be noted that most respondents already show a high level of exports to the EU in 2006. Additional growth of export to the EU and EFTA is moderate.

Table 5 Average ex-post budget per competent company for three ECPs

<i>ECP</i>	<i>Cost ex post*</i>	<i>Number of competent enterprises</i>	<i>Cost per competent enterprise</i>
1035	1.252.540	22	56.933
1037	1.870.832	29	64.511
1040	2.673.957	38	70.367
Total	5.797.329	89	65.139

Source: CBI: Financial documents ECPs 1035, 1037 and 1040. *Including overhead costs.

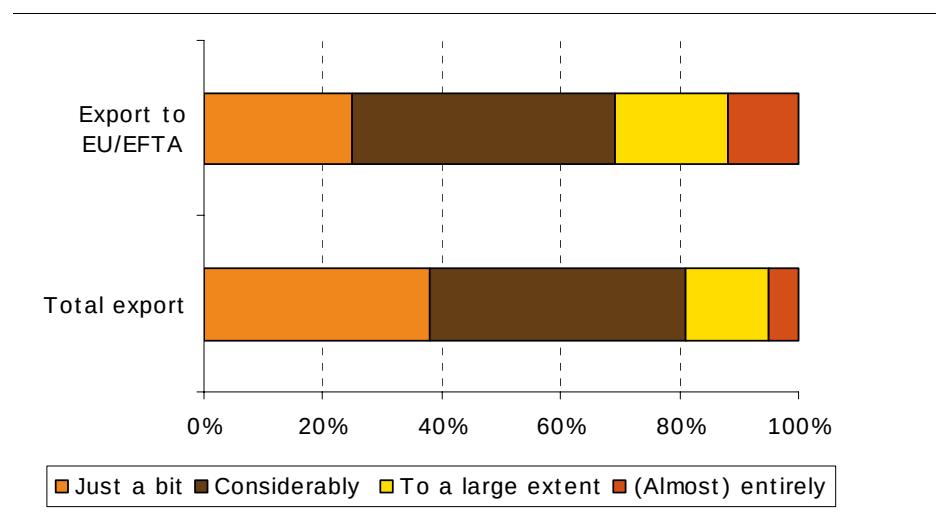
The respondents in the ECP programme 1035 Outerwear Macedonia reported an average decline in annual exports to the EU and EFTA in 2011, while ECPs 1037 Food Ingredients and 1040 Home decoration doubled their annual exports to the EU and EFTA between 2006 and 2011.

Those enterprises that report a growth in their overall export turnover attribute this mainly to their participation in the ECP (43% considerably²; 14% to a large extent and 5% almost entirely; together 62%). For exports to EU/EFTA these figures are even higher (respectively 44%, 19% and 12%), so in total 75% of respondents attribute the growth in export to EU/EFTA to their participation in the ECP.

¹ Here the average actual ex-post costs for the three ECPs considered has been used, i.e. € 65139. Multiplied by 2.5 the norm becomes € 162 848. However, between CBI and the Ministry it has been agreed that for type 2 ECP-programmes the norm would be 2.5 times a fixed price of € 66 445, rounded to € 167 000. But as stated in the main text, the average annual export to EU/EFTA after the ECP of € 414 000 as measured in the Internet survey is already considerably higher as both these norms for total export to EU/EFTA over several years.

² Scale used: not 0%, just a bit 1-30%, considerably 31-60%, to a large extent 61-90% and almost entirely more than 90%.

Figure 4 Extend to which companies with increased exports attribute this to participation in ECP for total export and export to EU/EFTA, before and after ECP (N=26 and N=20)



Source: Internet Survey Panteia, 2012.

More than a third (37%) of respondents report growth in the number of jobs as a consequence of participating in the ECP and 40% report a considerable number due to the ECP. Less than a quarter (23%) of respondents report no growth in the number of jobs. The total number of jobs attributed by respondents to participating in the ECP by 15 enterprises is 954 (average 64 per enterprise)¹. When we exclude one outlier of 500 jobs, the results are still quite good with an average job growth of 32 jobs per enterprise. However, these averages are calculated based on the answers of only 14 respondents. That means that these averages should be interpreted with care.

The markets to which most respondents started to export after participation in the ECP are 'North America' (n=17, of which 6 started after 2006) and Australia/New Zealand (n=11, of which 5 started after 2006). In total 25 of the 30 respondents have export to EU/EFTA one year after completion of the programmes. However, it should be noted that 22 of these respondents were already exporting to the EU/EFTA in 2006.

Including those companies that already had some export to the EU/EFTA, 18 out of 30 respondents have at least one new export market (country) within the EU/EFTA. The highest number of first time exports are reported for Germany (n=6) and Sweden (n=4). The results seem to indicate that focus has been on expanding and consolidating exports to familiar markets.

¹ However it should be noted that 500 additional jobs are reported by one company.

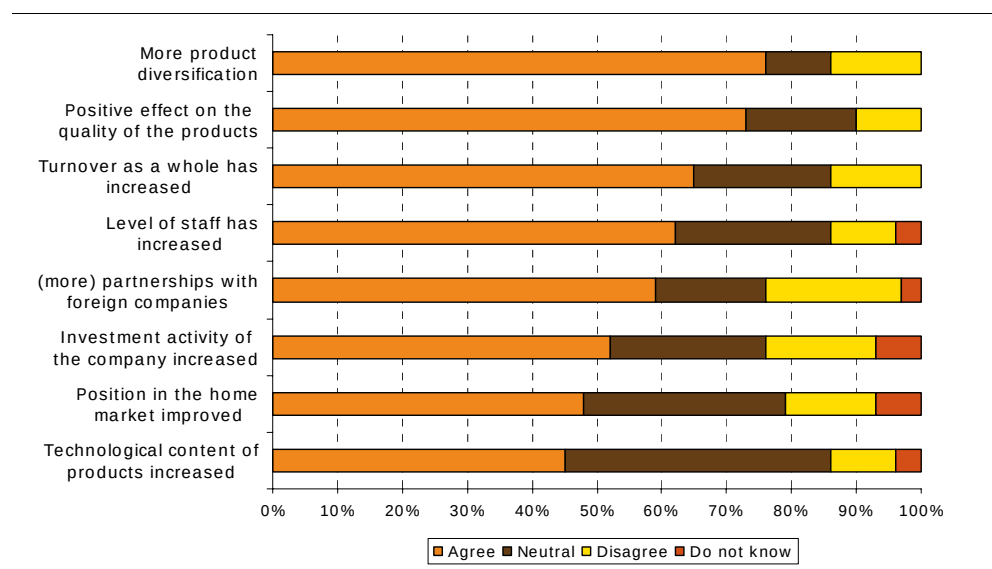
3.2.4 Eight statements evaluated by respondents

The respondents were asked to state to which extent they agree with nine statements. The full text of these 8 statements is *Because of participating in the Export Coaching Programme of CBI ...*

- ... not only exports were affected, also turnover as a whole has increased
- ... there has been a positive effect on the quality of our products
- ... the technological content of our products increased
- ... we now have more product diversification
- ... our position in the home market also improved, e.g. better reputation, more sales, better prices
- ... the investment activity of the company increased, i.e. a growth of asset base.
- ... we now have (more) partnerships with foreign companies
- ... the level of our staff has increased: higher skill level of (new) employees and higher wages are paid.

The results are shown in Figure 5, ranked by the sum of *fully agree* and *agree* (counted as one category). Respondents most often agree with (score > 60%) positive effects of participating in the ECP regarding product diversification, quality of products, turnover and level of the staff. Least agreement is with positive effect of the ECPs on the technological content of products (45%) and improvement of the position in the home market (48%). All in all, rather positive outcomes of these statements.

Figure 5 Statements evaluated by respondents (N= 29)



Source: Internet survey Panteia, 2012.

3.2.5 Investments in export capacity

The respondents were asked the following question regarding investments: *“Considering all activities of the Export Coaching Programme (ECP), can you indicate if your enterprise invested in the following items regarding export capacity, during your participation in the CBI Export Coaching Programme?”* Re-

spondents who gave a positive answer were also asked to give an indication of the costs for their company involved in investing in export capacity. The results are shown in Table 6 and Table 7.

Table 6 Investments in export capacity during participation in the ECP

Type of investment	None	A bit	Much	Don't know/ no answer
Fees for technical assistance	35%	24%	31%	10%
Purchase of capital goods	24%	17%	48%	11%
Production revisions	10%	38%	48%	4%
Hiring expertise	28%	38%	31%	3%
Fees for third audit/certification	35%	35%	24%	6%
External training of staff	31%	48%	21%	0%
Travel expenses to fairs/importers	7%	21%	69%	3%
Exhibition costs	10%	17%	69%	4%
Product marketing tools	7%	45%	45%	3%
Other*	17%	38%	31%	14%

*Mostly new tools/machines, overlap with capital goods.

Source: Internet survey Panteia, 2012.

Table 7 Investments in export capacity during participation in the ECP (EUR), number of enterprises

Type of investment	<5.000	5.000-10.000	10.000-25.000	>25.000
Fees for technical assistance	9	3	3	0
Purchase of capital goods	2	3	4	9
Production revisions	11	4	2	4
Hiring expertise	7	6	3	1
Fees for third audit/certification	6	7	1	1
External training of staff	11	4	3	1
Travel expenses to fairs/importers	7	6	6	6
Exhibition costs	6	3	8	5
Product marketing tools	14	6	3	1
Other*	1	2	0	6

*Mostly new tools/machines, overlap with capital goods.

Source: Internet survey Panteia, 2012.

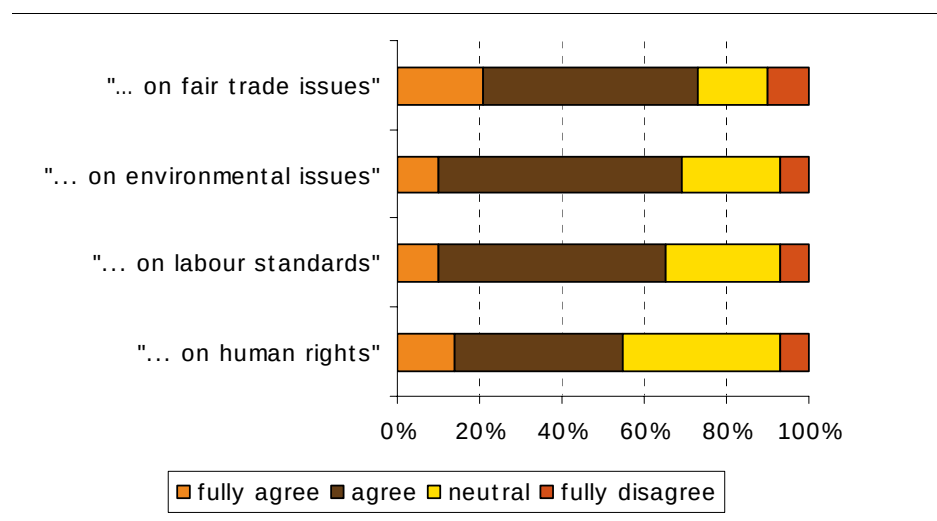
More than two-thirds of respondents report that their enterprise invested much in exhibition costs and travel expenses to fairs and almost half of respondents report much investment in production revisions, purchase of capital goods and product marketing tools.

3.2.6 Corporate Social Responsibility

An important topic in international trade is Corporate Social Responsibility (CSR). CSR has been made part of this evaluation by measuring four aspects of CSR. The respondents were asked to react on four different aspects of CSR with the following statements: "Because of participating in the Export Coaching Programme of CBI ...

- ... our company has improved its performance on human rights
- ... our company has improved its performance on labour standards
- ... our company has improved its performance on environmental issues
- ... our company has improved its performance on fair trade issues"

Figure 6 CSR: "because of participation in the ECP of CBI our company has improved its performance....."



Source: Internet Survey Panteia, 2012.

According to a majority of participants the ECPs contribute to improving CSR. CBI contributes most on the issue of Fair Trade; 73% of respondents agree or fully agree that performance on Fair Trade has improved because of participation in the ECP. On the aspect of human rights this is only 55%, but this may be because this aspect is not relevant (for example ECP 1035 Outerwear Macedonia) or had already been tackled.

3.2.7 Summary of findings Internet survey regarding accountability

The Internet survey only provides information originating from about one third of the 89 delivered companies across the three ECPs evaluated. From this a mostly positive picture emerges:

- The average annual total export per company almost doubled to € 664 000 and export to the EU/EFTA markets increased by 34% to € 414 000 in 2011. The average annual realised export to EU/EFTA markets is 6.4 times higher than the ex-post budget per competent company. This is many times higher than the CBI target formulated (the CBI standard for the planned export is 2.5 times the price/budget, so export over several years being 2.5 times higher as average budget). The main new markets within the EU are Germany and Sweden.

