International Trade Centre

EXPORT IMPACT FOR GOOD

ITC CLIENT SURVEY 2009

PRELIMINARY REPORT TO THE JOINT ADVISORY GROUP

EXECUTIVE SUMMARY

This preliminary report of the 2009 ITC client survey is divided in four sections:

1. **Outline of the objectives and structure of the survey**

   - The 2009 survey aims to provide detailed insights at regional level of the environment in which ITC operates, and to better understand the drivers of ITC's perceived image. The survey has also been designed to provide guidance on the relevance and impact of ITC's products and services.
   - The survey consisted of a total of 48 questions and 15 sub-questions, including 2 open answer questions.
   - The survey went live from September 16 to October 10, 2009, in three languages (English, French and Spanish), accessible through ITC's website.

2. **Overview of the survey respondents' profile**

   - Some 2,500 completed surveys were received from a total of 78,000 surveys sent. Weighted representation indicates that a quarter of ITC clients originate from Latin America, another quarter from Asia Pacific, and a final quarter from Africa. The remaining quarter is made up of clients from Arab States, Eastern Europe and other regions.
   - Trade Support Institutions represent 22% of survey respondents, government ministries 17%, universities 16%, SMEs 29% of survey respondents.
   - Peru, Mexico, India, Brazil and Turkey were the top five responding countries.

3. **The current international trade environment as perceived by survey respondents**

   - The global financial crisis has a significant impact on ITC clients: 25% rate access to finance and investment as the most important challenge they face in view of the current financial crisis, followed by 17% who rate decreasing demand and another 17% who rate government policy (eg support for trade development, taxes) as major challenges.
   - The lack of information about the market is the greatest challenge to ITC clients in expanding their exports. This aspect is most frequently mentioned by Trade Support Institutions and SMEs.

4. **Overall ITC performance as perceived by survey respondents**

   - The overall rating of ITC in helping clients achieve positive results in export development reached 56% of positive responses in 2009, compared to 43% in 2008 and 38% in 2007; This figure is to be regarded as indicative, considering methodological changes (e.g. scoring and sampling) occurred since our previous surveys.

- ITC services achieving the highest rate in the 2009 survey in terms of relevance are the market analysis tools, capacity building in both market analysis and trade information and ITC's work in export strategy.
- ITC's interventions in Africa are rated as having the most impact and being the best aligned to client needs, reflecting ITC's efforts in this region for a better integration of its services through regional programmes and a closer association with beneficiaries and donors with regard to programme development.

THE ITC CLIENT SURVEY 2009 – BACKGROUND AND EVOLUTION SINCE 2007

Assessing the impact of ITC's activities on its clients is essential for determining the effectiveness of the organization, and one central feature of this assessment is the annual client survey. This year's survey marks the end of a three-year cycle that provides insight into ITC's progress in dimensions common to all three years. Launched on 15 September 2009 and closed four weeks later, the survey generated 2,472 responses, a record for the cycle, up from 2,017 in 2008 and 1,537 in 2007.

Results are being compiled according to five prioritized geographical sections, and two new questions were included this year. One focused on problems confronting companies in their trade environments, and the other focused on the three greatest challenges faced by countries and companies as they emerge from the current global financial and economic crisis. The interpretation of the survey results will be fed into strategic planning at ITC, both corporately and at the divisional level, facilitating fine-tuning of the organization's direction.

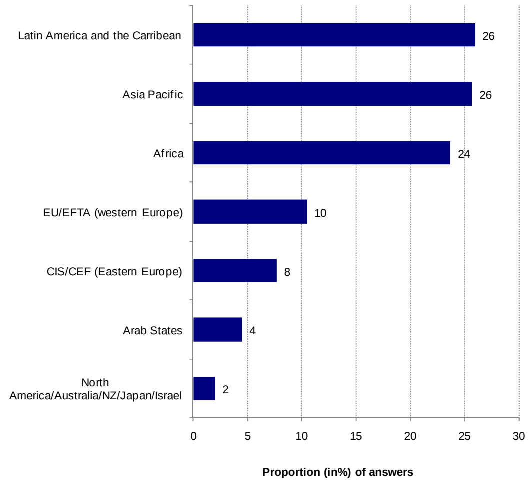
The 2009 survey shows consistency with the results of the past two years in many of the responses provided by respondents, particularly with regard to the issues clients faced in expanding exports, and in the way some of ITC services are rated. Some comments received for the open questions in the survey tend to reinforce similar comments received in previous years, suggesting improvements in areas such as client relationship management, needs assessment and customisation of services. Some notable progress is to be noted in the way ITC's impact is perceived in helping clients achieve positive results in export development. Further analysis of the usage and relevance of selected services will be required with a view to further adapt ITC's offering to its clients in various parts of the world.

