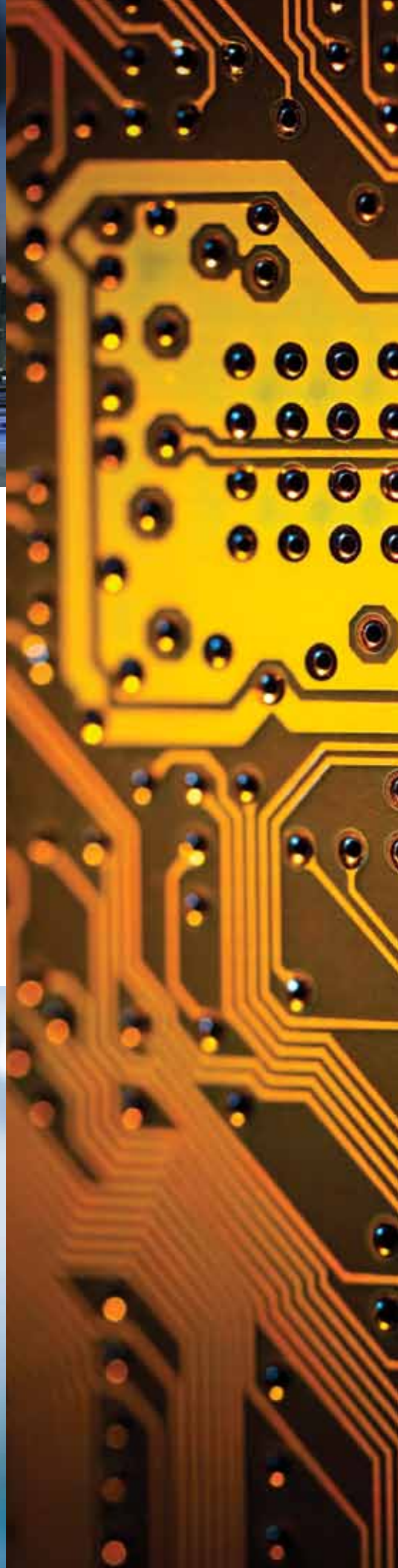




# TEN STEPS TO DELIVERING A SUCCESSFUL METRO EXPORT PLAN





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BROOKINGS-ROCKEFELLER PROJECT  
ON STATE AND METROPOLITAN INNOVATION

BRAD MCDEARMAN AND AMY LIU

**METRO EXPORT  
INITIATIVE**

TEN STEPS  
TO DELIVERING  
A SUCCESSFUL  
METROPOLITAN  
EXPORT PLAN





## SUMMARY

Many leaders in states, cities, and metropolitan areas across the country are exploring ways to help their firms tap into expanding markets worldwide to grow jobs at home. This brief serves as a how-to-guide for private, nonprofit, and government leaders in metro areas who are interested in developing effective action-oriented metropolitan export plans and initiatives customized to their region's unique assets and capacities. It builds on lessons learned from a one-year pilot (2011-2012) where the Metropolitan Policy Program at Brookings collaborated with leaders in four metro areas to develop localized export plans. Metro leaders play a critical role in a trade promotion and development infrastructure long served mostly by states and the federal government. Metro areas are uniquely positioned to identify and increase the number of firms ready to export and to make exports and global engagement a central, consistent part of broader regional economic strategies. This brief aims to help more metro areas adopt or refine their global trade strategies so the nation can remain a center of growth and innovation for years to come.

Ten key steps are suggested to regions seeking to deliver a successful metropolitan export plan. They are:

- ① **Go Metro to Go Global**—Markets are regional and export strategies foster regional collaboration in economic development.
- ② **Organize for Success**—The planning effort must have the stated commitment of local leaders and be well-organized at the outset to create a culture change in economic development practice.
- ③ **Produce a Data-Driven Market Scan**—A credible export plan is built on a solid foundation of data and information about the region's export performance and potential.
- ④ **Capture Local Market Insight**—At the heart of the local market assessment is direct input from firms and service providers obtained through surveys and one-on-one interviews.
- ⑤ **Champion Exports Now**—Promoting and communicating the importance of exports to the region's long-term economic future is critical to ensure the export plan is embraced.
- ⑥ **Develop a Customized Export Plan**—A clear, easy-to-read document will serve as a strong vehicle for galvanizing stakeholders to act on and support the exports opportunity.
- ⑦ **Prepare for Implementation**—A detailed implementation (or business) plan that delineates how the export plan will be executed must include details on deliverables, phasing, budgets, and the division of labor among lead organizations.
- ⑧ **Identify and Promote Policy Priorities**—Metro leaders should articulate and advance a state and federal policy agenda that will foster an environment for enabling the region's exports to thrive.
- ⑨ **Track and Publicize Progress**—The metro export team will need to identify metrics that are most realistic to collect locally and dedicate resources to maintaining, analyzing, and reporting progress.
- ⑩ **Mainstream Exports into Economic Development**—For a region's economy to fully benefit from international trade, exports must be an integral part of a multi-pronged economic growth agenda that includes innovation, transportation and logistics, and global talent.

## INTRODUCTION

**A**cross the country, regional leaders are re-examining their job and economic growth strategies in the wake of the Great Recession. At the core of their reexamination is a heightened interest in tapping the growth of expanding markets worldwide to grow jobs and the economy here at home.

New strategies make sense, as the rules for economic growth have changed dramatically, especially in recent years. While rising markets have been “emerging” for some time, it was in 2010 that the BIC (Brazil, India, and China) nations’ combined share of the economic output in the world economy first surpassed that of the United States.<sup>1</sup> As these and other countries industrialized, they also urbanized. In 2008, the majority of the world’s citizens for the first

time lived in metro areas, with that share expected to grow to 70 percent by 2050.<sup>2</sup> Even highly rural China is now majority urban.<sup>3</sup> These twin forces of rapid industrialization and urbanization have contributed to the growth of the world’s middle class and therefore purchasing power.<sup>4</sup> All told, more than 70 percent of the world’s purchasing power is now located outside of the United States.<sup>5</sup>



These trends point to a great market opportunity for U.S. firms and local economies. The more U.S. goods and services are the product or solution of choice around the world, the more increased foreign demand will translate into more jobs, greater revenue, and better wages for American businesses and workers. Further, to create globally competitive products and services requires, in part, more American workers to engage in understanding the cultures, preferences, and needs of different customers around the world.

The purpose of this brief is to provide private, nonprofit, and government leaders in U.S. metro areas a concise road-map to take advantage of the enormous market opportunity offered by exports. It serves as a “how-to” guide for regional leaders interested in developing effective action-oriented metropolitan export plans and initiatives customized to their

unique assets and capacities. This guide builds from the lessons learned from a one-year pilot (2011-2012) launched by the Metropolitan Policy Program at

Brookings in which the program collaborated with leaders in four metro areas in developing localized export plans. That pilot was further enhanced by a formal collaboration with the U.S. Department of Commerce International Trade Administration and their partner agencies within the National Export Initiative. Much was learned. Most fundamental is that while there is a laudable national goal to “double exports,” there is no one-size-fits-all approach to doing so. Though each metro area in the pilot set the common goal of doubling exports in five years, each laid out very different strategies and different operational structures to achieve that goal, reflecting the unique market advantages and contexts of their respective regions.

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A plan to boost a state or region's exports must start with a fundamental understanding of why exporting is critical to economic prosperity and why metro areas are the right lens from which to design and act on regional potential to trade and grow jobs and revenue.

### WHAT IS AN EXPORT?

There are three primary ways to define an "export" at the metropolitan or regional level: (1) the sale of goods or services produced in a metro area to a business or resident of a foreign country; (2) shipments that travel from a broader geographic area (e.g., entire country) through a port to a foreign destination; and (3) shipments that travel from a broader geographic area through a customs district on their way to a foreign destination. The second two definitions relate to the point of movement of goods based on shipments and excludes services exports (for example, in Los Angeles, shipments come from throughout the U.S. and are processed through Los Angeles and Long Beach ports before going overseas). The first relates to where the product or service is actually produced. In Brookings' "Export Nation" report, exports are defined by the first method and include these types of exports from a metro area:

- **Goods:** These are manufactured goods or parts, such as U.S.-made automobiles shipped for sale to the United Kingdom
- **Services:** Services exports come in many forms. They can be purchased overseas, such as work done by a metro-based engineer or architect on a project in China. They can also be purchased in the United States, such as foreign students from India purchasing education services at a U.S. university. Or, they can be tourism-related services, such as a Canadian resident making expenditures on such items as taxis, restaurants, entertainment, clothing, lodging, or health care while visiting a U.S. metro area
- **Royalties:** These are payments made by foreign companies to distribute U.S. film and television shows overseas, to software companies for licensing fees, or to retail firms for franchising fees
- **Secondary Exports:** These are product or service inputs into exports from companies in the supply-chain

What makes something a U.S. (or metro) export is not where the transaction takes place, but whether or not the buyer is based outside the United States.





## WHY EXPORTS MATTER

Exports matter because they represent one critical way to grow the tradable sectors of our economy— the very sectors that drive wealth, boost productivity, and grow local industries. U.S. tradable sectors have severely underperformed in the last few decades.<sup>6</sup> To reverse that trend, states and metro areas can help firms in key industry sectors grow and innovate by selling their goods and services globally. Exporting firms have been major contributors to the nation's economic recovery. Exports accounted for nearly half of the nation's economic growth in the first year of the post-recession recovery and can power economic growth over the long haul.<sup>7</sup>

The benefits of helping more firms, and the entire economy, tap and engage global markets are many:

- The production of exported goods and services creates jobs, both directly and indirectly in the supply chain. One study finds that every \$1 billion in new exports creates 5,400 additional jobs<sup>8</sup>
- The movement of goods exports and passenger travel (for business services and tourism) supports jobs and revenues in the port, airport, freight, and logistics sector<sup>9</sup>
- Education services exports, characterized by international students purchasing a U.S. education, represent a \$21.3 billion industry and generate a critical source of revenue and talent for public and private higher education institutions<sup>10</sup>
- Export sector jobs pay well. For every \$10 billion in sales in a metropolitan export industry, its workers earn 10 to 20 percent higher wages than those in nonexporting jobs<sup>11</sup>
- Small- and mid-sized firms (SMEs) that export generally experience greater revenue growth than non-exporters and weathered the recession better as a result; in one study, SME manufacturing exporters grew revenues by 37 percent while non-exporting manufacturers experienced a 7 percent decline in revenues<sup>12</sup>

- Exporting spurs innovation. Small- and mid-sized firms that export tend to innovate more in products and processes than non-exporters; further, high-exporting metro areas also generate high patenting rates<sup>13</sup>

Despite these benefits, we remain a nation of under-exporters. Only 1 percent of American firms sell a product or service outside U.S. borders.<sup>14</sup> Only about 35 percent of Americans possess a passport.<sup>15</sup> That figure is 60 percent in Canada.<sup>16</sup> The result is a U.S. economy, reliant upon domestic demand, less export-oriented – at 13 percent of its overall economy– than many of our global peers and trading partners.<sup>17</sup>

Global market trends show that past practice will not be sufficient to fuel American competitiveness. To make the shift to greater global orientation, it is time not just to embrace a national export strategy but a series of bottom-up metropolitan export strategies that will boost trade and global engagement in the very places where America's high value goods and services are produced.