- In total 25 out of 30 respondents have export to the EU/EFTA one year after completion of the ECPs. It should be noted however that 22 of these respondents were already exporting to the EU/EFTA in 2006.
- In total 18 out of 30 respondents have at least one new export market (country) within the EU/EFTA.
- A large majority of the participants report that they have acquired more skills and knowledge with regard to export marketing and development; better general orientation on European markets; better knowledge of characteristics and trends in European markets; and are better prepared for market entry.
- Ease of access to the programme as such might be further increased. But once admitted, companies find it easy to contact the CBI sector experts and companies participate to a large extent to all activities of the ECP.

3.3 OVIs for the three individual ECPs

In the three subsections below, we discuss the extent to which the objectives set by the Objective Variable Indicators (OVIs) were actually achieved. Each section contains a table that list all the indicators as introduced in Section 1.3. The last column in each table provides a rating using these symbols:

- ++ Objective exceeded with 10% or more
- + Objective achieved (or exceeded with less than 10%)
- Objective not met, up to 10% lower
- - Objective not met, 10% or more lower

The information should in principle be retrieved from the final documents (slot document) made for each CBI programme. However, as mentioned in Section 2.4, the three programmes have adopted the new modular approach that is recently implemented by CBI. In this approach, final documents are no longer used. Similar information for the ECPs was obtained from the internal CBI monitoring sheets and from the Testimonies of Competence.

Table 8 Assessment OVIs 1035 Outerwear Macedonia

Indicators	Target	Achieved	Rating
Number of competent enterprises delivered	22	22	+
Impact (effect of use of capacity)			
Total export turnover for the group as a whole	€ 1 mil.	€ 18.2 mil. (2010)	++
Total export turnover, average per company	€ 43 000	€ 827 000	++
Percentage of total export to EU/EFTA	60%	100%	++
Export to EU/EFTA for the group as a whole	€ 576 000	€ 18.2 mil. (2010)	++
Export to EU/EFTA, average per company	€ 26 000	€ 827 000	++
Percentage of companies active on at least 2 new export markets, of which 1 in EU/EFTA	45%	27%	--
- Same in numbers	10	6	--
Effect (use of capacity)			
Percentage of companies realising export during the programme (perc. exporting to EU/EFTA)	70% (70%)	86% (86%)	++ ++
- Same in numbers (of which to EU/EFTA)	16 (16)	19 (19)	++ ++
Result (capacity transfer)			
Percentage of participants indicating that skills and knowledge increased as result of participation	N.A.	77%	N.A.
- Same in numbers	N.A.	17	N.A.
Percentage of companies scoring a sufficient mark on all clusters of the Export Audit	85%	64%	--
- Same in numbers	19	14	--
Perc. of companies having Export Marketing Plan	60%	91%	++
- Same in numbers	13	20	++
No. of companies having leads (after trade fair)	22	18	--
No. of leads per company	8	6	--
Of which to EU/EFTA	5	6	++
Other indicators			
Additional jobs, for the group as a whole	N.A.	-2 162	N.A.
Additional jobs, average per company	N.A.	-98	N.A.
Total budget	€ 1 248 500	€ 1 252 540	-
Total budget per delivered company	€ 56 750	€ 56 933	-

Source: CBI "start" documents, monitoring sheets and Testimonies of Competence; calculations by Panteia/EIM

Table 9 Assessment OVIs 1037 Food Ingredients

Indicators	Target	Achieved	Rating
Number of competent enterprises delivered	37	29	--
Impact (effect of use of capacity)			
Total export turnover for the group as a whole	€ 2.7 mil.	€ 53.2 mil. (2010)	++
Total export turnover, average per company	€ 73 000	€ 1.8 mil.	++
Percentage of total export to EU/EFTA	50%	30%	--
Export to EU/EFTA for the group as a whole	€ 1.4 mil.	€ 15.7 mil. (2010)	++
Export to EU/EFTA, average per company	€ 36 500	€ 542 000	++
Percentage of companies active on at least 2 new export markets, of which 1 in EU/EFTA	41%	38%	-
- Same in numbers	15	11	--
Effect (use of capacity)			
Percentage of companies realising export during the programme (perc. exporting to EU/EFTA)	68% (68%)	93% (79%)	++ ++
- Same in numbers (of which to EU/EFTA)	25 (25)	27 (23)	+ -
Result (capacity transfer)			
Percentage of participants indicating that skills and knowledge increased as result of participation	N.A.	94% (EXPRO 63)	N.A.
- Same in numbers	N.A.	N.A.	N.A.
Percentage of companies scoring a sufficient mark on all clusters of the Export Audit	85%	62%	--
- Same in numbers	31	18	--
Perc. of companies having Export Marketing Plan	60%	93%	++
- Same in numbers	22	27	++
No. of companies having leads (after trade fair)	31	27	--
No. of leads per company	10	N.A.	N.A.
Of which to EU/EFTA	6	25	++
Other indicators			
Additional jobs, for the group as a whole	N.A.	-11	N.A.
Additional jobs, average per company	N.A.	-0.4	N.A.
Total budget	€ 1 859 906	€ 1 870 832	-
Total budget per delivered company	€ 50 268	€ 64 511	--

Source: CBI "start" documents, monitoring sheets and Testimonies of Competence; calculations by Panteia/EIM

Table 10 Assessment OVIs 1040 Home decoration, Accessories & Gifts

Indicators	Target	Achieved	Rating
Number of competent enterprises delivered	40	38	-
Impact (effect of use of capacity)			
Total export turnover for the group as a whole	€ 6.4 mil.	€ 13.6 mil.	++
Total export turnover, average per company	€ 158 750	€ 357 000	++
Percentage of total export to EU/EFTA	60%	72%	++
Export to EU/EFTA for the group as a whole	€ 3.8 mil.	€ 9.7 mil.	++
Export to EU/EFTA, average per company	€ 95 250	€ 255 000	++
Percentage of companies active on at least 2 new export markets, of which 1 in EU/EFTA	43%	61%	++
- Same in numbers	17	23	++
Effect (use of capacity)			
Percentage of companies realising export during the programme (perc. exporting to EU/EFTA)	73% (73%)	89% (74%)	++ +
- Same in numbers (of which to EU/EFTA)	29 (29)	34 (28)	++ -
Result (capacity transfer)			
Percentage of participants indicating that skills and knowledge increased as result of participation	N.A.	92%	N.A.
- Same in numbers	N.A.	35	N.A.
Percentage of companies scoring a sufficient mark on all clusters of the Export Audit	85%	84%	-
- Same in numbers	34	32	-
Perc. of companies having Export Marketing Plan	60%	97%	++
- Same in numbers	24	37	++
No. of companies having leads (after trade fair)	N.A.	37	N.A.
No. of leads per company	10	39	++
Of which to EU/EFTA	6	30	++
Other indicators			
Additional jobs, for the group as a whole	N.A.	5	N.A.
Additional jobs, average per company	N.A.	0	N.A.
Total budget	€ 2 010 111	€ 2 673 957	--
Total budget per delivered company	€ 50 253	€ 70 367	--

Source: CBI "start" documents, monitoring sheets and Testimonies of Competence; calculations by Panteia/EIM

Comments with regard to Tables 6 to 8

The OVI for total export turnover in ECP 1035 Outerwear Macedonia is formulated as 16 enterprises having at least € 45 000 export on average, so a total value of € 720 000; 8 of these enterprises with at least € 75 000 export on average (so an additional amount of € 240 000). So in total € 960 000 export is targeted.

The OVI for total export turnover in ECP 1037 Food Ingredients is formulated as 25 enterprises having at least € 80 000 export on average, so in total € 2 million. 10 of these 25 enterprises having at least € 350 000 export on average (so an additional amount of € 700 000). So overall total export aimed at is € 2.7 million.

The OVI for total export turnover in ECP 1040 Home decoration, Accessories & Gifts is formulated as 29 enterprises having at least € 175 000 export on average, so a total value of € 5.1 million; 17 of these enterprises with at least € 250 000 export on average (so an additional amount of € 1.3 million). So in total € 6.4 million export is targeted.

All three ECPs have achieved the targets for total export turnover. The CBI testimonials show a total export turnover of € 18.2 million in 2010 for ECP 1035 Outerwear Macedonia, € 53.2 million in 2010 for ECP 1037 Food Ingredients and € 13.6 million in 2011 for ECP 1040 Home decoration; a total export turnover of € 85 million for the three ECPs. With a total of 89 'delivered' companies, the three ECPs generated an average export turnover per company of € 955 000. Note that the CBI testimonials contain the sum of exports over the years that companies participate in the ECP, whereas the estimates on the basis of the 31 respondents in the Internet survey are that the average annual export turnover per company increased to € 664 000 in 2011.

The percentage of total export going to EU/EFTA is very high for ECP 1035 Outerwear Macedonia: 100%. For ECP 1037 Food Ingredients the percentage of total export going to EU/EFTA is much lower: 30%. However this is not because the target of export value to EU/EFTA is not achieved. On the contrary, in value terms the export to EU/EFTA is almost 10 times higher. But because total export is even 20 times higher than targeted, export to EU/EFTA is lower in relative terms.

The CBI testimonials provide high scores for all three ECPs with regard to increase of skills and knowledge and regarding the number of companies having an Export Marketing Plan. However, the target for the scoring of a sufficient mark on all clusters of the Export Audit (85% of the delivered companies) is not achieved. For ECP 1040 Home decoration 37 out of 38 delivered enterprises have acquired leads (business contacts) after trade fairs and for ECP 1037 Food Ingredients 27 out of 29 delivered enterprises have acquired leads; both very positive scores. However, for ECP 1035 Outerwear Macedonia only 18 out of 22 delivered enterprises have acquired leads and also the number of leads per company (6) is low. This is remarkable because B2B activities received much attention within ECP Outerwear Macedonia.

From the results of the Internet survey it can be concluded that companies attribute on average 32 jobs per company to participating in the ECP. The OVI

scores with regard to additional jobs from the CBI testimonials are far less impressive. For ECP 1040 Home decoration the total number of additional jobs is only 5. For ECP 1037 Food Ingredients no additional jobs are created and for ECP 1035 Outerwear Macedonia the monitoring sheets indicate a loss of 98 jobs per company.

To make a useful comparison of anticipated and ex-post budgets possible, the ex-post costs presented here are taken from the accounting system of CBI, that is inclusive all surcharges as done in the starting documents (as reported by CBI on 25 September 2012). The average budget spent per delivered company was almost equal to the targeted budget in ECP 1034 Outerwear Macedonia. However, it was much higher in ECP 1037 Food Ingredients (+28%) and in ECP 1040 Home decoration (+40%). This is mainly due to a new CBI method of allocating gross costs, resulting in higher gross costs of ECPs. In addition, the number of competent enterprises delivered for ECP Food Ingredients and ECP Home decoration is much lower than anticipated. For ECP Food Ingredients the total ex-post budget is almost equal to the targeted budget (+1%), but the number of competent enterprises delivered (29) is much lower than anticipated (37). Also for ECP 1040 Home decoration the number of competent enterprises delivered (38) is lower than anticipated (40). In addition, the total ex-post budget of this ECP is 33% higher than the targeted budget.

4 Major findings and top 10 of lessons learned

4.1 Introduction

In this chapter we focus on the major findings and the main lessons learned. Section 4.2 presents some overall results of the Internet survey regarding learning issues. Section 4.3 reviews the findings from a series of interviews that were held with the CBI programme managers, stakeholders and sector experts. Section 4.4 gives a summary of the main findings as regards the five IOB evaluation criteria: relevance, effectiveness, efficiency, sustainability and impact. Finally, section 4.5 presents the top 10 of lessons learned.

4.2 Results from the Internet survey regarding learning issues

This chapter starts with presenting some overall results of the Internet survey that are relevant for learning issues. Two bar charts offer some insight in the appreciation of the ECPs to see whether these been designed in an appropriate manner according to the participants.

The graphs provide information on:

- satisfaction with 11 different components of the ECP
- the importance of these 11 components as perceived by the companies.

