

# Export Matters

Enabling the conditions for  
increasing external sales  
and exports in Northern  
Ireland

March 2016



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## Ministerial Foreword

Exports *really* matter to the Northern Ireland Economy. Our Economic Strategy clearly identified that the route to economic success would come through a renewed focus on export led economic growth and that still holds true today. Promoting external sales/exports also remains a key priority for the Programme for Government. We have many local firms who are already competing successfully overseas and we will continue to assist these firms, while also looking to identify and work with new exporters to increase and diversify our export base.

I recognise that there are many extraneous factors which impact on the export environment and which are outside the control or influence of a region or indeed individual nations. Therefore we need to focus our efforts on those areas we can influence and in particular creating the best possible environment to develop and support local exporting companies.

'Export Matters' sets the very challenging target of increasing the value of sales outside Northern Ireland by 33% by 2020 and 80% by 2025. This ambitious goal assumes Corporation Tax will be devolved to the NI Executive, with a 12.5% rate implemented in April 2018. Achieving such a scale of growth would only be possible with a major stimulus such as a lower rate of Corporation Tax and meeting this target will require a coherent and holistic approach by all those involved.

Ensuring that the conditions and behaviours are in place to help us achieve these goals is at the heart of 'Export Matters'. To enable our companies to sell more outside Northern Ireland, it is vital that support mechanisms are aligned, coordinated and as effective as possible. It is important that those involved are clear about roles and responsibilities and work in a collective and coherent way recognising the benefits which can be accrued through the implementation of a single operating model for export support delivery in Northern Ireland. I believe conditions are ripe to embed such principles within the reorganised 11 council local government model and the planned restructuring of Executive Departments.

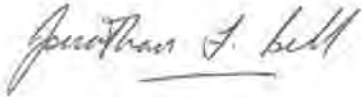
Export led growth is essential to the development of sustainable economic growth and helps underpin sustainable job opportunities and have a substantial ripple effect across the economy. We therefore want to increase both the volume of sales and the number of our companies engaged in



sales outside Northern Ireland. Doing this will make a real contribution to long term economic growth. Equally we need to identify how Northern Ireland companies can maximise benefits from the export process. We will therefore want to ensure range and balance in external sales/exports by focusing on those geographic markets where our external sales/exports can be maximised.

Achieving these aims will require a partnership approach. That is why 'Export Matters' has been developed by DETI, Invest NI and InterTradeIreland and has been shaped by engagement with our local Councils, economic development agencies, economists and local businesses.

'Export Matters' should be viewed as a living document, to be updated on a regular basis to reflect Northern Ireland's ever evolving export position. Our collective challenge is to deliver against these ambitious targets through a collaborative, partnership approach. I am confident that by doing this, we can make a real difference.

A handwritten signature in black ink, reading "Jonathan J. Bell". The signature is written in a cursive style with a horizontal line underneath the name.

**JONATHAN BELL MLA**

**MINISTER OF ENTERPRISE, TRADE & INVESTMENT**

**MARCH 2016**

# 1. Executive Summary

The promotion of exports is central to the United Kingdom (UK) Government's strategy for growing the national economy and its resilience. And here in Northern Ireland, recognising the role that external sales and exports can play in diversifying our economy, stimulating innovation, and smoothing-out fluctuations in home markets, we too are focused on trading outside our borders. Indeed, the Northern Ireland Economic Strategy (NIES)<sup>1</sup>, published in March 2012, identifies export-led economic growth as its key driver, setting down the following challenge:

*'we need to significantly increase our export focus if we are to achieve our economic goals, but the challenge is to both grow exports and diversify into new markets.'*

The NIES also recognises the need to build on our existing successes, as well as exploiting the new opportunities which a globalising world offers. Key to this is equipping those of our companies already active overseas to be more successful, and supporting those not yet selling externally or exporting to do so. In its simplest terms this requires:

- A clear understanding of the capability of the Northern Ireland business base (now and in the future) in order to determine where we have distinct international competitive advantage;
- A clear focus on those geographic markets that offer the greatest opportunity, and
- A comprehensive and integrated support framework that enables Northern Ireland firms to increase sales in external and export markets.

As a region, we need to perform, and be recognised, as a globally-active economy with a clear eye to market opportunities outside our borders.

It is against this background that this document, 'Export Matters', has been developed. Sitting within the NIES, and at a time of change in our administrative structures, 'Export Matters' is about setting out how companies and those local and regional bodies supporting external sales and exporting can work together more effectively and closely. 'Export Matters' is not about new structures or lots of new initiatives, but

## Talking Terms

In this document, when we talk about . . .

. . . 'external sales', we mean sales by Northern Ireland companies outside the region

. . . 'exports', we mean sales by Northern Ireland companies outside The United Kingdom.

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<sup>1</sup> Northern Ireland Executive, (2012), Northern Ireland Economic Strategy: Priorities for Sustainable Growth and Prosperity

sticking with the basics of collaboration, alignment and, where appropriate, integration in all we do. In short, 'Export Matters' is about enabling the conditions in which external sales and export sales can flourish. This will allow us to secure more wealth and employment by building a larger and more outward-facing private sector.

The remainder of this short document sets out 'Export Matters' challenges, context, and content in more detail. The key intents of the framework are summarised in the box below. To be clear from the outset, the period covered by this document extends to 2025. At Annex A we have a number of initial actions to cover the period to March 2017 after which time progress will be reviewed and the action plan reset.

### Box 1 – Export Matters – our key intents

<b>Vision</b>	A Northern Ireland economy characterised by a sustainable and growing private sector, where a greater number of firms compete in global markets, and there is growing prosperity and employment for all.
<b>Aim</b>	Creating the conditions through which more companies are active and more successful in global markets, and so achieving the intents of the Northern Ireland Economic Strategy.
<b>Strategic Objectives</b>	Grow the value of sales by local businesses made outside Northern Ireland by 80% by 2025, against baseline year of 2014. Encourage more local businesses to engage in sales outside Northern Ireland. Ensure that local businesses maximise sales in a wide and diverse range of global markets.
<b>Behaviour Objective</b>	Building on 'Export Pathway' and 'Support Escalator' concepts; develop, implement and sustain a single operating model for export service delivery in Northern Ireland.

## 2. Why Exports Matter

### Northern Ireland's Grand Challenge

In modern market economies, the generation of wealth is key. Wealth enables us to invest in our businesses, people and their communities, and so improve their well-being and quality of life. Productivity, the amount of wealth being 'created' per employee in the economy, is an important measure of wealth creation.

Seen through the lens of productivity, Northern Ireland's economy has, for a considerable period of time, lagged behind most other UK regions and the UK as a whole. Figure 1 tells the long-run story. The underlying causes are well known – less than average levels of entrepreneurship, some key skills gaps especially at the higher end and mixed levels of innovation. The Northern Ireland Economic Strategy argues that if action is not taken to tackle these weaknesses, then our productivity gap will at best remain unaltered and most likely continue to widen over time<sup>2</sup>. Neither position is acceptable if we want to progress our prospects in an increasingly competitive world.

It is in this context that exporting assumes significant importance. The research is clear that there are positive relationships between exporting and higher levels of innovation and skills, with exporters tending to be larger, more innovative, more productive and able to pay higher salaries for skilled staff<sup>3</sup>. This supports the findings of complementary research for UK Trade and Investment (UKTI), the UK's national exports development body, which found that exporters had contributed 60% of the UK productivity growth in the 1996/2004 period, with new exporters experiencing, on average, a 34% productivity uplift in the year in which they started to export<sup>4</sup>.

#### Message

Northern Ireland is not producing as much wealth per worker as most other UK regions. This is a longstanding issue and needs to be addressed.

External sales and exporting can help address this challenge, given the evidence that exporting companies generally are significantly more productive than their non-exporting counterparts. Selling externally and exporting also helps build our wider market resilience.