## WHY METRO EXPORT PLANS

Recognizing the rationale for greater U.S. exporting, President Obama announced the National Export Initiative (NEI) during the 2010 State of the Union, with the stated goal of doubling U.S. exports in five years, from \$1.57 trillion to \$3.14 trillion by the end of 2014.<sup>18</sup> To meet the NEI goal, a multi-faceted National Export Strategy was released in June 2011 by the Trade Promotion and Coordinating Committee (TPCC), which includes grounding the strategy in states and metro areas. [See **Appendices A** and **B** for more information about the NEI and the TPCC] The President's Export Council (PEC) also reinforced the importance of federal alignment with state and local efforts in a June 2012 letter to the president.<sup>19</sup>

The focus on metro areas and metro leaders is correct. As research by Brookings and others have shown, the global economy is made up of a network of distinct metro economies.<sup>20</sup> Boosting exports requires



a targeted strategy to grow industry specializations at the point of production in metro areas where they cluster and innovate, and then connect leading-edge goods and services to likely metro markets around the world. Already, the 100 largest metro areas are the producers of our trade economy, generating nearly 65 percent of all exports and 75 percent of all services exports.<sup>21</sup> They are the hubs of supply chains, goods movements, and business and tourism travel, handling 82 percent of the nation's air freight, 88 percent of foreign waterborne cargo weight and 92 percent of air passengers.<sup>22</sup> As a result of these economic assets, the 100 largest metro areas generate 75 percent of the nation's economic output and the majority of economic output in 47 out of 50 states.<sup>23</sup>

Regional leaders know their companies and their industry strengths best and can help bring more small- and mid-sized firms into the international marketplace.

To this end, Brookings launched the Metropolitan Export Initiative (MEI), a signature effort within the Brookings-Rockefeller Project on State and Metropolitan Innovation aimed at helping the nation and its regions and firms move from aspiration to action on exporting. The goal was to work with a limited number of state and metro leaders to develop and implement customized metro export plans. During the course of 2011 and 2012, Brookings partnered with a cross-section of leaders in four metro areas: Los Angeles, CA; Portland, OR; Minneapolis-Saint Paul, MN; and Syracuse/Central New York, NY. These metro areas were chosen in part because of their geographic diversity, variation in industry mix, strong engagement of state and regional leaders, history of effective regional collaboration, and a demonstrated commitment to exports as part of a larger economic strategy. These plans are currently being implemented.

The hard work and experimentation carried out by leaders in these four metro areas are shedding light on the critical role that metropolitan areas armed with smart metropolitan export plans can play in an export-promotion system long driven by states and the federal government. Despite some initial concerns, the early evidence suggests that metro export

plans do not usurp state and federal activities but instead supplement and fill key gaps, thereby improving the performance of the existing delivery system. So far, the plans have seemed to channel at least four major benefits of metropolitan-level problem-solving on exporting:

- Metro leaders can proactively increase the number of firms who are ready to export or export to additional markets because they have strong direct relationships with firms and know the firms and actors in their leading industry clusters
- Metro leaders can help create a more transparent, coordinated (federal, state, local alignment), and efficient export assistance system that is moving toward common goals
- Metro leaders can help facilitate the cultural shift needed to embrace global engagement by making exports and trade a mainstream part of regional economic development
- Finally, metro area leaders are best positioned to integrate exports into a broader economic strategy for growth and global competitiveness in the "next economy." This means aligning exports and foreign direct investment with innovation in manufacturing and services (including in the clean economy); transformative investments in freight and logistics; and the grooming of a globally fluent workforce.

In short, the nation's ambition to grow jobs and exports relies upon metro area leaders taking the lead, with state and federal leaders as partners. This guide gives metro area leaders the tools and steps they need to develop purposeful, tailored metro export plans that will grow their regional economies and further the economic growth of their states and the national economy as a whole.

## TEN STEPS TO DELIVERING A SUCCESSFUL METROPOLITAN EXPORT PLAN

Given the compelling case for metropolitan exporting, more and more state and local leaders have expressed interest in developing and implementing unique, ground-up metropolitan export plans for their regional markets. These leaders not only aspire to increase exporting from their jurisdictions but seek practical guidance on how to get to work right away. The ten steps outlined here aim to help economic development practitioners, government leaders, businesses, and other local stakeholders not only develop a quality plan, but to develop one that has a strong chance of being effectively implemented.

- 1 Go Metro to Go Global
- 2 Organize for Success
- 3 Produce a Data-Driven Market Scan
- 4 Capture Local Market Insight
- 5 Champion Exports Now
- 6 Develop a Customized Export Plan
- 7 Prepare for Implementation
- 8 Identify and Promote Policy Priorities
- 9 Track and Publicize Progress
- 10 Mainstream Exports into Economic Development

### A PRIMER ON KEY EXPORT-RELATED TERMINOLOGY, LESSONS, AND OBSERVATIONS FROM THE FOUR METRO EXPORT INITIATIVE PILOTS

Before embarking on a metro export plan, a basic understanding of common terms, acronyms, and market conditions of the export field is necessary. **Appendix C** provides a guide to common export terms.

**Appendix D** summarizes the insights that have emerged from the first four metro area pilots on the state of U.S. and metro exporting and how concerted metro export plans benefit state and national efforts. These insights can serve as a starting point to evaluating regional markets and possibilities. These findings can help clarify why U.S. companies and industries need dedicated and sustained support to export. And these will help shed light on how best to position the metro export plan with key state and national partners.

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## **STEP 1** **GO METRO TO GO GLOBAL**

It is critical at the outset to clearly define the geography of the export plan and it should be metropolitan or regional in scope. Markets are regional and any local plans involving trade and investment should reflect that reality. While it may be tempting or seemingly easier to focus export activities at a single-city or county scale, or a statewide scale, moving to a metropolitan geography allows one to position the market to compete globally by assembling and aligning all related regional assets, such as key corporations, top industries, workforce, area higher education institutions, and transportation infrastructure.

Once they started the export planning process, the four MEI pilot metro areas immediately found that their trade and investment community was already regional in scope. Exporting companies are scattered in cities and counties throughout the metro area. The wide array of federal, state, and local export service providers, while not typically well-coordinated, tend to focus their work with companies at the regional level.

Exports can also serve as a strong unifying platform on which to build a better overall regional economic development effort and culture. Whereas many other traditional economic development activities, such as business attraction, tend to foster internal competition, exports tend to foster regional collaboration at the economic development policy and service provider level. Leaders in each of the four pilot metro areas quickly recognized that by working together on increasing exports and fostering a more globally-oriented economy, they were going to see gains made throughout the regional economy and the regional supply chain, without taking anything away from, or threatening, individual local jurisdictions.

## **STEP 2** **ORGANIZE FOR SUCCESS**

Step Two should result in a well-organized work plan to clearly guide the export plan process and better assure its success. For most metro areas, exports represent a new direction in economic development—one that requires a culture change. The planning effort must have the stated commitment of local leaders and be well-organized at the outset to shift from the status quo. Producing a successful export planning process requires at least one respected local organization, leader, or core team to convene and champion the effort and best guide the process according to plan. It requires a good deal of pre-planning, getting the right people at the table, and assembling an inventory of available resources (e.g., staff, research, existing reports) to support the planning process. One needs to determine an appropriate and realistic scope for the project, schedule a series of committee meetings upfront, establish critical deadlines, clarify deliverables, and identify the right organizations and individuals that will be committed and involved in strategy development. The process also benefits greatly from a local leader or outside consultant to facilitate and drive the local planning effort to best ensure that it moves along according to plan. Not all export planning processes can or should be the same in terms of scope and capacity, so it is important to determine what can be realistically accomplished given resources.

### **TIMING AND DELIVERABLES**

From start to finish, the export planning process should require about six to nine months to complete, although this will vary by region. This should include at least four meetings of the full steering committee of the export initiative and several interim meetings for the core team and any specialized task forces. The process should result in three key deliverables: an export market assessment, the export plan (and associated implementation or “business” plan), and a policy memo. These are each discussed in greater detail in other steps in this guide.



## CORE TEAM

The core team consists of the champion organization(s) committed to staffing and driving the export planning effort. It is best to include a representative from local and state government and the private sector in the core team as they are key during implementation, when the focus shifts to service alignment, funding, and staffing. This team will be responsible for pre-planning, securing steering committee members, scheduling and preparing meetings, conducting and assembling export research, carrying out the daily needs of the planning effort, and ensuring the export planning process is successfully completed. Each of the four pilot metro areas had different local champions and core team leaders. In Los Angeles, the core team was led by the Office of Los Angeles Mayor Antonio Villaraigosa and the city of Los Angeles, the Los Angeles Area Chamber of Commerce, and the University of California Los Angeles' Anderson CIBER. In Portland, the metro export initiative was led by the Office of Portland Mayor Sam Adams and the Portland Development Commission. In Minneapolis-Saint Paul, the core team included the Office of Minneapolis Mayor R.T. Rybak, the city of Minneapolis, and the Minnesota Trade Office. In Syracuse, CenterState CEO (the region's chamber and economic development partnership) drove and staffed the plan.

## STEERING COMMITTEE MEMBERS

In addition to the champion organization(s) that will lead and drive the effort on a daily basis, a metro export plan will require a steering committee that includes key stakeholder organizations in the region and state. It is best to secure the highest level leader from each organization (see Step Five for further discussion of this topic). Division of labor, active support, and participation from committee members are critical to ultimately producing a successful plan. These organizations also provide resources (e.g., staff, consultants, facilities, time) to the initiative. These stakeholders need to be involved not only because they bring valuable ideas and perspectives to the development of the plan, but also because their support and buy-in will be needed during the release and implementation of the plan. In the four MEI metro areas, there were 15 to 30 leaders who participated on



the steering committee. This engagement proved to quickly generate a crucial network of regional export ambassadors, some who later became instrumental in helping align federal and state efforts to the plan.

The steering committee should include a wide variety of government, civic, university, and private sector leaders who are active participants in or experts on economic development and global trade (see sidebar). This array reinforces the diversity of activities underway that need to be better aligned and coordinated. In particular, many of the MEI metro areas wished they had proactively secured the involvement of more international trade professionals (e.g., freight forwarders, bankers, lawyers) and well-performing export companies at the outset of the project. These contacts proved to be tremendous resources and often became engaged advocates for the exports effort. While some of these contacts can be surfaced through project interviews, it would be preferable to identify and include them from the outset, especially if the effort starts as a public-sector push.

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## EXAMPLE MEMBERS OF A METRO EXPORT PLAN STEERING COMMITTEE

### Metro Area

- Mayor or county executive's office
- Chamber of commerce (including any ethnic chambers of commerce groups)
- Regional economic development partnership
- Local economic development office (city/county)
- University, business school, and/or related international program
- Air and water ports
- World trade center
- Manufacturing extension program
- Industry associations
- International/trade associations
- Private-sector exporting companies
- Freight forwarders/logistics firms
- Private-sector export services firms (banks, legal)
- District Export Council (DEC)
- Small Business Development Center (SBDC)

### State

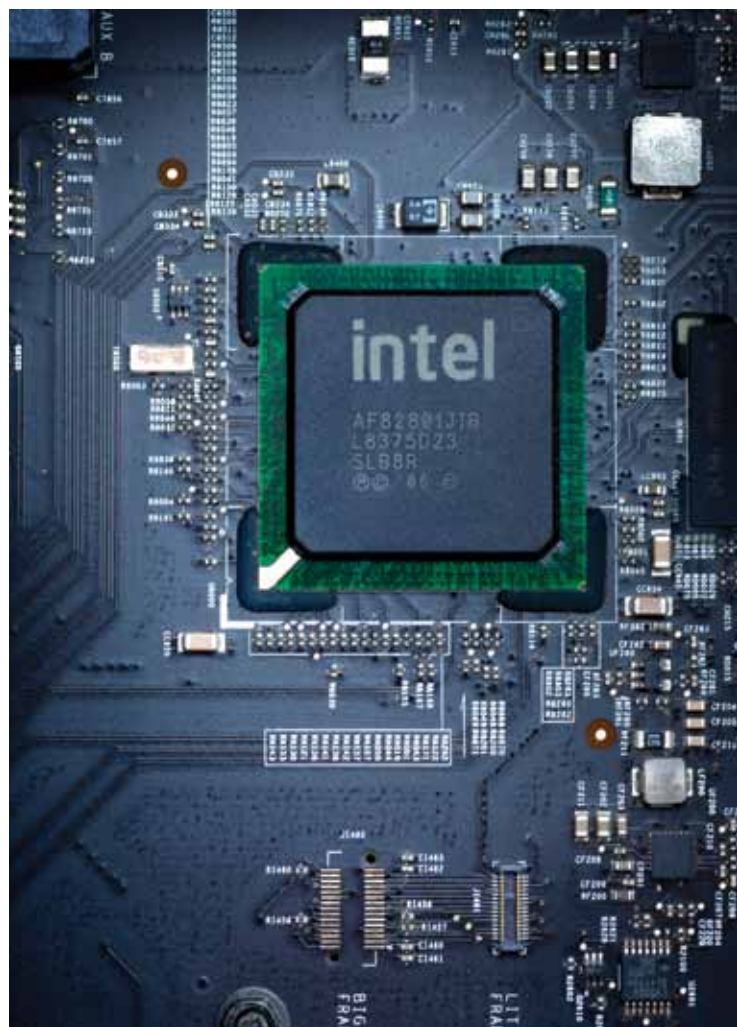
- Office of the governor
- State international/trade office
- State economic development agency
- State chamber of commerce

### Federal

- U.S. Department of Commerce (U.S. Commercial Services)
- U.S. Small Business Administration
- Export-Import Bank of the United States
- U.S. Department of Agriculture

## THE VALUE OF GOVERNMENT LEADERSHIP IN GLOBAL TRADE

It is critically important to secure the involvement of state and local elected public officials (and their staffs) in the planning and implementation process. These leaders serve an important convening role in that they can often galvanize firms from throughout the metro area to participate in the process. They will also play a critical role in implementation. In foreign countries, high-ranking U.S. federal officials, state governors and large city mayors are viewed as the top leaders representing their markets. These individuals provide the metro delegation with credibility in foreign markets that can open up doors and make connections for local companies. Hence, the committed involvement of government leaders is vital to an effective presence at global trade fairs or targeted overseas mission trips. Such leaders represent entities that can provide early seed money and in-kind support. Both are critical to the start-up phase of an export effort and can help secure matching private-sector funding for long-term operations.