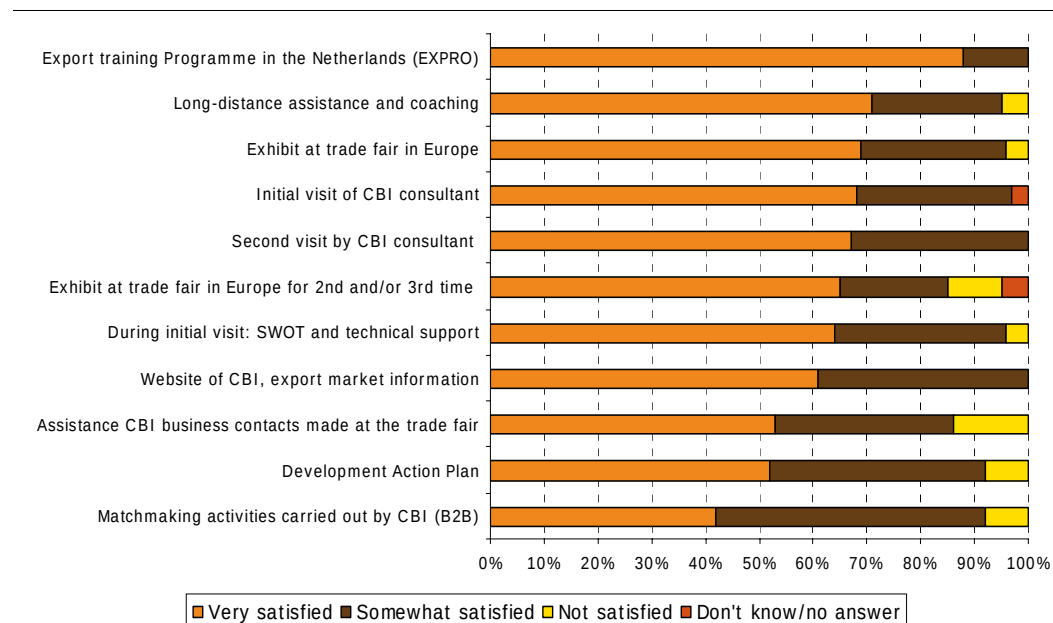
The respondents were asked to state to which extent they are satisfied with eleven different components of the ECP. The full text of the question is:

"Please indicate how satisfied your enterprise is with regard to specific elements of the Export Coaching Programme (ECP) of CBI."

- *Initial visit of CBI consultant to your company at the start of the programme to do export audit*
- *During initial visit of CBI consultant, look into strong and weak points of your enterprise and provide technical support*
- *Action Plan developed after initial visit to be implemented by your enterprise*
- *Long-distance assistance and coaching from CBI consultant*
- *Second visit by CBI consultant to your enterprise for Technical Assistance*
- *Export training Programme in the Netherlands (EXPRO): export marketing, management, etc.*
- *Exhibit at trade fair in Europe; collective CBI stand or supported by CBI*
- *Exhibit at trade fair in Europe for 2nd and/or 3rd time supported by CBI*
- *After participating as exhibitor in trade fair receive assistance from CBI to solidify and expand business contacts made at the trade fair*
- *Accessing at website of CBI, export market information*
- *Matchmaking activities carried out by CBI (B2B).*

It is of course important to see how satisfied the participants are with regard to the services provided in the framework of the ECPs, see Figure 7. The sum of 'very satisfied' and 'somewhat satisfied' is very high. For 9 out of 11 elements it is even higher than 90%. Only for "business to business activities" and "receiving assistance after trade fairs to solidify and expand business contacts" the score is a bit lower. So, here we see that although the percentage of participants that received assistance for solidifying and expanding business contacts after trade shows rose, the (total) satisfaction for this component dropped somewhat compared to the evaluation of five ECPs in 2011.

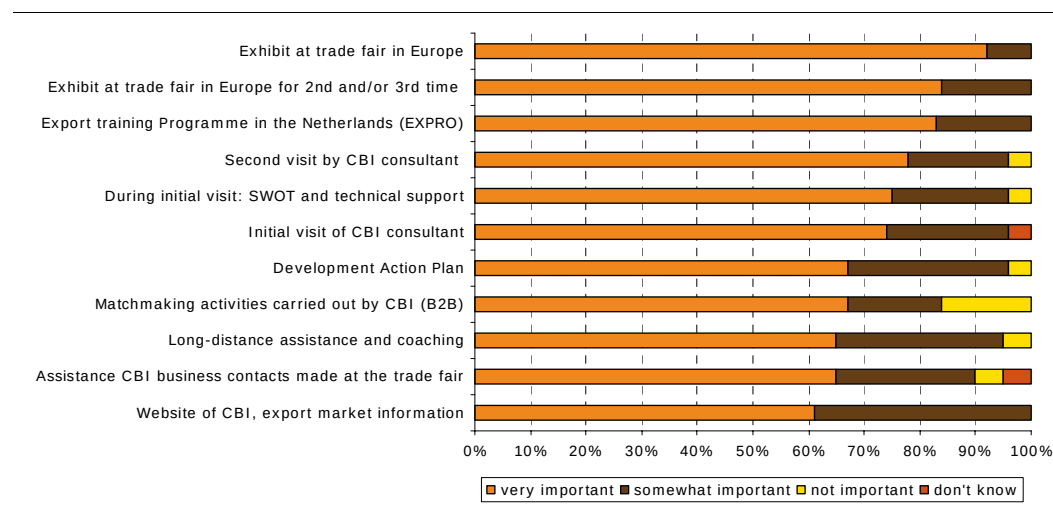
Figure 7 Satisfaction with various elements of the ECPs (%)



Source: Internet survey Panteia, 2012.

How important are these elements of the ECP for the export performance of the company in the perception of the participants? Figure 8 clearly shows that 80% to over 90% find all elements either very important or somewhat important. For exhibition at trade fairs in Europe (first time) 90% of respondents score this component as 'very important'. In contrast to the evaluation of five ECPs in 2011, the matchmaking activities score lowest when the scores 'very important' and 'somewhat important' are combined.

Figure 8 Importance of the components of the ECPs



Source: Internet Survey Panteia, 2012.

When asked about the importance of the total support of the ECP combined, 72% find the ECP 'very important' for the export performance of their company, and the rest (28%) find it 'somewhat important'.

The respondents were asked to mention three most positive aspects of the ECPs (whether with regard to subject matter, actual activities, structure of the programme, communications, etc.). The most frequently mentioned positive aspects are participating in trade fairs and Showrooms; and good coaching and training, see Table 11.

Table 11 Open answers most positive aspects ECPs (aggregated)

<i>Aspect</i>	<i>Count</i>
Trade fairs and Showrooms	13
Good coaching/training (at others in Rotterdam)	13
Good relevance/content/structure	8
Getting in contact with potential buyers	7
Development marketing plan/skills	7
Gained vision/strategic insight	6
Technical assistance	6
Good communication	5
Exposure to the market	3
Product development strategies	3
The combination of the actual activities	2
Getting information about trends on the EU market	1
CBI experts easy to reach	1
Friendly environment , good accommodation	1
Consultant visits were invaluable	1
Motivational support	1

Source: Internet Survey Panteia, 2012. Respondents could give multiple answers.

From the suggestions for improvements of the respondents, calls are made for increasing B2B activities and getting more assistance with finding importers (See Annex V for the full list of suggestions for improvements). It should however be noted that in several ECPs activities are undertaken that are classified as 'B2B', without the participants always realising this (for example make European importers aware of potential suppliers).¹

¹ This was already noted in the evaluation of five ECPs in 2011.

4.3 Lessons learned from the interviews

This section presents the findings from a series of interviews that were held with the CBI programme managers of the three ECPs concerned, stakeholders and CBI sector experts working for the three ECPs.

Almost all respondents state that awareness of the ECPs in developing countries is limited. Acquisition of companies takes a lot of time. Several sector experts express the need to increase the efforts of CBI to become more known in relevant business circles in the selected countries. Some experts also indicate a need for CBI to do more PR, also as regards the communication of CBI's results and successes. CBI could do more promotional efforts through commercials on the radio, advertisement in magazines, information campaigns on websites of export promotion agencies and trade organisations in the selected countries, and through social media. Because word-of-mouth marketing works best, suggestion is to start an alumni network for ECP participants.

All respondents state that the various elements of the ECP (selection enterprises, export audit, action plan, EXPRO seminar, trade fairs and B2B activities) have sufficient coherence and synergy. When asked about the most important, most valuable element in the ECP, most of the respondents mention the package as a whole. Individual elements such as support to participate in a trade fair or export marketing training can also be obtained elsewhere (e.g. local government agency or trade association). The unique and strong point of the ECP is the integrated approach: a European expert visiting the company, a training preparing the companies for exhibiting at an international trade fair in Europe, the same experts available at the trade fair to assist etc. Great strength is that 'CBI stands with both feet in the European market'. Some experts suggest that integration with CBI Market intelligence and co-operation with EVD could further strengthen the integrated approach.

In all three ECPs, acquisition and selection of companies took a lot of time. Overall, respondents feel the selection of companies (within the sector and countries chosen) is done quite well. For ECP 1037 Food Ingredients the country distribution could have been better (for example only one African country, two delivered African companies). Occasionally, some issues arise that should have been identified in the export audit (for example inadequate working capital, high costs of registration of products, insufficient quality system). Some respondents also state that selection needs to be improved because some of the companies were not really ready yet to start with the programme, and hence objectives were not timely met. They suggest that more attention should be paid to 'soft' selection aspects, such as mentality, growth ambitions and personal drive of the entrepreneur. In addition, some sector experts indicate that there could be a tension between the need to apply strict selection criteria and personal interests of the sector expert.

A lot of companies have difficulty with writing the Export Marketing Plan (EMP). Part of the EMP is carrying out an export SWOT analysis. Many companies indicate that they would like to receive more assistance from CBI. Some respondents suggest an evaluation of the EMP instrument (in combination with the export audit form) to examine how the EMP could better fit the needs of companies. Perhaps a shorter EMP could be sufficient. Companies should use the

EMP as a strategic management instrument, facilitating the planning processes. The ideas on the purpose and nature of an EMP might need to be brought out more effectively during the EXPRO.

Some experts suggest that CBI might consider strengthening monitoring and evaluation by arranging regular general feedback rounds after one and/or two years in the ECP programmes. At that moment, many companies have made adjustments to their strategy or have ideas about adjusting their strategies. At the level of the participating companies, action plans could be reassessed. Participating enterprises and experts could indicate items that might need attention in the second half of the programme. This offers companies the possibility to indicate their needs. At the programme level, programme managers could ask sector experts for feedback. This meeting could also give the opportunity to (re)define and communicate clear roles and responsibilities for the sector experts.

For the average SME entrepreneur in a developing country, CBI is a bureaucratic organization characterized by a lot of administrative rules. A sector expert suggests to more clearly indicating what CBI expects from a participating company, right at the start of the ECP. This includes attention to personal development of the participants. In addition, CBI should give a clear overview of the ECP activities in the various years: when starts EXPRO and when is the trade fair, visit of the sector expert, end of the programme? What information would CBI like to receive and when? For the purpose of monitoring, CBI could send the participating companies a link to a form and ask them to fill in data on exports, jobs etc. Suggestion is to create an account for each participating company that is user-friendly and clearly organized: 'My CBI'.

Suggestion from some sector experts is to create multiple contacts with the participating companies. The first visit of the sector expert should be an open conversation and have enough time for introduction to the company, further information about the ECP and presentation of the enterprise. Possibly, a follow-up visit could be arranged to carry out an export audit and action plan. Suggestion is to split the introduction visit and the export audit because of the tension between the objectives. More frequent visits should be organized for a more integrated support of business processes.

Several respondents suggest that CBI could strengthen cooperation with other organizations, both in the selected developing countries and in the Netherlands. The three ECPs were not locally embedded. In some countries (Colombia, Ecuador, Peru) BSOs were actively involved in acquisition, but in other countries they were not involved at all. Some respondents suggest that PUM consultants could be used for acquisition and selection. In addition, it is useful to involve local consultants, for example SIPPO¹ consultants, already before start of the ECP. In some countries (for example Colombia and Peru) SIPPO was in contact with the same companies, therefore coordination issues played a role. Furthermore, CBI could strengthen cooperation with Dutch Embassies,

¹ Swiss Import Promotion Programme (SIPPO).

EVD (market intelligence, matchmaking and the PSI programme¹), IDH and NGOs.

Several respondents state that the three ECPs paid no explicit attention to CSR, except for certification issues and for biological products in ECP 1037 Food Ingredients. Increasing demand for sustainable products means that it's important for companies to incorporate CSR into their business models. Recently, CBI added a CSR cluster to the export audit. Some respondents state that a proper balance should be maintained between CSR requirements and business practices. This calls for a realistic approach of sustainability.