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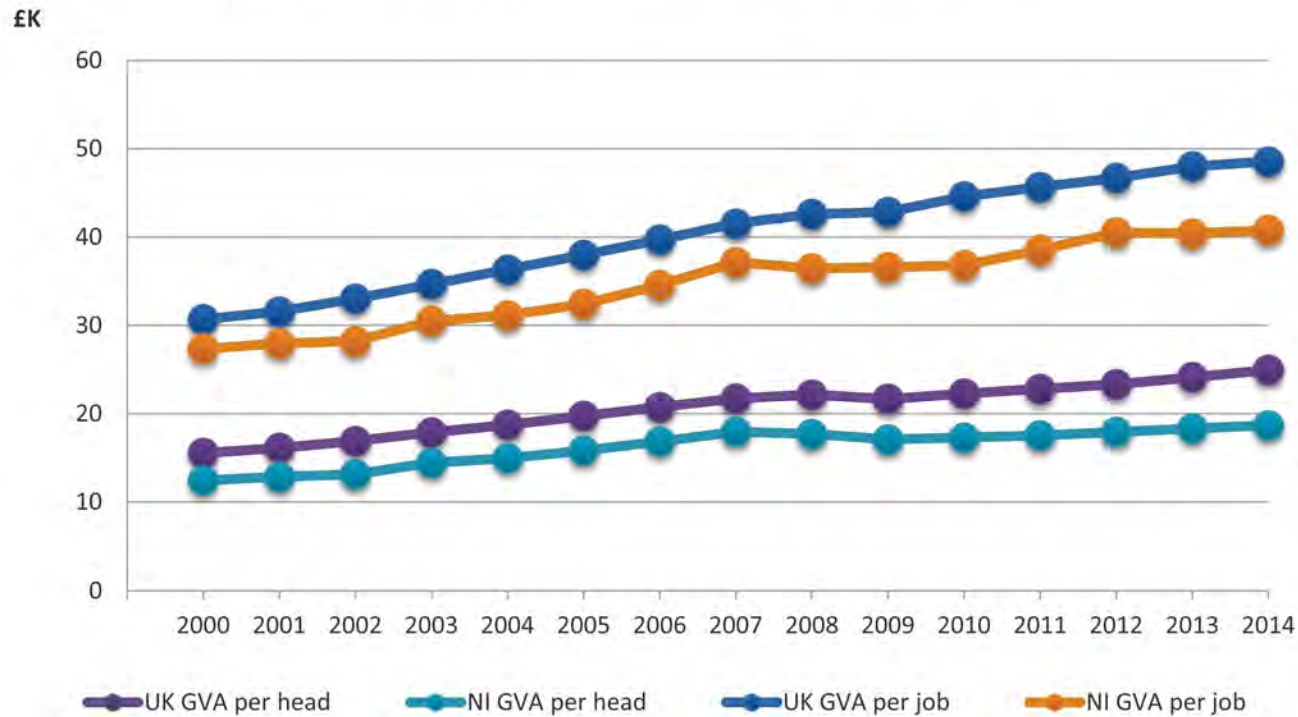
<sup>2</sup> Northern Ireland Executive, (2012), Northern Ireland Economic Strategy: Priorities for Sustainable Growth and Prosperity

<sup>3</sup> InterTradeIreland, (2006), Who Exports? A Firm-Level Study of the Characteristics of Exporters and the Determinants of Export Performance for Northern Ireland and Ireland

<sup>4</sup> Harris, R. and Q. Cher Li, (2007), Firm-Level Empirical Study of the Contribution of Exporting to UK Productivity Growth



Figure 1: Prosperity (GVA per Head) and productivity (GVA per Job) in Northern Ireland



### Message

Exports *really* matter for the Northern Ireland Executive. Promoting external sales/exports is a key priority for the Programme for Government. This will remain so for the foreseeable future.

Ensuring that the conditions and behaviours are in place to enable this priority to be achieved is at the heart of ‘Export Matters’.

## The Strategic Response

The positive correlation between exporting and wealth creation is recognised explicitly in the economic priorities of the Northern Ireland Executive. The Executive’s Programme for Government (PfG) for 2011/15 sets rebuilding and rebalancing the economy as the Executive’s principal goal, and commits to stimulating an export-driven private sector. Importantly, this includes a target for increasing the value of manufacturing exports (as a share of Northern Ireland’s economy) by 20% between 2010/11 and 2014/15. Note here, the ever-present problem of Northern Ireland’s export data not including most tradable services, so this uplift in performance is down to manufactured goods alone. We return to the issue of data limitations later in this document.

Sitting beneath the Programme for Government, the Northern Ireland Economic Strategy (NIES) takes a longer-term view to 2030. It too re-emphasises the imperative for increased external sales and exports within Northern Ireland's economy, captured in the following vision:

*'An economy characterised by a sustainable and growing private sector, where a greater number of companies compete in global markets and there is growing employment and prosperity for all'.*

The NIES restates the objective of increasing the value of manufacturing exports by 20% between 2010/11 and 2014/15. It also adds a further target of increasing the value of sales to new/emerging markets<sup>5</sup> by 60% over the same time period, and against the same base year of 2010/11.

Of course, the Northern Ireland Executive is not alone in pushing the importance of exports within our economies. At a UK level, the former Coalition Government had set a target of doubling its export value to £1 trillion by 2020. And in Scotland, the 2011 Economic Strategy has a target to grow the value of export sales by 50% over the period 2011/17.

A further point to note, is that the targets for export growth, including those in Northern Ireland, were all set against a background of forecast growth in key export markets, which has since proven to be optimistic. Indeed, since 2011, annual GDP growth in Organisation for Economic Cooperation and Development (OECD) countries has remained below 2%. So, the targets have proven highly challenging and, as we comment later, while export values have grown, this has not been to the level needed to meet the targets set, across the UK, including in Northern Ireland. Being alert to, and accounting for, the influence of external factors on our export performance is an issue we need to become more aware of going forward.

## Message

Where 'Export Matters' fits in the 'strategy hierarchy'

**Northern Ireland Programme  
for Government**



**Northern Ireland Economic  
Strategy**



**'Export Matters'**

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<sup>5</sup> New markets include the BRIC (Brazil, Russia, India and China) and CIVETS (Colombia, Indonesia, Vietnam, Egypt, Turkey and South Africa) economies.

## Corporation Tax

The UK Government has recognised the strongly held arguments for devolving Corporation Tax rate setting powers to Northern Ireland. The Corporation Tax (Northern Ireland) Bill provides the opportunity for the Executive to take control of this major economic policy lever. Following the publication of 'A Fresh Start: the Stormont Agreement and Implementation Plan' in November 2015, the Executive has set the rate and date of Corporation Tax at 12.5% from April 2018.

Evidence suggests that reducing Corporation Tax could have a significant impact on the NI economy. The latest estimates from the Ulster University Economic Policy Centre show that, by 2033, the net economic benefits of a 12.5% Corporation Tax rate from April 2018 could lead to in excess of 30,000 additional jobs alongside an economy that is almost 10% larger.

A 12.5% rate of Corporation Tax can provide a major stimulus for increasing the value of sales outside the region. Almost three-quarters of the jobs are expected to come through Foreign Direct Investment, with these companies locating here to sell their goods and services to Great Britain, Europe and beyond. Attracting regional/global profit centres and new business functions will therefore directly boost our external sales. It is not just foreign investors that will benefit from a reduced tax rate. Local companies will also be able to invest more in their business and become more competitive in external markets as well.

Our ambitious overarching goal to grow the value of external sales by 80% by 2025 assumes that Corporation Tax will be devolved to the NI Executive as intended, with a 12.5% rate implemented in April 2018. Achieving the scale of growth outlined here needs a major stimulus such as reduced Corporation Tax, and will require a coherent and holistic approach across government to ensure that the benefits of a lower rate are maximised.

