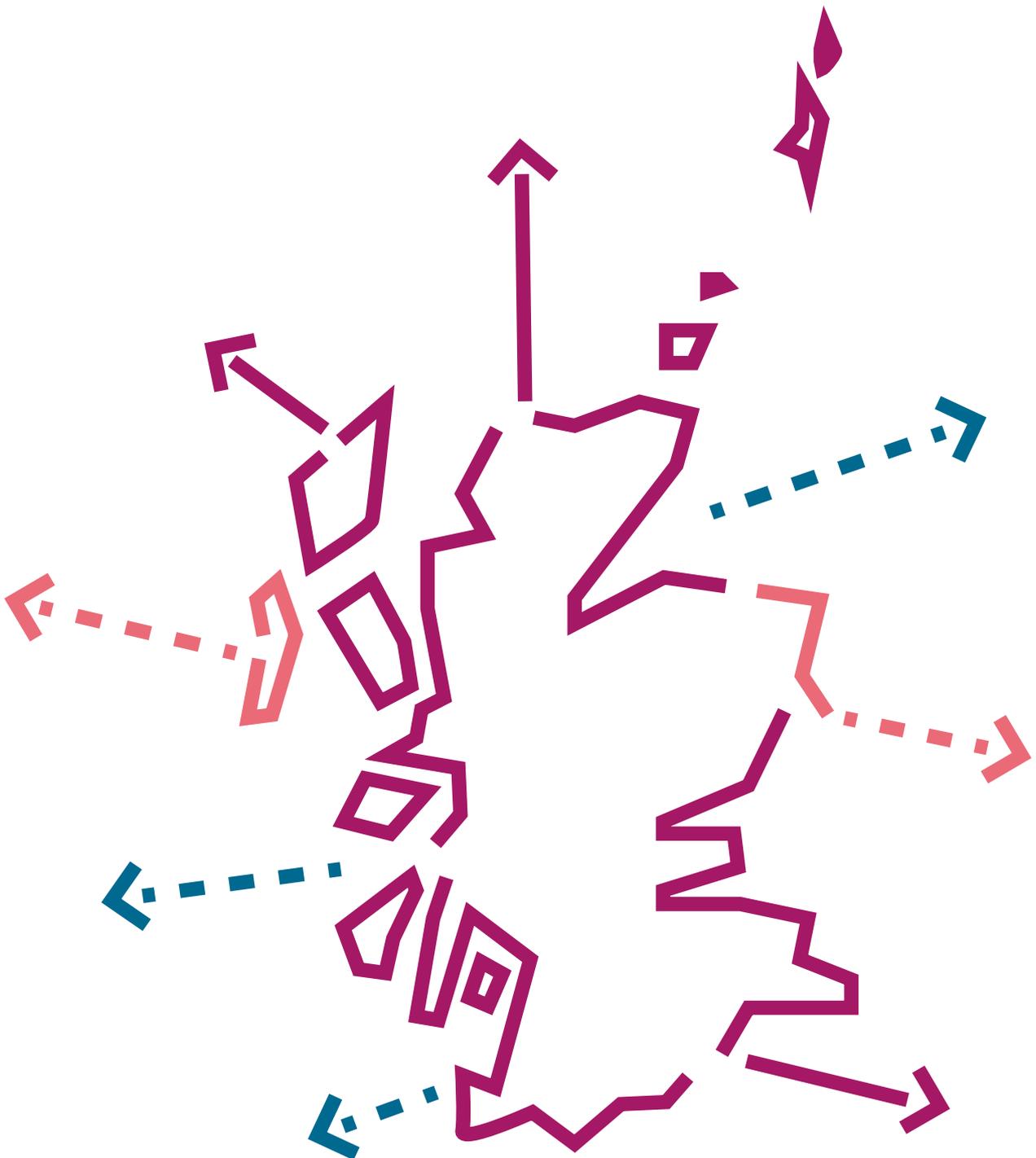


A Trading Nation - Progress Review 2022



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1. Ministerial foreword



We are now three years into delivering our 10-year Export Growth Strategy, **A Trading Nation** (ATN), which sets our strategic direction for growing Scotland's exports: the priority countries we want to focus on; the priority sectors that offer the biggest opportunity; and how we will support businesses to maximise their export growth potential.

As with any long-term strategy, it is important that we continue to assess both progress towards our strategic objectives, and what has changed within the wider environment. To assist us in that assessment, the Scottish Government's **Trade Board** provides the mechanism to bring the voice of business into the heart of that process. Drawing on the views of exporters across various sectors and scale of companies, the Trade Board helps us to assess delivery of ATN to date and the opportunities to grow Scotland's exports in the future. In 2022 we refreshed the membership of the Board.

Since ATN first launched, there have been unprecedented challenges in the economy. The Covid-19 pandemic and Scotland's forced exit from the European Union (EU) have significantly impacted Scotland's trading environment. In spite of these challenges, recent data highlights that Scotland is performing well compared to the rest of the UK in terms of exports. In fact, Scotland is the only part of the UK with a positive trade balance in goods with the Rest of the World, exporting £2.2bn more goods than it imported in 2021. This is critical to Scotland's economic strength both now and in the future, and underpins the significance of our work set out in ATN to support Scotland's export performance. I would like to take this opportunity to thank all of Team Scotland who have worked hard to deliver these results.

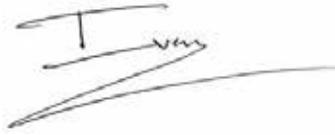
Our strategy remains firmly focused on the recovery and growth of Scotland's exports through values-based trade, and our trading relationships with the EU remain central both now and in Scotland's future, with 9 out of our top 15 markets identified in ATN being in the EU.

Since publishing ATN, we have built on our ambitions for the internationalisation of Scotland's economy through our Vision for Trade, Inward Investment Plan and Global Capital Investment Plan. These strategies seek to set out the strategic direction for how Scotland can maximise trade and investment opportunities to develop a Scottish economy with inclusivity and wellbeing at its centre, and support our climate change targets.

