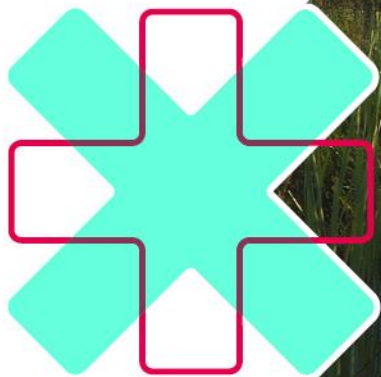


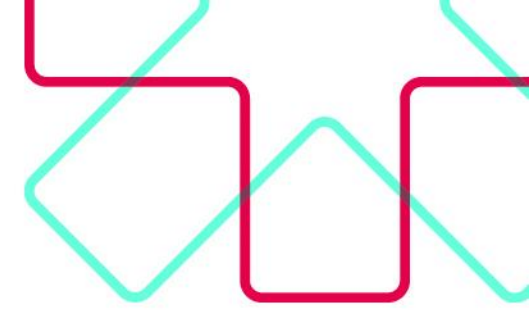
NEEDS OF BUSINESSES INTERNATIONALISING IN NORTH ASIA

Final Report

A report for the North Asia Centre of
Asia Pacific Excellence, hosted
by the University of Auckland

21 November 2017





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PREFACE

This report has been prepared for the North Asia Centre for Asia Pacific Excellence by EeMun Chen, Stephen Knuckey and Nicola Halliday from MartinJenkins (Martin, Jenkins & Associates Limited) and Paul Gestro (William Partnerships Limited).

MartinJenkins advises clients in the public, private and not-for-profit sectors, providing services in these areas:

- public policy
- evaluation and research
- strategy and investment
- performance improvement and monitoring
- business improvement
- organisational improvement
- employment relations
- economic development
- financial and economic analysis.

Our aim is to provide an integrated and comprehensive response to client needs – connecting our skill sets and applying fresh thinking to lift performance.

MartinJenkins is a privately owned New Zealand limited liability company. We have offices in Wellington and Auckland. The company was established in 1993 and is governed by a Board made up of executive directors Kevin Jenkins, Michael Mills and Nick Davis, plus independent directors Sir John Wells (Chair) and Hilary Poole.



EXECUTIVE SUMMARY

The North Asia Centre of Asia Pacific Excellence (CAPE), hosted by the University of Auckland, seeks to prepare New Zealanders to engage more competently with, and do business with, the countries of North Asia. The North Asia CAPE commissioned MartinJenkins to identify what the CAPE should offer to improve New Zealand businesses' performance when internationalising in North Asia. We undertook a literature review and services stocktake, semi-structured interviews with service providers and informants and semi-structured interviews with businesses and entrepreneurs. The major findings of the review are outlined below.

When internationalising in North Asia, businesses encounter difficulties in several key areas

In talking with service providers, informants and businesses we find that businesses struggle in:

- Being adequately prepared for market entry and committed to building offshore relationships over the long term
- Finding and vetting distribution and investment partners
- Understanding cultural norms
- Not appreciating the importance of language
- Understanding, developing and maintaining a social media presence

- Understanding the importance of detailed market research and how to interpret the research
- Keeping abreast of regulatory and legal hurdles
- Understanding the relevance of support that is available and finding the right support for their circumstances.

The system of support is crowded and confusing

There are many providers of services which aim to deal with the issues that businesses face in internationalising in North Asia. Overall, the support system is crowded, fragmented and difficult to navigate. Although the North Asia CAPE can potentially fill some gaps and improve existing offerings, it has the potential to create further confusion for businesses and other providers unless its implementation is carefully managed.

Universities are not regarded as a natural provider of business capability services

A key theme from the interviews is that universities are perceived as having less credibility than industry or private sector organisations in providing business-facing capability development services (despite what the reality might be¹). There were strong perceptions that university training and research are geared towards the requirements of students and the academic year, rather than being tailored to business requirements (for example,

¹ We recognise that the University of Auckland currently holds a contract to deliver the Callaghan Innovation Better By Lean programme across New Zealand.



research papers based on theory and course requirements rather than being 'user-friendly'; students seeking to undertake research projects with businesses in holiday periods rather than when businesses have the time and capacity to make best use of the resource). Several service providers believed that universities could make their offerings more relevant but that this was more likely to be achieved in partnership with others.