## How We Have Performed

### *The characteristics of our existing export activities*

To set the context for 'Export Matters' the dashboard (on page 13) sets out six perspectives on the shape of our existing export performance. This covers the stock of exporters over time, the values of exports over time, where our exports go to, and the sectoral composition of our export sales. All references to HM Revenue and Customs (HMRC) as the source mean the data presented are for manufactured goods – most traded services are not captured currently by HMRC's data.

The key messages from these data are as follows:

- Relative to the rest of the UK, the total number of exporters in Northern Ireland since 2007 has shrunk at an average rate, albeit slightly quicker in 2012/13 (Figure 2)
- In terms of export sales, the performance of Northern Ireland was broadly similar to England and Wales until 2008, but lost ground in 2009/10, particularly as the hard recession in the Republic of Ireland took hold. Growth in 2013, alongside England experiencing a drop in the value of exports, has allowed Northern Ireland to close the performance gap somewhat, although Wales remains ahead. Scotland has experienced the weakest performance of the UK nations (Figure 3).
- The Republic of Ireland market is of great importance (shown in Figure 5) particularly for small firms. The Manufacturing Sales and Exports Survey (MSES) shows that 38% of small firm external sales go to the Republic of Ireland and 65% of their exports (2013/14 figures).

## Case Study 1: Exporting success in action CDE Global

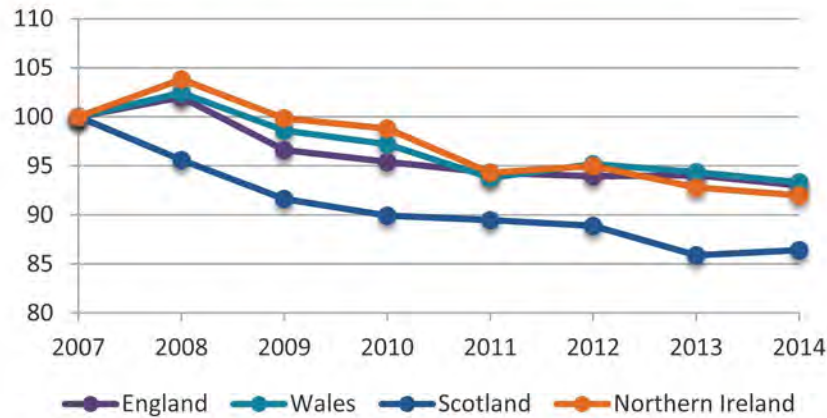
**The background** - Founded in 1992, Cookstown based CDE Global manufactures and supplies materials washing equipment for quarries, mines and recycling applications worldwide.

**The change** - To access opportunities identified via research, market intelligence and visits as part of trade missions to international markets; the company realised they needed to build the required international infrastructure. This included the recruitment of business development and engineering teams throughout designated strategic regions across the globe.

**The result** - The company has experienced admirable growth over the last 10 years based firmly around an export and product development strategy. This strategy has taken CDE into more than 50 countries across the world. Almost all of its business is now outside Ireland.

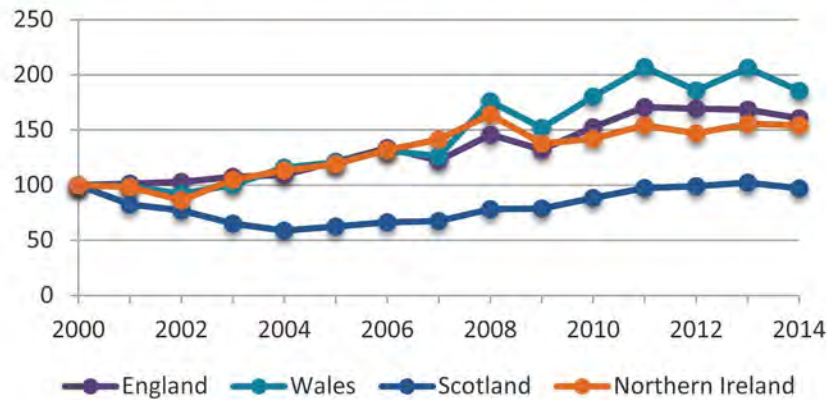


**Figure 2: Total Number of Exporters in Northern Ireland**



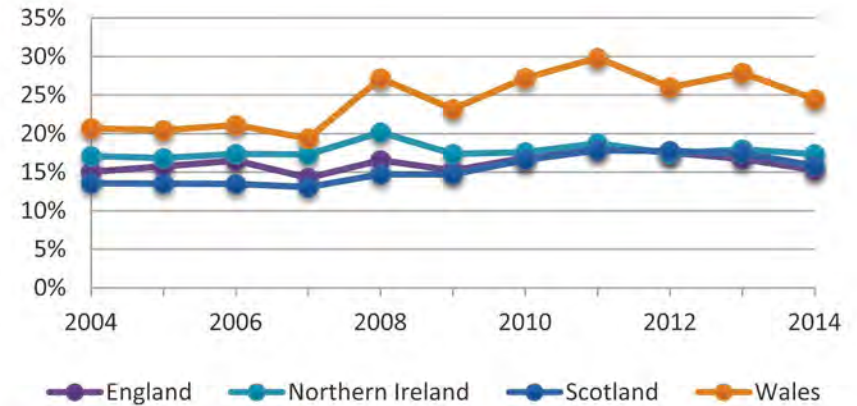
Source: HMRC 'Regional Trade Statistics', released December 2015 Index 2007 = 100

**Figure 3: Comparative export sales performance over time**



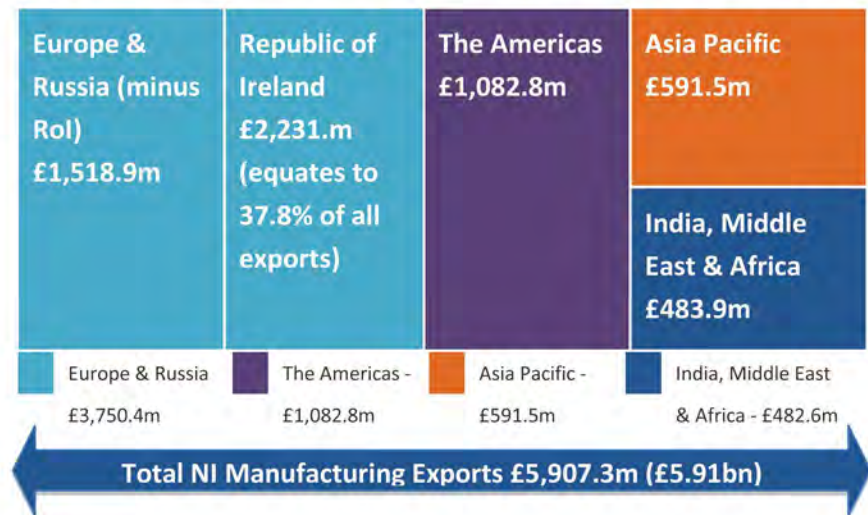
Source: HMRC 'Regional Trade Statistics', released December 2015 Index: 2000 = 100

**Figure 4: Value of exports, as % of GVA**



Source: ONS Regional Trends income approach & HMRC export data, released June 2014