In March 2022 we published our National Strategy for Economic Transformation (NSET) which reaffirmed the Government's commitment to export growth through delivering the actions within ATN. As we move into this next phase of ATN delivery there is much more to be done and we want to create the right conditions and provide the right support to do that.

We will continue to take an evidence-based approach on what works, working with our agencies and businesses to target support on the markets, sectors and types of export support that will best drive Scotland's export growth. With our partnership approach to the delivery of ATN, we will continue to provide business with access to the type of expert advice and support that they tell us is essential to for them to compete in international markets. It is businesses, with the support of Government, that will deliver the export growth that will really make a difference to the Scottish economy.

We are clear about the kind of country that we want Scotland to be, with strong principles to guide how we do business around the world so that people, businesses and other Governments know who we are and what we represent as a nation. We want Scotland to be a successful trading nation, but we want to be known as much for how we trade as for what we trade – our economy, our people and the planet require it.

A handwritten signature in black ink, appearing to read 'Ivan McKee', with a long horizontal stroke extending to the right.

Ivan McKee MSP
Minister for Trade, Investment and Innovation

2. Scotland's export performance since A Trading Nation was published

ATN set out an ambitious target to increase international exports from 20% to 25% of GDP over the next 10 years. Achieving this should increase Scotland's GDP by approximately £3.5 billion and help support 17,500 jobs with an increased tax take of around £500m per annum.

Since publishing ATN in 2019, there have been significant shocks to Scotland's trading environment. From early 2020, the Covid-19 pandemic resulted in many countries implementing rigorous lockdowns and other health measures which disrupted international trade across the world. This led to a 21% decrease (down £7.2 billion) in Scotland's goods exports in 2020¹.

More recently, exporting businesses have also experienced significant challenges following the end of the EU transition period in January 2021 and the transition to the new trade agreement between the UK and EU since then. Business survey data from the Office of National Statistics (ONS) indicates trading conditions remain challenging for businesses in Scotland, with almost a quarter (23%) of exporting businesses exporting less in June 2022 than in June 2021. Businesses continue to report changes in transportation costs, additional paperwork and custom duties or levies as the main challenges they face when trying to export².

Despite this changing landscape, Scotland's international exports remain at around 21% of GDP. Furthermore, the latest trade data shows Scottish export performance improving and outperforming the rest of the UK. Scotland's goods exports in the year ending March 2022, excluding Oil & Gas, increased by 5.7% compared to the year ending March 2020 (compared to a reduction of 2.9% in the UK over the same period)¹. Scotland is the only part of the UK with a positive trade balance in goods with the Rest of the World, exporting £2.2bn more goods than it imported in 2021.³

1 [UK regional trade in goods statistics: first quarter 2022 - UK Trade Info](#)

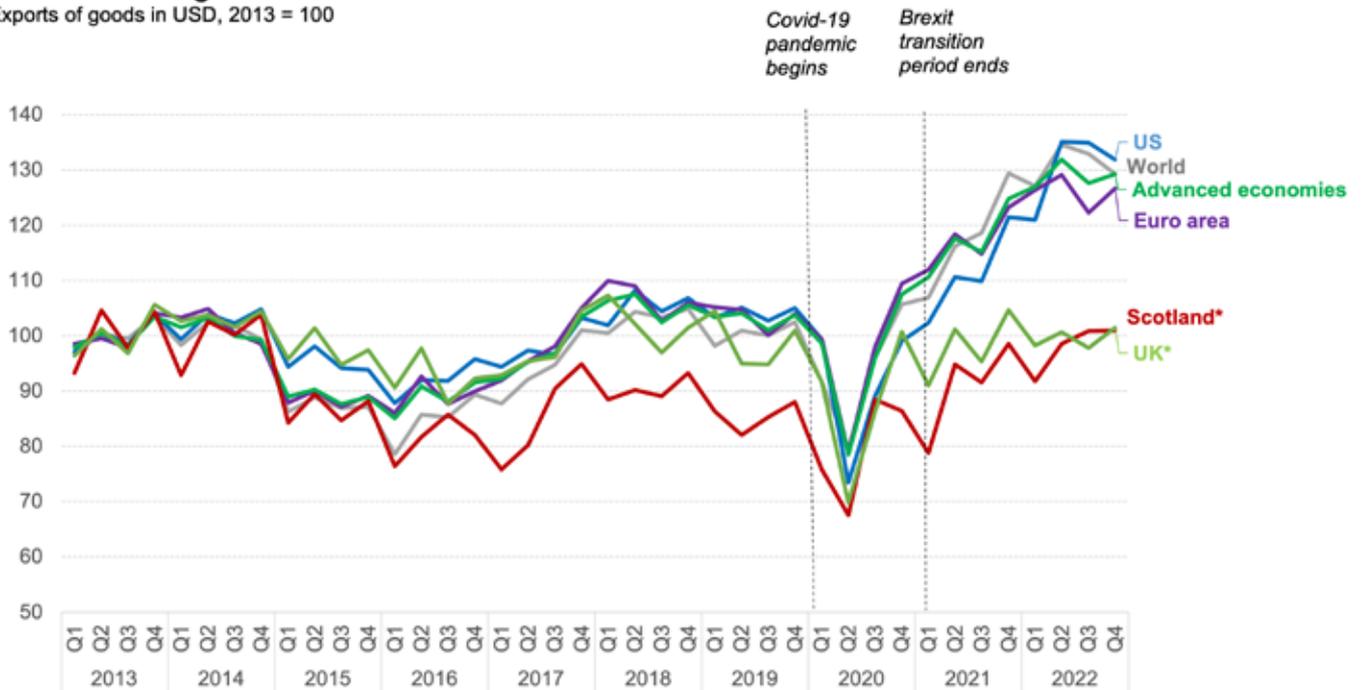
2 [BICS weighted Scotland estimates: data to wave 61 - gov.scot \(www.gov.scot\)](#)

3 [UK regional trade in goods statistics: third quarter 2021 - GOV.UK \(www.gov.uk\)](#)

Figure 1 shows Scotland's recent export performance over time compared to the rest of UK and other economies⁴:

UK misses on a global trade rebound

Exports of goods in USD, 2013 = 100



Sources: Other country data is sourced from World Trade Organisation International Merchandise Trade Statistics. UK and Scottish data are sourced from Regional Trade Statistics published by HMRC. Scottish/UK data excludes exports of mineral fuels to provide a meaningful comparison between Scotland and the UK as a whole. Note that exports of mineral fuels add volatility to Scotland's export figures.