4.4 Main findings

In this section we present a summary of the main findings as regards the five IOB evaluation criteria: relevance, effectiveness, efficiency, sustainability and impact. Synthesis allows u to draw overall evaluative conclusions from multiple findings from the desk research, a series of interviews that were held with the CBI programme managers, stakeholders and CBI sector experts, and the Internet survey. In drawing conclusions we follow the research questions that were presented in section 2.2.

<i>Relevance</i>
To what extent has the programme contributed to the local needs and priorities as stated prior to the programme?
Have the right products, countries, participating companies and counterparts been chosen in relation to the objectives of the programme?
To what extent did the effects of the intervention make a sustainable contribution to increasing export of the participating companies? Would they have started export to Europe without participation in the programme?
How is its consistency of the programme with other policy instruments? To what extent does it duplicate or overlap with other Dutch policy instruments?

- Considering all, it can be concluded that in general the objectives of the ECP activities are consistent with beneficiaries' requirements and local needs.
- Overall, the interview respondents feel the selection of companies, within the sector and countries chosen, is done quite well. For ECP 1037 Food Ingredients the country distribution could have been better (for example only one African country, two delivered African companies). Some respondents state that the selection needs to be improved because some of the companies were not really ready yet to start with the programme. They suggest that more attention should be paid to 'soft' selection aspects, such as mentality, growth ambitions and personal drive of the entrepreneur. In addition, it should be noted that the average export value to the EU/EFTA was already high at the start of the ECPs. Therefore, CBI could consider to further improve the selection of companies.
- The effects of the interventions make a sustainable contribution to increasing export of most companies participating in the ECPs. The results of the Internet survey, covering about one third of delivered companies, show that three quarters of the participating companies indicate that they have more

¹ Private Sector Investment programme (PSI).

exports to the European market because of this support and 14% of respondents started export to Europe earlier because of this support. Only 3% of respondents state that they would not have started export to Europe without the support. This group is much smaller compared to the participants from the evaluation of five ECPs in 2011 (18%).

- The ECPs do not duplicate or overlap with other Dutch policy instruments. Some experts suggest that integration with CBI Market intelligence and co-operation with EVD (market intelligence, matchmaking and the PSI programme¹) could further strengthen the integrated approach.

<i>Effectiveness</i>
Have the ECP components been executed in an effective manner? What is the added value of each component? Should there be more coherence? Were there more effective alternative approaches? What are the critical success factors of the ECP programme?
Which aspects of programme management were the most effective in the context of goal attainment?
If companies have not been able to export to Europe, what are the driving forces behind this outcome?
To what extent have European importers been involved in the ECP programme in an effective manner? Was the programme capable to generate a sufficient number of relevant business contacts with European buyers?
To what extent has quality and performance of the external experts contributed to the outcome of the programme?

- The ECPs have been executed in an effective manner. The percentage of companies that according to CBI testimonials are realising export to EU/EFTA is high in all three ECPs. In ECP 1035 Outerwear Macedonia 86% of the delivered enterprises export to the EU/EFTA, in ECP 1037 Food Ingredients 79% of the delivered companies are realising export to EU/EFTA and in ECP 1040 Home decoration 74%. The results from the Internet survey show that the average annual total export per company almost doubled to € 664 000 and export to the EU/EFTA markets increased by 34% to € 414 000 in 2011.
- From the results of the Internet survey it can be concluded the instrumental aims of the ECP are achieved by a large majority of the participants: more skills and knowledge with regard to export marketing and development; better general orientation on European markets; better knowledge of characteristics and trends in European markets; and being better prepared for market entry.
- All interview respondents state that the various elements of the ECP (selection enterprises, export audit, action plan, EXPRO seminar, trade fairs and B2B activities) have sufficient coherence and synergy. When asked about the most important, most valuable element in the ECP, most of the respondents mention the package as a whole. The unique and strong point of the ECP is the integrated approach.
- The results from the Internet survey show the importance of 11 different ECP components for the export performance of the company in the percep-

¹ Private Sector Investment programme (PSI).

tion of the participants. The results clearly show that 80% to over 90% find all elements either very important or somewhat important. For exhibition at trade fairs in Europe (first time) 90% of respondents score this component as 'very important', followed by exhibition at trade fairs in Europe for the second or third time, and EXPRO.

- In case companies have not been able to export to Europe, this was mostly due to the impact of the financial and economic crisis. This means that in some market segments external conditions have a strong effect on the outcomes of the programmes.
- The CBI testimonials provide high scores for the number of enterprises that have acquired leads after trade fairs. For ECP 1040 Home decoration 37 out of 38 delivered enterprises and for ECP 1037 Food Ingredients 27 out of 29 delivered enterprises have acquired leads. However, for ECP 1035 Outerwear Macedonia only 18 out of 22 delivered enterprises have acquired leads and also the number of leads per company (6) is low. This is remarkable because B2B activities received much attention within ECP Outerwear Macedonia.
- From the suggestions for improvements of the respondents, calls are made for increasing B2B activities and getting more assistance with finding importers, implying that these aspects need more attention.
- The results from the Internet survey show that 74% to almost 80% of the participating companies find the initial and second visit of the CBI consultant very important for the export performance of their enterprise.

Efficiency
To what extent have the ECP components been executed in an efficient manner? Were there more efficient alternative approaches?
Was the Logical Framework Approach designed well, both in structure and content?
Was the planning of the ECP realistic and adequate?
How do actual expenditures relate to the programme budget and the outcome?
Is the ratio visits by sector experts to the outcome in balance? Would more visits lead to better outcomes? How could more visits improve the uptake of the companies?

- Given the activities implemented for this evaluation (focussing on ECPs only), it is rather difficult to compare the efficiency of the three ECPs with alternative approaches to bring about the same outputs. However, for some of the obvious issues that might be considered in looking at the budgets required to bring about the outputs (use local experts not European; provide export training locally not in the Netherlands; reduce international missions of European experts, reconsider need to exhibit at international trade fair several times), clear indications were received that these are all essential elements of the ECP.
- As part of the Logical Framework Approach, CBI has a well designed and comprehensive set of monitoring indicators for ECP programme management. Monitoring should be strengthened by actual and full implementation of the monitoring tools.
- Overall, the planning of the ECPs was realistic. However, acquisition and selection of companies took a lot of time in all three ECPs.

- The average budget spent per delivered company was almost equal to the targeted budget in ECP 1034 Outerwear Macedonia. However, it was much higher than the target in ECP 1037 Food Ingredients (+28%) and ECP 1040 Home decoration (+40%).
- Suggestion from some sector experts is to create multiple contacts with the participating companies (see page 43). More frequent visits should be organized for a more integrated support of business processes. Further research is needed regarding the ratio visits by sector experts to the outcome.

<i>Sustainability</i>
To what extent are the companies likely to continue their export activities?
Have companies invested in export capacity? If so, how much and what type of investment was made?
Is the sustainability of the outcome of CBI interventions safeguarded? What has been done in the programme to ensure sustainability?
What is the assessment of the CSR effects (human rights, labour standards, environmental issues and fair trade issues) at the level of the participating companies?

- The ECP programmes that guide companies for a number of years and encompass several different activities in an integrated way (technical assistance, export training, developing an Export Marketing Plan, exhibiting at trade fairs) seem to have sustainable effects on the export activities of the enterprises. Participants state that they have more skills and knowledge with regard to export marketing and development; better general orientation on European markets; better knowledge of characteristics and trends in European markets; and are being better prepared for market entry.
- The results from the Internet survey show that a majority of the participants invested in export capacity during participation in the ECP. More than two-thirds of respondents report that their enterprise invested much in exhibition costs and travel expenses to fairs and almost half of respondents report much investment in production revisions, purchase of capital goods and product marketing tools.
- The effects of the CBI interventions make a sustainable contribution to increasing export of most companies participating in the ECPs. The results of the Internet survey show that more than 60% of the participating companies agree with positive effects of participating in the ECPs on product diversification, quality of products, turnover and level of the staff. In addition, 60% of the respondents state that the ECP contributed much to R&D activities.
- According to a majority of participants the ECPs contribute to improving CSR. 73% of respondents agree or fully agree that performance on Fair Trade has improved because of participation in the ECP. Almost 70% of respondents agree or fully agree that performance on environmental issues has improved and 65% of respondents agree or fully agree that performance on labour standards has improved.

<i>Impact</i>
To what extent have the achieved effects (outcomes) contributed to broader, more far-reaching objectives?
Has the ECP led to employment growth? What kind of employment?
Has the ECP led to increase of turnover?

- The wider effects of the export coaching programmes can not be established, especially if most of the data collection in this evaluation concerned participants in the ECP focussing on the effect for their own companies.
- From the Internet survey it can be concluded that the average annual total export per company almost doubled to € 664 000 and export to the EU/EFTA markets increased by 34% to € 414 000 in 2011. The average annual realised export to EU/EFTA markets is 6.4 times higher than the ex-post budget per competent company. This is many times higher than the target formulated.
- The OVI scores with regard to the amount of total export turnover (total over the years the companies are participating in ECP) and export to the EU/EFTA for the three programmes are very good. For ECP 1035 Outerwear Macedonia and ECP 1040 Home decoration the percentages of total export going to EU/EFTA are very high: 100% and 89%. For ECP 1037 Food Ingredients the percentage of total export going to EU/EFTA is below 50%. However, this is not because the target of export value to EU/EFTA is not achieved but because total export is much higher than targeted.
- The OVI scores with regard to additional jobs from the CBI testimonials are far less impressive: for ECP 1040 Home decoration the total number of additional jobs is only 5; for ECP 1037 Food Ingredients no additional jobs were created and for ECP 1035 Outerwear Macedonia the monitoring sheets indicate a loss of 98 jobs per company. Suggestion is to have a closer look at the definition and method of measuring the total number of employees.

Overall we conclude that the three ECPs obtained most objectives aimed at (OVIs).

4.5 Top 10 of lessons learned

In this section we present the top 10 of lessons learned. We focus on recommendations that can relatively easy be implemented within the existing framework of the ECP programme.

Increase efforts to raise awareness: more active PR campaign

Because awareness in developing countries is very limited, there's need to increase the efforts of CBI to become more known in relevant business circles in the selected countries. CBI could do more promotional efforts through commercials, information campaigns and social media. Because word-of-mouth marketing works best, suggestion is to start an alumni network for ECP participants.

Maintain integrated approach: the ECP as a package

Considering the fact the ECP programmes recently adopted a modular approach, it should be seriously monitored whether the essential character of the ECP programme – the high value attached by the participants to most elements and the added value of the combination of various elements – is not lost. Safeguard the link between the different modules.

Improve selection of companies

The selection could be improved to better assess whether the companies can indeed be ready within a few years to enter the European market and that they also have the drive to achieve this. More attention should be paid to 'soft' selection aspects, such as mentality, growth ambitions and personal drive of the entrepreneur.

Evaluation of the Export Marketing Plan (EMP)

Companies should use the EMP as a strategic management instrument, facilitating the planning processes. A lot of companies have difficulty with writing the Export Marketing Plan (EMP). Some respondents suggest an evaluation of the EMP instrument (in combination with the export audit form) to examine how the EMP could better fit the needs of companies. Perhaps a shorter EMP could be sufficient.

Mid-term monitoring and evaluation by organising feedback

CBI might consider strengthening evaluation by arranging regular general feedback rounds after one and/or two years in the ECP programmes. At the level of the participating companies, action plans could be reassessed. Participating enterprises and experts could indicate items that might need attention in the second half of the programme. At the programme level, programme managers could ask sector experts for feedback.

Implementation of monitoring and evaluation tools

CBI has designed a comprehensive set of monitoring indicators for ECP programme management. Monitoring should be strengthened by actual and full implementation of the monitoring tools. Providing all relevant internal CBI documents and monitoring information on the programmes right at the start of the desk research, could enhance the evaluation.

My CBI

Suggestion is to create an account for each participating company that is user-friendly and clearly organized: 'My CBI'. This should give a clear overview of the ECP activities in the various years and what information CBI would like to receive and when. For the purpose of monitoring, CBI could send the participating companies a link to a form and ask them to fill in data on exports, jobs etc.

More relevant contact moments

Suggestion is to create multiple contacts with the participating companies. The first visit of the sector expert should be an open conversation and have enough time for introduction to the company, further information about the ECP and presentation of the enterprise. Possibly, a follow-up visit could be arranged to carry out an export audit and action plan. Suggestion is to split the introduction visit and the export audit because of the tension between the objectives. More frequent visits should be organized for a more integrated support of business processes.

Strengthening cooperation with other organizations

CBI could strengthen cooperation with other organizations, both in the selected developing countries and in the Netherlands. PUM consultants could be used for acquisition and selection. In addition, it is useful to involve local consultants, for example SIPPO¹ consultants, already before start of the ECP. Furthermore, CBI could strengthen cooperation with Dutch Embassies, EVD (market intelligence, matchmaking and the PSI programme²), IDH³ and NGOs.