**Figure 5: Destination of Northern Ireland's Exports as % of Total, 2013**

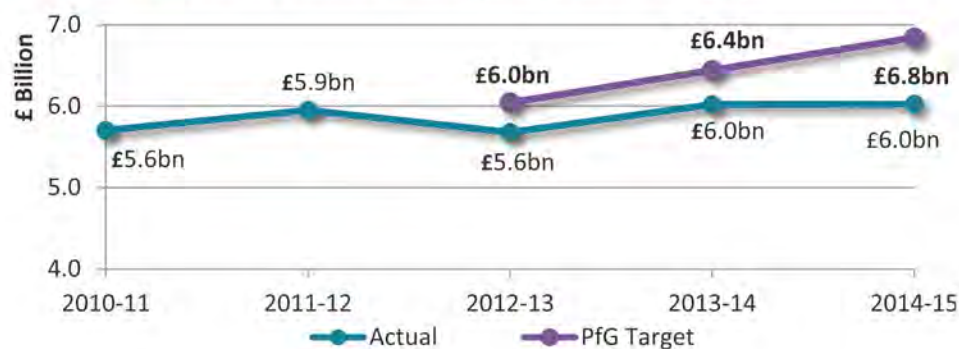


**Figure 6: Northern Ireland exports by sector (£m)**

Exports by SITC Section	2010/11	2014/15	% change
<b>Food</b>	882	1,134	28.6%
<b>Beverages and Tobacco</b>	292	206	(29.3%)
<b>Crude Materials</b>	248	242	(2.4%)
<b>Mineral Fuels</b>	85	68	(19.9%)
<b>Animal &amp; Vegetable Oils</b>	13	28	109.8%
<b>Chemicals</b>	570	887	55.6%
<b>Manufactured Goods</b>	520	542	3.7%
<b>Machinery &amp; Transport</b>	2,402	2,238	(6.8%)
<b>Miscellaneous Manufactures</b>	667	672	0.7%
<b>Other Commodities</b>	21	9	(58.9%)
<b>Total Exports</b>	5,702	6,026	5.7%

Source: HMRC 'Regional Trade Statistics', released December 2015

**Figure 7: Northern Ireland Goods Exports (and PfG target)**



Source: HMRC 'Regional Trade Statistics', released June 2014

On export value as a percentage of GVA ( Figure 4 ), the picture is positive in relative terms, with the performance of Northern Ireland remaining similar to England and Scotland throughout the period, although all three countries lag behind Wales.

In terms of destinations (Figure 5), Northern Ireland's top five country export markets (Republic of Ireland, United States, Canada, France and Germany) in 2014 remain the same as a decade ago (although not in exact same order). There are some signs of market diversification as the top five's share has fallen slightly from 69% to 65%, with some new entrants among the next largest markets (including China, Thailand, United Arab Emirates (UAE), and South Africa). (For context and not shown in the charts, external sales to Great Britain account for about 58% of manufacturing sales outside Northern Ireland. Research by InterTradeIreland found that Great Britain was the most recent market entered for 45% of Northern Ireland businesses<sup>6</sup>).

On our key export sectors (Figure 6), Machinery and Transport Equipment has remained at around 40% of total exports for the past decade; within this, Aerospace and Specialised Industrial Equipment account for almost half of the performance. There have been some changes in other sector shares: exports from the Food and the Chemicals sectors both experienced substantial growth between 2010/11 and 2014/15, while exports from the Beverages and Tobacco sector fell back. The majority of other sectors remained largely stable over the period or changes were from a low base.

<sup>6</sup> InterTradeIreland, Analysis of the key features of an exporting SME on the island of Ireland (2013).

### **And what this means for our performance against the PFG/NIES Targets?**

Figure 7 shows that Northern Ireland did not meet its NIES targets on exports. Against the headline objective of increasing manufacturing exports by 20%, the statistics show that, at the end of 2014/15, Northern Ireland was approximately £817m behind the target of £6.84bn. In relation to the second NIES target (of increasing exports to emerging economies by 60% by 2014/15), Northern Ireland also did not reach its final target, despite being on target in earlier years. HMRC data for 2014/15 shows that Northern Ireland only achieved 16% growth over the four year period ending 2014/15.

### **Being clear on the data limitations**

For all the above analyses, there are two key data considerations to bear in mind:

- The HMRC data available to us are focussed primarily on manufactured goods. Most tradable services – and these are not insignificant in Northern Ireland’s economy – are not captured or reported.
- Second, the current HMRC data does not allow the value of external sales to Great Britain (GB) to be identified. This is a weakness – the GB market is estimated to account for 58% of all manufacturing sales outside Northern Ireland. Sales have grown by 28% since 2008/09, in part due to recession in The Republic of Ireland although manufacturing sales here have also increased year-on-year since 2010/11, reflecting its recent strong growth. GB’s share of all sales outside Northern Ireland has also risen from 53% to 58%. Not being clear formally on how we are performing in our single most important external market is a real limitation.

So, an important challenge for ‘Export Matters’ is therefore, to provide a measure of exports across the broad economy that captures all sales outside Northern Ireland. Accordingly, a new Broad Economy Sales and Exports Sales (BESES) indicator will be implemented to provide a more comprehensive measure of our external sales and export performance. The indicator will allow targets to be set for the broad economy rather than just manufactured goods, and for all sales outside Northern Ireland. The new indicator will also allow us to link ‘top level’ performance on external sales/exports down to the performance of companies (in terms of their turnover and profits). At last, this will make it possible to target and monitor the impact of support mechanisms to the companies generating the sales.

### **Message**

Northern Ireland did not meet its exports performance targets as set out in the NIES. On the ‘20% increase in manufacturing exports’, we achieved 5.7% against the target of 20% at the end of 2014/15. The ‘new/emerging economy’ target was also not met, with 15.7% growth achieved against the target of 60% by 2014/15.

Going forward, we need to keep setting ambitious targets, but we also need to be meeting them.



### 3. NI Business Base & Sector Strengths

#### Companies and sectors with potential, but also some things that ‘get in the way’

As we have seen from the data dashboard, we have a sound base of companies engaged in external selling and/or exporting to a wide range of destinations. And within this, we have sectors which are internationally recognised for their quality, innovation and heritage, and are prioritised as such in our economic thinking. These are outlined in Box 2 below.

#### Box 2: Northern Ireland’s existing priority sectors – foundations to build on

<b>Advanced Manufacturing &amp; Materials</b>	348 companies contributing over £1.6bn value added and over 33,500 jobs to the Northern Ireland economy. This technology-led and growing industry is both internationally and locally integrated and includes specialisations in Advanced Engineering, Composites and Electronics and electrical components.
<b>Life &amp; Health Sciences</b>	Northern Ireland’s forward-thinking approach to employing state-of-the-art technology to improve outcomes in health and boost its economy is paying dividends. This sector includes Connected Health and Stratified Medicine and with 130 companies contributes over £1bn value added and 7,500 jobs.
<b>Agri - Food</b>	Sector internally recognised for the provenance, quality and reputation of its food and drink products. The 145 companies in this sector combine well-known multinational businesses and a thriving small business base contributing £534m value added and 16,590 jobs.
<b>ICT &amp; Telecommunications</b>	The ICT sector currently contributes £344m (E-Skills UK) of Gross Value Added, to the NI economy. It is a key enabler across all industry sectors - 27,000 people in NI are employed by the ICT sector, making it one of the largest knowledge-based sectors in NI.

Given the imperative to improve our productivity, and the contribution that external selling and exporting can make to this, we need more companies doing business outside Northern Ireland. The benefits of doing this are clear – exposure to new ways of working, building broader and deeper skills, and broadening horizons generally. Why then, given the potential upsides to the economy, and the firm-level benefits that external selling and exporting provide, don’t more companies engage spontaneously in exporting activity?

There are typically one or more of the four following reasons in play:

- Because they have not done it before, companies are not aware of the benefits that can come to them from selling externally and/or exporting;
- Companies are often unclear where and who to go to, to get advice on exporting. As we set out below, there are many support organisations in play, and sometimes it's just too hard for companies to find the right source;
- Companies are often wary about developing relationships with unknown and untrusted contacts and intermediaries overseas. Getting these relationships right can be risky, and sometimes that risk is seen as being just too large, and
- Finally, companies are often reluctant to get into external selling and/or exporting for fear that the staff they develop and then use for these functions will move to other competitors.