What should the North Asia CAPE do?

Given the large range of existing business services that are available and the strongly held perceptions about the role of universities, our view is that the North Asia CAPE should focus on collaborating with existing providers to fill specific gaps in their services, and to help improve the reach and quality of their services, rather than creating a set of new services per se. In doing so, a key consideration should be the extent to which the offerings leverage the capabilities and experience that the universities have in relation to research, evaluation, language and cultural education, international relationships and student exchanges.

Several service providers and businesses appreciated the potential of further support in the form of North Asia CAPE. Several providers were happy to partner with North Asia CAPE to extend the reach of existing services, and to develop and implement collaborative approaches.

As a first step, we recommend North Asia CAPE work with key existing service providers (such as NZTE, ATEED, Export New Zealand, Asia New Zealand Foundation, MFAT and North Asia business councils/trade associations) to develop joint engagement and work plans for supporting businesses in engaging with North Asia.

There are several service areas which can make the most of the strengths of universities which the North Asia CAPE could explore with these providers in the first instance, such as:

- improving the coverage and depth of some existing services in specific capability areas, such as in languages and cultural knowledge
- providing access to university research expertise:
 - supporting businesses to interpret market research
 - undertaking evaluations of existing services
 - providing the evidence-base for existing providers' programmes and services
 - providing practical case-study research on success factors for businesses when entering North Asia markets.
- leveraging students and graduates:
 - improving/extending internships of university students into New Zealand exporters and into North Asia
 - supporting and developing future leaders in partnership with existing business and industry association youth development programmes
 - facilitating international and migrant students into employment in exporting businesses.
- leveraging universities' international relationships, for example with education and innovation institutions offshore, to improve New Zealand businesses' connections with this expertise in North Asian markets.

Specific programmes of joint work or services could be developed to help prepare New Zealand small and medium enterprises to take up opportunities in North Asia associated with major events and developments over the next three to 10 years, for example, the next Tripartite Summit, the Rugby World Cup in Japan in 2019, and the World Masters Games in Japan in 2021.



We believe that such an approach will not only help to clarify the intent and purpose of the North Asia CAPE with existing providers but will have the added benefits of:

- enhancing trust and relationships between North Asia CAPE and the private sector
- mitigate any risks of duplication and overlap between North Asia CAPE and existing providers
- ensure there is a united front and seamless approach to businesses.



INTRODUCTION

Government allocated \$34.5 million over four years to develop new Centres of Asia-Pacific Excellence (CAPEs) in New Zealand universities as part of the Innovative New Zealand package in the 2016 Budget.

A consortium of the universities of Auckland, Waikato, Victoria and Otago were successful in hosting all three CAPEs. University of Auckland hosts the North Asia CAPE, covering 'greater China', Japan and Korea.

The North Asia CAPE has three objectives:

- To prepare New Zealanders to engage more competently with and do business with the countries of North Asia
- To support and deepen New Zealanders' knowledge and understanding of North Asia
- To build New Zealanders' language competence and cultural skills.

North Asia CAPE has undertaken a review of the literature on New Zealand businesses internationalising in North Asia and has had conversations with a number of providers of business and management capability training. North Asia CAPE understands that there is a gap in the provision of training and information for SMEs, in particular, internationalising in North Asia.

North Asia CAPE commissioned MartinJenkins and William Partnerships to undertake in-depth research to understand how best to support New Zealand companies when internationalising in North Asian markets, and what complementary services it could provide, given the existing offerings.

Method

This study incorporates a number of methods:

- literature review and services stocktake
- semi-structured interviews with service providers and informants
- semi-structured interviews with businesses and entrepreneurs.