Scotland's international exports will require significant annual growth over the next eight years to achieve the 25% target and this review sets out the focus for the next phase of delivery.

⁴ [Regional trade data table - UK Trade Info. WTO Stats](#)

3. ATN delivery so far

ATN recognises that exports could, and should, contribute more to the Scottish Government’s goal of sustainable, inclusive economic growth. ATN was based on analysis, was co-produced, deliberately addressed strategic choices and had a strong focus on delivery.

In developing ATN we conducted one of the most comprehensive reviews of Scottish export data in over 20 years, in order to set the direction on how best to grow Scotland’s exports by focusing our policies and resources on the priority markets (where), sectors (what) and businesses (who) to best deliver that growth (how).

Our research indicates that we could drive up the value of exports more by refocusing our efforts to: support key exporters who generate 80% of our export value; undertake concentrated engagement with our top 26 export markets which offer 80% of our strongest export growth opportunities; and focus on key sectoral strengths that account for over 80% of our export value. Our analysis shows that the country and sector focus for the next phase of delivery remains consistent with what was previously set out in **ATN**. The USA and Europe remain our top exporting destinations and our export sectoral strengths are: food & drink; engineering services & manufacturing; life & chemical sciences; technology, digital & media; financial & business services and energy.

We have worked in partnership with our enterprise agencies and businesses to oversee the delivery of ATN and have organised this across six themes, comprising 23 projects and 107 actions:

Exporting Infrastructure	Smart Segmented Export Development	Trade Support	International Networking	Showcasing Scotland	Supporting Exporters in Market
Export Finance	Global By Birth	Data and M&E	Global Scots	Dubai Expo Legacy	Leveraging DIT
Leveraging London	Potential Performers	Digital	Links to Market	Brand Scotland	SDI in Market
Transport Links	Sleeping Giants	E-Commerce	Trade Envoys	Ministerial Visits and Events	
	Solid Performers	Sector Export Plans		Overseas Missions & Exhibitions	
	Top Exporters	Skills for Exporting			
	FM Export Challenge				

Figure 2 shows the ATN actions organised across six themes and 23 projects.

Understanding that a strategy is only of value if it delivers results, Team Scotland has had a relentless focus on delivery of ATN over the past 3 years with monthly Ministerial reviews. Here are the results of that work.

3.1 Exporting Infrastructure: making better use of our assets to support exporters

In ATN we committed to working with industry stakeholders and agency partners, Transport Scotland and wider policy colleagues to ensure that our infrastructure supports our ability to trade internationally and complement our export growth ambitions.

3.1.1 Leveraging London

We are supporting our exporters to make connections in critical domestic markets, via our 'Scotland House' office and wider networks in London to create strong footholds for further internationalisation. This includes:

- 164 events delivered in partnership with the Scottish Business Network (SBN) and our Scotland House office, through which we connected Scottish companies with exporting opportunities in London, increasing the membership of SBN and opening new international opportunities for Scotland.

3.1.2 Transport Links

Physical connectivity is a key part of Scotland's exporting infrastructure. We continue to:

- Work with a range of external stakeholders and Transport Scotland to assess data on Scotland's Trade flows across the various modes of transport and commodity type with a view to maximising opportunities for Scottish businesses to access international market, in particular through direct shipping routes.
- Align ATN with ongoing policy development under both NSET and the Strategic Transport Projects Review 2 (STPR2) to ensure strategic investments enable easier routes to market.

3.1.3 Export Finance

The ability to finance export plans and secure future sales with confidence is critical for businesses to export. While continuing to promote support available across the UK via UK Export Finance (UKEF) we have invested additional resources by embedding a Trade Finance Specialist in Scottish Development International (SDI) to:

- Ensure more exporters have awareness of and access to available trade finance and insurance options, including those via UKEF.
- Provide support via one-to-one sessions and tailored workshops, masterclasses and webinars alongside SDI's International Trade Specialists and the private sector to signpost the full range of finance support on offer.

We also continue to monitor developments on UKEF support via Department for International Trade's (DIT) Refreshed Export Strategy (published November 2021) and how they can support Scottish companies.

3.2 Smart Segmented Export Development: tailoring our support offer to exporters

3.2.1 Smart Segmentation Delivery

In ATN we committed to tailoring our export support through Smart Segmentation – to ensure specialist trade support was focused on those Scottish companies which will make the most significant contribution towards Scotland’s export growth. Our segmented model includes the following business cohorts:

- **Top Performers** – Global businesses that require “economic diplomacy” support in the form of political intelligence, introductions and advice to exploit opportunities in new markets to further embed their supply chains in Scotland or to consider further investment.
- **Solid performers** – Predominately SMEs. They may have limited internal resources and are likely to need a blend of intensive export support services and, where needed, economic diplomacy interventions.
- **Sleeping giants** – Businesses with a strong performance of selling into the Scottish or rUK markets, in sectors where their products are likely to be in demand internationally. They need support services to grow their business, innovate their products and when a strong opportunity arises, access to export support.
- **Global by birth** – Small businesses in sectors which, by their nature, are global in outlook, for example, in the technology or creative sectors. These businesses need to be treated differently as they are often internationally focused from the outset.
- **Potential performers** – the majority of businesses that are already exporting, or aspire to, but typically at a smaller scale. For these businesses, existing support services are in place supplemented by export support services (most likely delivered by partners such as the Scottish Chambers of Commerce), and delivered in a “one to many” format, such as workshops and digital services.