Realistic approach of sustainability

Increasing demand for sustainable products means that it's important for companies to incorporate CSR into their business models. Recently, CBI added a CSR cluster to the export audit. Some respondents state that a proper balance should be maintained between CSR requirements and business practices. This calls for a realistic approach of sustainability.

¹ Swiss Import Promotion Programme (SIPPO).

² Private Sector Investment programme (PSI).

³ IDH the Sustainable Trade Initiative

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Terms of Reference Evaluation CBI Export Coaching Programmes 2012

1. Introduction

The policy of the CBI is to conduct evaluations of its interventions one year after completion. For 2012 there are three, so called, Export Coaching Programmes (ECP's) that require evaluation. These are:

1. Outerwear Macedonia (1035)
2. Food Ingredients (1037)
3. Home decoration, accessories & gifts (1040)

This Terms of Reference provides the basic framework for conducting the evaluations of three ECP's.

2. Background

The Centre for the Promotion of Imports from developing countries (CBI) is an agency of the Ministry of Foreign Affairs and part of the development cooperation effort of the Netherlands. CBI is inspired by contributing to trade-led economic growth and the resulting reduction of poverty in developing countries. The mission of the CBI is to contribute to equitable economic development of selected developing countries and countries with economies in transition by providing services aimed at strengthening the competitiveness of exporters on the EU and EFTA market.

The aim of the sectoral development programmes (Export Coaching Programme's, ECPs) is to enable exporters in developing countries to become or remain active as suppliers in EU markets and/or to improve their market position in the EU. These programmes may consist of the following activities, amongst others:

- business analyses and technical assistance (consultancy) provided during business visits and by means of assistance given at a distance;
- training which focuses on raising awareness, and on improving knowledge and skills in the fields of export marketing and management, and specific sector-related subjects;
- providing advice and assistance in relation to market access and help to follow up and consolidate any contact that has been established with customers.

3. Objective

The objective of this evaluation is twofold. The *first* objective is to render account of the programme and to analyse whether all means have been used in an effective and efficient manner and if all the objectives of the intervention have been reached (Accountability). The accountability part will:

- (a) Evaluate whether the method of determination of the (number of) competent companies by CBI has been executed according to the procedure as written down in the Final Document (Slot document);

- (b) Examine to which extent the OVI's¹ on result and project purpose level, as formulated in the Logical Framework (LFA) and 'Startdocument' have been achieved; and
- (c) Evaluate for each programme the level of compliance to the five IOB evaluation criteria (relevance, sustainability, effectiveness, efficiency and impact).

The second objective is to find the main 'lessons learned' (Learning). For this objective the evaluator will:

- a) Determine a top 10 priority of lessons learned based on the five IOB evaluation criteria (relevance, efficiency, effectiveness, sustainability, impact). As the ECP evaluation in 2011-2012 yielded many recommendations regarding the instrument ECP, this evaluation should render new insights that helps CBI to improve its ECP modules.

The above listed three export coaching programmes will be evaluated according to the two main objectives.

4. Main research questions

The accountability section will consist of three sections per programme, beginning with an explanation of the rationale and objectives of the programme, followed by the results of the OVI's² which will be displayed using the table in annex 4. The third section will provide an assessment of the course of the programme including an overview of the activities per phase and an assessment of the choices that were made. For the assessment of the course of the programme the IOB evaluation criteria must be used. The table below shows which criteria should be evaluated for each of the ECP components.

ECP components	JOB evaluation criteria
1. Acquisition and selection of companies	Relevance, Efficiency, Effectiveness
2. Audit and action plan	Relevance, Efficiency, Effectiveness
3. Capacity building	Relevance, Efficiency, Effectiveness
4. Market entry	Relevance, Efficiency, Effectiveness
5. Outcome and impact of the ECP programme	Sustainability, Impact

IOB evaluation criteria³

Some relevant research questions are provided in annex 5, however the final research questions shall be discussed with the CBI Programme Manager.

Relevance: Relevance is defined as the extent to which the objectives of a development intervention are consistent with beneficiaries' requirements, country needs, global priorities and partners' and donors' policies. In the logical framework, rele-

¹ CBI & DGIS have agreed on quality indicators for its programmes. These quality indicators are referred to as objective variable indicators (OVI's).

² Please note that the numbers, amounts and percentages in the OVI's are different for each of the programmes, this is documented in the 'Start document' of each programme. These documents will be provided to the contractor at the start of the evaluation.

³ The guidelines can be found at http://www.minbuza.nl/dsresource?objectid_buza=be-heer:194706&type=org

vance refers to the extent to which the effects of interventions make a sustainable contribution to achieving the ultimate objective (the impact).

Efficiency: Measures the outputs – qualitative and quantitative – as a result of inputs. This generally requires comparing alternative approaches to achieving an output, to see whether the most efficient approach has been used.

Effectiveness: Measures the extent to which an activity achieves its purpose, or whether this can be expected to happen on the basis of the outputs.

Sustainability: Sustainability refers to the need to ensure that activities of a short-term nature are carried out in a context that takes long-term and interconnected problems into account.

Impact: Impact refers to the wider effects of the project – social, economic, technical, environmental – on individuals, gender- and age-groups, communities and institutions. Impact can be intended and unintended, positive and negative, macro (sector) and micro (enterprise).

5. Methodology and implementation

The information will be gathered through both desk and primary research. The desk research will be based on the existing documents of the three programmes. The primary research is based on a questionnaire and in-depth interviews with CBI Programme Managers, external experts, participant companies and importers.

Desk research

Desk research consists of analysing all relevant internal CBI documents on the programme (evaluation reports, interim evaluations, final documents, starting document, reports on activities, the LFA).

The following documents will be provided to the researcher at the start of the evaluation.

- Startdocument for each programme;
- Slotdocument for each programme;
- Interim report for each programme;
- Data on exporters that have participated in the programmes;
- 2 past evaluation reports of ECP programmes;
- Review and summary of CBI evaluations 2003 -2009

Primary research

Primary research consist of:

1. In-depth interviews held with:

- Programme Managers (3)
- Programme experts
- 10 exporters
- 3 importers
- Value Chain Actors (BSO's etc.)/ other relevant stakeholders

2. Questionnaire (and possible telephone interviews) with:

- A random selection of at least 40% of participants which have completed the whole programme.

Lessons Learned Previous Evaluation:

1. Establishing contact with the exporters for the questionnaire must be done right from the start. Previous evaluation has taught us that it takes much effort and time to obtain all the data.

2. Use CBI experts for establishing contact with the exporters and importers. Previous evaluation has taught us that exporters are more inclined to participate in the questionnaire. This equally counts for arranging interviews with importers.

6. Process and deliverables

Phase 1a: Based on this ToR, the contractor will draw up a plan of action (6 pages maximum). The plan of action will be sent to the Programme Manager Kristine Ocon kocon@cbi.eu by the **12th of July 2012 by 12.00 latest**.

The Plan of Action will include the proposed approach, methodology, a broad time-frame and budget. The plan of action includes the resumes of the research team¹.

Phase 1b: Based on the received proposal the contractor will be invited to present the plan of action at the CBI office in The Hague. The presentation will be in the presence of the relevant CBI Programme Managers and the CBI ECP Module Manager. Based on the presentation of the action plan the Programme Manager at CBI will provide feedback on outstanding questions and further details as input for the adjustment of the plan of action.

Phase 1c: The revised plan of action is sent to the CBI programme manager and jointly agreed upon. The necessary research questions will be determined at this point.

Phase 2a: Based on the approved plan of action the contractor shall conduct the necessary activities for the evaluation of the three ECP's (see methodology). The contractor will discuss all questionnaires with the CBI Programme Manager.

Phase 2b: The contractor will deliver a draft report by **17th of September 2012** and submit it to the responsible Programme Managers. The responsible Programme Managers will provide feedback to the contractor within one week. The contractor will then revise the draft report after which the final report shall be delivered. The deadline for the final report is **5th of October 2012**.

Phase 4: A debriefing session with the responsible programme managers is conducted in **October 2012**.

Phase 5: An interactive workshop is held with all CBI Programme Managers to reflect on the lessons learned from these three evaluations (October/ November 2012).

Deliverables:

1. Plan of action based on this ToR, including the methodology for accountability and learning.
2. Presentation of the Plan of Action.
3. Revised Plan of Action.
4. Draft and final questionnaires.
5. Draft report of the outcomes of the evaluations, including a top 10
6. priority of lessons learned (see annex 2 for the expected structure of the report).
7. Final report of the outcomes of the evaluations.
8. Debriefing with responsible Programme Managers.
9. Workshop with all CBI Programme Managers

7. Resources and timing

¹ The resumes are not included in the five pages

Based on this ToR the contractor is requested to provide a plan of action including a budget. The budget should include costs for preparation, research, report writing, presentation of results (debriefing) and the workshop with CBI Programme Managers.

8. Contractor

The contractor must meet the following criteria:

- Must not have (had) any stake in the implementation of programmes to be evaluated.
- Must have multiple years of experience in the field of evaluations of development interventions beyond CBI.
- Must have experience in the field of Trade and Private Sector Development.
- Must be a registered company at the Chamber of Commerce.
- Must have at least one person on the evaluation team that can speak and read Dutch as all the programme documents are written in Dutch.

Annex 1: CBI definition of competent company

According to the CBI a competent company meets the following requirements:
For the owner S (and payment of costs quoted by Q) a company is competent if the selected company has demonstrated to work towards improving the critical action points identified in the Export Audit, as well as active participation during the programme (i.e. participated in Expro, TAM visits and participated in exhibitions).

Quality indicators:

Impact

- The total realised export to the EU / EFTA markets measured one year after completion of the programme. The indicator scores sufficient if the total volume of the realised export is at least the same or more than the planned export. The standard for the planned export is 2.5 times the price, thus the CBI investment per company. The export turnover is measured from the start of the CBI intervention until one year after completion of the programme.
- The total realised export to the non- EU / EFTA markets measured one year after completion of the programme.
- The number of addition jobs created within the company measured one year after completion of the programme. The indicator is sufficient if the number of jobs has increased.

Effect

- The number of companies that have demonstrated increased export to the EU / EFTA. The indicator scores sufficient if 70% of the companies meet the requirements of this indicator.

Result

- Transmission of capacity: Products and processes meet market requirements in the EU / EFTA.
- Company scores at least 2 on a scale of 4 in the various clusters of the CBI Export Audit. The indicator scores sufficient if 85% of companies meet the requirements of this indicator.
- Company has knowledge of EU / EFTA market and has used this in the development of the Export Marketing Plan. The indicator scores sufficient if 60% of companies meet the requirements of this indicator.
- Company has sufficient relevant contacts in the EU / EFTA market and has developed skills and experience in marketing their products. The indicator scores sufficient if 85% of companies have at least 15 contacts in the EU / EFTA market.

Annex 2: Structure of final report

List of abbreviations

Summary of findings

1. Introduction

2 Set-up and implementation of evaluation

- 1.1 Objective and expected results
- 1.2 Main research questions
- 1.3 Methodology and implementation
- 1.4 Limitations

3 Overview of Results and conclusions per programme (Accountability)

- 3.1 Introduction
- 3.2 Logical framework
- 3.3 Activities per phase
- 3.4 OVI's and results
- 3.5 Evaluation of results per evaluation criteria
 - 3.5.1 Relevance
 - 3.5.2 Effectiveness
 - 3.5.3 Efficiency
 - 3.5.4 Impact
 - 3.5.5 Sustainability

4 Top 10 priority of lessons learned

5 Bibliography

Annexes

- ToR
- Project team
- Approved Plan of Action
- Questionnaires
- List of interviewees
- Results internet survey
- Summary of 3 start documents

Annex 3: Overview number of companies in the different countries

	1035	1037	1040	Total
Macedonia	21			21
Pakistan		5		5
India		5	7	21
Sri Lanka		1	4	5
Indonesia		1	5	6
Philippines			4	4
Peru		2	2	4
Ecuador		5	3	8
Colombia		4	7	11
Bolivia		4		4
Uganda		2	2	4
Egypt			2	2
Tunisia			1	1
Jordan			1	1
South Africa			6	6
Total	21	29	44 ¹	94

1035 – Outerwear Macedonia

1037 – Food ingredients

1040 – Home decoration, accessories & gifts

¹ The official number of completed companies is 38, however the overview shows 44.