## FEDERAL EXPORT SERVICES, PROGRAMS, AND STRATEGIES

It is important to get to know and engage the key federal export service providers in a metro export plan, and how existing federal programs and strategies can plug into regional efforts. There are three federal entities with a primary mission to provide export services and programs on the ground in metropolitan areas or larger local regions. They are:

- **U.S. Foreign and Commercial Services:** The U.S. Department of Commerce, International Trade Administration's (ITA) trade promotion arm, which has trade professionals on the ground to serve companies in over 100 U.S. cities and 70 foreign countries. Primary roles involve market entry services to "export ready" firms; advocacy for major projects; trade promotion via trade missions and international buyers programs; and market access casework
- **Export-Import Bank (Ex-Im Bank):** Official export credit agency of the U.S. Government; assists with loan guarantees, export credit insurance, and direct loans (to buyers)
- **U.S. Small Business Administration (SBA):** Business development and working capital financing. Helps small firms that are new to exporting, and links them to business counseling networks

These and other federal agencies serve on the Trade Promotion and Coordinating Committee (TPCC), which serves as the coordinating body designed to provide a common framework to unify the export promotion and financing activities of the U.S. Government, as well as to develop a comprehensive plan for implementing strategic priorities (including the National Export Initiative).

To learn more about the TPCC, its 20 member agencies and Export.gov, please see **Appendix B**. To learn more about the National Export Initiative and the National Export Strategy, please see **Appendix A**.

## STEP 3

## PRODUCE A DATA-DRIVEN MARKET SCAN

The first task of the core team is to develop an export market assessment. This will ensure steering committee members start with a common grounded understanding of the metro area's market position and opportunities as the basis for strategy development.<sup>24</sup> Step Three should result in a comprehensive market (or data) scan that will serve as the first critical input to the market assessment. A credible export plan is built on a solid foundation of data and information about the region's export performance and potential.

The market scan should help determine, for example, the region's current export strengths and weaknesses, what export industries or foreign markets the plan may want to target for proactive outreach, or what baseline performance metrics could be considered to evaluate progress. It should begin with an overview of the metro economy and its recent performance. This can include high-level economic data on employment, unemployment, gross metro product, and industry size, specializations, or industry clusters. Next, the scan should summarize the role of exports in the overall regional economy. This can include such statistics as total export volume, export growth, export intensity, export jobs, top exporting industries, goods and services exports, and top export markets by country. This will allow the group to hone in on its region's unique export opportunities.

Local leaders often crave more in-depth data as they try to better understand this new area of economic growth and focus, but often find detailed data, such as firm-level data, hard to come by. It is likely that additional data (other than what is outlined in this document) does not yet exist or will not greatly impact the base set of strategies. The experience in each of the four MEI metro areas is that the available export data was sufficient to produce solid export plans. Each of those metro areas continue to build on their base of knowledge as they implement their plans and will react accordingly.



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## **BROOKINGS METRO ECONOMY AND EXPORT DATA**

The Metropolitan Policy Program at Brookings produces and maintains a strong array of metro-oriented data related to the economy, demographics, exports, and many other topics. A good source of metro economic data for the largest 100 U.S. metro areas is the quarterly “MetroMonitor”, which provides data on employment, unemployment, gross metro product, and housing, and provides metro rankings for each factor. You can access all this data on the program’s data resources page at: <http://www.brookings.edu/about/projects/state-metro-innovation/resources>

The primary source for metropolitan-area export data based on the location of where a service or goods export is produced (not from where it is shipped) is Brookings’ latest analysis “Export Nation 2012.” This report provides the core set of export data and rankings for each U.S. metro area, as well as for all states and counties. Profiles have been developed for each of the largest 100 U.S. metro areas and all states to provide a snapshot overview of export performance.

Brookings has also developed a U.S. exports database, with export data for all 3,113 counties, all metro areas and micropolitan areas, and all 50 states plus the District of Columbia. To access the full Export Nation 2012 report, metro area export profiles, the database and related documents, go to <http://www.brookings.edu/research/reports/2012/03/08-exports>

For a more detailed description of what the Brookings’ export database provides, and to learn more about federal, state, and other export-related data resources, see **Appendix E**.

## **STEP 4**

## **CAPTURE LOCAL MARKET INSIGHT**

Data analysis is essential but not sufficient. The second input for the market assessment, and arguably the most valuable, is local market intelligence. This covers information and insight that can only be secured locally through more direct outreach to firms and export services providers and assembly of all relevant local reports and articles related to trade and investment. The result of Step Four should be completion of a full market assessment, which assembles the findings from both the market scan and local market intelligence.

At the heart of local market outreach is direct input from firms and service providers obtained through surveys and one-on-one interviews. The overall purpose is to seek their perspectives on their own exporting activities (and whether they export), export opportunities, obstacles, quality of existing export services and programs, the benefits of exporting, and other issues that may arise. The surveys and interviews can be conducted simultaneously to the market scan.





A company survey proved to be a highly valuable tool in the three initial MEI metros that conducted one. The three metro areas emailed surveys to thousands of companies using lists provided by area business groups, such as the state trade office, area chamber of commerce, or regional economic development partnership. From that distribution, a total of over 600 companies responded to the three surveys (an average of about 200 companies per metro area). The results helped each team to better understand which companies are exporting, how they first entered export markets, what they are exporting, where they are exporting, which markets they plan to grow, the most significant challenges they face, their awareness and satisfaction with local export services, and their top policy priorities. The company survey, developed by Brookings and the Minneapolis-Saint Paul export team, is available for use (in a form that can be adapted to local needs). However, each metro area must administer their survey, encourage companies to respond to it, and provide a written assessment of the results.

The one-on-one interviews with companies and export services providers proved to be an extremely valuable exercise. These interviews not only provided more in-depth qualitative insight into the export process, but also strengthened relationships and dialogue between the committee members and exporting firms, opening new doors for collaboration and engagement. On average, each of the four pilot metro areas conducted between 25 and 30 one-on-one interviews. A key takeaway the pilot region teams emphasize is that it is very important to start this step early on in the process because of the overall value and insight these contacts provided.

The four MEI metro areas quickly realized that the interviews served to excite and encourage these firms about the export effort and that they needed a way to channel these newly unleashed energies. For example, in Syracuse, six of the companies interviewed for the export plan ultimately joined the export committee and served as local export champions. These companies have agreed to remain involved in implementation and to mentor and guide local new-to-export companies as they enter export markets. Some

## SURVEY AND INTERVIEW INSTRUMENTS AND EXAMPLE ASSESSMENTS

An example export survey instrument and company interview form can be found here: <http://www.brookings.edu/about/projects/state-metro-innovation/mei>

Key common market assessment findings from the four MEI metro areas are summarized in **Appendix D.**

of these company representatives have already been recruited to serve as presenters and panel members at local trade-related events and conferences.

Interviews with government and for-profit export services providers were also conducted, including related federal, state and local agencies, and other providers who already actively work with firms (e.g., local freight forwarders, logistics services providers, banks and legal firms). These export services providers each have different missions, perspectives, resources, and performance measures. Listening to them individually will help to ensure the steering committee gains from the experiences and expertise of all actors operating in the region, that all voices are heard and respected, and that all available resources are more effectively aligned and coordinated.

Once the market scan data and the interviews and survey assessment are complete, these findings must be pulled together into a clear, cohesive market assessment that tells the story of the export market and its potential for growth. An experienced and trusted researcher, consultant, or strategist should take the lead on this critical component of the planning effort because the core findings will serve as the foundation for related export strategies. Those responsible for this scope of work must have experience in tying together and assessing both quantitative and qualitative information, turning it into a simple compelling story, and preparing it in written and presentation form. Two-page market assessment key findings summaries for each of the four MEI pilot metros are available in the associated export plans and may be helpful guides.

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## **STEP 5** **CHAMPION EXPORTS NOW**

This step is designed to better ensure the export plan is embraced and championed by key local leaders and stakeholders during the planning process to build the kind of support needed later to successfully implement, fund, and sustain the plan. Exporting, and an emphasis on global trade and investment, is a new agenda for many local elected officials, economic development agencies, the media, and even private-sector businesses. With the market assessment complete, the steering committee will now have the data and talking points needed to make the strong case for exports. Thus, this is a good time to begin promoting and communicating the importance of exports to the region's long-term economic future, particularly to potential funders and stakeholders of the plan who frequently contend with fierce competition for limited time and resources in today's constrained environment. Early and regular outreach is critical so that the steering committee does not end up in the position of releasing a plan that requires several additional months of gathering support from key leaders, stakeholders, and potential funders just to get the effort off the ground.

One way to do so is to secure the right committee members to participate in the development of the strategy (also discussed in Step Two). Recruitment to the steering committee is an on-going process. Certain business leaders and experts who were interviewed as part of the market assessment in the four pilot metro areas were later invited to join the steering committee, providing critical insights and serving as visible champions for the export plan. Regional economic development organizations, chambers, and certain public-private partnerships are also critical committee members, as they may ultimately become the lead implementer or "quarterback" for the new metro export plan. This was true for each of the four pilot metro areas, where at least some key portion of the metro export effort is now housed within either the regional chamber or economic development partnership-groups which typically have not had global trade and engagement as part of their missions.

It is preferable to gain the commitment of the highest ranking official from each engaged organization to participate on the export steering committee; however, this may not be realistic for many metro areas. Even when high level officials convene an export initiative, many of those participating in the regularly

scheduled meetings are likely to be the key staff leads from each organization as opposed to the top leaders. In this case, the committee should prepare an internal communications plan to keep their organizations' top leaders informed throughout the planning process, thus retaining the high level buy-in needed for the export plan. The takeaway lesson here is that one should not assume that people (including regional leaders) understand the value of exports. Early and ongoing education and engagement is important.





### Securing High-Level Champions for Exports

The Minneapolis-Saint Paul export initiative approached the task of securing high-level champions (stakeholders) for exporting by ensuring the highest ranking metro-based federal, state, and local officials were committed participants of the export plan steering committee at the outset of the project. By having the head of the state trade office and the mayor of Minneapolis lead the planning effort, and commit to attending all meetings, they were able to convene the highest ranking officials from most of the involved organizations from day one. By the middle of the process, top leaders from throughout the region didn't have to be sold. Having been part of the planning process, and having heard the rationale for exports, they were committed to engaging in the effort early on and quickly became champions. GREATER MSP, the region's economic development partnership, was engaged from the start and ultimately agreed to quarter-back the branding/marketing portion of the metro effort, in partnership with the Minnesota Trade Office.