Literature review and services stocktake

The literature review and services stocktake provide an overview of the landscape of services in internationalising in North Asia, the types of challenges that New Zealand businesses face in internationalising in North Asia and evaluative evidence of what types of services work. Key inputs include:

- Journal articles from the New Zealand Asia Institute's research programme on *Engaging with Asia: A study of growing SMEs*
- Evaluation reports from the Ministry of Economic Development and Ministry of Business, Innovation and Employment
- Reports from Asialink Business. Asialink Business is supported by the Australian Government Department of Industry, the University of Melbourne and the Myer Foundation.

Interviews with service providers and informants

We interviewed 31 representatives from 22 organisations.

Interviews occurred between 18 September 2017 and 16 October 2017. They were conducted either in person or on the phone, and the majority were audio recorded. Interviews were, on average, an hour in length.



Interviews with businesses and entrepreneurs

Thirteen (13) interviews were held with businesses who were already exporting to Greater China, Japan and Korea. Some of the businesses attended the ASEAN Forum (hosted by ASEAN New Zealand Business Council, AUT and the South East Asia CAPE) and/or the Start Thinking: Japan seminar (hosted by NZTE, ATEED, JETRO and Staples Rodway).

These interviews uncovered the challenges businesses face when internationalising in North Asia. They identified the types of services that businesses sought to help them overcome challenges and were used to test potential recommendations arising from this study.

Themes for discussion at the interviews included:

- What challenges have the businesses faced in entering and doing business in that market? How did the challenges change over time?
- What do they wish they knew before they embarked on market entry?
- What kinds of skills do they wish they had before they started?
- Where did they turn to for advice? How did that change over time?
- What sorts of information or training did they access? How useful was it?
- How would they prefer to get access to skills/information in this area?

We used design thinking tools to facilitate the discussion, including customer journey maps.



BUSINESS NEEDS AND CHALLENGES

Where are New Zealand businesses currently internationalising?

New Zealand businesses are exporting a significant proportion of goods and services to North Asia. In the year ended June 2017, \$13.2 billion of goods and services were exported to China, which equates to 18 percent of New Zealand's total exports (Table 1). Countries within North Asia are in New Zealand's top 25 export destinations – China is number one, Japan is five, Korea six, and Hong Kong eleven.

The goods and services exported to North Asia are relatively similar across countries (Table 2), with milk powder, butter and cheese exported to all four destinations. New Zealand exports a greater amount of fruit to Japan and Taiwan, and significant amounts of aluminium and aluminium articles to Japan (a good that does not appear in the top three of all the other North Asian countries). Tourism and education are the most significant services exports.

Table 1: New Zealand's exports of goods and services, by value, 2017 (\$NZ million)

Country	Goods exports	Services exports	Total	Percentage of total exports
China	10,412	2,820	13,232	18.4%
Japan	3,079	879	3,958	5.5%
Korea	1,489	468	1,957	2.7%
Taiwan	1,064	175	1,239	1.7%

Country	Goods exports	Services exports	Total	Percentage of total exports
Hong Kong	84	332	416	0.6%
All other countries	33,753	17,270	51,024	71.0%
TOTAL	49,882	21,944	71,826	100.0%

Source: Statistics New Zealand

Table 2: Top three goods and services exported, by value, year ended June 2017

Market	Major goods exported	Major services exported
China	<ul style="list-style-type: none"> • Milk powder, butter, and cheese • Logs, wood, and wood articles • Meat and edible offal 	<ul style="list-style-type: none"> • Personal travel services • Education travel services • Transportation services
Japan	<ul style="list-style-type: none"> • Aluminium and aluminium articles • Fruit • Milk powder, butter, and cheese 	<ul style="list-style-type: none"> • Personal travel services • Education travel services • Transportation services
Korea	<ul style="list-style-type: none"> • Logs, wood, and wood articles • Meat and edible offal • Milk powder, butter, and cheese 	<ul style="list-style-type: none"> • Personal travel services • Education travel services • Transportation services
Taiwan	<ul style="list-style-type: none"> • Milk powder, butter, and cheese • Meat and edible offal • Fruit 	<ul style="list-style-type: none"> • Personal travel services • Education travel services • Other business services

Source: Statistics New Zealand

Note: We were unable to access data on Hong Kong

North Asia is an important market for New Zealand businesses; however, the research, and our interviews and workshops, found that New Zealand businesses find the market challenging to enter and sustain.