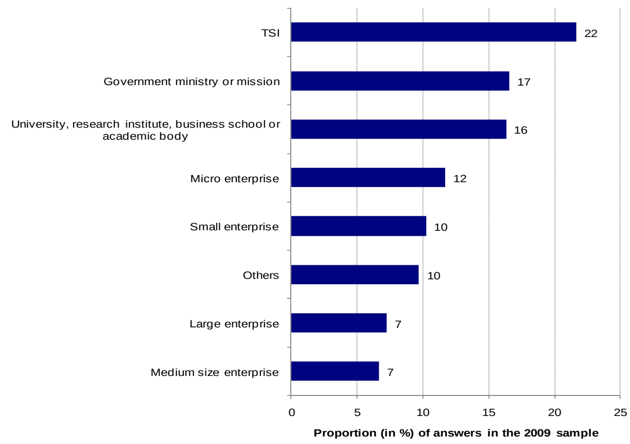
The perception of ITC's capacity to achieve impact and understand needs demonstrate the achievements of ITC as an organisation to better align its programmes, particularly in Africa, to the very specific needs of beneficiaries, in close cooperation with donors. The high rating achieved in the Africa region could be attributed to programmes such as PACT, providing integrated solutions on a regional basis. The efforts deployed in 2009 with the development of a regional programme for Arab states (ENACT) will also contribute to better address ITC's clients needs and expectations in this region.

With this survey, ITC has confirmed its ability to handle the management of large data sets: for the first time this year, ITC's staff processed all data collected from the 2,500 respondents with a view to prepare a report to be shared with ITC staff and clients. ITC, with the help of its independent advisor Dalberg, is now well placed to process and implement its client surveys in subsequent years.

The results of the 2009 survey demonstrates the importance for ITC to continue its efforts to provide integrated solutions, customised to the specific needs of clients, aligned to national or regional specificities and supported by effective and thorough needs assessment processes.

Representation by Geographical Regions (weighted)	Clients' Organisation Type





Latin America is the most represented region in survey responses. Originally not all regions were adequately covered, therefore some weights have been applied in the figures to correct this sample effect. The traditional ITC partners: Trade Support Institutions (TSIs), Government ministries and small and medium sized enterprises (SMEs) represent two thirds of respondents; the remaining third represents Universities, large enterprises and NGOs.

Top Ten Countries Responding (by region):

TOTAL	
Country name	Number of answers
Peru	213
Mexico	161
India	133
Brazil	87
Turkey	75
Colombia	66
Argentina	63
Bolivia	57
South Africa	57
Pakistan	52

Africa	
Country name	Number of answers
South Africa	57
Kenya	27
Nigeria	27
United Republic of Tanzania	27
Ghana	26
Uganda	26
Madagascar	25
Ethiopia	19
Mauritius	14
Burkina Faso	13