In Portland, where key staff led the working effort, the committee convened a presentation of the export plan to top officials once the market assessment and an initial draft plan were complete. They conducted background interviews with media a few months before the scheduled plan release to inform the press about the initiative, educate them on basic findings and direction, and prepare them for the ultimate public release. By the time the plan was released in February 2012, the Portland export committee was able to schedule related media briefings and editorial board meetings with each of the major local news outlets with relative ease. Top economic and elected leaders led the briefings. The export plan and release event attracted wide attendance and high-quality on-message stories in major local media outlets.

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## STEP 6

### DEVELOP A CUSTOMIZED EXPORT PLAN

The core deliverable of this entire process is the metro export plan itself, the focus of Step Six. This plan should be a 15- to 25-page document that makes a simple compelling case for exports as a driver of the metro area's long-term economic success and provides a logical guide for how to get there. It should be a clear, easy-to-read document that serves as a strong vehicle for educating a wide range of audiences about the exports opportunity and how the region plans to take advantage of it.

#### Key Considerations in Developing the Plan

In general, the export plan should cover the following sections: (a) the metro area's rationale for exports; (b) key findings from the market assessment; (c) the plan's goals and objectives; (d) core strategies and tactics that will best drive attainment of stated goals and objectives; (e) new programs and initiatives to carry out the strategies; (f) an implementation plan (e.g., roles, responsibilities, funding); and (g) performance goals to measure progress. The four MEI pilot regions each chose to include a section summarizing key policy reforms needed to best support the successful implementation of their individual export plans. Given the current resource-constrained environment, the four pilot regions came to the conclusion that the more the strategy builds off existing economic development programs, staff and resources, the more likely they were to have implementation success. For example, by integrating exports and prioritizing it in existing business retention/expansion work, the metro areas are able to move forward without major fundraising initiatives. It may prove more valuable to reprioritize exports within the current economic development structure than to create totally new structures.

To help determine the core goals and elements of a regional plan, below are some key questions to consider:

- **What are the key rationales for producing this export plan?** Why is this the right time in the region to embrace an export strategy? Describe the "export moment."
- **What are the primary goals and objectives of this export plan?** Will the plan set broader economic goals, related to job growth, income growth, or becoming more globally aware, fluent, and connected? If so, how would one quantify such goals, and what would be the timing for achieving them? How do other international efforts (e.g., foreign direct investment, imports, immigration, infrastructure) relate to economic and export goals? Each objective will lead to different strategies.
- **How will the plan leverage the metro area's distinct export industries?** Should the export plan target and prioritize certain industries or clusters for proactive export development outreach and services? If so, which clusters and why? How do top exporting industries mesh with currently identified clusters in the metro area? Is there a compelling reason to target certain industries, as opposed to providing broad export services? Are there any industries that dominate the market for exports? Are there any emerging industries in the region that should be targeted based on projected future growth?
- **Generally, what types of firms, in terms of export-readiness and size, will this plan hope to assist?** Will the plan aim to broadly serve all types of firms, or will it distinguish and prioritize between those that are export ready, New-to-Market (NTM), or New-to-Exports (NTE)? How will the region identify and define these firms?

Further, will this plan focus on SMEs (small- to medium-sized enterprises) or firms of all sizes? Why? Increasing exports among the largest firms/exporters may help the metro area reach its export goals faster; however, these firms may either



have complex needs or not require as much basic assistance. A focus on SMEs may help to grow more firms that export and open up new markets; however, it will likely require more resources and take longer to reach export growth goals. SMEs could support potential longer-term goals related to global fluency and international connections.

Similarly, how will the plan treat SMEs that are suppliers to larger exporters, but are not likely to be direct exporters themselves?

► **Should the export plan target certain countries for export development?** If so, which countries

and how should they be determined? Should the focus be on countries where there is already a strong market penetration by area firms? Should the focus be on markets with the greatest demand for the dominant products and services from the region? Should the plan focus on fast growing/emerging markets (e.g. in Brazil, India, China)? What would be the proposed activity related to these countries? Target them for trade missions or foreign trade shows? Ensure companies are at domestic trade shows with international buyers from these countries? Research?

► **What current federal, state and local export programs/efforts can be better aligned or strengthened?** What are the key gaps in the

current metro export system? What are the key interventions that the region can undertake to address these gaps in the export system or to better leverage opportunities? What new programs/efforts need to be created?

► **How can the export plan leverage the potential role of ethnic businesses, immigrants and/or international students prominent in the region?**

How can these populations and their natural global ties benefit from or play a proactive role in helping the region achieve its export goals? How could language and cultural strengths in certain ethnic populations or by international students support efforts to globalize?



► **What metrics should be used to measure the success of the metro export effort?** What timeframe should be considered? What can be realistically measured? How would the plan tie export services and programs to desired outcomes? How will the plan measure short-, mid- and long-term success? Where does cultural and behavioral change come in?

► **What will it take to realize successful implementation, funding, and results related to the draft export plan outline?** Which organization(s) will be held accountable for organization and implementation of the metro export plan? Should it be one lead organization or a coalition of equal partners? Who “carries the flag” for exports? What resources will be available to support implementation of the proposed plan?

► **What key policy topics (obstacles/opportunities) are critical to the success of your region's export efforts and can be elevated to top federal and state policy makers?** What federal programs, resources, or regulatory relief would help facilitate the successful implementation of your metro export plan?

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## SAMPLE STRATEGIES FROM CURRENT METROPOLITAN EXPORT PLANS

Below are example strategies from the metro export plans for the Los Angeles, Minneapolis-Saint Paul, Portland, and Syracuse/Central New York regions. These strategies illustrate the different ways a metro area can choose to achieve the stated objectives within their broader export plans.

### LOS ANGELES

#### ➤ Create the Los Angeles Regional Export

**Council (LARExC):** LARExC will ensure a sustainable regional export effort by coordinating existing export services and providers into a seamless regional export network with a focus on company success; developing and maintaining critical export research and a regional exports website; and supplementing existing programs with critical new additions.

#### ➤ Establish the "Export Champions" Program:

Export Champions will connect partnering companies within targeted industry clusters to UCLA and USC MBA research teams that will provide tailored export services and training using a case management approach. The MBAs will fill a critical gap in export services through market research, market entry strategies, and development of customized export business plans.

50 percent of current metro exports), including an intense focus on growing the local supply chain through strategic recruitment and existing business integration efforts.

#### ➤ "We Build Green Cities" - Brand and Market

**Portland's Global Edge:** Package Greater Portland's cluster strengths to support new market presence for the region's most innovative sectors. This begins with a clean tech initiative that offers regionally developed solutions to global challenges, including proactive marketing to sell Portland's "green city" story internationally around a set of industries, companies and products with export potential and a travel and tourism component to attract international conventions, meetings and tourists.

### SYRACUSE/CENTRAL NEW YORK

#### ➤ Build Export Capacity of the Region's SMEs:

Minimize real and perceived export barriers by increasing awareness of export opportunities, streamlining export services, and creating a 'tag-a-long' program to connect SMEs to successful, larger local exporters with global experience and connections. Given its proximity, the region will target Canada as an ease of entry market for SMEs with little or no export experience.

#### ➤ Expand Exports of the Region's Key Services

**Sectors:** Leverage significant export potential in key services sectors (education, health care and medical services, and tourism) by establishing a focused services working group within the newly formed Regional Export Council, enhancing foreign language services to assist foreign visitors and companies, and focusing on opportunities related to nearby Canada.

### MINNEAPOLIS-SAINT PAUL

#### ➤ Promote Global Advantages, Starting with

**Health and Wellness:** Engage deeply with identified local industry clusters through more intense export development and marketing, starting with Health and Wellness.

#### ➤ Sell MSP to the World: Market Minneapolis-Saint

Paul and global trade opportunities both internally and externally, including generating broad awareness of the importance of global trade to long-term economic viability and growth of the region and its companies.

### PORTLAND

#### ➤ Support and Leverage Primary Exporters in

**Computer and Electronics:** Provide proactive economic development support to the computer and electronics industry (which represents over

The full plans from each of the four pilot metro areas, and related two-page plan summaries, can be accessed here: <http://www.brookings.edu/about/projects/state-metro-innovation/mei>



## **PREPARING THE DRAFT AND FINAL PLANS**

To begin putting ideas to paper, the core team may want to consider development of a draft “straw man” export plan that outlines preliminary findings and suggests potential strategies for the steering committee to consider during the first brainstorming meeting. This draft should be based on findings from the market assessment and could provide a strong starting point and a vehicle to solicit the committee’s reaction and foster discussion.

Finalizing the actual plan at the end of the process typically requires at least six to eight weeks and consists of the following general stages: (1) produce a solid draft plan through the core team; (2) distribute the draft to all steering committee members along

with a strict deadline for turning it back in with all comments and edits; (3) incorporate feedback and produce the next draft in its final, published form; (4) share with a smaller group of key participants and stakeholders one last time and solicit feedback; and (5) produce the final export plan. Surprisingly, the fourth stage required much more time than expected in each of the pilot metro areas. Viewing the official, published version seemed to highlight the reality that the document was about to be released and led to a flurry of changes, comments and edits. The takeaways here are to provide time for edits after publishing the plan in its final form and to remind stakeholders that this is a plan based on available information – it can be adapted in future years based on what is learned during implementation.

## **ANTICIPATING LIMITATIONS IN DEVELOPING THE PLAN**

In developing the export plan, the committee should be aware of limitations related to planning and implementation. Data limitations were discussed in Step Three, but it bears noting that there will be some export questions that do not have ready (or even available) answers. You will need to leverage the creativity and insight of the committee to develop effective strategies, even without the full benefit of all the data committee members desire to have. There are also limits to how much your metro can realistically take on right out of the gate in implementation.

How will you approach this task in a strategic way given obvious boundaries? Each of the four MEI metro areas realized a few critical things early in the planning process and moved forward accordingly: (1) new resources for export development are limited; (2) there are many local (federal, state, local, private) players in the export/trade space and the challenge is how to bring them all together as a cohesive team working towards common objectives; (3) given limited resources, proactive efforts will need to be targeted towards areas of greatest opportunity (e.g., industries, overseas markets), based on findings from the market assessment; (4) there must also be a clear export services path available for those new-to-export firms that enter

the export services system unsolicited but desire to begin exploring exports; and (5) export performance and the direct impact of your local efforts is not easy to track.

While each of the four MEI metro areas recognized these issues as critical from early on in their processes, they chose to address some related components as part of implementation. Some groups now believe it would have been better to realistically address these issues (understand all resources/players and make clear, hard choices) during the planning process, so they would not have had to scramble afterwards during actual implementation. They also stress that the export services path (system) requires a lot of thought, since joint management of economic development efforts in a network format is not in the typical economic development DNA at the federal, state or regional levels. Sharing of information and credit, and coordinating economic development efforts, are things most regions are not doing. Even if they are, it is not generally across levels of government and private groups; so this represents a true challenge and a significant change in the culture of delivering economic development services. A successful plan will require your team to confront and work through these issues.

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## STEP 7

### PREPARE FOR IMPLEMENTATION

As with most regional economic strategies, great difficulty lies in creating a clear plan of action and accountability for making the strategies operational. With the release of their metro export plans imminent, each of the four pilot metro areas was anxious to nail down final decisions about how their new plan would be funded and implemented. The hope was to demonstrate to their regions that this was not another idea on paper but a serious initiative with real commitment and high probability for short-term progress and long-term sustainability. Thus, Step Seven should result in completion of a detailed implementation (or business) plan that clarifies how the metro area will make the export plan real, including details on the deliverables, phasing, budgets, and the division of labor among lead organizations.

The following are some guidelines and lessons on how to ensure that the plan is more than a paper exercise.

#### OPERATIONALIZING THE PLAN

Metro areas can and should adopt the same rigor as private sector business planning to bring to bear the operational and financial precision needed to clinch real commitments and resources to make these truly active efforts.<sup>25</sup> To that end, metro leaders should adopt not just the mentality but the actual business discipline of specifying all major elements of traditional business planning processes for the export initiative. Among the questions that will need answering in a systematic and explicit fashion are these:

- What new **products and services** will need to be created to implement the region's strategies? In the case of the four pilot metro areas, the planning committees determined that most of the necessary programs and services were available; however, they were not well-coordinated or adequately resourced. A few new programs, such as those related to better leveraging universities and MBA students, were added to the mix in all four metro areas to bring more on-the-ground resources directly to SMEs interested in developing export strategies.