What are the challenges that businesses face?

Research in New Zealand suggests that, in general, there is low management capability across New Zealand businesses (Green & Agarwal, 2011), that New Zealand businesses are perceived to be 'nice but naïve' in their approaches to internationalisation in Asia (Nielsen, 2008), and that size and distance from the market are at the source of many of these issues (Chen, 2012).

There is little large scale research of New Zealand businesses and the challenges they face in North Asia. However, survey data from Australian businesses exists that may be instructive. A survey of 419 businesses in Australia found that difficulty in finding or building relationships with local partners is the number one challenge to entering the Asian market, regardless of business size (Asialink Business, 2014) (Figure 1).

The results are broadly similar to an earlier survey of 380 businesses that Asialink sponsored which found that partnerships and networks, as well as understanding of the culture, were important factors in doing business with or in Asia (Asialink, Australian Industry Group, & Roy Morgan Research, 2011).

There is a clear sense from the providers and informants we interviewed that New Zealand businesses are generally not perceived positively by North Asian businesses and partners (see Figure 2).

Common challenges and pitfalls that service providers and informants identified during the interviews include:

- The need for businesses to be prepared, and committed for the long haul
- Finding and vetting partners and advice
- Knowledge of cultural norms.

Figure 1. Main challenge when planning and conducting business in Asia



Source: Asialink Business (2014).

Note: Survey of 419 businesses in Australia

- Language is not appreciated or understood
- Social media and digital platforms differ between New Zealand and North Asia
- Businesses need to understand the importance of market research
- Regulatory and legal hurdles need to be considered

Each of these is explored in further detail below.



Figure 2. Quotations from providers and informants on their perceptions of New Zealand businesses in North Asia and Chinese businesses' perceptions of New Zealand businesses



Businesses need to be prepared, and committed for the long haul

Many providers and informants commented on New Zealand businesses being 'keen to jump on a plane into the North Asian market' but less likely to take the time to 'do their homework' and adequately prepare.

"It is quite a balance between cost and time to market. Often it's just easier to go and find out. Not the greatest strategy but a common one with peers"

Businesses recognise that going directly to market might not be the best strategy but also encounter challenges in trying to prepare adequately:

- They may have no idea how to start the export journey so spend a lot of time searching for and evaluating advice and information of variable quality
- Owners and managers can 'often feel foolish asking for advice'
- Being unaware of valuable, time saving services. For example the APEC Business Travel Card²
- Needing practical advice such as what mode of transport is best from the airport, is the hotel in a useful location, are instructions in English or the native language.

Relatedly, there appeared to be a reluctance for New Zealand businesses to devote enough resources – time, money and people – to enter and maintain market presence for the long term. This was perceived by potential Chinese and Japanese partners as lacking commitment.

Providers and informants felt that New Zealand businesses underestimate the time and effort that is required to be successful in the North Asian

² The APEC Business Travel Card (ABTC) allows business travellers pre-cleared, facilitated short-term entry to participating member economies. The ABTC removes the need to individually apply for visas or entry permits, and allows multiple entries into participating economies during the three years the

card is valid. Card holders also benefit from faster immigration processing on arrival via access to fast-track entry and exit through special APEC lanes at major airports in participating economies.



market, and that a long term relationship and long term commitment is needed. One of the businesses we spoke to did 'do their homework', and as a result realised that they needed a lot more preparation time than they anticipated – five years rather than one. Conversely, another business we spoke to recognised that they did not prepare as much as they should have and 'got found out very fast'.

Many providers and informants commented on the production focus of New Zealand businesses. There is a strong perception that New Zealand businesses place a greater emphasis on getting products to market, rather than finding out what the market wants and modifying the good or service to meet market needs/wants (product push rather than market pull).

Finding, vetting and managing partners, and advice, can be challenging

One of the questions most often asked by New Zealand businesses internationalising in North Asia is 'how do I find a distributor?'