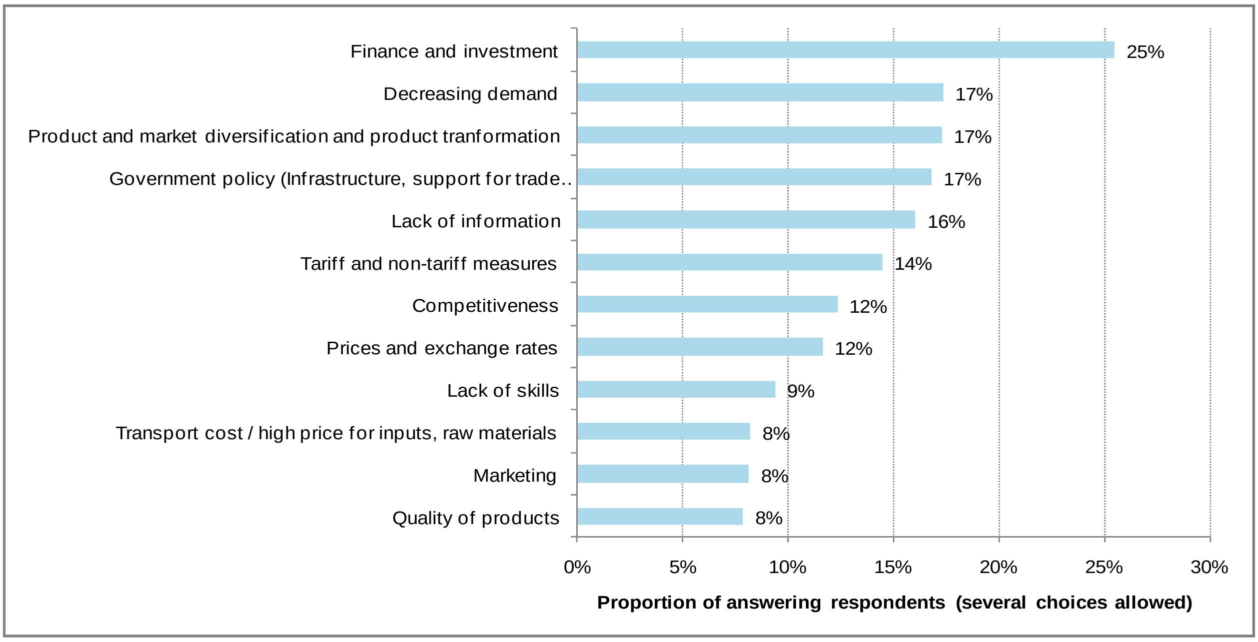
Arab States	
Country name	Number of answers
Egypt	41
Tunisia	37
Morocco	25
Jordan	10
United Arab Emirates	9
Algeria	6
Sudan	6
Kuwait	4
Lebanon	4
Oman	4

Asia Pacific	
Country name	Number of answers
India	133
Pakistan	52
Thailand	42
Philippines	38
Iran (Islamic Republic of)	33
Viet Nam	33
Bangladesh	29
Indonesia	27
Sri Lanka	24
China	24

Eastern Europe and Central Asia	
Country name	Number of answers
Turkey	75
Russian Federation	17
Serbia	17
Romania	16
Albania	11
Bosnia and Herzegovina	7
Bulgaria	7
The former Yugoslav Republic of Macedonia	6
Armenia	5
Georgia	5
Ukraine	5

Latin America and the Caribbean	
Country name	Number of answers
Peru	213
Mexico	161
Brazil	87
Colombia	66
Argentina	63
Bolivia	57
Ecuador	47
Chile	36
Trinidad and Tobago	21
Venezuela	18

Ten most important challenges to developing exports that emerged from the current financial crisis:



Access to finance and investment is the first challenge to emerge from the financial and economic crisis: one ITC client out of four declares being affected by these issues.