- What are the full array of **operational elements** needed to deliver on each of the strategies and new products and services? What organizations and partners, leadership and staffing, and/or new capacities are needed to implement the plan? What is the division of labor between different actors and organizations in the region (including clarifying the role of federal, state, and local leaders) to advance the strategies in the plan?
- What are the **financial assumptions** for the plan? What is the plan's proposed budget, given staffing and other operational needs? Where will likely resources come from in the near- and longer-term, including private, philanthropic, and government funds and programs?

At the core of the implementation plan is the need to clearly identify and reach agreement on which organization (or group of organizations) will ultimately be held accountable for ensuring that the metro export plan, and all its parts, will be carried out. This means driving implementation through multiple partners and making adjustments to the goals and plan as the effort proceeds. Each of the first four MEI metro areas found different ways to establish either a "quarterback" or the institutional home for their export plan. This also implies that each engaged organization must make an autonomous and internal decision to adapt their own performance metrics to focus on exports.

Los Angeles created a new Regional Export Council, housed in the Los Angeles Area Chamber of Commerce, to coordinate the local metro export network. While the City of Portland and the Portland Development Commission (PDC) co-led the development of their export plan, the committee determined that Greater Portland, Inc., the region's new public-private economic development partnership, was the logical choice to quarterback the regional export initiative. This required the willingness of Greater Portland, Inc. to take on this new role and the willingness of the city to relinquish "ownership" of the project and turn responsibility over to Greater Portland, Inc. In Syracuse, CenterState CEO, the regional business partnership, will coordinate the effort; while in Minneapolis-Saint Paul, the effort will





## USING CRM TO JOINTLY MANAGE METRO EXPORT CALLS AND ACTIVITIES

In Minneapolis-Saint Paul, to address the critical need to coordinate export activities and better serve companies, a CRM (Customer Relationship Management) system is now being extended to the organizations in the metro export network. Currently, information gathered through traditional economic development business calls is shared between the state and regional chambers of commerce through a CRM system; however, exports have not been part of the typical set of questions asked of businesses during these regular visits. Further, most members of the export team, such as local units of government and other business organizations, have not (until now) been included in this system.

be co-led by the Minnesota Trade Office and Greater MSP. In each case, these quarterbacks will be leading a coordinated network of export service providers, as opposed to taking on sole responsibility for exports.

Another critical decision: funding. Many of the pilot metro areas were eager to secure initial seed funding prior to or immediately following the public release of their plan. The goal was to demonstrate the seriousness of their effort and to ensure the plan got started right away, without losing momentum. However, securing seed funding proved to be a significant hurdle in some cases, made starker by the budget constraints in state and local governments. The Los Angeles team was able to work with their state to secure funds from the federal STEP grant to support the MBA Export Champions program. But they had a harder time raising funds to support the newly formed export efforts within LAREx, although it appears each of the major ports in the area will be key early contributors. The Minneapolis-Saint Paul team was able to get started using the existing resources of the Minnesota Trade Office and by having Greater MSP take the lead for branding/marketing. Both the Los Angeles and Minneapolis-Saint Paul examples show the benefit of working closely with the state at the front end in the design of the metro export

plan. Syracuse plans to house their core exports effort within CenterState CEO (regional chamber and business development partnership) and raise funds from their private-sector members. Given limited new funding sources, each of these metro areas obtained basic and in-kind resources from the existing partner network to make initial implementation of the export initiative possible. However, more funds will need to be identified to ensure the plans are fully implemented as envisioned.

The ultimate reason to develop a clear operational plan for executing the metro export initiative is that neither exporting nor regional collaboration are natural acts. It is not in the DNA of U.S. firms or local economic development efforts to focus on exports. It is not in the DNA of most regions to come together, even around what is clearly in the best interest of the metro economy. Yet, as a result of the metro export initiative and the bullish focus on execution, each of the pilot metro areas is on the path to creating real culture change in their community. As one of the export team leads urged to federal leaders, the MEI has pulled together an unprecedented level of alignment and trust between state, local, civic and private actors and providers. The National Export Initiative must encourage, not further fragment, these valuable on-the-ground partnerships and action plans.

## AVAILABLE FEDERAL GRANT PROGRAMS FOR EXPORTS

Federal grant programs to support metropolitan export initiatives are currently limited; however, there are some available programs that can prove helpful to plan execution. These include: STEP (State Trade and Export Promotion), MDCP (Market Development Cooperator Program), Jobs Accelerator (Jobs and Innovation Accelerator Challenge), and TIGER (Transportation Investment Generating Economic Recovery) grants, with some being standing grants and others likely only temporary. For a more complete description of these grants, see **Appendix F**.

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## GREATER PORTLAND'S BUSINESS PLAN FOR IMPLEMENTATION

Each of the four pilot metro areas developed longer implementation plans that clarified the export plan in greater detail and assigned timelines and responsibilities for each task to various partners. The Portland team approached this task by developing a business plan. Strategy maps reveal the major activities associated with each strategy in phases, and detailed tables break each strategy down into very specific deliverables, actions, metrics, lead agencies, key partners, timelines, and budget. This internal document is designed to keep all participants on task and create clarity about what exactly needs to be done to implement strategies and ultimately achieve objectives. Partners must commit internal resources to the export initiative in a hard way (e.g., the Portland Development Commission will allow its staff to bill 10 percent of its time to exports next year). They were able to use the export plan, and the associated business plan, to conduct a series of local presentations on the export plan with key stakeholders and to secure an initial two-year funding commitment for implementation from a variety of sources, including the Port of Portland, Metro Regional Government, and the Portland Development Commission (PDC), and other metro cities and counties. They also aim to use the business plan to help secure private-sector funding.



## STEP 8

## IDENTIFY AND PROMOTE POLICY PRIORITIES

Ideally, regional leaders should develop a policy memo that highlights and discusses top priorities for federal and state governments to consider to best support a successful, sustainable metropolitan export initiative. The development of a metro export plan naturally surfaces the kind of policy barriers that impede getting strong export results on the ground. Local leaders will also quickly realize the “top-heavy” (federal and state) nature of export-related services, programs, and resources. Hence, metropolitan export initiatives will always remain highly molded by the quality, effectiveness, and capacity of state and federal programs to bring credibility and success to their firms and “customers.” For that reason, metro leaders would be wise to articulate and advance a well-constructed and supported export policy agenda that will foster an environment for enabling the region’s exports to thrive and grow.

In general, the federal government sets the global rules for trade, provides critical export financing to firms, and supports export promotion and match-making through funds to states and on-the-ground staffing and programs both domestically and abroad. A regional policy memo can identify and prioritize the extent to which free trade agreements, unfair trade practices, protection of intellectual property, tariffs, currency manipulation, export compliance and regulation, customs clearance, visa attainment, overseas staffing and resources, regulations and paperwork, export finance, and critical transportation infrastructure, among many others, are hampering or supporting export efforts. Each of the metro export teams has actively used its policy memos in meetings with Congressional delegations and federal agency contacts. They have found this kind of outreach valuable to educating federal leaders on why state and local leaders care about trade, infrastructure, and export promotion programs and how such policies and programs impact job creation and economic growth in their communities.



State governments also have a strong role to play in providing resources, commitment, and a unified promotion platform for exports, trade and investment. However, the roles and commitments of states to exports and trade vary widely and are generally lacking or constantly threatened. While Minnesota has a relatively robust exports effort through the Minnesota Trade Office, the budget of the office has been cut significantly in the past several decades and was considered for elimination in 2011. New York's Empire State Development, as with many states, has made significant cuts to its international trade budget over the past decade. The new governor, drawing from the NEI and the Syracuse/CenterState MEI, is in the process of aggressively exploring what the state's role and resources dedicated to global trade and investment should be. California eliminated its international trade office in 2001 due to budget constraints. While it does have trade-related efforts within tourism, energy, and agriculture departments and community colleges, it has no formal state-funded trade office today, such as those found in Washington, Minnesota, Oregon, or Pennsylvania. Yet, a number of states are beginning to realize that they need to work directly with regional leaders across the state if they are to more effectively and efficiently meet common export goals. Thus, a metro policy memo can articulate how the metro export initiative advances state interests

in trade and job growth and which state policies, programs, and funds can better align to the regional MEI for mutual, maximum impact.

The policy memo should be viewed as a working document, one that will evolve as policy priorities shift, as certain issues get resolved or as new issues arise during implementation. In the beginning, local leaders can rely on the local survey, company interviews, export services provider interviews, and expert input to develop a policy memo that raises the areas of greatest concern and opportunity for companies in the region.

According to the four pilot metro teams, the policy memos have already demonstrated their value in bringing the region around a unified "ask." The memos have functioned as valuable regional talking points for use when local export champions and elected officials make their way to state capitols and Washington, D.C. Firms and companies have become more engaged in the metro export initiatives due to the desire to join up and strengthen policy efforts. And some of the region's policy recommendations have already been addressed as outreach, and partnership with federal leaders has been an ongoing part of the planning process.



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to Go Global

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for Success

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Market Scan

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Market Insight

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Exports Now

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Implementation

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Priorities

**STEP 9**  
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Progress

**STEP 10**  
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Exports into  
Economic  
Development

**BROOKINGS  
METROPOLITAN  
POLICY  
PROGRAM**

## SAMPLE POLICY RECOMMENDATIONS TO FACILITATE METROPOLITAN EXPORTS

Each of the four pilot metro areas developed policy memos to highlight and share recommendations with federal and state officials. The current policy memos can be accessed here: <http://www.brookings.edu/about/projects/state-metro-innovation/mei>

Below are some of the policy recommendations that emerged from the four plans:



### LOS ANGELES

► **Put companies first in the provision of coordinated services and in measuring success.** The federal government must better coordinate and provide a common sense of purpose among its existing agencies involved in exports. Federal, state, and local export programs must start operating as a unified team, with shared export objectives, as opposed to fragmented and siloed operations. The federal government should develop unified performance and tracking systems that focus on clients and support unified metropolitan efforts.

► **Boost export financing and make it more effective.** Federal and state government must better clarify what is truly available in terms of export financing and how companies can access it. Firms that don't already export frequently mention financing as one of the biggest hurdles to overcome. Key aspects of the problems with financing export trade include: the amount/quantity of finance capital made available for exporting and by whom, under what conditions; methods of financing using both private sources and government guarantees; qualifying for export finance assistance; liabilities, insurances and protections and more.

### MINNEAPOLIS-SAINT PAUL

► **Sustain support for export service provider capacity.** Federal leaders and legislatures must carefully analyze and balance budgets with strategic investments that will allow local leaders to fully realize the "export moment." The successful implementation of this valuable strategic plan for the region will not be possible without support for the U.S. Commercial Service, Minnesota Trade Office, Center for International Business Education and Research (CIBER), Small Business Administration, and Export-Import Bank staffing and programs.

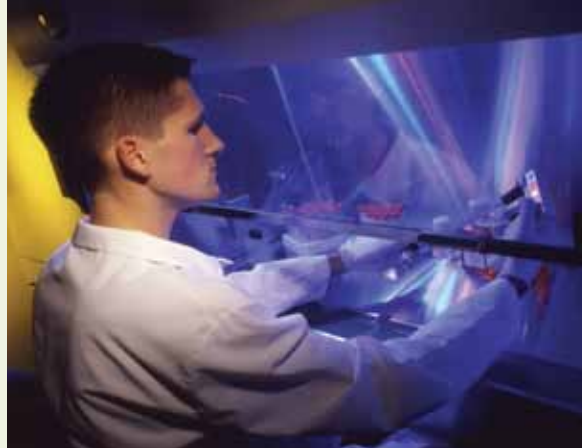
► **Reform current visa policies for business visitors and tourists.** Restrictions on visas for business visitors slows or halts deals that are critical for exporters in the Minneapolis-Saint Paul region. These exporters require timely and fair visa processing procedures in order to facilitate exports and remain competitive internationally.