These reasons, individually and together, work to constrain companies getting involved with external selling and exporting. So our potential in overseas markets isn't realised, our productivity doesn't build, and the opportunity to achieve our full economic potential is missed. 'Export Matters' is about ensuring these blockages are recognised and understood, and that the support we provide to exporters – be these new or experienced – is designed to address these head-on.

## Message

We can all win from selling externally and exporting. The economy benefits through increased productivity, and so do the companies involved in terms of bottom-line performance, skills, innovation, and wider market resilience.

However, there are often inhibitors which hold companies back. Benefits aren't realised, and opportunities are missed.

'Export Matters' is about making sure these inhibitors are understood, and addressed so that selling externally and exporting becomes as natural as selling at home.

## Case Study 2: Exporting success in action SAM Mouldings

**The background** - With one of the most advanced production facilities in Europe and an ever-expanding range of products, SAM is the UK market leader in MDF mouldings. After 2008, the Antrim Company instigated a move into exporting, working closely with Invest NI to evaluate new markets. Accessing Invest NI support for trade missions and undertaking the 'Going Dutch' initiative provided successful vehicles to deliver export success.

**The change** - The company began to look for opportunities in international markets and took a strategic approach to enter new markets. Taking a very deliberate and focused path SAM began by selling to The Netherlands. The foothold in The Netherlands provided an avenue into Belgium and other targeted markets have flowed from there and now the company has since established distribution networks in Belgium, Germany and Denmark.

**The result** - The company journey when examined consists of a very consistent line of markets targeting moving from the Benelux, then into Germany and upwards to Scandinavia. Sweden is the next market of focus. The company ensured they did not over stretch by focusing on too many markets at one time. Exports now account for around 10 per cent of turnover.



### Health Warning

The export data we have currently for Northern Ireland and the UK, gathered by HM Revenues and Customs, include only the value of manufactured goods. They do not include most traded services.

### Message

Establishing an indicator for tracking external sales/exports of services/non-manufactured goods will be an action this framework will address. This needs to present Northern Ireland's external sales, as well as its wider export performance.

## A Strong Support Infrastructure

While we need companies to step-up to the exporting challenge set out in this document, we don't expect them to do so alone. Growing Northern Ireland's external sales and exports needs to be a joint enterprise, with companies bringing their knowledge, energy, and acumen alongside that of the business support infrastructure whose job is to enable the conditions in which export potential can be realised. We already have a rich and capable support infrastructure to call on, as summarised in Box 3 below:

### Box 3: A strong support infrastructure – roles and remits

<b>Chambers of Commerce</b>	Membership organisations comprising corporates, SMEs and micro businesses, spanning all sectors across the Northern Ireland economy. Focused on support for member growth, locally and internationally. Skilled at navigating members through the mix of support provision, providing member linkages to the global chamber movement, and delivering activities to support and develop networking among members.
<b>Enterprise Northern Ireland</b>	A network of 32 locally based enterprise agencies supporting entrepreneurs in establishing their business, and then enabling them to grow. Close operational integration with Local Councils, and Invest NI, with a particular focus on those companies not meeting Invest NI's high-growth criterion.
<b>InterTradeIreland</b>	Works to exchange information and co-ordinate work on cross-border trade, business development and related matters. Close working links with Invest NI, Enterprise Ireland, and IDA Ireland. Offers a focused set of supports to assist external sales and/or exporting on the island of Ireland between Northern Ireland and the Republic, and vice versa.
<b>Invest NI</b>	Northern Ireland's 'business development agency', with responsibility for working with and supporting a wide range of small, medium and large companies, and companies that are selling or have the potential to sell in external and export markets. Provides an extensive range of export and international trade supports, and links to the UK's wider export infrastructure (e.g. UKTI, Department of Business Innovation and Skills, and the Foreign & Commonwealth Office).
<b>Local Councils</b>	11 Councils now operating across the region, with strong knowledge of their local economies and contexts. Work with Invest NI and other delivery partners to support companies at a local level and in their Council areas. Provide a range of locally directed supports. Not all Councils at present are involved in supporting external sales and exporting.
<b>UK Trade and Investment (UKTI) and DETI</b>	Provides expert international trade advice and practical support to UK-based companies who want to grow their business overseas. Through a range of services, helps companies trade successfully in foreign markets and become familiar with overseas business practices. In Northern Ireland, UKTI support activity is delivered alongside that of Invest NI. Not a service deliverer as such, but a key role in overseeing and coordinating the activities of the deliverers above to support Northern Ireland's business base in an integrated and seamless fashion.

This mix of delivery organisations ensures a comprehensive framework of support to enhance external sales and exports across geographies and companies of all sizes. However, there are ever-present risks of duplication and the inefficiencies that go with that. Variations in service quality, differences in emphases (e.g. around priority markets and sectors) and disconnects mean that the services of one do not link-on naturally to those of others. Recent research for DETI has highlighted some duplication by delivery organisations in the delivery of export development support for all types of exporter, be these inexperienced or experienced.<sup>7</sup> Going forward we need to address this duplication.

In light of the imperative for a greater number of our companies to be exporting more, it is vital that the different parts of our support are aligned, coordinated, and facing the same way. This is not about parts of the support infrastructures losing their identities and remits, but making sure that, as a collective, the effort is coherent, comprehensive, and communicable.

Putting in place the conditions and behaviours that will enable this is a central focus of this Framework. Key to achieving this will be two models which all delivery organisations and partners will start to work towards going forward. These models are: the 'Export Pathway' and 'Support Escalator'.

## Message

We have a rich, diverse and capable supply of organisations involved in supporting external selling and exporting. Going forward, these organisations need to be still further aligned, coherent, and reinforcing in their service offers and efforts.

We will use two methods to achieve this:

- ✓ the 'Export Pathway', which will set out a common understanding for the different stages in the export journey
- ✓ the 'Support Escalator', which defines how the different support available should be organised and linked logically to one another, as companies' export journeys progress.

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<sup>7</sup> RSM McClure Watters, Growing and Diversifying the Northern Ireland Export Base (2014).

The 'Export Pathway', provides a shared understanding of, and vocabulary for, the different stages of the external selling and/or export journey. The Pathway is presented below.

Table 1: The 'Export Pathway' – a summary

Non Exporter	First Time Exporter	Inexperienced Exporter	Experienced Exporter	Maximising Exporter
<ul style="list-style-type: none"> <li>• Focused on local sales</li> <li>• Limited selling fundamentals</li> <li>• Unconvinced of ability to, &amp; relevance of, exporting</li> <li>• Lacking market knowledge</li> </ul>	<ul style="list-style-type: none"> <li>• Keen to extend customer range</li> <li>• Selling fundamentals operating to a degree</li> <li>• Committed to selling outside Northern Ireland</li> <li>• Unsure of key markets</li> <li>• Unsure of process</li> <li>• Unsure of target customers</li> <li>• May be operating in ROI/GB</li> <li>• May not appreciate extent of time &amp; resource commitments needed for exporting</li> </ul>	<ul style="list-style-type: none"> <li>• Good grasp of selling fundamentals</li> <li>• Experience of market logistics outside Northern Ireland</li> <li>• Committed to selling outside GB</li> <li>• May be operating in ROI, GB, &amp; a few ad hoc export markets</li> <li>• Time &amp; resource is committed to extending sales</li> <li>• Unsure of exact markets to target</li> <li>• Need to consider export skills &amp; resource requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Keen to extend into multiple markets</li> <li>• Good grasp of market opportunities</li> <li>• Operating in multiple markets</li> <li>• Developing international sales &amp; marketing strategy</li> <li>• Ongoing structural support development</li> <li>• Building distributor &amp; existing customer relationships</li> <li>• Looking at all potential market opportunities &amp; modes of engagement (e.g. overseas tender competitions)</li> <li>• Need to consider specific export skills &amp; resource requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Focused on exploiting opportunities</li> <li>• Advanced sales &amp; marketing skills present</li> <li>• International sales &amp; marketing strategy developed</li> <li>• Diversification is key element of company strategy</li> <li>• Looking at merger &amp; acquisitions opportunities to extend reach</li> <li>• Developing overseas partnerships</li> <li>• Sophisticated customer relationship management</li> <li>• Reviewing potential diversification opportunities</li> </ul>