Related to lack of preparation is the tendency for New Zealand businesses to 'take people at face value' and not undertake due diligence and appropriate risk management in assessing potential partners in North Asia. Providers and informants felt that New Zealand businesses were taken in too easily by partners who boasted about extensive connections, ability to make sales and 'their flashy cars'. One business commented that the term 'partner' can be misleading and that it is important to define what it means to the business and the potential partner. Providers and informants mentioned that the tendency to not appropriately vet advice and advisors was common, not just in relation to North Asian partners but also to services and advice in general.

Made the mistake of going with the first decent looking business to partner with. Just wanted to get things going.

The difficulties encountered with partners can also be related to employee KPIs. Staff can sometimes be given the mandate to 'go out and conquer with no guidance given'. In the absence of management oversight, and the pressure to find partners, appropriate due diligence may not be carried out.

Businesses also experienced difficulty managing partners from a distance. Being in market, Memorandums of Understanding, contracts and clarity on what the New Zealand business wants out of the relationship, were strategies businesses used to improve partner management.

The businesses we spoke to highlighted that serendipity played a part in the development of distribution partnerships. However, due diligence still needs to be done. One New Zealand business who proceeded with two different partners who approached them resulted in no export sales, due to the partners' lack of networks and follow up.

However, it is not all bad news. Research on 26 small to medium enterprises (SMEs) in New Zealand found that as organisations engage with Chinese business partners, some SMEs built trust, tested the trustworthiness of their distributors and could learn about their partners through formal and informal experiments to test whether partners were committed to their goals (Fiedler, Fath, & Whittaker, 2017). For example, experiments could include visiting stores to gain insights into staff knowledge of their projects, and comparing the performance of multiple distributors.



Businesses noticed some differences in developing partnership relationships between Japan and China. One thought it was difficult in Japan as it was hard to decipher actual intent, and if the partner was a large business the connection was often pushed down to junior operational staff. On the other hand, another business found it easier in Japan than China. It was thought that there was more honesty and less of a 'cowboy mentality'. The business has taken longer to find partners in Japan, but this has been positive as the Japanese businesses have taken the time to understand the opportunity, rather than 'offering false promises'.

Knowledge of cultural norms is important

Knowledge of culture and cultural norms was considered important by all providers and informants. Understanding the basics, history, popular culture and food were acknowledged by businesses as helpful and can leave a good impression with potential business partners. It was recognised by businesses, providers and informants, however, that without being immersed in a culture for a considerable period of time, there cannot be a real understanding of the culture.

One business remarked that cultural and market understanding should be the priority of all employees within a business, not just the managing director or export manager. We are aware that some businesses are putting all their staff through 'working with North Asia' training, but they may be in the minority.

Employing Chinese students during the holiday period, and on internships, was the strategy of one of the businesses we interviewed, to help the business understand culture.

However, one provider commented that some of the more distinct and traditional customs have started to have less prominence in business transactions as business in North Asia, particularly China, becomes more international. Additionally, many of the new business owners and managers

have been educated offshore in the United States of America, Australia or the United Kingdom.

Protocols aren't that big of a deal. China is becoming more international. There is standardisation in the way people do business. Distinct customs are less prevalent. Language trumps all that.

Businesses who had attending cultural training, workshops and seminars commented that it can be hard to 'teach culture sitting in Auckland' and questioned whether it really helped. However, they felt that New Zealand service providers could do better in this area. Conversely, providers commented that capability development in this area can be 'a hard sell'.

"The gaps are more basic. People think they know about culture and working cross-culturally, but often they can't. They need convincing that they need help with it"

Provider of 'Building Cultural Competency' course

In the research into SME experiences discussed earlier, a different group of SMEs actively sought knowledge of Chinese business etiquette, customs and norms and followed protocols in business meetings and social interactions. They also engaged in social activities with business partners, such as fishing, hiking and visiting karaoke bars (Fiedler et al., 2017). The SME owner-managers felt that this cultural knowledge and personal commitment would signal to their partners that they were committed and would form a trust based relationship.



However, these 'emotional' or 'affective' trust based relationships tend to lead to situations where the business can only access the market through its partner. This in turn means that managers have little relevant knowledge to develop the market and are reliant on the partner for market development.