## PORTLAND

- **Improve metro-level export data.** There are large export data gaps in specific categories that, if addressed, would allow for more accurate and supportive metrics for metro export planning and support. Improvements could include updated export market data to support country strategies; better tracking of services exports; export tracking by detailed industry codes; and related-party information to support supply chain strategies.
- **Develop a national freight strategy to support export growth.** Greater Portland encourages development of a true national freight strategy with attention to urban freight and the last (or first) mile and passage of a Surface Transportation Program Reauthorization with stable funding, and that includes provisions for freight corridors, and corridors of national significance.



## SYRACUSE/CENTRAL NEW YORK

- **Shift export service priorities.** With the understanding that federal resources are limited, the federal government should shift resources from support services in the United States to support on-the-ground activities in foreign markets. Companies are also seeking a "Team USA" approach, highlighted by greater depth of involvement with and support for U.S. companies in foreign markets, including presence and support for missions and at international trade fairs.
- **Simplify U.S. export control laws and regulatory compliance.** Many companies (particularly those selling to military markets) believe U.S. export regulations and controls are a bigger issue than those in foreign markets. While all of the laws are well intentioned, there are an excessive number of agencies involved in the review, and decisions consequently take too long. The strong recommendation by member companies is for the federal government to consolidate the review and enforcement capacity in one agency, such as the Department of Commerce.

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➤ Furthermore, the President's Export Council, composed of private sector leaders, has developed a set of letters of recommendation covering critical policy priorities. These have been submitted to the president and the latest set can be found here: <http://trade.gov/pec>



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## STEP 9 TRACK AND PUBLICIZE PROGRESS

The metro export plan must include performance metrics to ensure that the collective efforts in the region are moving toward the broader goal of the plan. And to reiterate, the plan must identify a common set of performance metrics that the coalition of federal, state, and regional leaders can agree to, that build off the separate, organizational metrics for which they may be held individually accountable. While identifying the best performance metrics can be quite difficult, there are several key benefits to committing time, attention, and resources to measuring and communicating progress of the export initiative. Doing so helps:

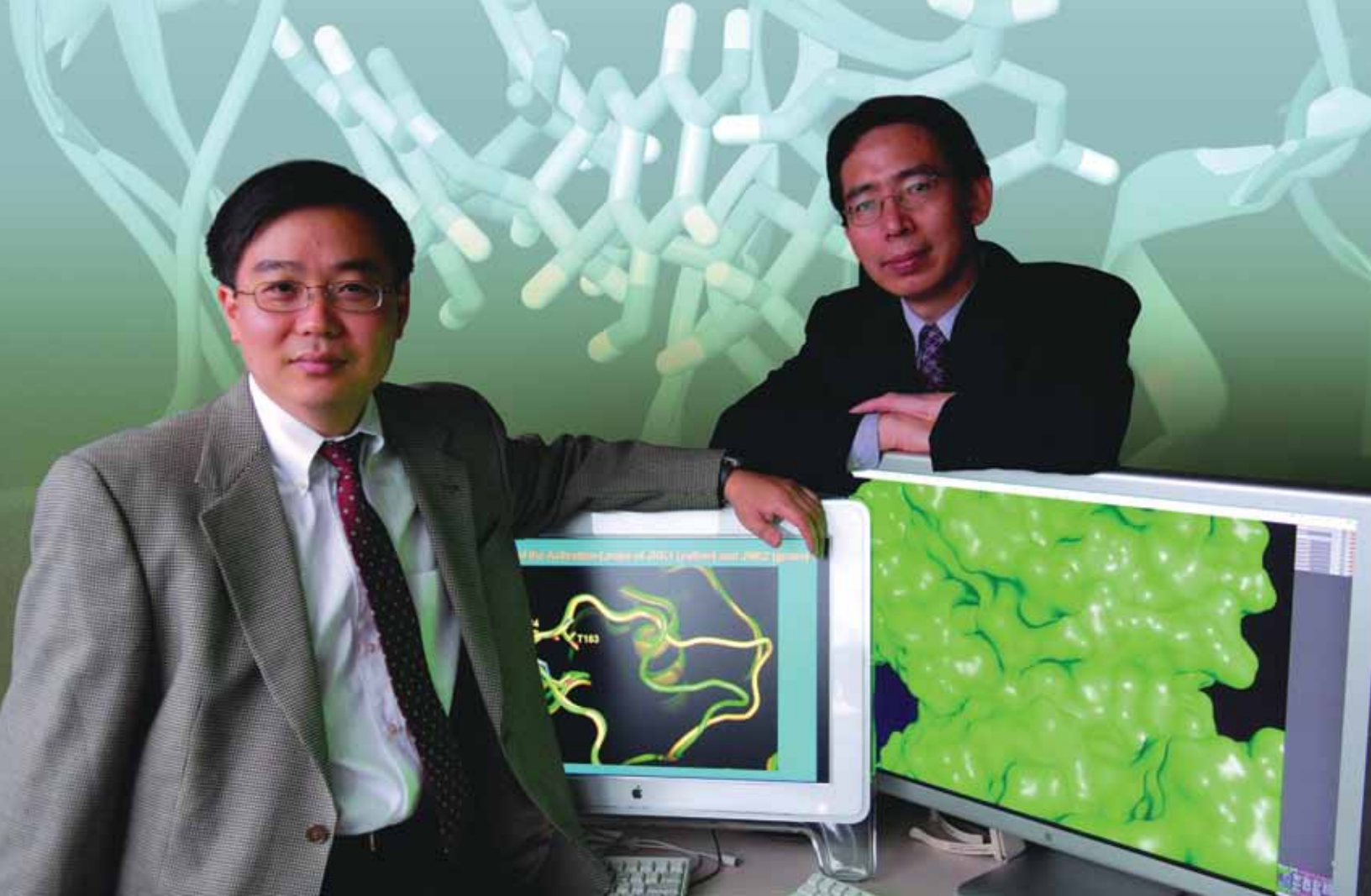
- Determine whether or not the export initiative is achieving its desired objectives and outcomes, thereby helping key partners to stay focused on the right activities or adjust accordingly
- Keep key partners aligned around common outcomes, as opposed to individual, competing performance objectives; increase awareness among area leaders and firms on the benefits of exporting, generating local buy-in and company engagement in the initiative
- Demonstrate any early wins that will provide critical initial momentum and keep stakeholders at the table. Make the case for securing and maintaining resources and funding for long-term sustainable export services and program operations
- Provide progress reports and indicators that can be shared through the regional exports website, mainstream and social media, and other means to encourage more discussion of exports and the opportunity exports represent

Below are some indicators to consider when determining how to best measure your metro export initiative performance:

**Macro Export Indicators** - These indicators relate to the outcomes the export initiative is trying to achieve, such as export value and growth, export jobs and growth, export intensity, export rankings, and diversification of export industries. These measures are available for each U.S. metro area in the Brookings “Export Nation” report series and the export data web page. The Export Nation report, or the data it contains, is scheduled to be updated and released on at least an annual basis.

**Company Progress Indicators** - These indicators relate to local company progress in pursuit of exports, such as an increase in the number of export ready firms; expansion of export reach (number of companies exporting; number of markets/countries to which local companies export); new firms entering the local export services system or the export supply chain; overall demand for export services and programs; success in referring companies through various stages of the export services process to the point where they make an overseas sale or sign with a distributor; and export growth and successes in specific, targeted industry clusters. These measures are not available through any national source, so the region will need to dedicate research staff to identifying, tracking, collecting, and reporting these data.

**Services and Activities Indicators** - These indicators measure export activities and client/partner satisfaction, such as customer satisfaction with export services, trade events, overseas mission trips, and export partner cooperation and performance. They are measures of activities and services that should support the export effort and lead to desired outcomes. They must also be captured and measured by the local team through detailed company tracking and surveys, requiring creative, dedicated staff to conduct this on-going research.



**Global Engagement Indicators: Cultural and Behavioral Change**

**Global Engagement Indicators: Cultural and Behavioral Change** – These indicators measure progress towards changing the underlying environment and culture that will allow exports and broader global engagement to thrive. These would include such indicators as recommended policies adopted; integration and elevation of exports and goals into regional planning and economic development efforts; exports established as a top local indicator of economic performance; number of foreign languages taught in schools; number of international business degrees or concentrations conferred; and change in other indicators of greater global orientation and fluency. These metrics will take some creativity to develop because it is difficult to capture and measure qualitative progress. However, committee members in each of the four MEI metro areas recognized that these qualitative indicators represent a critical component of what they are trying to accomplish—cultural change to position the region (and nation) for productive engagement in the world economy.

**Company Success Stories** – Tell the story of exports, and maintain momentum, by producing a constant stream of success stories describing local companies and their experiences exporting. This could include discussion of both their experiences in working with the local export team (the array of export services and programs) and how they successfully opened up new markets, and improved company performance and sustainability, through exports. These types of stories will provide positive real world examples for other firms and tangibly demonstrate that exports is a critical part of success in today's business world.

Tracking all aspects of export performance is not easy. As discussed previously, the data is not as rich or up-to-date as most would like; it is difficult to connect export services and programs directly to export outcomes and jobs; and it is hard to identify factors to measure the “cultural change” required to become more globally-oriented. Each metro export initiative will need to identify metrics that are most realistic to collect locally and dedicate resources to maintaining, analyzing, and reporting that progress.

**METRO EXPORT  
INITIATIVE**  
TEN STEPS  
TO DELIVERING  
A SUCCESSFUL  
METROPOLITAN  
EXPORT PLAN

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## STEP 10

### MAINSTREAM EXPORTS INTO ECONOMIC DEVELOPMENT

In order for a region to fully maximize the benefits of global trade and demand, exporting needs to be promoted as a key economic strategy within the region as well as better integrated into existing regional economic growth strategies.

To start, the region can help make exports a vital part of the metro area's economic development efforts by consistently reporting exports as a top regional (and national) economic indicator, equal to indicators such as the unemployment rate. This means using export activity indicators in regional economic benchmark reports, as performance measures in regional economic strategies, and in speeches and presentations as part of aspirational goals for the region. Regions can also push the U.S. government to elevate national and regional export performance more regularly.

Exporting firms interviewed as part of the MEI export plan process often related the difference in the level of attention given to exports as an economic indicator in the United States relative to what they see in other nations. In Brazil, China, Germany, Korea, and Japan, they say, exports are widely viewed and reported as one of the top indicators of economic performance. It is universally recognized that exports are critical to growth, jobs and sustainability, and this high level of visibility drives the desire to improve export performance at all levels. However, in the United States and in many metro areas, economic performance is more likely to be discussed based on measures of consumption, such as consumer confidence, retail sales and housing starts, or job growth only, than on the global competitiveness and progress of U.S. firms and metro economies.

State and regional economic development leaders and organizations must also mainstream exports into their everyday activities and promotion efforts. Local elected officials, academic and not-for-profit leaders, businesses, and the media (among others) must be made aware of the importance of exports, kept informed of ongoing progress and tangible successes, and brought in as export ambassadors. Exports must be tangibly made as important to economic performance as business recruitment, retention, innovation and tourism, and regional export performance tracked and reported on a consistent basis. The Syracuse/Central New York MEI team has begun to approach this by including exports prominently in their regional economic development strategic plan, by prioritizing projects that are export-driven when attempting to secure limited state resources, and by thinking about how they can build international trade and investment into the measurement criteria to evaluate all of the region's economic development programs.

An export strategy is also one of many ways that a metro area can be fully engaged in the global marketplace. In time, the region can explicitly tie the export strategy with other key initiatives and assets such as foreign direct investment, import assistance, immigrant entrepreneurship and connections, foreign languages in schools, and global supply management into a more intentional, comprehensive global engagement strategy.

Finally, the metro exports plan will be most effective if it is part of a broader regional economic plan that aligns the stated export strategies with other highly related initiatives, such as boosting innovation and commercialization in key industry clusters, enhancing human capital, and modernizing freight and logistics. A small manufacturing exporter will eventually grow into a larger firm. As the firm moves up the value chain, it will need access to leading edge technologies, skilled workers, and financing/capital to stay on the cutting edge of global competition. Thus, the region needs to be advancing an integrated economic growth strategy that improves the region's overall level of growth, productivity, and income.