Source: Invest NI

### Case Study 3: Exporting success in action – Genesis Crafty

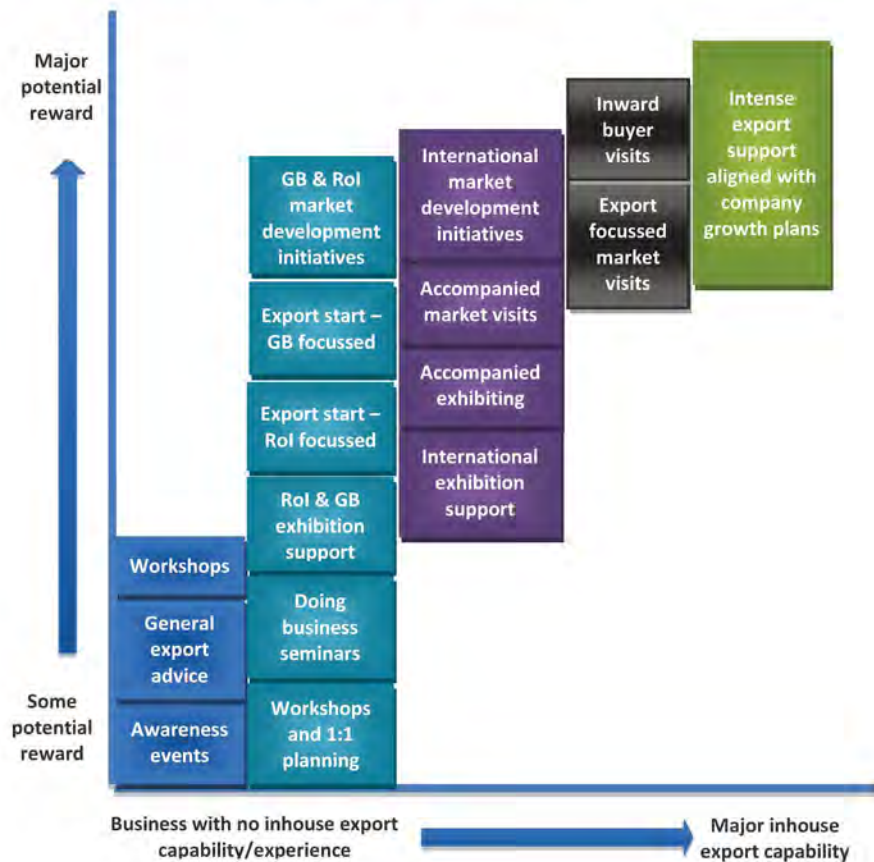
**The background** - Genesis Crafty is a family bakery which, in 2012, was reliant primarily on the local Northern Ireland market, with some sales in the Republic of Ireland (RoI) and Great Britain. The business had always valued innovation, developing product offerings and rebranding itself when the Northern Ireland market changed with the arrival of the UK multiples.

**The change** - In 2011, the company decided to explore a strategic entry into the RoI market, supported by InterTradeIreland’s Acumen Programme. This provided a salesperson for the firm to increase its cross-border export networks and sales.

**The result** - A doubling of sales in the RoI market gave confidence to the business to develop links with both Irish and UK-owned multiples. Genesis Crafty bakery products are now not only performing strongly in the RoI market but also in GB, particularly in Sainsbury’s and Waitrose. As a result, turnover has increased dramatically, up by 20% in 2013 alone. The business is also active further afield, including market entry into the USA and the United Arab Emirates, supported by a Dublin-based agency. As a result, the Acumen salesperson, John Paul Lyttle, won the prestigious award of Accounts Manager of the Year with Sainsbury’s in 2014.

Aligned to the ‘Support Escalator’, an integrated export support system ensuring that the external selling and/or export supports provided are coordinated, alert to one another, and focussed on moving companies virtuously onwards. A depiction of the Escalator, and the types of support at each stage in the process is set out below.

**Figure 8: The ‘Support Escalator’ in summary**



Guided by 'Export Matters', the 'Export Pathway' and the 'Support Escalator' will be implemented across central/local government and the private sector, to ensure a strong export culture and develop a global reputation for Northern Ireland as an open and a competitive trading region. Both models will be flexible enough to identify and help overcome the barriers to growth experienced by all companies, regardless of their level of export experience and capability. Support, advice and guidance will address generic export capability issues as well as specific geographic market and sector issues. Individual companies will benefit from bespoke market information relating to their products/services as well as specific information on potential competitors, customers, and business partners.

#### Case Study 4: Exporting success in action -Armstrong Medical

**The background** - Founded in 1984, Armstrong Medical makes and sells respiratory disposable products for critical care applications. The company first began selling to Britain and then the Republic of Ireland four years later, followed by mainland Europe in the mid 1990s.

**The change** - By identifying the company's USP and researching the other potential markets, especially via trade missions and international exhibitions e.g. Arab Health; the company now has distributors and customers worldwide, from Saudi Arabia and Sweden to China and Venezuela. The company continues to visit markets and undertake market research to identify new opportunities, regularly review tender notices and contract awards for particular markets. Whilst time-consuming, this is a very useful exercise as you can often gauge market potential (size) and even find out which competitors are active. Product descriptions in tenders/contracts quite often pertain to one particular brand.

**The result** - Customisation has been a key differentiator for Armstrong Medical. By listening to hospital customers they discovered early that they wanted the added value of everything in one package, rather than order and stock multiple SKUs. Their rapid prototyping centre enables a faster speed of response compared to most of their competitors. They can have a sample of a customised product, designed to meet the customer's exact requirements, made and delivered to them within one week.

Entirely self-financed, the company uses profits from top-performing markets to support its expansion into new export destinations. The company aims to double its current turnover within three years.





## 4. Making It Happen

For all the fine statements and arguments above, how are we going to make 'Export Matters' happen on the ground? We will do four things:

### Stick to our intents

Our intents will be formalised at three levels – a Vision, a Strategic Aim, and four Objectives. It is intended these will be embraced by all those – policy makers, services deliverers and companies (irrespective of their size and/or sector) – involved in the business of external sales and exports. These statements will be our shared commitment to doing the right things, and doing those things right. These are described in the table below. Each intent will be revisited annually to ensure they remain valid and current.

#### Box 4: 'Export Matters' – our key intents

<b>Vision</b>	✓ A Northern Ireland economy characterised by a sustainable and growing private sector, where a greater number of companies compete more in global markets, creating growing prosperity and employment for all.
<b>Aim</b>	✓ Creating the conditions through which more companies are active and more successful in global markets, and so achieving the intents of the Northern Ireland Economic Strategy.
<b>Strategic Objectives</b>	✓ Grow the value of sales by local businesses made outside Northern Ireland . ✓ Encourage more local businesses to engage in sales outside Northern Ireland. ✓ Ensure that local businesses maximise sales in a wide and diverse range of global markets.
<b>Behaviour Objective</b>	✓ Building on 'Export Pathway' and 'Support Escalator' concepts; develop, implement and sustain a single operating model for export service delivery in Northern Ireland.