Annex 4: Assessment table for transfer of capacity

Indicators	Target	Achieved	Rating
Number of competent enterprises delivered	xx	xx	++ / + / - / --
Impact (effect of use of capacity)			
Total export turnover for the group as a whole	€ xx mln	€ xx mln	
Total export turnover, average per company	€ xx	€ xx	
Percentage of total export to EU/EFTA	xx%	xx%	
Export to EU/EFTA for the group as a whole	€ xx mln	€ xx mln	
Export to EU/EFTA, average per company	€ xx	€ xx	
Percentage of companies active on at least 4 new ex- port markets, of which 2 in Europe	xx%	xx%	
- Same in numbers	xx	xx	
Effect (use of capacity)			
Percentage of companies realising export during the programme (of which to EU/EFTA)	xx%	xx%	
- Same in numbers (of which to EU/EFTA)	xx	xx	
Result (capacity transfer)			
Percentage of participants indicating that skills and knowledge increased as result of participation	xx%	xx%	
- Same in numbers	xx	xx	
Percentage of companies scoring a sufficient mark on all 10 clusters of the Export Audit	xx%	xx%	
- same in numbers	xx	xx	
Perc. of companies having Export Marketing Plan	xx%	xx%	
- same in numbers	xx	xx	
No. of companies having leads (after trade fair)	xx	xx	
No. of leads per company	xx	xx	
Of which to Europe	xx	xx	
Other indicators			
Additional jobs, for the group as a whole	xx	xx	
Additional jobs, average per company	xx	xx	
Total programme budget	€ xx	€ xx	
Total budget per delivered company	€ xx	€ xx	

ANNEX II Project team

The project team consists of Nicolette Tiggeloove and Christi Veldhuis-van Essen. They combine broad knowledge and experience in international business by SMEs with recent experience with evaluation of ECPs.

Drs Nicolette Tiggeloove (project leader)

Nicolette Tiggeloove graduated in economics from the Free University in Amsterdam in 1989. She became a research assistant at the inter-university Centre for Latin American Research and Documentation (CEDLA) in Amsterdam in the same year. After completing a post-graduate course on Financial Economic Policy Making at the Faculty of Economics of the Erasmus University in Rotterdam in 1992, she entered the service of the Dutch Ministry of Economic Affairs. As a senior policy advisor at the Foreign Markets Analysis Division of the Directorate-General for Foreign Economic Relations her work focused on project management and international economic policy analysis with focus on foreign trade, foreign direct investments and markets in Central & Eastern Europe. Nicolette also worked with the NL EVD International, the Agency for International Business and Cooperation. In 2008, Nicolette joined the staff of EIM as a senior researcher where she has been working in the field of international activities of SMEs and international policy research for the European Commission and other clients. At EIM, Nicolette has broad experience with project management, policy evaluation, evaluation of business support measures and research on entrepreneurship, internationalisation of SMEs, export potential and foreign investments. Nicolette was project manager of an overall assessment of the internationalisation policies of the Ministry of Economic Affairs and project manager of the policy evaluation 'bilateral economic cooperation' for the Dutch Ministry of Agriculture, Nature and Food Quality. She also developed an instrument for baseline measurement for the 2g@there programmes run by NL EVD International, basically a questionnaire focussing on measuring impact of supporting clusters of Dutch enterprises in accessing new, difficult markets. Nicolette has an extensive network of professional contacts in the field of international economic relations and – based on her experience with the Ministry of Economic Affairs and NL EVD International – substantial knowledge of policy instruments and policy processes.

Christi Veldhuis-van Essen MSc, researcher

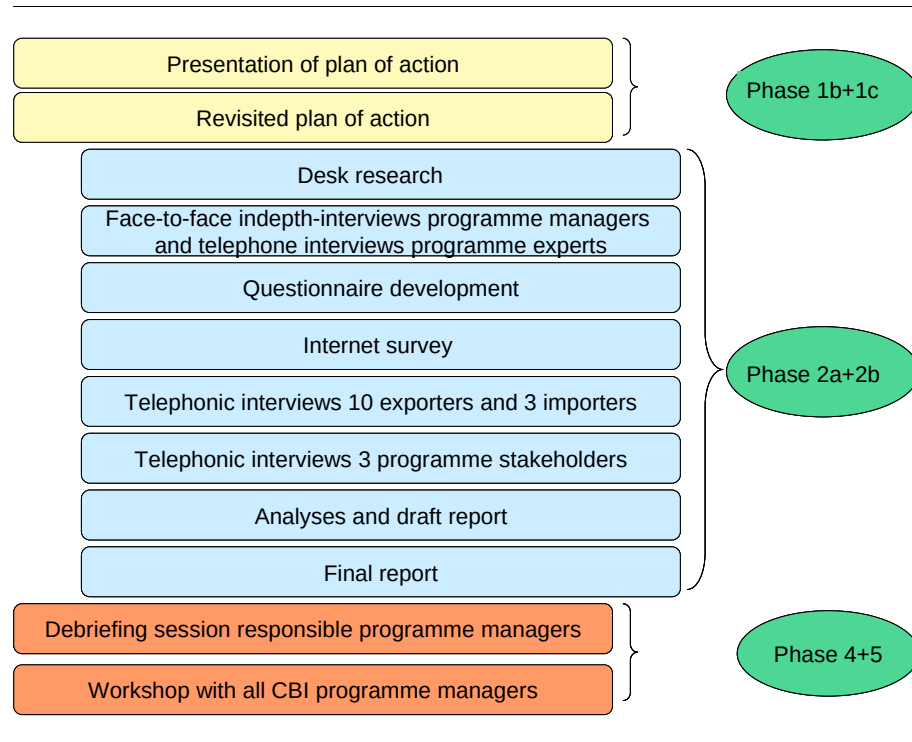
Christi Veldhuis-van Essen holds a masters degree in Strategic Management and Business Administration at the Rotterdam School of Management (RSM/Erasmus University). She completed her master elective courses in Norway, where she lived for five months. Topic of her master thesis was 'The development and diversity of Science Parks in China'. Topics in her thesis were public-private knowledge transfer, start-ups and university spin-offs and the innovation policy of the Chinese government. Christi joined EIM in January 2008 as a junior researcher. She has participated in a range of projects among others: 'International Cooperation by Dutch SMEs, Evaluation on Entrepreneurship policy For the Dutch Ministry of Economic Affairs, Development of a micro dataset on characteristics of Dutch entrepreneurs, Policy Evaluation of the programme "bilateral economic Cooperation" for the Dutch Ministry of Agriculture, Midterm Review innovation programmes for the Dutch Ministry of economic affairs (developing questionnaires, in depth interviews, data analysis, and reporting), the effects of environ-

mental zoning for business vehicles'. Christi was also co-author of the book "Springen over de grens" a case study research on successful International Entrepreneurship. Christi was one of the researchers who contributed to the Evaluation CBI Export Coaching Programmes in 2011-2012 and is now involved in an international ILO study about the recent empirical evidence on the contribution of SMEs in developing countries to employment creation.

ANNEX III Plan of Action

The figure below visualises our approach of the evaluation of the three ECPs. Below the figure the steps are described in detail.

Figure 9 Plan of Action



Source: Panteia/EIM 2012

➤ *Presentation of the plan of action*

In this presentation we will give detailed information about our approach, the research questions and the planning of the project. The programme managers will be given the opportunity to provide feedback.

➤ *Revisited plan of action*

The feedback of the programme managers will lead to a modification of the plan and final formulation of the research questions.

➤ *Desk research*

After CBI has agreed with the final plan of action we will start with the desk research. Included will be at least:

- Start document for each programme;
- Interim report for each programme;
- "Slot" document for each programme;
- Data on exporters that have participated in the programmes;
- Two previous evaluation reports of ECP programmes;
- Review and summary of CBI evaluation 2003-2009.

➤ *Face-to-face in-depth interviews with programme managers and telephonic in-depth interviews with programme experts*

We plan to carry out two face-to-face interviews: one with Mr. Peter van Gilst (ECP 1037) and one with Mrs. Henrique Postma-Hazelaar (ECP 1040 and ECP 1035). We will try to plan these face-to-face interviews in the Hague at the CBI office on one day. If this is not feasible the interviews will take place by phone. In addition, we want to interview 2 programme experts by phone for each ECP. For the interviews a checklist will be used which is developed in consultation with CBI.

➤ *Questionnaire development*

The results of the desk research and interviews of the programme managers and experts will be input for the development of the questionnaire for the internet survey. We will also use the questionnaire applied ECP evaluation 2011-2012 and the lessons learned of the analysis of this survey. The final questionnaire will be approved by CBI.

➤ *Internet survey*

In this next step, the internet survey will be programmed, implemented and the results will be analysed. We will do maximum efforts trying to reach 40% response. Reminders will be sent and to motivate the companies to participate we will send them a brief report with the results after the project is finished. In this brief report we will also provide an overview of participating companies. In doing so the evaluation can also contribute to international networking.

➤ *Telephonic interviews with 10 exporters and 3 importers*

Per programme, we will interview three exporters and one importer by phone. For these interviews also a client approved checklist will be used. The initial analysis of the internet survey will be used in the preparation of this checklist.

➤ *Telephonic interviews with 3 programme stakeholders*

The telephonic interviews with the 3 programme stakeholders will be mainly used to gain insight on the effectiveness and efficiency of the programme from a different point of view. The stakeholders will be explicitly asked for suggestions for improvement: they are expected to have more 'out-of-the-box' ideas.

➤ *Final analyses and draft report*

After all steps are performed we will analyse all data and information collected and prepare the draft report. This report will include a 'top 10 of lessons learned' from this evaluation and they will be related to the lessons that emerged in the previous evaluations. This chapter is an important input for phase 4 and 5 of the evaluation. The draft report will be sent to the responsible programme managers by e-mail (Friday 12 October) so they can give feedback. If it is feasible, we would like to discuss the report at the CBI office in The Hague.

➤ *Final report*

Following the comments of the programme managers, Panteia/EIM finalises the draft report and delivers the final report on Friday 2 November 2012. The structure shown in the ToR (Annex 2) is decisive here.

➤ *Debriefing*

In November 2012 (week 45) the debriefing of the responsible programme managers is planned.

➤ *Workshop*

Panteia/EIM likes to organise a workshop for all CBI programme managers in November (week 46). In this workshop we will not only share the final results, but also make a start with tackling the *implementation* of the top 10 of lessons learned.

Table 12 Planning Evaluations ECPs 2012

	Action	Done by	Period
1	Presentation Plan of Action	Panteia/EIM	week 33
2	Revised Plan of Action	Panteia/EIM	week 33
3	Engagement letter / contract	CBI	week 33-34
4	Documents for desk research	CBI	week 33
5	List of suggestions interviews programme experts	CBI	week 33
6	List of exporters participating in the ECP programmes: name, contact person, e-mail address (preferable Excel file)	CBI	week 33
7	Desk research	Panteia/EIM	week 33-37
8	Draft invitation letter for exporters	Panteia/EIM and CBI	week 33-34
9	Send invitation letter (introduction) to all exporters	CBI	week 35
10	Interviews with programme managers and programme experts	Panteia/EIM	week 34, 35
11	Final list of prioritized research questions	Panteia/EIM	week 34
12	Draft questionnaire Internet survey	Panteia/EIM	week 35
13	Discuss draft questionnaire Internet survey	Panteia/EIM and CBI	week 35
14	Programming questionnaire for on-line survey	Panteia	week 36
15	Send out invitation for on line survey (with link)	Panteia/EIM	week 36
16	Monitor response internet survey	Panteia/EIM	week 36-38
17	Reminders to be send to non responding exporters	CBI	week 37, 38
18	Interviews exporters/ importers	Panteia/EIM	week 38, 39
19	Interviews programme stakeholders	Panteia/EIM	week 38, 39
20	Analyse results Internet survey and interviews + reporting	Panteia/EIM	week 40, 41
21	Draft final report Friday 12 October	Panteia/EIM	week 41
22	Discuss draft report	Panteia/EIM and CBI	week 42
23	Final Report Friday 2 November	Panteia/EIM	week 44
24	Debriefing meeting	Panteia/EIM and CBI	week 45
25	Workshop	Panteia/EIM and CBI	week 46

ANNEX IV Internet questionnaire enterprises

Some general remarks regarding the questionnaire

This annex presents a text representation of the online questionnaire presented to the respondents on screen. This text version of the online questionnaire has not the same lay-out. Some issues were nicely presented as structured elements on line, i.e. boxes with answering options in different columns etc.

The respondents were not confronted with all these questions as the Internet survey used an automatic routing, i.e. depending on the answer to a particular question the respondent is either guided to the next question or to an onward question after skipping a few questions. In addition, several questions contain many alternatives of which only a selection was presented to the respondent depending on answers given to previous questions.