## CONCLUSION

There are enormous untapped opportunities for leaders in metro areas to expand and strengthen their economies through greater exports and trade, and doing so in close collaboration with state and federal partners. But leaders and firms must be proactive and purposeful in acting on this opportunity. This guide and its associated on-line resources hopes to make the task—and culture shift—of embracing global engagement an achievable one. Like sound financial advice, firms and metro areas that diversify their portfolio by economically engaging in multiple markets will reduce their risk and secure high returns on investment. In short, leveraging American strengths and accessing global markets is a winning strategy for states and metro areas. Embracing exports and trade will build world-class metro economies that grow jobs in the short term and provide wealth and opportunity for all firms and workers in the long term.

## APPENDIX A

### THE NATIONAL EXPORT INITIATIVE AND THE NATIONAL EXPORT STRATEGY

The Obama administration announced in February 2010 the National Export Initiative (NEI) with the stated goal of doubling U.S. exports over the five-year period extending from late 2009 to the end of 2014 or from \$1.6 trillion to \$3.2 trillion.<sup>26</sup> The NEI represents an effort by the administration to serve as a full partner with U.S. businesses in promoting American-made goods and services worldwide, within global trading rules.

As outlined in the “Report to the President on the National Export Initiative”, the NEI has five key components: (1) advocacy and trade promotion; (2) export financing, especially for small and medium-sized business; (3) removing barriers to the sale of U.S. goods and services abroad; (4) robustly enforcing trade rules; and (5) pursuing policies at the global level to promote strong, sustainable and balanced growth.

The National Export Strategy is the annual report of the Trade Promotion and Coordinating Committee (TPCC), an interagency task force composed of 20 federal agencies, which reports on the progress of the NEI. The June 2011 report focused on federal initiatives and plans for implementing 70 recommendations made in the September 2010 NEI report to the President. The report identifies several areas of focus for federal agencies in their export promotion efforts, including:

- Improved collaboration with states, metropolitan areas and border communities
- Support of exports by US companies selling technologies in high growth sectors, primarily through improving the US supply-chain infrastructure
- Better data collection and measurement of exporting by the services sector
- Removal of barriers to trade, including the resolution and passage of pending free trade agreements with Columbia, Panama and South Korea (which have since passed)

The “Report to the President on the National Export Initiative” from September 2010 can be found here: [http://www.whitehouse.gov/sites/default/files/nei\\_report\\_9-16-10\\_full.pdf](http://www.whitehouse.gov/sites/default/files/nei_report_9-16-10_full.pdf)

The 2011 National Export Strategy was released in June 2011 and can be found here: <http://trade.gov/publications/pdfs/nes2011FINAL.pdf>

## KEY FEDERAL AGENCIES/DEPARTMENTS INVOLVED IN EXPORTS

**The Trade Promotion Coordinating Committee (TPCC)** is an interagency task force mandated by Congress and chaired by the Secretary of Commerce. It was established pursuant to the Export Enhancement Act of 1992 to provide a unifying framework to coordinate the export promotion and financing activities of the U.S. Government, as well as to develop a comprehensive plan for implementing strategic priorities, improving service delivery, and avoiding duplication. Unlike many other countries in Europe and Asia, the United States does not have a single agency or government department responsible for enforcing a unified approach to governing export promotion. Instead, multiple departments and agencies approach export promotion from different mandates. The TPCC serves as the coordinating body designed to ensure that these agencies and departments act together and work to implement the Administration's export promotion agenda, through principals meetings and more frequent working group meetings on a variety of subjects, including training, marketing, program integration, and information sharing. Implementation of the National Export Initiative (NEI) has been the core focus of the TPCC since January 2010.

There are seven TPCC agencies and departments that provide direct export assistance:

- **U.S. Department of Commerce (Commerce)/International Trade Administration (ITA):** Market entry services to "export ready" firms; advocacy for major projects; trade promotion via trade missions and international buyers programs; and market access casework. The ITA's trade promotion arm is **US Foreign and Commercial Services**, which has trade professionals on the ground to serve companies in over 100 U.S. cities and 70 foreign countries.
- **Export-Import Bank (Ex-Im Bank):** Official Export Credit Agency of the U.S. Government; assists with loan guarantees, export credit insurance and direct loans (to buyers).
- **Small Business Administration (SBA):** Business development and working capital financing. Helps small firms that are new to exporting, and links them to business counseling networks.
- **Department of State (State):** Ambassadorial support for major projects through U.S. Embassies and Consulates, and commercial function support from Economic Officers in overseas Posts with no ITA presence.
- **Overseas Private Investment Corporation (OPIC):** Assists with U.S. investment and business management know-how in developing countries; and guarantees and finances political risk insurance.
- **U.S. Department of Agriculture (USDA)/Foreign Agricultural Service:** Complete menu of services for agricultural goods, including finance. Services delivered by state groups (State Regional Trade Groups) and trade associations.
- **U.S. Trade and Development Agency (USTDA):** Reverse trade missions, infrastructure feasibility studies, and international conferences.

There are 13 other agencies/departments involved in the TPCC:

- **U.S. Trade Representative (USTR):** Leads development and coordination of U.S. international trade and investment policy, and oversees negotiations with other countries.
- **U.S. Department of Treasury:** policy oversight role with Ex-Im Bank; negotiates export credit disciplines.
- **U.S. Department of Energy:** Co-chairs with Commerce the TPCC Renewable Energy/Energy Efficiency Working Group.
- **U.S. Department of Transportation:** Works closely with Commerce on supply chain competitiveness issues.
- **U.S. Department of the Interior:** Works closely with Commerce on travel & tourism related policies and strategies.
- **U.S. Environmental Protection Agency (EPA):** Co-chairs with Commerce the TPCC Environmental Technologies Working Group; recently launched the Environmental Technologies Export Initiative.
- **U.S. Department of Homeland Security (DHS):** Works closely with Commerce on travel & tourism related policies and strategies; also engages directly with exporters via CBP.
- **U.S. Department of Defense (DOD):** Works with Bureau of Industry and Security (BIS) on export control reform issues; a critical agency for the exporting industrial base.
- **U.S. Department of Labor:** Assists with workforce readiness issues linked to export related jobs.
- **U.S. Agency for International Development (USAID):** Working to identify overseas development projects for U.S. companies.

#### **OVERSIGHT AGENCIES:**

- **National Security Staff (NSS):** Chairing the Export Promotion Council, which is now integrated into the work of the TPCC.
- **U.S. Office of Management and Budget (OMB):** Assisting with, among other issues, the Single Window initiative along with Export.gov and Businessusa.gov.
- **Council of Economic Advisors (CEA):** Providing input and guidance on economic trends and Administration policies affecting TPCC priorities, public messaging, and goal setting.

#### **DATA AND INFORMATION**

**Export.gov:** Export.gov is designed to bring critical export data, services and program information together on one website. The federal government recognizes the need to serve an increasing number of companies to meet NEI goals and plans to release Export.gov 2.0 during 2012. Service delivery via a content-rich, robust web portal is a critical piece of the strategy to meet increased demand from clients and to reach out to new firms. This new version will be designed to allow businesses to access information and contacts via a self-service web portal, then follow-up for individualized advice and higher level counseling at a later stage in the process. The link to Export.gov is: [www.export.gov](http://www.export.gov).



## APPENDIX C

### SAMPLING OF COMMON EXPORT TERMS AND ACRONYMS

Numerous terms and acronyms have become commonplace in the export world. Below is a sampling of these:

- **National Export Initiative (NEI):** An initiative launched by the Obama administration that outlines a set of steps to double U.S. exports between 2009 and the end of 2014, since exports are believed to create jobs and boost the long-term economy of the United States
- **U.S. Export Assistance Center (USEAC):** Located in major metropolitan areas throughout the United States, USEAC's are one-stop shops designed to provide businesses with local export assistance by professionals from the U.S. Department of Commerce (U.S. Commercial Service), the U.S. Small Business Administration, the U.S. Export-Import Bank and other public and private organizations
- **Gold Key Matching Service (Gold Key):** A U.S. Dept. of Commerce fee-based service that assists businesses in the United States with transactions and planning that take place overseas. The assistance includes travel planning, interpreters, and a service that matches American businesses with relevant potential clients, partners, and legislators who can help increase exports. This is one of several matchmaking services the U.S. Department of Commerce offers, in addition to activities related to foreign and domestic trade shows, as well as trade missions
- **District Export Council (DEC):** DECs are organizations of international trade professionals based in local communities who use their knowledge and international business experience to act as peer consultants to small- and medium-sized businesses that want to export their products into markets outside of the United States
- **Small- and Medium-Sized Enterprises (SMEs or SMBs):** In the United States, businesses which employ less than 500 people, adjusting for revenue and ownership structure. In 2010, SMEs made up 98 percent of all exporters and produced nearly 34 percent of all goods exports sales in the United States<sup>27</sup>
- **New-to-Export (NTE):** A business or firm that has just begun to explore exporting goods or services for the first time and must take into consideration all the factors that may pose specific challenges or advantages to selling goods in the global market
- **New-to-Market (NTM):** A term used to describe exporting firm's ready to enter into either a new market or a new segment of a current market
- **Centers for International Business Education and Research (CIBER):** A program initiated by the U.S. Department of Education to support and advance research that looks at U.S. competitiveness in global markets and better prepares businesses and future employees for international participation, with a focus on SMEs. The 33 CIBERs are primarily housed within the business schools at major U.S. research universities<sup>28</sup>
- **International Traffic in Arms Regulations (ITAR):** A set of laws that bans the sharing of all U.S. information regarding military and defense technology with institutions both inside and outside of the country; in the study of exports, it is debated as to whether ITAR is detrimental to commercial interests or crucial for defense and foreign policy purposes

## APPENDIX D

### KEY LESSONS AND OBSERVATIONS FROM THE FOUR METRO EXPORT INITIATIVE PILOTS

As leaders in the four pilot metropolitan areas reached out to firms and service providers in their communities to design their metro export plans, numerous insights surfaced about the state of U.S. and metro exporting. These insights can serve as starting points to begin to evaluate the local market and produce a metro export plan. Among the themes unveiled were the following:

- **Companies fear exporting.** Many companies say that they would like to export, but fear of the unknown and comfort operating within the United States limits actual action. For these companies, numerous real and perceived risks loom large and range from difficulties associated with connecting to global partners and conducting global marketing to issues involving logistics, regulatory compliance, financing, and unfair trade practices. For their part, companies that already export often express concern about how other local companies, and the metro region as a whole, will compete in the future if they don't engage in exports and global trade.
- **Companies lack awareness of global opportunities and services.** Company awareness (particularly among SMEs) of global opportunities, foreign markets and available export services and programs is low. As a result, a relatively low proportion of firms export, and a minority of exporting firms report having ever received assistance from federal, state or local export services providers.
- **Thus, there is an inadequate pipeline of identified firms ready to enter foreign markets.** The pipeline of "export ready" companies in each of the four metro areas is not currently strong enough to meet export objectives. To build a larger pipeline of prospects, metro areas will have to be proactive in identifying and reaching out to export ready companies and in developing a system that better prepares companies for global opportunities. Initial outreach in the four metro area pilots is demonstrating that there are companies ready to start filling the export pipeline; however, the export outreach and development effort had not been identifying and bringing them into the export services system.
- **Many companies are accidental (reactive) exporters and thus may be under-exporting.** Few companies proactively target export opportunities. More often, companies reported that export opportunities were accidental or passive (e.g., the overseas company found them or a current U.S. customer moved its operation overseas). In some cases, existing export strategies were often isolated incidents and not part of a defined growth strategy (e.g., the CEO randomly knew someone in a country, and that country represents their only export market). Further, many companies are indirect exporters (through sales to U.S.-based exporting firms); however, they have no intentional export strategy of their own.