Figure 3 illustrates ATN’s segmentation and the support provided to the different business cohorts depending on their export profile within the model.

Our segmentation approach ensures companies get the right support when they require it, with support being focused, targeted, robust and data driven. Through this approach with our enterprise agencies and other delivery partners we have:

- Delivered an additional £3bn of planned international sales (over a three-year period) through over 1300 company projects
- Supported Scottish exporters to enter over 350 markets new to them from May 2019 to March 2022, with over 250 new products and services leaving Scotland for these markets, with a focus on the Top 15 priority markets as per ATN
- Provided businesses with research and insights on international markets, with access to new sector and market opportunities
- Facilitated introductions to key overseas buyers and export opportunities via virtual missions and international market events
- Delivered trade finance advice and guidance and the latest funding options for our exporters, alongside the latest market advice from our in-market sector specialists and our GlobalScots in over 60 markets globally
- Added 800 of our top exporters to the GlobalScot digital platform giving them easier access to our growing network of over 1,100 GlobalScots across over 60 markets
- Delivered wider business support from Scottish Enterprise including innovation and investment support helping to ensure exporters can adapt products and services for international markets and have the funding to successfully scale.

As markets open this will increase global demand for products and services that Scotland has considerable expertise in, such as low carbon and high-tech products. We will continue to deliver the segmented approach through ATN to ensure Scottish exporters have access to future trade opportunities, supporting them in taking advantage of additional routes to overseas markets to increase export growth and in turn drive increases in Scotland's GDP.

3.2.2. First Minister (FM) Export Challenge

The FM Export Challenge Programme supports companies within the segmented model to increase their exports through further internationalisation and scale-up activities via a wide range of specialist support, including digital marketing, e-commerce, translation services, mentoring, trade fairs, social media and technical/legal consultancy. Through this programme we have:

- Supported over 190 businesses as of the end of March 2022. This is in excess of the initial 150 target
- Aligned the programme to our priority sectors in ATN, supporting businesses in the food & drink, consumer industries, technology and science and energy and low-carbon sectors
- Delivered a forecast of export sales (£195m), with 451 living wage jobs created (252 expansions and 199 safeguarded).

Case Study 1 - FM Export Challenge

The Tartan Blanket Co started in 2014. They specialise in woven blankets and scarves using recycled woollen items and sustainably-farmed lambswool and cashmere, and currently sell into 70 countries. Their commitment to growing the business has been demonstrated with their successes to date with a 30% year on year (YoY) growth (and forecasting 45% by the end of this financial year). In addition, they have invested in a new warehouse premises in Edinburgh in 2021 to cater for this growth. The USA is a priority market for the company and the need to develop their digital capabilities was highlighted in response to the impact of the global pandemic due to restrictions on travel, attending exhibitions and increased trends with online selling.

With support from SDI via FM Export Challenge, they were able to appoint the expertise of a digital marketing agency to map out their approach to building their online presence in the USA. This project helped the company grow their international visibility on B2B platforms, retail and B2C sites and present new market opportunities. As a result of this support the company expect to see an increase of £1.4m in international sales over the next 3 years.

Direct feedback

“The project was instrumental in the growth of the US market. We were able to reach new audiences and gather strategic customer insights to better serve and grow the US market specifically. As a direct result, we hired and on-boarded a new member to our digital marketing team this month to focus on international growth. SDI have been fantastic at supporting our international growth through our retail, wholesale and corporate channels. From providing guidance and research to sourcing platforms and contacts, we’ve been able to utilise SDI expertise to support our international growth strategy.”

Yvonne Barton, Brand Manager

3.3 Trade Support: our domestic support for exporters

In ATN we committed a range of activities to support our domestic companies to start or continue to export. These varied from plans to help specific sectors to export, to offering e-commerce support to help businesses grow through selling products overseas and online.

3.3.1 Sector Export Plans

We have been developing Sector Export Plans (SEPs) linked to key sectors with high growth potential. These are being co-produced with industry and our agencies to collectively mobilise around both current and future export growth opportunities:

- In March 2022, [An Export Plan for Scotland’s Technology Sector](#) was published. It identifies opportunities to build on strengths in key areas aiming to help the technology sector reach new international markets.
- Work has commenced on the development of a Renewable Energy Sector Export Plan and a Life Sciences Sector Export Plan and both are expected to be published later this year.

Through each SEP we will deliver a set of evidence-based recommendations to assist companies who work in the sector to realise their export ambition that will, in turn, contribute to our overall aim to grow Scotland’s exports from 20% to 25% of GDP by 2029.

3.3.2 eCommerce and Digital

In ATN we committed to supporting e-commerce programmes that would enable Scottish exporters to access new customers through digital platforms. We have:

- Supported over 2000 companies to attend SDI's International eCommerce Programme since its launch in September 2020, including events delivered in partnership with major e-commerce platforms, helping them to reach overseas markets for their products and services.
- Built on this success to develop an E-Commerce Accelerator Programme:
 - The first accelerator (Q4 2021) focused on Consumer Industries businesses looking to sell to the US market.
 - The second (Q1 2022) supported Food & Drink companies looking to recover sales post Brexit and Covid-19.

The [Scottish Enterprise website](#) provides companies with:

- The latest guidance, support and advice from SDI and partners on operating after Brexit.
- A range of self-service export digital tools, guides and resources for new and experienced exporters, helping them to grow their business internationally.

Case Study 2 – International eCommerce

Amy Livingstone and Julie Wilson, two 'mumpreneurs' from Midlothian, have taken their baby business to new heights, despite the unforeseen obstacles of the last two years.