These key intents are brought together in the diagram below:

### Message

To move 'Export Matters' from concept to reality, we will do four things:

- Stick to the intents captured in this document's Vision, Strategic Aim, and Objectives
- Set and achieve targets
- Ensure comprehensive and relevant actions
- Commit to clear responsibilities, disciplined monitoring, and formal review

Figure 9: 'Export Matters' in overview

**Vision:** A Northern Ireland economy characterised by a sustainable & growing private sector, where a greater number of firms compete more in global markets, creating growing prosperity & employment for all.  
**Key target:** Grow the value of sales outside Northern Ireland by 80 % by 2025, against baseline year of 2014.

**Aim:** Creating the conditions through which more firms are active and more successful in global markets and so achieving the intents of the Northern Ireland Economic Strategy.



## Set and achieve clear targets

To ensure that these intents function as live, directive, and accountable facets of ‘Export Matters’, we are proposing a simple tracking framework with two types of indicator:

- Change Indicators, which will allow us to understand overall how we are making a difference through our intents.
- Activity Indicators, which will allow us to track and monitor the progress of those individual actions we progress against the ‘Export Matters’ document.

The **Change Indicators** we are proposing are as follows:

**Table 2: ‘Export Matters’ – Change Indicators**

Component	Change Indicator	Target for Change Indicator
Grow the value of sales by local businesses made outside Northern Ireland.	Total Annual Value of External Sales by Northern Ireland companies, including ✓ sales to Great Britain ✓ export sales outside the UK <i>(Source: NISRA Broad Economy Sales and Export Sales)</i>	Baseline at 2014 Target at 2020 – value of exports sales increased by 33% of Baseline Target at 2025 – value of exports sales increased by 80% of Baseline
Encourage more local businesses to engage in sales outside Northern Ireland.	Total number of companies selling outside NI <i>(Source: NISRA Broad Economy Sales and Export Sales)</i>	Baseline at 2014 – 11,348 Target at 2020- 14,000 Target at 2025 – 16,000

Component	Change Indicator	Target for Change Indicator
Ensure that local businesses maximise sales in a wide and diverse range of global markets.	Monitor the proportion of sales by local businesses to non-traditional markets (i.e. outside GB, ROI, Western Europe and North America)  <i>(Source: NISRA Broad Economy Sales and Export Sales)</i>	Baseline at 2014 – 7.4%  This indicator will be monitored as part of the Annual Exports Report.
Building on ‘Export Pathway’ and ‘Support Escalator’ concepts; develop, implement and sustain a single target operating model for export service delivery in Northern Ireland.	Change Indicator not relevant. Activity Indicator set out below	Not applicable

These targets are assigned to their relevant intent of ‘Exports Matters’ in Figure 9 on page 22. The **Activity Indicators**, that is those activities, outputs and outcomes from this Plan’s proposed actions, are discussed below in relation to the actions we will go forward with.

## Ensure comprehensive and relevant actions

We have consulted widely on appropriate actions to progress ‘Export Matters’. Through this process, we have identified what is being done already, what is proposed (for example in plans and policies) and thought hard about those new extra things which are needed to progress ‘Export Matters’ and its contribution to the Northern Ireland Economic Strategy. Annex A sets out the agenda of activity we will go forward with over the period of this document – 2016/17-2017/18. In preparing this, we have identified action leaders, action partners, and key target audiences for the actions defined.

For 2016/17 in particular, four of the listed actions have been identified as priorities, and the focus of early efforts. These are as follows:

**Table 3: 'Export Matters' – Priority Actions for 2016/17**

Action	Lead	Key Partners	(Draft) Activity Indicators and Timing
<p>Develop, promote and embed the 'Export Pathway' and 'Support Escalator' models to:</p> <ul style="list-style-type: none"> <li>✓ Provide comprehensive external sale/export market development support to businesses, regardless of their stage of export readiness</li> <li>✓ Provide a clear 'road map' of what support is available to which business, from which delivery partners, and at which stage in the export journey</li> <li>✓ Agree and develop stakeholder engagement plans (relating to agreed roles and responsibilities for delivery/provision of various segments of export support) with export development partners in Northern Ireland and in key markets outside Northern Ireland.</li> </ul>	DETI	Invest NI Local Councils InterTradeIreland Chamber of Commerce	<ul style="list-style-type: none"> <li>✓ 'Export Pathway' and 'Support Escalator' models developed and approved</li> <li>✓ Models implemented across network of delivery partners involved in supporting external sales and exports</li> <li>✓ Formal stakeholder plans developed and agreed</li> <li>✓ By 30 September 2016</li> </ul>
<p>Develop the new Broad Economy Sales and Exports Sales indicator into a timely and reliable indicator of all manufacturing and services sales outside Northern Ireland.</p>	DETI	DFP (NISRA)	<ul style="list-style-type: none"> <li>✓ Indicator designed, prototyped and launched</li> <li>✓ By 31 March 2016</li> </ul>
<p>Establish a Northern Ireland Export Forum, comprising representatives from Northern Ireland business and providers of external-selling/exporting advice in central/local government and the private sector. The Forum will act as a means of ensuring effective collaboration across delivery partners and review the progress of 'Export Matters'.</p>	DETI	Invest NI Local Councils InterTradeIreland Chamber of Commerce	<ul style="list-style-type: none"> <li>✓ Export forum established, to meet 6 monthly basis</li> <li>✓ One meeting of exports Forum achieved by June 2016</li> </ul>
<p>Compile and publish Northern Ireland's Trade Development and Overseas Event programme. Informed by this, all providers of external-selling/exporting advice in central/local government and the private sector to align their broad suite of Business Solutions to focus on external/export market development.</p>	DETI	Invest NI Local Councils InterTradeIreland Chamber of Commerce	<ul style="list-style-type: none"> <li>✓ First coordinated programme published by 30 June 2016</li> <li>✓ Subsequent updates reissues of programme - Annually</li> </ul>

## Commit to clear responsibilities, disciplined monitoring, and formal review

In a fast-moving world, it is important that the context for, and progress we are making with, 'Export Matters' is understood in real time. That way, action agendas do not fossilise, but remain fresh and aligned with the challenges to hand.

We will achieve this in three ways:

Firstly we will operate to clearly defined roles and responsibilities as follows:

- DETI will have overall responsibility and accountability for 'Export Matters', in line with its existing responsibilities for the Northern Ireland Economic Strategy;
- Invest NI will have the lead operational role in 'making things happen' for those businesses with clear external sales/exporting capability, be this actual or potential;
- InterTradelreland will continue to lead on developing cross-border linkages and relationships for exporters. The organisation will have a particular focus on new exporters, given that the Republic of Ireland is often a valuable 'starter market' for those new to exporting;
- Our local authority partners will play the lead role at local level in supporting those companies outside Invest NI's growth criterion, as well as scouting for export talent which they (and Invest NI) can support;
- Northern Ireland's priority sector bodies will continue to play a vital role, through sector strategy and action, in progressing the collective external sales/exporting interests of their constituencies. They will also have a vital role in making sure that their knowledge of sectoral/market/technology trends is available to the wider support infrastructure;
- The Chambers of Commerce will continue to provide a further vital 'route to market' for companies, aligning with the intents of 'Export Matters', as well as bringing strong private sector perspectives to bear. The global network of Chamber links is an asset we will want to give greater prominence to, and

### Message

If it is to deliver real results, 'Export Matters' needs to be well directed and managed. To ensure this we will:

- make sure all partners involved in 'Export Matters' are clear on their roles and responsibilities;
- commit to regular monitoring and review, and
- evaluate 'Export Matters' progress critically and honestly, and change direction in light of the evidence.

- UKTI will continue to ensure that the national priorities for doing business overseas are articulated clearly and purposefully in Northern Ireland. The agency will also work to ensure that its very substantial intelligence, representational, and in-country resources are brought to bear for our companies.