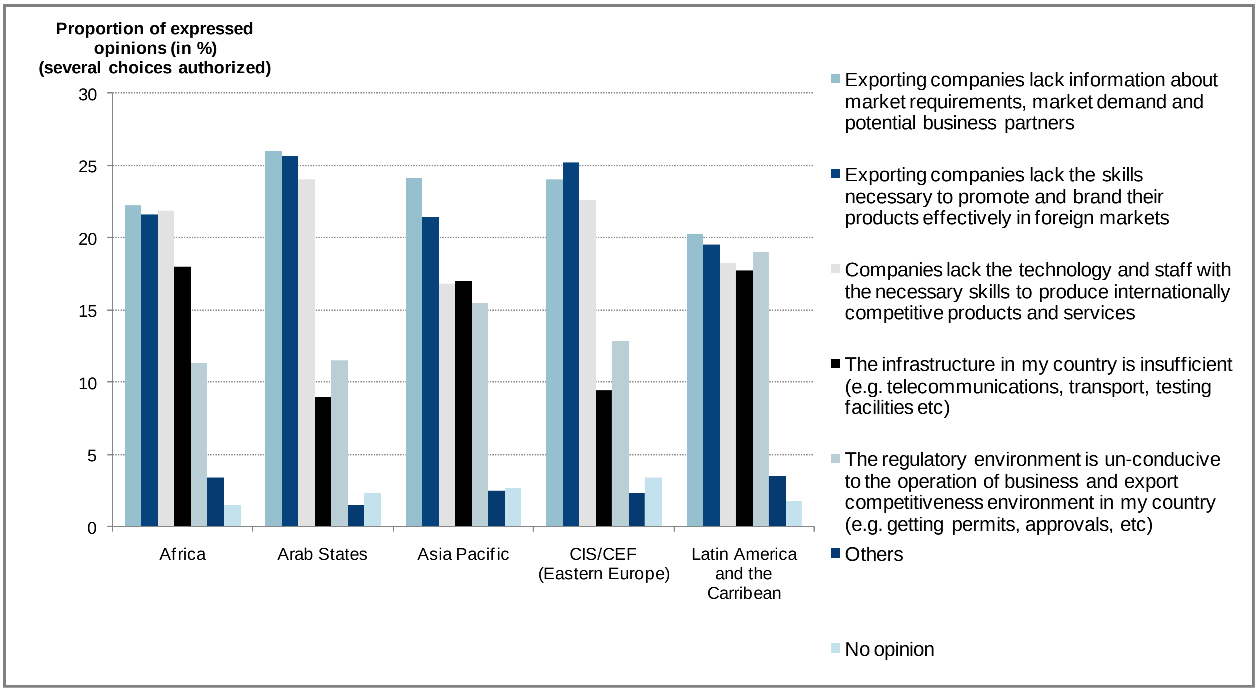
Top three most important challenges to developing exports that emerged from the current financial crisis (by region):

Region	Top 3 challenges		
	1st challenge	2nd challenge	3rd challenge
Latin America and the Caribbean	Product and market diversification and product tranformation	Finance and investment	Decreasing demand
Asia Pacific	Government policy (Infrastructure, support for trade development, taxes)	Lack of information	Competitiveness
Africa	Finance and investment	Decreasing demand	Lack of information
CIS/CEF (Eastern Europe)	Finance and investment	Government policy (Infrastructure, support for trade development, taxes)	Decreasing demand
Arab States	Finance and investment	Government policy (Infrastructure, support for trade development, taxes)	Decreasing demand
EU/EFTA (western Europe)	Finance and investment	Decreasing demand	Marketing
North America/Australia/NZ/Japan/Israel	Finance and investment	Decreasing demand	Prices and exchange rates

In Latin America and the Caribbean, product and market diversification is perceived as being the main challenge emerging from the financial crisis. In the Asia and Pacific region, infrastructure and support to trade development is perceived as the primary challenge.