The pair invented and designed the world's first neckerchew – a chewable dribble bib – in 2013, when their own children were babies. Since then, Cheeky Chompers has grown from a small enterprise into an internationally known and loved brand.

In the first five years, the business grew quickly, expanding into 35 different marketplaces with nine different products. Now, the brand has expanded into 49 countries and are stocked in over 1500 stores worldwide and is forecast to achieve a turnover of around £1.8 million by 2023, whilst navigating the challenges of Covid-19 and Brexit.

Case Study Link: [How online selling can help your business expand into new markets – Scottish Enterprise \(scottish-enterprise.com\)](#)

Direct feedback

“Support via Scottish Enterprise helped Scottish baby brand Cheeky Chompers to export worldwide and expand into 49 countries. From its beginnings in Midlothian, to Asia and beyond. The best help Scottish Enterprise has given us has been innovation support around developing new products, ecommerce and market intelligence. To be able to ask questions of the right people, and access financial support, has been invaluable. I'd encourage other companies to contact them and ask for the support that they need.”

Amy Livingstone, Co-founder, Cheeky Chompers

In ATN we recognised the need to boost the skills and knowledge of businesses in marketing, international leadership and sales to enable them to attract customers and in time export more to wider markets.

As such we supported business to access training on exporting, enabling them to take advantage of export opportunities. We have also delivered:

- Wider business support via Highlands and Islands Enterprise and South of Scotland Enterprise, to companies of all sizes, offering expertise, advice, coaching and mentoring to develop entrepreneurial skills, along with events and workshops with a focus on export training that mirrors business need.
- In 2021/22, there was an increase in visits to the exporting content of the Scottish Enterprise [website](#) by 59% on the previous year and also a significant jump in Google UK search rankings (top three) for key export related search terms.
- The [Find Business Support](#) website gives customers an overview of all the support, funding and services offered by our agencies and partners across Scotland, making it easier for businesses to find the information, advice and support they need, when they need it.

3.3.3 Data and Measurement and Evaluation

We committed to evaluating our actions within ATN to ensure that we learn from what's working, what's not and focus our resources on measures that are delivering the strongest results. We have:

- Commissioned robust economic evaluation via a number of independent consultants to appraise our export support to businesses, measuring the value, impact and return on investment of our actions and programmes within ATN. This will be completed and published within 2022/23 and the results will inform decisions on the development of future export support services to businesses.

3.4 Showcasing Scotland: promoting Scotland's strengths

In ATN we committed to showcasing what Scotland has to offer to the world. The following projects detail how we have engaged globally with key stakeholders and at key international events to demonstrate the diversity of skills, innovation and talent that Scotland has.

3.4.1 Ministerial Visits and Events

In ATN, we committed to making the best use of ministerial visit programmes to build relationships in-market with the parent companies of our key Scottish based businesses and promote Scottish capability. We have:

- Organised trade & investment focused ministerial visits, led by Mr McKee, to 14 of the top 15 priority markets since October 2018. Visits to support export growth took place to Switzerland, France, Ireland, Germany, Poland, Italy, Norway, Sweden, Denmark, The Netherlands, China, Belgium, USA, UAE and Spain.
- Ran programmes including: one-to-one engagements and roundtables with potential and existing investors; supported Scottish Trade Missions and Ministerial participation in trade & investment events in-market; and engaged with key local and national foreign government stakeholders and business organisations.
- Refocused the ministerial visits and trade mission programmes to prioritise the markets and sectors that offer Scotland the best trade and investment opportunities.

3.4.2 Digital Ministerial Visits

With the onset of Covid-19 pandemic, where necessary we have moved towards more digitally driven work-streams, including developing a virtual international engagements and events programme.

- During 2020/21, the Minister for Trade showcased our export strengths by participating in 44 internationally facing (virtual) engagements including meetings and events with influential overseas trade audiences, UK Government Trade Commissioners and Ambassadors.
- Further, SDI delivered 101 virtual trade events across SDI's priority sectors to an audience of 4,925.



Figure 4 shows a map of our Trade and Investment Overseas visits, along with the regions where our Trade and Investment Envoys are based.

3.4.3 International Trade Partnership 2

In partnership with the Scottish Chambers of Commerce (the SCC), the International Trade Partnership 2 (ITP2) programme has delivered 71 trade missions of which 88% were delivered and aligned to ATN's top 15 priority destinations.

- The SCC has grown in expertise and capacity, with 15 Chambers of Commerce participating and delivering missions independently.
- As at 31st March 2022, over 700 business participated in Trade Missions, with projected export sales of £12.5 million.
- ITP2 continues to see year-on-year growth in participation, demand for missions and mission delivery.

Case Study 3 – The International Trade Partnership 2

Forth Valley Chamber:

Three Scottish businesses are celebrating landmark export deals facilitated by ITP2 and delivered in conjunction with Tartan Week NYC.

- Courageous Spirits has secured a partnership with PACE wines which will see its brands Glaswegian Gin and King's Inch Single Malt Whisky immediately available in 22 US states. Despite launching just one year ago, Courageous Spirits' export department has already established market partnerships in nine countries, with further expansion in Canada and Europe on the horizon. As a result of this latest deal, it is set to distribute 4,000 nine-litre cases to 22 US-states within a year.
- Angels' Share, a family-owned specialist glass manufacturer, is now looking to upscale its production capacity to meet US demand after securing a deal to supply an initial 2,000 units to The Good Night Group's NYC venues
- Britton Manufacturing Ltd who manufactures sustainable ranges of accessories in Scotland is celebrating a recent collaboration with Highland based Prickly Thistle and The Carnegie Corporation of New York. They are supplying the Carnegie Corporation with bespoke Tartan glasses cases for their prestigious awards ceremony where the Medal of Philanthropy is awarded to distinguished philanthropists. These products are designed with this ethos at their core. All parts, including the thread, woven labels, paper labels and internal padding, are 100% recycled and all wool fibres are Scottish.