Second, we will commit to regular monitoring. Specifically:

- We will establish an Export Forum to ‘check and challenge’ the direction, work and performance of ‘Export Matters’, to ensure it remains focused on evidence and intelligence, and is making the right calls and choices;
- We will make available on a six-monthly basis a short monitoring report, reporting on the targets set out above (and as developed over time) with a clear narrative explaining how and why performance is being achieved, and
- We will produce an annual ‘Statement’ on our external sales/exporting activity. This will have two intents – to build the public profile and commitment we want on growing external sales and exports, and to report-back on the wider progress that this action plan is achieving.

Finally, we will evaluate progress formally. Given the importance attached to ‘Export Matters’ and its role in improving our economic well-being, it is important that it remains valid, topical, and focused on the right priorities. Reflecting this, there will be formal evaluations of ‘Export Matters’ on an 18 – 24 month cycle. This will ensure formally that ‘Export Matters’ remains aligned with current Northern Ireland and UK policies for external sales and exports, and is taking account of changes in markets and technologies which have implications for our international business activities. The process of evaluations will be inclusive and the results shared widely.

## 5. Contacting Us

If this document is not in a format that meets your needs please contact the Export Matters Team. This document is also available on the DETI website at <https://www.detini.gov.uk/topics/economic-policy/economic-strategy>. You can contact us at the address below or by email at [exportmatters@detini.gov.uk](mailto:exportmatters@detini.gov.uk)

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Room 124  
DETI  
Netherleigh  
Massey Avenue, Belfast BT4 2JP

## Annex A: Actions in more detail

This Annex comprises the action listing for taking ‘Export Matters’ forward over the period 2016/17-2017/18. Using a typology of ‘Existing Activities’, ‘Pipeline Activities’ (i.e. those already in the planning) and ‘New Activities’, it sets out for each action a description of the proposed activity, who will lead it, the partners supporting it, and a timetable for action achievement.

This Annex, and its component actions, will be reviewed annually in line with the monitoring regime for ‘Export Matters’ set out in the main document.

Strategic Objectives	Behaviour Objective
<ul style="list-style-type: none"> <li>✓ Grow the value of sales by local businesses made outside Northern Ireland by 80% by 2025, against baseline year of 2014.</li> <li>✓ Encourage more local businesses to engage in sales outside Northern Ireland.</li> <li>✓ Ensure that local businesses maximise sales in a wide and diverse range of global markets.</li> </ul>	<p>Building on ‘Export Pathway’ &amp; ‘Support Escalator’ concepts; develop, implement &amp; sustain a single target operating model for export service delivery in Northern Ireland.</p>

## Legends

### ‘Target Audiences’ for Actions

■	Public Sector Agencies
■	Business Base at large
■	All Audiences
■	Priority Actions for ‘Export Matters’ in 2016/17



## Existing Activities

Action No.	Activity	Lead	Partners	Timing
1	Compile and publish Northern Ireland's Trade Development and Overseas Event programme. Informed by this, all providers of external-selling/exporting advice in central/local government and the private sector to align their broad suite of Business Solutions to focus on external/export market development.	DETI	Invest NI Local Councils InterTradelreland Chamber of Commerce	Annually, with first publication by 30 June 2016
2	Prioritise geographic market focus on those countries that offer the greatest opportunities for the Northern Ireland business base. This will include taking account of emerging sectoral opportunities linked to existing strengths and future potential growth. Invest NI has developed specific Country and Territory plans, which are reviewed annually. Invest NI's individual company Account Development Plans will provide a core source of reference for these plans.	Invest NI		Ongoing
3	Ensure full access to the resource of market intelligence, which is a fundamental requirement for any exporter, available from Invest NI's Business Information Centre and other partners, to analyse trends, review performance and target suitable export markets.	Invest NI		By 30 June 2016
4	Maximise collaboration and joint working opportunities aimed at boosting Northern Ireland's external and export market sales performance. Invest NI has appointed a Strategic Relationship Manager who has the lead role in coordinating with UKTI, Intertradelreland, Enterprise Ireland and other stakeholders. Stakeholder engagement plans are in place with UKTI and Enterprise Ireland.	Invest NI	UKTI Intertradelreland Enterprise Ireland	Ongoing

## Pipeline Activities

Action No.	Activity	Lead	Partners	Timing
5	Develop customer Account Development Plans (ADP) with those businesses identified as having the highest external sales/export growth potential. Use ADPs to develop company-specific, tailored action plans to boost external/export sales.	Invest NI		Ongoing
6	Use the intelligence from in-market contacts, market growth trends, and ADP information to identify key markets of focus.	Invest NI		Ongoing
7	Target new export-intensive and 'profit centre' Foreign Direct Investment opportunities linked to the benefits and attraction of lower Corporation Tax.	Invest NI		Ongoing
8	Build on the work of MATRIX to develop Sector Strategies for those priority sectors with the greatest potential to sell in external/export markets (e.g. Life & Health Sciences, ICT, Advanced Engineering, and Agri-Food). Export specific initiatives will include participation at International Trade Fairs and sectorally-focused Trade Missions or individually tailored sector initiatives to target markets.	Priority Sector Bodies	MATRIX Panel Invest NI DETI	Ongoing
9	Develop the new Broad Economy Sales and Exports Sales measure into a timely and reliable indicator of all manufacturing and services sales outside Northern Ireland.	DETI	DFP (NISRA)	By 31 March 2016
10	Establish a Northern Ireland Export Forum, comprising representatives from Northern Ireland business and providers of external-selling/exporting advice in central/local government and the private sector. The Forum will act as a means of ensuring effective collaboration across delivery partners and review the progress of 'Export Matters'.	DETI	Invest NI Local Councils InterTradeIreland Chamber of Commerce	By March 2016
11	Pilot use in Northern Ireland of the Performance and Impact Monitoring Survey (PIMS) operated by UKTI which provides a framework for monitoring and evaluating performance.	Invest NI	UKTI	By 30 September 2016

## New Activities

Action No.	Activity	Lead	Partners	Timing
12	<p>Develop, promote and embed the 'Export Pathway' and 'Support Escalator' models to: Provide comprehensive external sale/export market development support to businesses, regardless of their stage of export readiness.</p> <p>Provide a clear 'road map' of what support is available to which business, from which delivery partners, and at which stage in the export journey.</p> <p>Agree and develop stakeholder engagement plans (relating to agreed roles and responsibilities for delivery/provision of various segments of export support) with export development partners in Northern Ireland and in key markets outside Northern Ireland.</p>	DETI	Invest NI Local Councils InterTradeIreland Chamber of Commerce	By 30 June 2016
13	Develop, agree and implement a target monitoring framework for partners under the Exports escalator model which feeds into the Northern Ireland economy targets included in this Action Plan. These should be as consistent with the NISRA data used to set the overall targets as best possible.	DETI	Invest NI Local Councils InterTradeIreland Chamber of Commerce	By 30 Nov 2016
14	Carry out market research and horizon scanning activity to identify new export opportunities and establish a method for sharing this information across all delivery partners and the business base to inform decision making and ongoing strategy development.	Invest NI, DETI	InterTradeIreland (for cross-border market)	By 31 March 2017
15	<p>Develop a series of Export Start initiatives to provide support for businesses focusing on the following:</p> <p>International – a new Strategic Export Development Programme aimed at high growth potential, export focused businesses.</p> <p>Export Start initiatives focusing on the Republic of Ireland – using InterTradeIreland's 'Elevate model'</p> <p>Export Start initiatives focusing on Great Britain.</p>	Invest NI InterTrade Ireland Local Councils	Local Councils	By 31 March 2017
16	Carry out further analysis on the new NISRA Broad Economy Sales and Exports Sales measure to better understand the implications of widening the scope of targets to include sectors where data was not previously available.	DETI	NISRA Invest NI	By 31 Dec 2016





Export Matters

March 2016



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**Enterprise, Trade  
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