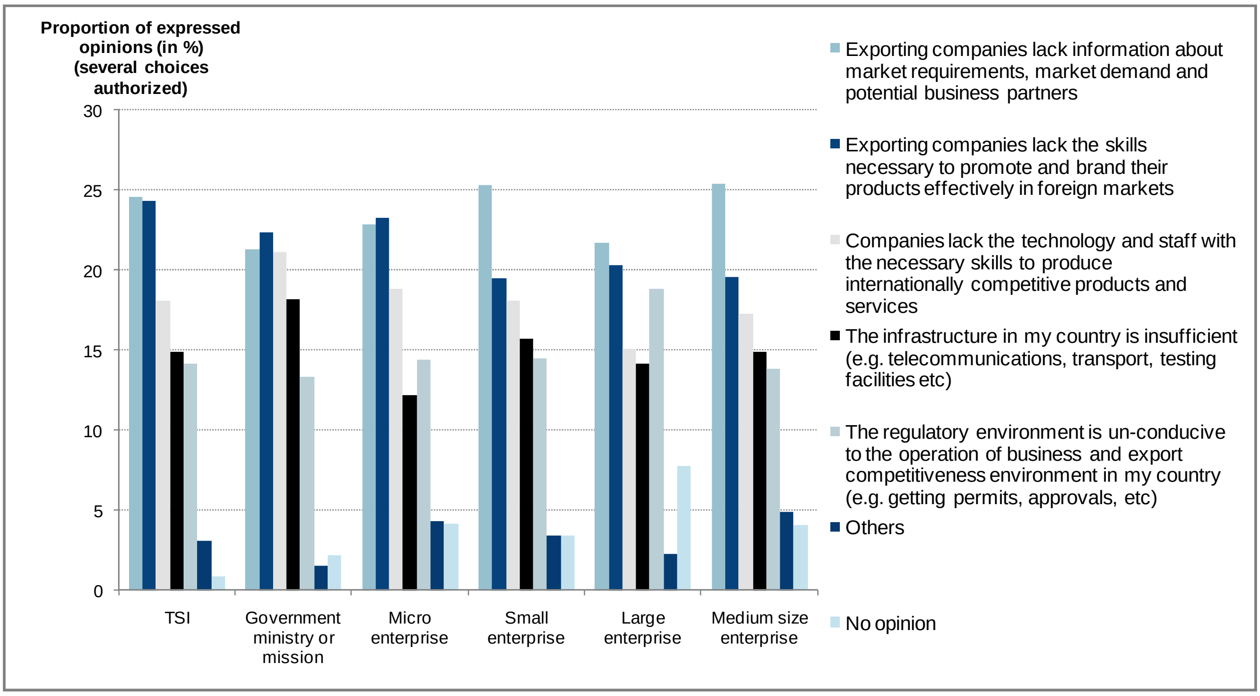
Issues presenting the greatest challenge in expanding exports:

- By region:



The lack of skills in the promotion of products is the first challenge indicated in Eastern Europe. The regulatory environment is considered more challenging in Latin America and the Caribbean than anywhere else. The lack of information about markets is rated as the primary challenge by Africa, Arab States and Asia Pacific, while the lack of promotion and branding skills rate a close second in these regions.

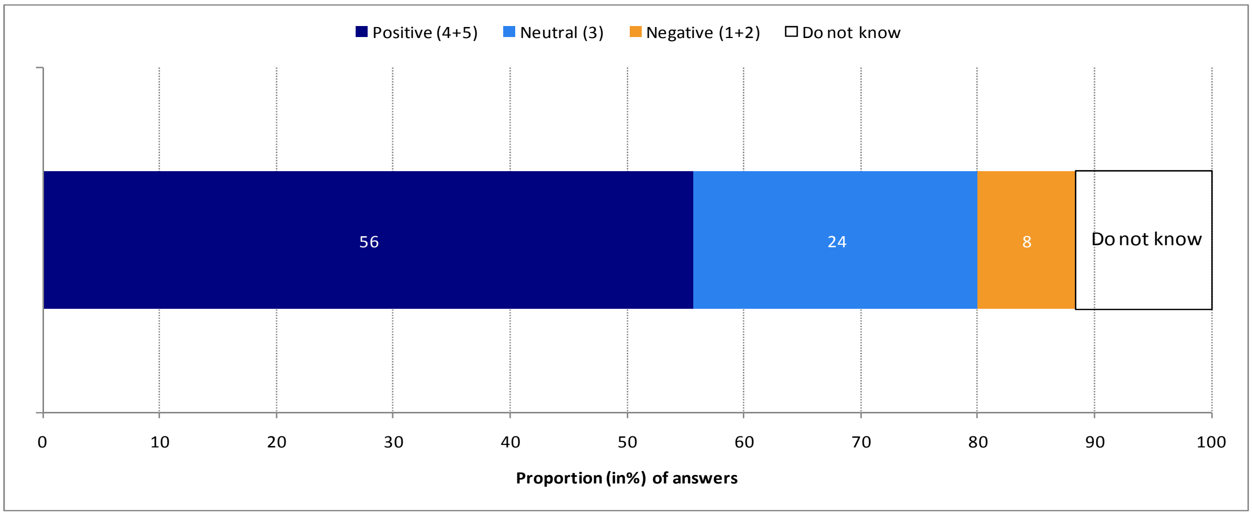
- By type of respondent:



The lack of information about markets is the greatest challenge faced by ITC clients in expanding exports. This is most frequently indicated by TSIs and SMEs. The lack of promotion and branding skills is perceived as the greatest challenge by governments and micro-enterprises, closely followed by the lack of market information.