Scottish Chambers of Commerce:

Valentine International LLP, agreed a six-figure contract to manage the design and build the first whisky distillery on behalf of the MengTai Group Co, to be based in Orbos. At least two other Scottish whisky equipment companies are in the final stages coming on board the project which is expected to be worth over £3 million. It creates a significant opportunity for Scottish suppliers.

The SCC is confident that more investors could come to Scotland as a result. It is an example of what can be achieved by forging relationships and adding value and confidence between businesses across the globe, and working in partnership with the government.

Case Study Link: [Scots firm to develop whisky distillery in Inner Mongolia](#)

Feedback from businesses participating in ITP2 Trade Missions

“A big thank you for organising the Virtual Trade Mission to Canada. Overall, both the introductions in the lead up and the sessions organised during the mission were very interesting and highly useful. We have now made it through to the second stage of a beer tender for the potential supply of one of our beers to over 100 stores. Tender value – approximately £150,000.

John Hunt, Director, Broughton Ales

“Earlier this week I was in Helsinki visiting three potential clients and other opportunities as a direct result of the Trade Mission you organised to Finland back in February. The value of proposals generated this week is over £100k, this is on top of a small project we did there back in June. So, full marks to you and your team for organising these events. If we land these proposals, I ought to at least take you all out to lunch.”

Robop Limited

“During a time when entering into new markets seems completely impossible due to Covid-19 restrictions, the Virtual Trade Missions to Germany opened a door of opportunity that otherwise would have remained closed at this time. We should never underestimate how fortunate we are as Scottish businesses to receive this investment in time and resources.”

E-Comm Scotland

3.4.4 Brand Scotland

The Brand Scotland’s business pillar has been developing content and collateral to further promote our trade and investment ambitions overseas. Several pieces of new branding collateral and guidance have been developed – including the development of a new Brand Marque which was showcased internationally for the first time at COP26 and Expo 2020 and a Digital Trade toolkit for front line international trade specialists.

Through the business pillar, and under the banner of Think Different Think Scotland, high level digital marketing campaigns have been developed and delivered in key global markets for Scotland to sectors of importance to our values and Scotland’s economy – notably Net Zero, Health and Well Being, Space, Data and Technology. In 2021/22 these campaigns delivered:

- 94 million impressions of our content served to target customers and over 28 million views of our video content viewed by target customers.
- Over 500k social engagements on SDI and Scotland.org social media channels generating 2 million visitor sessions to the Scotland.org website and 378k visitor sessions to the SDI website. This generated an additional 850 enquiries and resulted in more than 50 positive engagements from those enquiries, which are currently being followed through.

3.4.5 EXPO 2020 Dubai

ATN committed to delivering a high profile Scottish presence at [EXPO 2020 Dubai](#). The Scottish programme was a collaborative Team Scotland effort delivering five daytime and three evening events showcasing our innovation, sectoral strengths and global business ambitions in Space, Digital Health & Wellbeing, Net Zero, Tourism, Culture and Food and Drink.

Evaluation of the Scotland at Expo project highlights that the Scottish presence at this event has delivered:

- Contracts worth £8.1m won by Scottish companies in Expo's pre-event procurement, design and build stage and projected revenue forecasts in excess of £89m for Scottish companies as a direct result of their participation.
- Audience figures of up to 1000 attendees both in person and virtually across our Activation events and evening receptions.
- A succession of global media coverage across the six months - 95 media articles; 2.8m online coverage views and an aggregated 'potential' reach of all international coverage of 1.8 bn.

Case Study 4 - EXPO 2020 Dubai

At Expo 2020 in Dubai Scottish expertise in the space, low carbon and digital health sectors were effectively promoted using our Team Scotland approach to demonstrate why Scotland is a world-leading destination, not only for your business and investment, but also for education, culture and tourism.

Scotland's Space Activation event brought top Scottish space companies to showcase their pioneering technologies at the UK Pavilion and Minister McKee launched Scotland's Space Strategy, with further sessions on Scotland's Collaborative Ecosystem, The role of academia in Scotland's Space Ambitions, Sustainable Space and Tartan Space Pitches.

For the Tartan Space Pitches, six companies were invited to participate in Scotland's Space Day (Trade in Space, Craft Prospect, Ecoscene, Skyrora, Prestwick Spaceport & Spelfie). They took advantage of a range of SDI support, including GlobalScot Coaching and SE support to attend, prepare and pitch at the event. These six finalists presented their innovations to an international audience of space stakeholders and investors.

The Space Day attracted an online and in person audience from 51 unique companies, and 13 different countries and was nominated as the "event of the day" across the Expo site. Significant global media coverage was achieved during Space Day with the highlight being CNN & Expo TV's interview with Astroagency founder who used this opportunity to bring further global attention to Scotland's space strategy, industry capabilities and the importance of international collaboration.

Direct Feedback

"The GlobalScot Team were great; they are such an advantage to have on side. Their help to tweak the pitch and confirm how to zero in on the messaging I was trying to put across. The dry run at D-Tec and then the pitching session were invaluable experience. A big thank you to all the team involved in putting it together."

Derek Harris, Ecoscene

3.5 International Networking: maximising the impact of our formal & informal networks

ATN committed to developing the **wider international networks** to support and align with our **Brand Scotland** ambitions, including GlobalScots, Trade Envoys, diaspora and alumni. Since ATN's publication, the following projects have helped develop and strengthen our relationships with the priority markets as outlined in ATN.

3.5.1 Trade and Investment Envoys

Trade and Investment Envoys are a key part of Scotland's international business network. ATN committed to expanding our Trade and Investment Envoys in key markets. We have grown our network from four to 11 Envoys (all of whom are GlobalScots) who are located in Indonesia, UAE, Spain, Singapore, Poland, Scotland (higher education); two in London (capital investment) and three in the USA (East and West Coasts).