The research found that a third group of SMEs were most successful, as they worked on establishing strong relationships with one or a few partner(s) and co-created opportunities. These SMEs found partners with complementary skill sets, provided training to develop the business and add value, and had frequent personal contact. This enabled the SMEs to learn about new opportunities from the partner and gain information on local customer needs and preferences. The mutual learning and knowledge flows between the SME and partners was beneficial (Fiedler et al., 2017).

This finding was replicated by one of the businesses we spoke to:

"This partner represents our brand in market and has connections into the relevant retail sector, servicing 3,000 supermarkets and convenience stores in the Shanghai region ... Our partner's specialist in-market knowledge has been invaluable"

A recent report on the Japanese market, based on six focus groups of Japanese consumers and interviews with 11 businesses, found that New Zealanders are viewed as 'casual and rugged' rather than 'refined and precise' (Big Picture & Seven Seas Marketing Research, 2017). New Zealand businesses sometimes fail to deliver on time to Japanese businesses, and there is a perceived lack of refinement in our products and packaging which is mismatched with Japanese preferences and aesthetic. The report recommends the following when establishing and building business relationships in Japan (New Zealand Story Group, Big Picture, et al., 2017):

- Be early
- Respect hierarchy

- Be polite
- Play the long game.

Language is not appreciated or understood

Service providers, businesses and informants had different responses to the relative importance of language in internationalising in North Asia:

- Language basics are useful to show respect and commitment to the market and business partners
- Language fluency is required for negotiation, and having a real understanding of how people/business partners/customers think. One business thought that during negotiation, this capability needed to be in-house
- The approach of many businesses is to buy language skills in, but this tends to be for translation or interpretation rather than in a decision making capacity. Interviewees commented that there needed to be more ethnic diversity at the senior, executive and governance levels of organisations
- Having a presence in the market and employing local staff is one way some businesses mitigate the language challenge
- Businesses are aware of many services and tutors available for language training
- Businesses cover multiple markets in North Asia and may not be able to resource learning the languages of all those markets
- Market priorities change so resources engaged at one point in time might be redundant in the short and long term.

I hired someone with very good Korean capability but our market has shifted to predominantly Chinese. It is quite hard to predict where you will be in five years so makes resourcing for languages difficult.



I hired Chinese as that was the market we were developing. All good but now we are mostly in Japan ... I almost need to replace the Chinese staff with Japanese but they are all good people

Some informants and providers commented that language acquisition and fluency was too late for this generation, but should be a focus for future generations through prioritising Asian language education within the New Zealand Curriculum.

Social media and digital platforms differ between New Zealand and North Asia

Providers and informants commented that many businesses struggle to understand and use social media and digital e-commerce platforms that are not commonly used in New Zealand, particularly in relation to the Greater China market. WeChat and Weibo (and Daigou using WeChat and Weibo) were raised as examples of channels that New Zealand businesses should use to engage with business partners and their customers.

There are some services that provide businesses with resources and knowledge of these channels, for example, NZTE's China Digital Forum and tourism's #NZCN module and portal.

Most of the businesses we interviewed recognised that they needed an online or digital strategy but did not know where to start:

"I can't get my head around it"

"I've always adopted a traditional approach so new ways of communicating are daunting. Who do I turn to?"

"There are plenty of experts out there but it is very difficult to assess their capabilities"

"I'm still searching for a strategy on digi"

"I know I need it but don't know how to tackle it. I've found NZTE useless in this space. They seem to know China OK but not Japan"

"I tried New Zealand-based agencies to help with my digital presence but they know nothing about Japan. Then I found it hard to find Japanese expertise, as they know little about my company and New Zealand. It's a big divide"

This year, NZTE's Taste NZ programme employed an online marketing campaign using WeChat in China. Consumers who purchased a New Zealand product online during the promotion period received a voucher with their product which paired their WeChat account with their purchase, enabled them to receive points that could be used on other New Zealand products and made them eligible for regular competitions and prize draws. The programme led to a database of 70,000 members that has been used to collect and analyse consumer insights to promote other New Zealand brands and products.