INTRODUCTION screen

Welcome,

Please note that the information you provide will not be used at an individual level nor handed over to CBI or any other third party.

The objective of this survey is to assess the Export Coaching Programme (ECP) of the Centre for the Promotion of Imports from Developing Countries, CBI in the Netherlands. ECP is a range of services to assist enterprises in getting access to the European market. To do this and to enable fine tuning of the CBI support to your needs, it is important to know your opinion.

You can navigate by using the next and previous buttons at the bottom of your screen. Please do not use the forward and back buttons of your browser.

You can stop answering the survey at any moment. Your answers are stored and whenever you log in again - using the same user ID and password - you will return to the point where you stopped earlier on.

If you have questions relating to this survey please email:

For technical issues regarding the internet survey: helpdesk-CBI@panteia.nl

For other issues contact Mrs. Christi Veldhuis-Van Essen

(c.veldhuis@eim.panteia.nl).

Please be so kind to provide the requested feedback. Answering all questions will not take more than 15 minutes.

Questions start on the next page

Q1

What is your name and the name of your enterprise?

.....

These two items can be left blank if you prefer.

Q2A

Were you personally involved in the Export Coaching Programme (ECP) of CBI the Netherlands? Select all that apply.

- 1: Yes, I was personally in contact with CBI or CBI consultant
- 2: Yes, I personally participated in the training programme in Rotterdam
- 3: No, I was not personally involved in cooperating with CBI but I'm rather well aware of the effects on our enterprise
- 4: No, I was not personally involved in cooperating with CBI and I can not provide feedback on the effects on our enterprise
- 5: No answer

Q2B

If Q2A is 4 or Q2A is 5

Please write down the name of a colleague who was personally involved in the CBI support programme.

- Name colleague involved in CBI activities: ...
- E-mail address of that colleague (please check carefully): ...

This questionnaire will be closed and we will invite that colleague to provide feedback. Thank you very much for your kind cooperation.

Q3

In which year did your enterprise start exporting?

Please enter year ...

Q4

Is it in your opinion easy or difficult to get admitted to the Export Coaching Programme of CBI?

- 1: Very difficult
- 2: Difficult
- 3: Average
- 4: Easy
- 5: Very easy
- 6: Don't know/no answer

Q5

Once admitted to the Export Coaching Programme of CBI, was it easy to contact the sector expert, the CBI consultant, assigned to your enterprise?

- 1: Very difficult
- 2: Difficult
- 3: Average
- 4: Easy
- 5: Very easy
- 6: Don't know/no answer

Q6

In the next question we will ask about the export turnover of your enterprise. Please indicate whether you prefer to answer in US dollar (\$) or Euro (€).

- 1: Amounts specified in US Dollar
- 2: Amounts specified in Euro

Q7

Please give an estimate of the total annual export turnover of your enterprise in the fiscal year 2006 and in the fiscal year 2011 (i.e. at the start and at the end of your participation in the CBI Export Coaching Programme).

Please write figures as whole numbers, i.e. do not use spaces, commas, or decimal points. Example: write 150000 (for one hundred fifty thousand) or 3000000 (for 3 million).

If not exporting to that region, just write zero.

- Total annual exports of your enterprise in 2006
- Of which to European markets (EU + EFTA)
- Total annual exports of your enterprise in 2011
- Of which to European markets (EU + EFTA)

Q8A

If total annual export in 2011 is larger than total annual export in 2006

To which extent do you attribute the increase in export turnover to the support received from CBI?

Extent to which increase in overall export is attributed to support from CBI.

- 1: Not (0%)
- 2: Just a bit (1 - 30%)
- 3: Considerably (31 - 60%)
- 4: To a large extent (61 - 90%)
- 5: (Almost) entirely (> 90%)
- 6: Don't know/no answer

Q8B

If export to EU/EFTA in 2011 is larger than export to EU/EFTA in 2006

To which extent do you attribute the increase in export turnover to the support received from CBI?

Extent to which increase in export to EU / EFTA is attributed to support from CBI.

- 1: Not (0%)
- 2: Just a bit (1 - 30%)
- 3: Considerably (31 - 60%)
- 4: To a large extent (61 - 90%)
- 5: (Almost) entirely (> 90%)
- 6: Don't know/no answer

Q9

Has the participation of your enterprise in the Export Coaching Programme resulted in additional jobs in your enterprise?

- 1: No
- 2: Yes, a limited number
- 3: Yes, a considerable number
- 4: Yes, a very large number
- 5: Don't know/no answer

Q10

If Q9 is 2 or Q9 is 3 or Q9 is 4

Can you estimate the number of jobs that can be attributed to the participation of your enterprise in the Export Coaching Programme, i.e. the number of additional jobs since 2006?

Q11

To which of the following regions did your enterprise export in 2006 and in 2011 (i.e. at the start and at the end of your participation in the CBI Export Coaching Programme)?

Tick all that apply.

- ☐ Australia/New Zealand (incl. Oceania, i.e. islands in the Pacific Ocean, i.e. Melanesia, Micronesia and Polynesia)
- ☐ Japan
- ☐ China (incl. Hong Kong and Macau)
- ☐ Other Asia: (Afghanistan, Armenia, Azerbaijan, Bangladesh, Bhutan, Brunei, Cambodia, Georgia, India, Indonesia, Iran, Kazakhstan, Kyrgyzstan, Laos, Malaysia, Maldives, Mongolia, Myanmar, Nepal, North Korea, Pakistan, Philippines, Singapore, South Korea, Sri Lanka, Tajikistan, Taiwan, Thailand, East Timor, Turkmenistan, Uzbekistan and Vietnam)
- ☐ Middle East: (Bahrain, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Palestine Territories, Qatar, Saudi Arabia, Syria, Turkey, United Arab Emirates (UAE) and Yemen)

- ☐ Africa: (Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Republic of the Congo (Congo Brazzaville), Congo Democratic Republic (Zaire), Cote d'Ivoire, Djibouti, Egypt, Eritrea, Ethiopia, Equatorial Guinea, Gabon, Gambia, Ghana, Guinea, Guinea Bissau, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Senegal, Sierra Leone, Somalia, South Africa, Sudan, South-Sudan, Swaziland, Tanzania, Togo, Tunisia, Uganda, Western Sahara, Zambia and Zimbabwe)
- ☐ North America: (Canada and US)
- ☐ Middle & South America (Central: Belize, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua and Panamá. Caribbean Islands: Bahamas, Barbados, Cuba, Dominican rep., Haiti, Jamaica, Puerto, Trinidad & Tobago, Virgin Islands. South: Argentina, Bolivia, Brazil, Chilli, Colombia, Ecuador, French Guyana, Guyana, Paraguay, Peru, Suriname, Uruguay and Venezuela)
- ☐ Russia
- ☐ European Union and/or EFTA: (EU-27: Austria, Belgium, Bulgaria, Cyprus, Czech Rep., Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and UK.
Or EFTA: Iceland, Norway, Liechtenstein and Switzerland)
- ☐ Other countries in Western Europe: (Albania, Bosnia and Herzegovina, Croatia, Kosovo, Macedonia (FYROM), Montenegro, Serbia, Belarus, Moldova and Ukraine)

Q12

If Q10_1 is YES or Q10_2 is YES

Please indicate to which of the 27 Member States of the European Union and 4 EFTA countries you exported in 2006 and in 2011 (i.e. at the start and at the end of your participation in the CBI Export Coaching Programme)?

Tick all that apply (on line two columns shown)

EU	☐ France	☐ Malta	☐ Spain
☐ Austria	☐ Germany	☐ Netherlands	
☐ Belgium	☐ Greece	☐ Poland	EFTA
☐ Bulgaria	☐ Hungary	☐ Portugal	☐ Norway
☐ Cyprus	☐ Ireland	☐ Romania	☐ Iceland
☐ Czech Republic	☐ Italy	☐ Slovakia	☐ Liechtenstein
☐ Denmark	☐ Latvia	☐ Slovenia	☐ Switzerland
☐ Estonia	☐ Lithuania	☐ Sweden	
☐ Finland	☐ Luxembourg	☐ United Kingdom	

Q13

Does your enterprise have an export marketing plan?

- 1: Yes
- 2: No
- 3: Don't know/no answer

Q14

If Q13 is 1

Is this Export Marketing Plan (already) implemented in your enterprise?

- 1: Yes fully
- 2: Yes partly
- 3: No
- 4: Don't know/no answer

Q15

If Q13 is 1

Has this Export Marketing Plan been developed because of your participation in the Export Coaching Programme of CBI?

- 1: Yes fully
- 2: The Export Coaching Programme contributed a lot
- 3: The Export Coaching Programme contributed somewhat
- 4: No
- 5: Don't know/no answer

Q16

Did you exhibit at a trade fair in Europe in the framework of the CBI Export Coaching Programme?

(If yes how many times.)

Q17

Please indicate to which extent participating in the Export Coaching Programme of CBI contributed to each of the following items.

"The quality of your product and/or the processes within your enterprise"

"Obtaining certification for your products and/or services"

"Quality management system within your enterprise"

"Your Research and Development (R&D) activities"

"The skills and knowledge with regard to export marketing & management in general"

"Verifying the export intentions (export plans) of your enterprises"

"General orientation on European markets"

"Preparing for entry on European markets"

"Knowledge of particular characteristics of and trends in the European markets"

"Identifying EU regulations relevant for your product specifications"

"Identifying specific market opportunities in Europe"

"Finding importers in Europe"

"Finding agents and distributors in Europe"

"Logistics operations and capabilities"

- 1: None
- 2: A bit
- 3: Much
- 4: Don't know/no answer

Q18

Please indicate if your enterprise has used the following specific elements of the Export Coaching Programme (ECP) of CBI.

Tick all that apply.

"Initial visit of CBI Consultant to your company at the start of the programme to do export audit"

"During initial visit of CBI consultant, analyse strong and weak points of your enterprise and provide technical support"

"Action Plan developed after initial visit to be implemented by your enterprise"

"Long-distance assistance and coaching from CBI consultant"

"Second visit by CBI consultant to your enterprise for Technical Assistance"

"Export training Programme in the Netherlands (EXPRO): export marketing, management, etc."

"Exhibit at trade fair in Europe; collective CBI stand or supported by CBI"

"Exhibit at trade fair in Europe for 2nd and/or 3rd time supported by CBI"

"After participating as exhibitor in trade fair receive assistance from CBI to solidify and expand business contacts made at the trade fair"

"Accessing the website of CBI, export market information"

"Matchmaking activities carried out by CBI (B2B)"

- 1: Know it does exist, but did not use
- 2: Know what it could mean to our enterprise, but did not use
- 3: Have used it (participated)
- 4: Don't know anything about it
- 5: No answer

Q19

Please indicate how satisfied your enterprise is with regard to specific elements of the Export Coaching Programme (ECP) of CBI.

Tick all that apply.

"Initial visit of CBI Consultant to your company at the start of the programme to do export audit"

"During initial visit of CBI consultant, look into strong and weak points of your enterprise and provide technical support"

"Action Plan developed after initial visit to be implemented by your enterprise"

"Long-distance assistance and coaching from CBI consultant"

"Second visit by CBI consultant to your enterprise for Technical Assistance"

"Export training Programme in the Netherlands (EXPRO): export marketing, management, etc."

"Exhibit at trade fair in Europe; collective CBI stand or supported by CBI"

"Exhibit at trade fair in Europe for 2nd and/or 3rd time supported by CBI"

"After participating as exhibitor in trade fair receive assistance from CBI to solidify and expand business contacts made at the trade fair"

"Accessing the website of CBI, export market information"

"Matchmaking activities carried out by CBI (B2B)"

- 1: Very satisfied
- 2: Somewhat satisfied
- 3: Not satisfied
- 4: Don't know/no answer

Q20

Please indicate the importance of the various elements of the Export Coaching Programme (ECP) of CBI for the export performance of your enterprise.

Tick all that apply.

"Initial visit of CBI consultant to your company at the start of the programme to do export audit"

"During initial visit of CBI consultant, look into strong and weak points of your enterprise and provide technical support"

"Action Plan developed after initial visit to be implemented by your enterprise"

"Long-distance assistance and coaching from CBI consultant"

"Second visit by CBI consultant to your enterprise for Technical Assistance"

"Export training Programme in the Netherlands (EXPRO): export marketing, management, etc."