3.5.2 GlobalScots

- Consisting of entrepreneurs, business leaders and community figureheads, **GlobalScots** are a vital component of Scotland's international network, supporting the growth ambitions of Scottish companies and helping them access international markets. ATN committed to a revitalisation and significant expansion of the GlobalScots network. We have:
 - Scaled up the network to over 1100 business people in priority markets across the globe, including over 500 in Europe.
 - In July 2020, a revamped GlobalScot digital platform was launched, allowing exporters to connect with GlobalScots more easily and access the one-to-one support, in-market knowledge and real-life advice that will establish them overseas.
 - Developed a virtual GlobalScots events programme with a focus on supporting export sales recovery as well as growth, to ensure continuity of support to companies in the midst of Covid-19 restrictions SDI. 148 online events were facilitated during 2020/21 and 2021/22 reaching an international audience of 4700 participants.

Scotland's international networks will continue to promote the very best our country has to offer and ensure trade and investment is at the centre of our ongoing economic recovery from Covid-19.

Case Study 5 – GlobalScot

Founded in 2013, Verlume (formerly known as EC-OG) are recognised leaders in intelligent energy management and storage technologies for the energy industry and committed to enabling decarbonisation of offshore operations, they're dedicated to reshaping thinking around the energy transition and the integration of clean energy.

“Since our company’s inception in 2013, we’ve had great support from Scottish Enterprise,” says Paul. “A key benefit has been the introductions to key contacts in global markets, giving us a foot in the door to further develop these relationships. And through Scottish Enterprise, we were introduced to the GlobalScot network as a platform for connecting with influential Scots worldwide.”

Embracing digital connectivity, they’ve connected with many influential Scottish business people overseas. The effect has been instant, and significant – leading to several presentations and speaking engagements at several GlobalScot webinars, most recently to audiences in the US, Asia Pacific and Norway.

The GlobalScot network facilitated introductions to key target customers and stakeholders – and the ability to tap into the wealth of market-specific knowledge has shaped their business for the better.

Direct Feedback

“With ambitious global growth targets, we were looking at how we could improve our business development activities in the North American energy market,” he recalls. “As a key market for us, we were able to connect with GlobalScot Mark Hannigan of Fortior Ventures who suggested an alternative approach in the US market, a very flexible approach well suited to the Covid business model which was less dependent on international travel.”

“The GlobalScot network has allowed us to build strong relationships with global connections in key markets,” says Paul, “as well as giving us support to put our growth plans in place. We have access to new opportunities and tailored advice to help form specific business strategies suited to global business cultures.”

Paul Slorach, Verlume

3.5.3 Links to Market

While the Links to Market project was deprioritised during the Covid-19 and EU Exit crisis, a new International Education Strategy, which is under development, will pick up and take forward a number of the alumni activities identified in ATN. Our Education Trade Envoy, Wendy Alexander, also continues to promote the Scottish Higher Education Sector, including representing Scotland in UKG’s Educational Sector Advisory Group’s overseas visit to leading a trade mission to Nigeria in May 2022 and Singapore (and likely Jakarta) in late November/ early December 2022. With the lifting of Covid-19 restrictions we restarted GlobalScot engagements with overseas Scottish Alumni, such as in Dubai during the EXPO programme, and more are planned, including in the ASEAN markets described above, led by Wendy Alexander and the Trade Envoys to Singapore and Indonesia.

3.6 Supporting Exporters in Market: how we help exporters in overseas markets

In ATN we identified priority markets that were key to the Scottish economy and where exporters may need support. We committed to supporting exporters through providing in-market support through SDI advising companies in overseas markets, and through maintaining a close working relationship with UK DIT to maximise leverage of their in-market presence. The following projects summarise the work undertaken thus far:

3.6.1 SDI in Market

ATN sets out **15 key priority markets** which our analysis identified as having immediate opportunities across multiple sectors for Scottish exporters to increase their exports. To maximise the opportunities these markets can bring, we have undertaken a range of actions to ensure Scottish businesses can be supported in market:

- Building on pilot work from the food & drink sector, in 2019 SDI has been restructured into separate specialist divisions for Trade and Inward Investment.
- SDI strengthened its network of overseas in-market specialists by creating 15 new overseas trade specialists positions across the top 15 markets representing two thirds of our export opportunities. SDI's overseas trade network has been expanded to include energy specialists, including five co-funded with Opportunity North East (ONE), now focused on renewable energy.
- SDI Export support was also realigned to engage with 1200 key and potential exporters to maximise the increase of exports.
- As part of our recovery from Covid-19, SDI trade specialists developed over 60 market opportunity plans by sector, which are aligned with the international capabilities of Scotland's sectors and companies.

Case Study 6 – SDI In-Market Support.

Edinburgh-based Waire Health (formerly Sentinel), offers continuous wearable vitals monitoring devices, delivering unparalleled insight into daily health and activity of patients/ users in hospitals, care settings and at home. Its core team has 75 years' combined experience in electronics systems design, project management in large scale digital roll outs across multiple markets, including health. The devices can detect the vital signs of a patient in hospitals, care settings and at home.

In 2020, the company secured more than £1 million in funding from Innovate UK, EIT Digital and Scottish Enterprise to take its device to market.

This global growth potential and innovative technology was also supported by Scottish Enterprise through an account team service with intensive support in innovation, overseas market development, internal systems development, investment and support to navigate tricky importing and exporting regulations, alongside practical support with branding and digital expansion.

In July 2021 SDI arranged a Meet The Buyer event with Ireland's HSE, working with SDI's International Specialists in Scotland and Ireland. Following the event, HSE began formal negotiations with Waire Health to set up a Living Lab at Midlands Regional Hospital, Tullamore with a view to deploying the technology in three immediate opportunities and use cases with the ultimate aim of a national rollout. The company forecasted £40m of international sales growth and the creation of 40 new jobs over the next three years.