Businesses recognise that Key Opinion Leaders (KOL) are a very important and useful strategy in North Asia. Tourism New Zealand recently developed a social media campaign using Chinese actress Yao Chen as a celebrity endorser to promote New Zealand as a tourism destination. However, research found that there were lost opportunities amongst New Zealand tourism promoters as they failed to monitor and use the information generated through Weibo, and lacked the language and cultural skills to realise the benefits (Fath, Fiedler, Li, & Whittaker, 2017). Some businesses were able to mitigate language barriers by hiring fluent speakers who were culturally savvy, had social media marketing capabilities, and could monitor social media content strategically and connect with potential tourists.

In general, New Zealand businesses' depth of knowledge and experience in this area is relatively embryonic. In part, this is related to a lack of understanding of the market, and a lack of understanding of how to access, use and commission market research.



... businesses entering Japan don't understand the market e.g., using 'Made in NZ', when it should be 'Made for Japan'

Businesses need to understand the importance of, and how to interpret, market research

One provider commented that while there is excellent capability in New Zealand to undertake market research, there is a gap in ability to commission and make sense of market research. The interviewee believed this was because New Zealand's larger, multinational companies take their decisions from head offices offshore. It was perceived that this has led to a 'hollowing out' of capability.

Providers and informants commented that businesses and managers did not appreciate the importance of market research and market insights, and the level of diversity within Greater China, Japan and/or Korea where targeted, specific and local market knowledge is required. Additionally, providers and informants felt that many SMEs lacked the capability to commission and use market knowledge.

"Local understanding is important. Even though there's an inherent lack of trust in Chinese milk and a preference for imported dairy, the local dairy guys are still making 39 percent more per litre than exporters. That's because of distribution but also local understanding. They [New Zealand companies] are all exporting 1 litre Tetra packs. But the market worries about oxidation and not being fresh after they open it, so they want 200-250 ml packs. It's fresh, it's convenient."

China-specific market research and digital service provider

One of the businesses we spoke to thought that they had spent a lot of time undertaking their desktop research and strategic planning, but in the end they found out they had not spent enough time understanding their consumers. They did not know if their product was relevant or right for the Japanese market. They found out the hard way that the product needed more viscosity and different pack size to appeal to Japanese consumers.

Korea is difficult in the retail environment because in some categories they are very parochial and nationalistic. There's import restrictions too which businesses underestimate...

Japan is a tricky market. Their consumers are harder to activate. They are not as impulsive and very considered and very sophisticated. Often they are most aligned with Southern Europe in their preferences and tastes than Asia.

For businesses who do the research themselves, they find they spend a lot of time undertaking market research due to the amount of information that is available. Finding the right information can be difficult. However, there was a recognition that researchers in-market have advantages as they can search and analyse in the native language and terminology.

SMEs, in particular, comment that market research and data can be 'very expensive'.



Regulatory and legal hurdles need to be considered

Regulatory and legal hurdles are mostly related to the mainland China market. The pace of change has been so fast in China, and providers and informants felt that New Zealand businesses have struggled to keep pace with the regulatory and legal changes. At the same time, the changing nature of the regulatory and business landscape in China – which businesses comment seems to change rules daily – has led to significant uncertainty for New Zealand businesses and increased vulnerability.

Businesses commented that legal and professional services firms in China and in New Zealand had good expertise in relation to internationalisation, and costs between markets were on par.

Many businesses have turned to Ministry of Foreign Affairs and Trade (MFAT) for help, but often the levers they have to provide support are not the most appropriate to the specific issue faced by New Zealand businesses. At the same time, businesses expect the New Zealand government is able to immediately change regulation in relation to North Asia, but this is often not the case. MFAT has recently launched the tradebarriers.govt.nz service, however it is not well known in the market place. The service enables businesses to register a trade barrier they are experiencing, which triggers the relevant agency to respond within two working days and work out next steps within six weeks.

What do businesses say about internationalising in North Asia?

The following section outlines the insights gained from interviews with three businesses who are currently internationalising in North Asia. Personas and customer journey maps ‘bring to life’ the issues and challenges these organisations encountered.