"Exhibit at trade fair in Europe; collective CBI stand or supported by CBI"

"Exhibit at trade fair in Europe for 2nd and/or 3rd time supported by CBI"

"After participating as exhibitor in trade fair receive assistance from CBI to solify and expand business contacts made at the trade fair"

"Accessing the website of CBI, export market information"

"Matchmaking activities carried out by CBI (B2B)"

- 1: Very important
- 2: Somewhat important
- 3: Not important
- 4: Don't know/no answer

Q21

Please indicate the importance of the total support received through the Export Coaching Programme (ECP) of CBI for the export performance of your enterprise.

Considering all CBI services together, the entire package has been:

- 1: Very important
- 2: Somewhat important
- 3: Not important
- 4: Don't know/no answer

Q22

Considering all activities of the Export Coaching Programme (ECP), can you describe the overall effect of the participation of your enterprise on its export activities on European markets?

Tick all that apply.

- 1: No immediate effect (export to Europe would have taken place with or without this support)
- 2: We would not have started export to Europe without this support
- 3: We started export to Europe earlier because of this support
- 4: We have more export to Europe because of this support
- 5: Other effect, please specify:
- 6: Don't know/no answer

Q23A

Considering all activities of the Export Coaching Programme (ECP), can you indicate if your enterprise invested in the following items regarding export capacity, during your participation in the CBI Export Coaching Programme?

- fees for technical assistance
- purchase of capital goods
- production revisions
- hiring expertise
- fees for third party audit/certification
- external training of staff
- travel expenses to visit/exhibit at fairs and/or to visit importers
- exhibition costs
- product marketing tools
- other types of investments in export capacity: ...

- 1: None
 2: A bit
 3: Much
 4: Don't know/no answer

Q23B

If Q23A_10 is 2 or Q23A_10 is 3

Could you give an indication of the costs for your company involved in investing in export capacity during your participation in the CBI Export Coaching Programme?

1. \$0 to \$5,000
2. \$5,000 to \$10,000
3. \$10,000 to \$25,000
4. more than \$25,000

Q24

Please mention the three most positive aspects of the CBI Export Coaching Programme (for example with regard to subject matter, actual activities, structure of the programme, communication, etc.).

Q25

Do you have any suggestions for further improvements of the CBI Export Coaching Programme?
 (E.g. contents, structure, communication.)

Q26

We would very much appreciate to learn to which extent you agree with a number of statements.

Because of participating in the Export Coaching Programme of CBI ...

"... not only exports were affected, also turnover as a whole has increased"

"... there has been a positive effect on the quality of our products"

"... the technological content of our products increased"

"... we now have more product diversification"

"... our position in the home market also improved, e.g. better reputation, more sales, better prices"

"... the investment activity of the company increased, i.e. a growth of asset base"

"... we now have (more) partnerships with foreign companies"

"... the level of our staff has increase: higher skill level of (new) employees and higher wages are paid"

1: Fully disagree

2: Disagree

3: Neutral

4: Agree

5: Fully agree

6: Do not know/no answer

Q27

Finally, we would very much appreciate to learn to which extent you agree with the following statements.

Because of participating in the Export Coaching Programme of CBI ...

"... our company is aware that CSR (corporate social responsibility) is an important issue in its activities"

"... our company has improved its performance on human rights"

"... our company has improved its performance on labour standards"

"... our company has improved its performance on environmental issues"

"... our company has improved its performance on fair trade issues"

1: Fully disagree

2: Disagree

3: Neutral

4: Agree

5: Fully agree

6: Do not know/no answer

Q28

Please indicate whether you would like to receive a summary of the results of this survey.

Final text screen

This is your last chance to correct your answers. If you are satisfied with your answers you can end this survey by clicking the 'Next' button. If not, you can go back by using the 'Back' button.

If you have any remarks or additional information, we would very much appreciate if you send an e-mail to Mrs. Christi Veldhuis-Van Essen at Panteia in the Netherlands: c.veldhuis@eim.panteia.nl. This information will also be treated confidentially.

This is the end of the questionnaire. We thank you kindly for your cooperation. The answers have successfully been sent and received.

ANNEX V Suggestions for improvements: Full list

- More contacts with potential buyers
- Follow up for example a refreshment course
- Criteria for selection should be improved
- More activity based training
- After the 3 times participation with CBI in trade shows, it would be interesting to still be able to participate in CBI booth paying 100% of the cost
- Let it be outside of Netherlands
- Longer participation by the consultant (on own costs)
- For those who are already exporting to Europe prior to the programme, consultants assigned to these companies must be willing to closely work on product development using existing materials and skills in the company
- Second exhibit could be more financially supported
- B2B matching with the CBI database can lead to direct marketing for all participants
- Constant follow up
- Suggestions and help in dealing with the market crisis
- Work towards growing local and regional markets
- More in-depth assistance on specific product development
- The program is perfect, more attention could be given to letting the participants to absorb the learning points through activities
- The payment for the trade fair participation is very high to small producers
- To have an opportunity to continue learning
- More contacts with suppliers
- Arranging an in house training in a European organic company for at least one month
- Include maybe consultants who participated in the program in the past so that practical experience is shared with new participants
- Follow up workshops
- Would be interesting to develop more B2B relations
- More visits to different business groups
- More b2b meetings
- The programme must adapt to the times when European economies are down, export sales to Europe drop (or stopped with many importers). What are the necessary remedial actions for this?
- Hire coaches from third world say Indian or African origins
- Some time with other CBI consultants
- More help with contact details and arranging meetings with buyers and importers
- Financial support
- Promote products with European importers
- Capacity building on different levels in the company
- More effort to get actual buyers
- Help the participant to correct their mistakes, which they may not realized
- The numbers of the coaching days are too small to the producer/trainee
- Updating participants by email on recent developments in EU trade laws
- Maximum length of the Expro should be 5 days
- Increased B2B meetings
- Add some teachers from Eastern Europe
- Longer participation in trade fairs and other means to meet prospective clients

- Product research and development is key to sales. Focus on this. Hire experts on this.
- More direct interaction with end consumer: maybe selecting one for each exporter and giving in depth interaction over a year
- Do not exclude India from your list, lot of people can still benefit and look for smaller organisation who have turnover less than 150,000 Euros as these are the people who need the support most but as in the past the case has been well established
- Help in the understanding of new trends
- Access to financing
- More practical input than theoretical ones
- Take 3 times exhibitions to learn the whole package.
- Need of getting the certificate/accreditation to prove participation of the trainee

ANNEX VI Summary of three start documents ECPs

		A1035 Outerwear Macedonia	A1037 Food Ingredients	A1040 Home decoration, Accessories & Gifts
1	Dated	April 2006	December 2005	June 2006
	Period	2006-2011	2006-2011	2006-2011
	Objective: Selected Enterprises from developing countries are capable to access new EU/EFTA-markets for selected products and/or strengthen their position on existing EU/EFTA-markets	√	√	√
	Target countries	Macedonia	Albania, Bolivia, (Bosnia and Herzegovina), Colombia, Ecuador, Egypt, Ethiopia, Ghana, Guatemala, Honduras, India, Indonesia, Jordan, Kenya, (Macedonia), Nicaragua, Pakistan, Peru, Philippines, (Serbia), (Montenegro), South Africa, Sri Lanka, Tanzania, Tunisia, Uganda, Vietnam, Zambia.	Bangladesh, Bosnia and Herzegovina, Colombia, Ecuador, El Salvador, Ghana, Guatemala, Honduras, India, Indonesia, Kenya, Macedonia, Madagascar, Nicaragua, Peru, Philippines, Senegal, South Africa, Sri Lanka, Tanzania, Uganda, Vietnam
	Budget	€ 1 248 500	€ 1 859 906	€ 2 010 111
	Target	22 enterprises	37 enterprises	40 competent enterprises

		A1035 Outerwear Macedonia	A1037 Food Ingredients	A1040 Home decoration, Accessories & Gifts
	Issues to be covered (themes)	<ul style="list-style-type: none"> - Improved knowledge EU/EFTA markets; - Financial management; - Efficient operations; - Product development; - Matchmaking; - Market Entry Strategy (sales and distribution networks); - Logistics; - Sourcing trims; - Production technology; - Pricing. 	<ul style="list-style-type: none"> - Improved knowledge EU/EFTA markets; - Certification (biological products); - Traceability; - Food safety; - Reliability; - Influence European buyers; - Marketing importers, agents and processing industries. 	<ul style="list-style-type: none"> - Improved knowledge EU/EFTA markets; export marketing & management; - Pricing; - Reliability; - Influence European buyers; - Quality; - Trends; - Product development and export product range.

8	Activities foreseen within ECP	A1035 Outerwear Macedonia (nr. of items)	A1037 Food Ingredients (nr. of items)	A1040 Home decoration, Accessories & Gifts (nr. of items)
	- Recruitment enterprises	1	1	1
	- Selection participants	2	2	2
	- Technical assistance missions, export auditing	3	3	3
	- Final selection	4	4	4
	- Develop action plans and distance coaching programme with use of local consultants	5	5	5
	- EXPRO seminar	6	6	6
	- Matchmaking / B2B	7	7	7
	- Attend a trade fair in Europe	8	8	8
	- Consolidation of contacts from trade fair (Coaching from a distance)	9	9	9
	- Attend another trade fair in Europe (maximum 3)	10	10	10
	- Consolidation of contacts	11	11	11
	- (Evaluation)			

		A1035 Outerwear Macedonia	A1037 Food Ingredients	A1040 Home decoration, Acces- sories & Gifts
9	Impact (project purpose), major indicators	<ul style="list-style-type: none"> – 16 out of 22 enterprises have one year after and due to ECP on average € 45 000 export contracts, and 8 out of these 16 enterprises have on average € 75 000 export contracts, of which 60% to EU; – 10 out of 22 enterprises have one year after and due to ECP 2 new export markets, of which 1 in EU. 	<ul style="list-style-type: none"> – 25 out of 37 enterprises have one year after and due to ECP on average € 80 000 export contracts, and 10 out of these 25 enterprises have on average € 150 000 export contracts, of which 50% to EU/EFTA; – 15 out of 37 enterprises have one year after and due to ECP 2 new export markets, of which 1 in EU/EFTA. 	<ul style="list-style-type: none"> – 29 out of 40 enterprises have one year after and due to ECP on average € 175 000 export contracts, and 17 out of these 29 enterprises have on average € 250 000 export contracts, of which 60% to EU/EFTA; – 17 out of 40 enterprises have one year after and due to ECP on average 2 new export markets, of which 1 in EU/EFTA.
10	Effect, major indicators	16 enterprises have (more) export contracts to EU/EFTA	25 enterprises have (more) export contracts to EU/EFTA	29 enterprises have (more) export contracts to EU/EFTA

		A1035 Outerwear Macedonia	A1037 Food Ingredients	A1040 Home decoration, Accessories & Gifts
11	Results, major indicators	<ul style="list-style-type: none"> – 22 competent enterprises; – Selected enterprises have sufficient knowledge of export marketing and management and score positive marks in the various clusters of the CBI Export Audit; – Enterprises participated in activities; – Enterprises have prepared a Export Marketing Plan/ Market Entry Strategy; – Enterprises indicate that export skills and knowledge of EU market is increased at end of EXPRO; – As a result of participation in trade fairs, enterprises have on average 8 business contacts, of which 60% in EU/EFTA. 	<ul style="list-style-type: none"> – 37 competent enterprises; – Selected enterprises have sufficient knowledge of EU market, export marketing and management; – Products and processes comply with requirements of EU markets; – Selected enterprises have sufficient relevant contacts in EU market and have acquired skills and experience while promoting their products; – Selected enterprises score positive marks in the various clusters of the CBI Export Audit; – Selected enterprises indicate that skills and knowledge have increased at end of EXPRO; – Enterprises have prepared a Export Marketing Plan/ Market Entry Strategy; – As a result of participation in trade fairs, enterprises have on average 10 business contacts, of which 60% in EU/EFTA. 	<ul style="list-style-type: none"> – 40 competent enterprises; – Selected enterprises have sufficient knowledge of EU market, export marketing and management; – Products and processes comply with requirements of EU markets; – Selected enterprises have sufficient relevant contacts in EU market and have acquired skills and experience while promoting their products; – Selected enterprises score positive marks in the various clusters of the CBI Export Audit; – Selected enterprises indicate that skills and knowledge have increased at end of EXPRO; – Enterprises have prepared a Export Marketing Plan/ Market Entry Strategy; – As a result of participation in trade fairs, enterprises have on average 10 business contacts, of which 60% in EU/EFTA.

This is a publication of
Netherlands Enterprise Agency
Prinses Beatrixlaan 2
PO Box 93144 | 2509 AC The Hague
T +31 (0) 88 042 42 42
E klantcontact@rvo.nl
www.rvo.nl

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