- **Company executives must be highly intentional about exporting.** Successful exporting companies stress that pursuing business opportunities in new foreign markets requires significant up-front resources and persistence. While companies can start initial exploration of exports with existing staff, venturing into exports ultimately requires the demonstrated commitment and time of the CEO (one-on-one interviews with companies in the pilot metro areas consistently revealed the need for the CEOs of small- to mid-sized companies to commit up to 25 to 50 percent of available time in year one) along with the dedication of a person or consultant to the effort on a full-time basis. This can be difficult for SMEs that lack resources to commit to the effort in the face of other demands. However, successful exporting companies claim the rewards far outweigh the risks, hassles and investment.
- **Exporting firms typically require case management support.** Most companies require one-on-one case management support to navigate their way through the process of pursuing exports. While initial broader export training for groups is valuable in the early stages of the process, companies (particularly SMEs) need more focused and tailored guidance and support if they are to ultimately make that first overseas sale or add another export market.
- **Export services vary in quality and are often fragmented.** Export services and programs provided by federal, state, and local agencies vary in quality across U.S. metro areas. Most local systems are also fragmented, have gaps, and are typically reactive in nature. Companies are often not aware of or do not fully understand the export services and programs available to them and don't know to whom they must go for help at different stages in the process. There is no clear exports roadmap to follow. However, of the companies that have received state or federal export assistance in the four pilot metro areas, a high percentage report it as being "good" to "excellent."
- **State and federal export efforts often lack sustained vision and commitment.** State and federal government frequently provide the core export services and programs in metro areas. However, the level of resources and commitment provided to these programs is often described by companies and export service providers as "cyclical". Existing companies and on-the-ground export services providers in each of the four pilot metro areas have experienced ebbs and flows in the commitment to exports, and related funding and capacities, with changing state and federal administrations. While metro area leaders can help fill some of this capacity, they are highly aware that sustained, quality state and federal programs are critical to their metro area success and credibility. Companies and export experts interviewed as part of the pilot MEI process expressed the strong and consistent opinion that peer countries—such as Germany, Korea, China, Brazil and Japan—demonstrate a stronger, more consistent commitment of resources and outreach to global trade and investment, putting the U.S. at a competitive disadvantage.

The metro export plans have surfaced at least four major benefits of metropolitan-level engagement and problem-solving on exporting:

- Metro area leaders can proactively increase the number of firms who are ready to export or export to additional markets. Currently, most state and federal service providers lack the capacity to recruit non-exporting firms or help such small- and mid-sized firms become export ready. This may explain why the number of firms selling abroad has barely budged past one percent. However, metropolitan area leaders can play a critical role here because they have strong, direct relationships with firms and know the firms and actors in their leading industry clusters. Many of these metro export plans involve metro chambers of commerce, port authorities, regional civic groups, and/or regional economic development agencies that have ongoing contact with companies. They can proactively identify and reach out to target firms, perhaps within priority industries, and help them become export-ready. They can also work with their member companies or use surveys to better identify and reach out to firms that are under-exporting and can move into additional markets
- Metro leaders can help make exports and trade a mainstream part of regional economic development. Exporting and global engagement is not yet in the economic development DNA, hindering the ability to scale up firm- and cluster-based export activities. While regional economic development officials work with companies regularly on identifying their business expansion needs, few have the expertise or awareness to recommend global market expansion as a key growth opportunity. Engaging regional economic development practitioners in a metro export plan is essential to making exports more the economic development norm than the exception
- Metro leaders can help create a more transparent, coordinated export assistance system that is moving toward common goals. Leaders in the pilot metro areas are quickly learning that firms, government, civic groups, universities, and other export service providers are not aware of the array of existing services in a region, making it difficult to efficiently refer companies to appropriate services or address the gaps and redundancies in the delivery system. Thus metro area leaders, through their export plan, are key to bringing together the vast network of export service providers and champions around a unified goal and strategy for boosting exports. This has the added benefit of giving small- and mid-sized firms a coordinated system of services that will give them the confidence that exporting is the right investment
- Finally, metro area leaders are best positioned to integrate exports into a broader economic strategy for growth and global competitiveness. Exports represent just one step in a more comprehensive regional game plan for greater global engagement. The best metro leaders are those who are aligning export strategies with parallel strategies in foreign direct investment, manufacturing innovation, freight and transportation modernization, workforce development, and immigrant outreach so they can more effectively build a globally fluent economy



## APPENDIX E

### SOURCES OF METRO ECONOMY AND EXPORT DATA

No single definitive data source exists to support metropolitan export promotion efforts but a variety of entities provide important resources:

#### Brookings Institution

The Metropolitan Policy Program at Brookings produces and maintains a strong array of metro-oriented data related to economy, demographics, exports, and many other topics. A good source of metro economic data for the largest 100 U.S. metro areas is the quarterly Metro Monitor, which provides data on employment, unemployment, gross metro product, and housing, and provides metro area rankings for each factor. Brookings also tracks the economic growth of 200 world cities through its annual Global Metro Monitor, which provides great context for the shifting growth markets around the globe. You can access all this data on the program's data resources page at: <http://www.brookings.edu/about/projects/state-metro-innovation/resources>

The primary source for metropolitan-area export data based on the location of where a service or goods export is produced (not from where it is shipped) is Brookings' latest analysis "Export Nation 2012." This report provides the core set of export data and rankings for each U.S. metro area, as well as for all states and counties. Profiles have been developed for each of the largest 100 U.S. metro areas and all states to provide a snapshot overview of export performance.

Brookings has also developed a U.S. export database, with export data for all 3,113 counties, all metro areas and micropolitan areas, and all 50 states including the District of Columbia.

For each geographical level, the database provides

- Nominal and real exports, total and by industry (major and detailed)
- Exports share of Gross Domestic Product
- Direct export-production jobs, total and by major industry
- Total export-supported jobs, total and by major industry
- Annualized real export growth rates, total and by industry (major and detailed)

The dataset reports on 34 major industrial categories: 26 for goods exports (3-digit level NAICS) and eight for services (U.S. Bureau of Economic Analysis service export categories). It provides export data for 212 detailed industries (subcomponents of the major export industries), both goods and services.

In addition, for each of the largest 100 metropolitan areas, 50 states, and the District of Columbia, the database provides exports by export destination (country): in aggregate, by major industry, and the top 10 markets for the top 10 detailed industries.

To access the full Export Nation 2012 report, metro area export profiles, the database, and related documents, go to: <http://www.brookings.edu/research/reports/2012/03/08-exports>

### Federal Sources

Data on exports is also available from the U.S. Census Bureau, Foreign Trade Statistics division (Census) and from the International Trade Administration (ITA) at the national, state and metro level. However, there are a number of limitations to export data that metro-focused users may find frustrating. Metro area data from these sources are based on movement of goods through the market and not the point of production, typically lagging state and federal data by one- or two-years; data on top foreign export markets from each metro area are not readily available; some of the more in-depth public data are available for products and not industries; identifying export firms by metro area is difficult; and much of the data cover only goods, not services. As a result of the MEI effort, the Census plans to begin releasing more up-to-date metro area data with its quarterly export updates, starting in 2013.

The Census offers more tailored export data for a relatively low fee, such as, for example, more in-depth analysis of a metro area's top exporting industries. The Census also has good data on the destination countries for U.S. exports, by product; however, this data is not available for metro areas. It does provide a good understanding of where U.S. products are in demand throughout the world and this is highly beneficial to exporting companies.

Census trade data and information may be accessed here:  
<http://www.census.gov/foreign-trade/>

The Census trade database may be accessed on a fee basis at this website:  
<https://www.usatradeonline.gov>

For a comparison of Brookings and Census metro export data, please go here:  
[http://www.brookings.edu/~media/Research/Files/Reports/2012/3/08exports/0308\\_exports\\_appendixb.pdf](http://www.brookings.edu/~media/Research/Files/Reports/2012/3/08exports/0308_exports_appendixb.pdf)

For ITA data, go to: <http://www.ita.doc.gov/data.asp>

The Bureau of Economic Analysis (BEA) provides quarterly and annual trade in goods and services statistics for the United States, but not for state or local areas. These data include high-level national statistics for exports (broken down by goods and services) and for services exports, broken down by major category of service. This can prove helpful for high level national export trend analysis that includes services. The BEA also produces periodic research papers covering areas, such as the nature of U.S. exports and what types of firms are exporting services.

See:  
<http://www.bea.gov/international/index.htm#trade>

### State Sources

Some states track and report export and trade data on an annual or quarterly basis and this may prove to be the best source of more localized, up-to-date statistics for certain topics. While this data is typically statewide, it can serve as a reasonable proxy for a metro area in some cases, particularly if it represents a significant portion of state exports. For example, the Minnesota Trade Office produces statewide quarterly export data for exports and growth by industry and by country of destination. This data is available because Minnesota has a robust state trade office and they have dedicated resources to tracking it. In many states, this resource unfortunately does not exist and in larger states with many metro areas—such as California, Texas and Michigan—statewide figures may not suffice.

### U.S. Chamber of Commerce

The U.S. Chamber of Commerce "Trade Supports Jobs" website provides a database of top exporting firms by state and congressional district. While this data also has many limitations (including overrepresentation of freight forwarders), it is a good place to start in identifying exporting firms.

<http://www.tradesupportsjobs.com/>

## FEDERAL GRANT PROGRAMS FOR EXPORTS

A number of federal grant programs, some standing and others likely temporary, are available that can prove helpful to support execution. These include:

**STEP Grants:** The State Trade and Export Promotion Grant (STEP) Pilot Grant Initiative, sponsored by the U.S. Small Business Administration, provides grants to states to develop their own small business export promotion programs. The aim of the STEP Initiative is to increase the number of small businesses that are exporting and increase the value of exports from small businesses within the state. More information can be found at: <http://www.sba.gov/about-offices-content/1/2889/resources/14315>

**MDCP Grants:** Market Development Cooperator Program (MDCP) awards include financial and technical assistance from the International Trade Administration (ITA) to support projects that enhance the global competitiveness of U.S. industries. An MDCP award establishes a partnership between ITA and non-profit industry groups such as trade associations and chambers of commerce. Such groups are particularly effective in reaching small- and medium-size enterprises. The non-profit groups compete for a limited number of MDCP awards by proposing innovative projects that enhance their industry's competitive position. Industry groups pledge to pay a minimum of two-thirds of the project cost and to sustain the project after the MDCP award period ends. On average from 1997 through 2011 projects generated \$211 in exports for every \$1 of MDCP awards made. More information can be found at: <http://www.ita.doc.gov/td/mdcp/>

**Jobs and Innovation Accelerator Grants:** The Jobs and Innovation Accelerator Challenge (Jobs Accelerator) is an inter-agency funding opportunity led by the Department of Commerce's Economic Development Administration (EDA) and designed by the Taskforce for the Advancement of Regional Innovation Clusters (TARIC), in partnership with other Federal agencies and bureaus. TARIC recognizes that regions can benefit from coordinated, flexible, regionally customized investments with stronger goals and metrics that link economic development, workforce development, small business development, and the inclusion of historically underrepresented and excluded communities. Through the coordination of Federal resources, the Jobs Accelerator supports the development of self-identified clusters that demonstrate high-growth potential. In fiscal year 2011, the funding agencies and bureaus in the Jobs Accelerator, EDA, Department of Labor's Employment and Training Administration (ETA), and SBA, awarded \$37 million to 20 clusters in a variety of industries across the United States. In addition, another 13 Federal agencies and bureaus committed technical assistance to provide streamlined support to selected clusters for qualifying projects under current appropriation authority. For more information visit: <http://www.manufacturing.gov/accelerator>.

**TIGER Grants:** The Transportation Investment Generating Economic Recovery (TIGER) grants are awarded to transportation projects that have a significant national or regional impact. Projects are chosen for their ability to contribute to the long-term economic competitiveness of the nation, improve the condition of existing transportation facilities and systems, increase energy efficiency and reducing greenhouse gas emissions, improve the safety of U.S. transportation facilities and enhance the quality of living and working environments of communities through increased transportation choices and connections. The Department also gives priority to projects that are expected to create and preserve jobs quickly and stimulate increases in economic activity, as well as those that will enhance the facilitation of exports. More information can be found at: <http://www.dot.gov/tiger/>

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