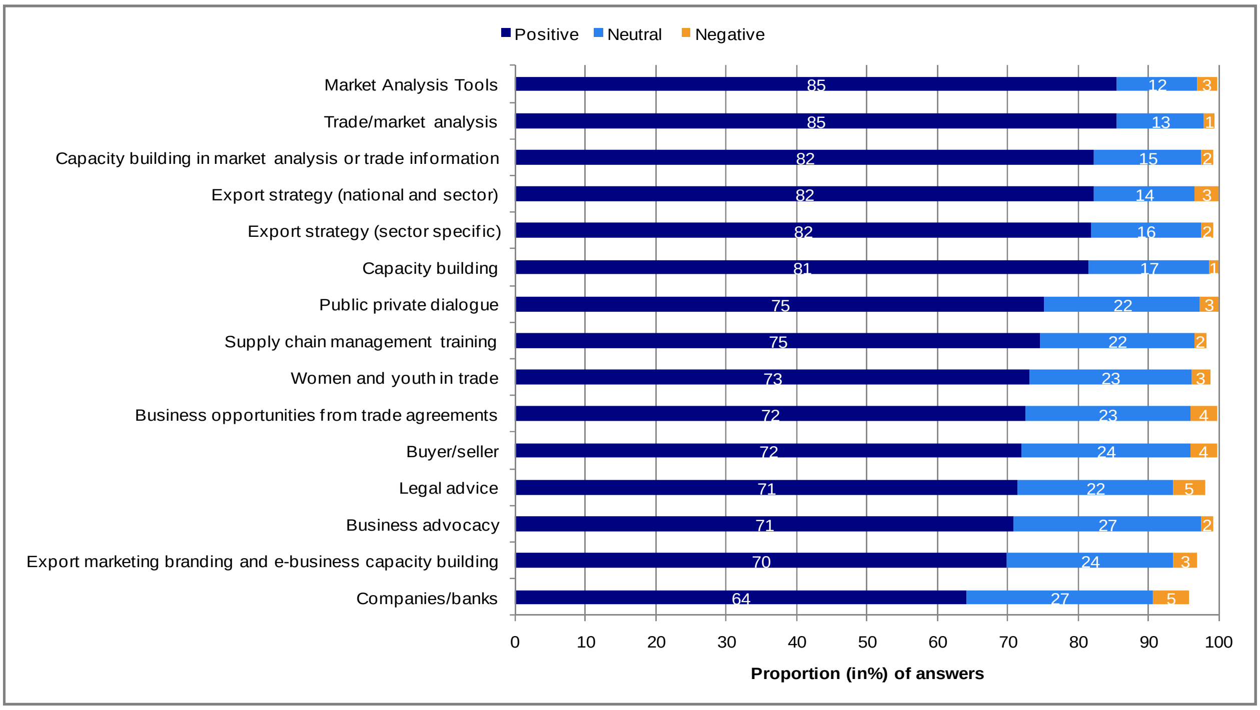
OVERALL ITC PERFORMANCE

Rating of ITC in helping organisation achieve positive results in export development:



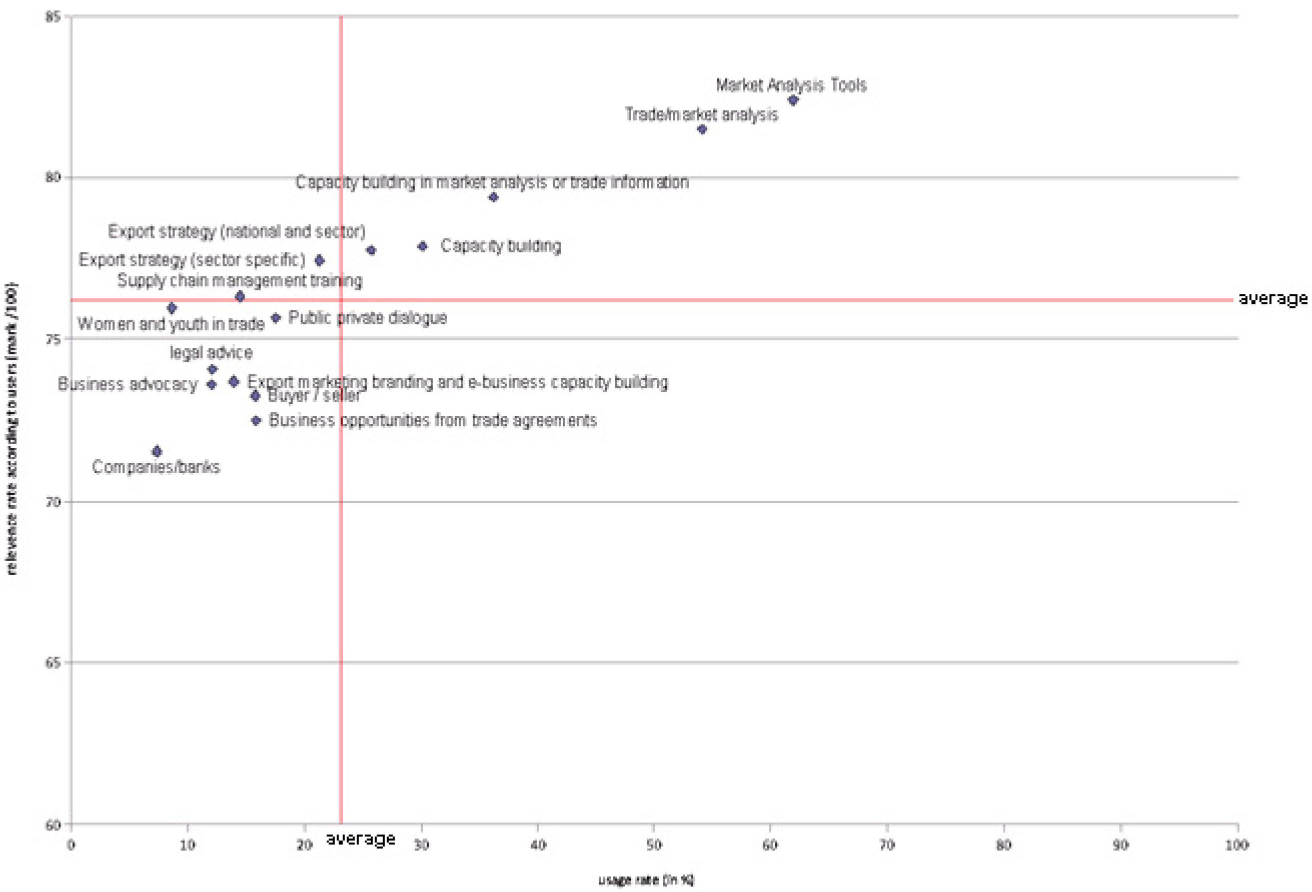
Positive ratings have progressed over the past three years: 38% in 2007, 43% in 2008 and 56% in 2009. This figure is to be regarded as indicative, considering methodological changes (e.g. scoring and sampling) occurred since our previous surveys.

Relevance of ITC services:



ITC services achieving the highest rate in the 2009 survey, in terms of relevance, are the market analysis tools, capacity building in both market analysis and trade information and ITC's work in export strategy.

Matrix representation of relevance vs usage for selected ITC products & services:



While the relevance of selected ITC's services as perceived by clients is globally high (average score 76 out of 100), some services lag behind in terms of the percentage of clients declaring using the service. In some cases this may reflect the niche character of the services provided. Nevertheless, further analysis as well as workshops with the concerned ITC sections will be undertaken with a view to further adapt ITC's offering to its clients.

FOR FURTHER INFORMATION, PLEASE CONTACT

Stephan Blanc
International Trade Centre
Palais des Nations, CH-1211
Geneva 10, Switzerland
+41 22 730 0111
blanc@intracen.org

Micaela Daniel
International Trade Centre
Palais des Nations, CH-1211
Geneva 10, Switzerland
+41 22 730 0111
daniel@intracen.org

Wijnand de Wit
Dalberg, Global Development Advisors
7, Rue de Chantepoulet
CH-1201 Geneva, S
+41 22 809 9900
wijnand.dewit@dalberg.com