Direct Feedback

"I'll take as many of those 'Meet the buyer' events as you care to create. Martin Curley [Head of HSE's Digital Transformation Unit] spoke to the Irish Finance minister about us yesterday. He is a total fan and committed to Waire."

Dave Hurhangee, CEO and Co-founder, Waire Health

"Who would have thought that we would be competing against the richest company in the world – AND stand a good chance of winning. HSE have our sensors and love them."

Dave Hurhangee, CEO and Co-founder, Waire Health

"We have a whole team at Scottish Enterprise that helps us explore and see where innovation fits in to the markets. This has resulted in contract negotiations with companies."

Kathrina Skinner, Co-founder, Waire Health

Case Study 7 – International Market Event Support

Approximately 100 culinary leaders from North America, Europe and Asia dialled in to Scotland's Global Foodservice Summit, a digital programme across eight days in March and April 2021, that highlighted the country's finest produce and enabled long-term, international relationships to be built.

Organised by SDI's food and drink trade specialists, alongside industry partners and other public-sector bodies, the summit featured bespoke, engaging content that told Scotland's culinary story. This included interactive meet-the-producer sessions, live demos by some of the country's leading chefs, including Scotland's National Chef Gary Maclean, and virtual tasting sessions.

Direct Feedback

Su Cox, Communications and Business Development Director at The Scottish Salmon Company, said: "Scotland's food and drink industry is a key export sector that contributes £15 billion a year to the country's economy. The Scottish Salmon Company is proud to play its part in contributing to this success by targeting new customers and markets to sell our award-winning Scottish Salmon to. "It's important we continue to grow our food and drink sector and Scottish Development International's Global Foodservice Summit provided crucial support to the industry in how to reach new customers and markets."

Iain Stirling, Founder of Arbikie, commented: "At Arbikie, we very much enjoyed and gained from taking part in the Global Food Service Summit. Thanks to the preparation done by the SDI teams across the globe we're still benefitting from the many buyer connections we made"

Dave Quinnell, Commercial Director at Summerhall Distillery Ltd, said: "The Global Foodservice Summit organised by SDI has proved to be very beneficial to Summerhall Distillery (Pickering's Gin). Being able to meet with so many prospective buyers in a short space of time gave us the unique opportunity to gain very useful market insights and expand our network of contacts. Our participation has resulted in a contract being obtained with an importer in Hong Kong, and we are currently in advanced negotiations with several other markets."

3.6.2 Leveraging DIT

We continue to work in partnership with DIT to ensure that Scottish businesses are front and centre in the development of any high value campaigns. As such we have maintained close links with the UK government's Trade Team to understand the opportunities and how Scotland's exporters can benefit.

- We are working closely with the UK Government to ensure policy alignment, including their new Export Support Service, the UK Export Academy and the UK Tradeshow Programme to ensure this complements the existing support offer in Scotland.
- We have continued to work with the Department of International Trade (DIT) to ensure support for Scottish exporters is maximised, and we will strengthen links with UK Trade Commissioners to ensure they are aware of our economic policy and export priorities to support in-market visits.

Furthermore, we are continuously monitoring and reviewing the support we offer and the actions we undertake to ensure they effectively support Scottish businesses and are supported and led by the evidence. In a similar vein we continue to review our priority markets (and companies), sectors and company focus in light of changing global circumstances. This includes the challenges posed by Scotland's exit from the EU, to make certain that businesses receive the right support and resources when needed, and also that they are well placed to benefit from new and emerging trade opportunities in different markets.

4. Next Steps on ATN Delivery

This review details the significant progress made in delivering ATN and the impact this has had in supporting business to grow their exports. The next phase of ATN delivery will build on the work done so far across existing actions, while ensuring we have the flexibility to introduce additional actions to reflect changes in the trading environment.

Key upcoming activity includes work on:

- Skills for Exporting, to ensure it reflects the needs of exporters following EU Exit, and reflects emerging offers of support from partner organisations.
- Ensuring the criteria and definitions within our segmented model of export support continue to capture both existing and emerging export growth potential, aligned to NSET and taking account of economic and trading challenges and opportunities, driving the support and focus we provide to markets and sub-sectors
- Developing a consistent and sustainable approach to trade missions and overseas ministerial visits that is mindful of our net zero obligations and the Vision for Trade
- Continuing to grow the breadth and diversity of our business networks, including targeted expansion of the GlobalScot network in priority markets and sub-sectors, and the number of exporters that can directly access their expertise and advice
- Embedding Vision for Trade commitments into our evaluation of priority markets, and to deepen our knowledge of the long-term trends in these priority markets
- Emerging sectoral priorities being driven by the transition to net zero, including the Hydrogen Action Plan and its related Hydrogen Sector Export Plan currently being developed, and our responsibilities under NSET to find and support new markets for our products and services across the sectors that will drive net zero
- Sharpening the focus of our understanding of the opportunities in 'continental'-sized economies through development of sub-national plans, in particular for the USA as resources permit
- Refining and defining our approach to engagement with emerging markets in our 2nd tier of ATN priority markets
- Identifying major international events over the next three years that we wish to target for major Showcasing Scotland promotional activities, including Osaka Expo 2025
- Re-focusing our work on leveraging DIT support for companies to ensure it complements existing trade support options for companies
- Ensuring exporters are aware of the increasing net zero considerations of consumers and businesses
- Working towards addressing key NSET ambitions, such as talent attraction, by using our global networks effectively to deliver against this ambition.

Finally, we committed to implementing a robust evaluation of our ATN activities to measure our impact and return on investment over the last three years. This process is well underway, with the management information review and consultation near completion. We have also commenced the next stage and recently awarded a tender to Aston University, who will carry out the qualitative survey and an economic impact assessment, to identify the value and contribution of our export support to businesses and Scotland's export performance. This is targeted for completion in 2022.



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