The three personas are on the right:



Andrew
“There is a brutal lack of support for SMEs”

Product/service
Functional drink

North Asia markets

- Hasn’t been able to enter Japan
- Been in China and Korea since 2015

Knowledge and skills

Lived and worked in FMCG in South East Asia for four years



Robert
Fiercely independent and wants to go it alone

Product/service
Value-added dairy

North Asia markets

- Hasn’t been able to enter Japan
- Been in China for 5-6 years, has just exited
- About to export to Korea

Knowledge and skills

- Limited export knowledge
- Korean distributor initiated the relationship. Mutually beneficial



Lillian
A considered and research-based approach to market entry

Product/service
Food and ingredients

North Asia markets

China is their first export market

Knowledge and skills

- Did five years research before entering China
- Networking onshore and offshore
- Active social media presence





Andrew

“There is a brutal lack of support for SMEs”

Product/service

Functional drink

North Asia markets

Hasn't been able to enter Japan
Has been in China and Korea since 2015

Knowledge and skills

Lived and worked in FMCG in South East Asia for four years

Andrew believes that assistance in doing business with North Asia is 'extremely brutally needed' by SMEs. He believes there is 'a lack of a cohesive eco system that ties' all the offerings together. He offers the idea of a unit that identifies high potential SMEs and helps 'lift these guys' as a potential solution.

Andrew believes in 'getting on the ground' in North Asia, as if you have no prior knowledge of those countries it's a 'black hole'. He does not believe that you can do business in North Asia purely from New Zealand.

Andrew started developing his product while working in South East Asia. He wants to grow to be a \$30 million business in five years' time. The product itself was further developed, prototyped and trialled using the New Zealand Food Innovation Network's Foodbowl in 2013, and exports of the product to Thailand began in 2015. He has found the services and facilities available at the Foodbowl to be excellent, but with production costs at about \$2,500 a day, Andrew has had to fund the production costs himself.

Andrew has found it difficult to navigate the various offerings available to businesses when internationalising in North Asia. It hasn't been clear to him what the right path should be for his organisation. He has been to a few events run by the Asia New Zealand Foundation and Export New Zealand, but considered that they didn't offer what he needed and that he was better 'cracking on' by himself. He found a private sector market research/export capability development services provider to be too expensive for a SME, and did not find them to be relevant. ATEED were responsive and he was able to access \$5,000 to improve his distribution models. He found Callaghan Innovation to be more difficult to deal with and less proactive in getting in touch with him.

It took Andrew six months to 'get in the door' of NZTE. However, his experience with NZTE staff offshore in Japan, China and Korea has been excellent.

Andrew's attempt to sell his product in Japan highlighted his lack of knowledge of customer trends and tastes. A different viscosity and pack size is needed, compared with his product in China and Korea. Andrew had done some desktop research but had not spent enough time talking to the consumer. He has found access to consumers difficult:

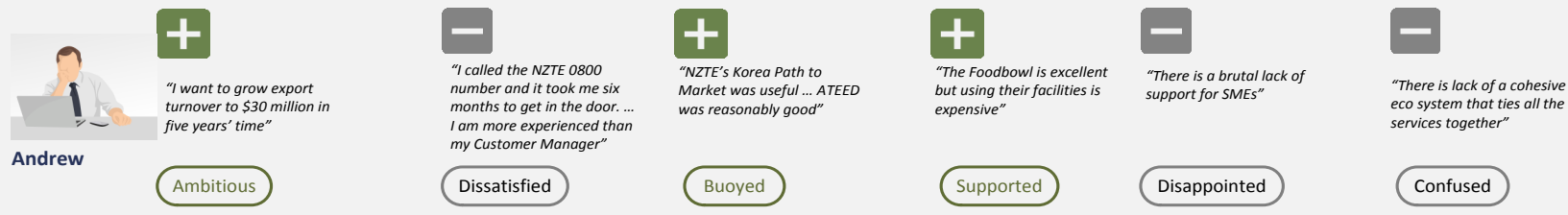
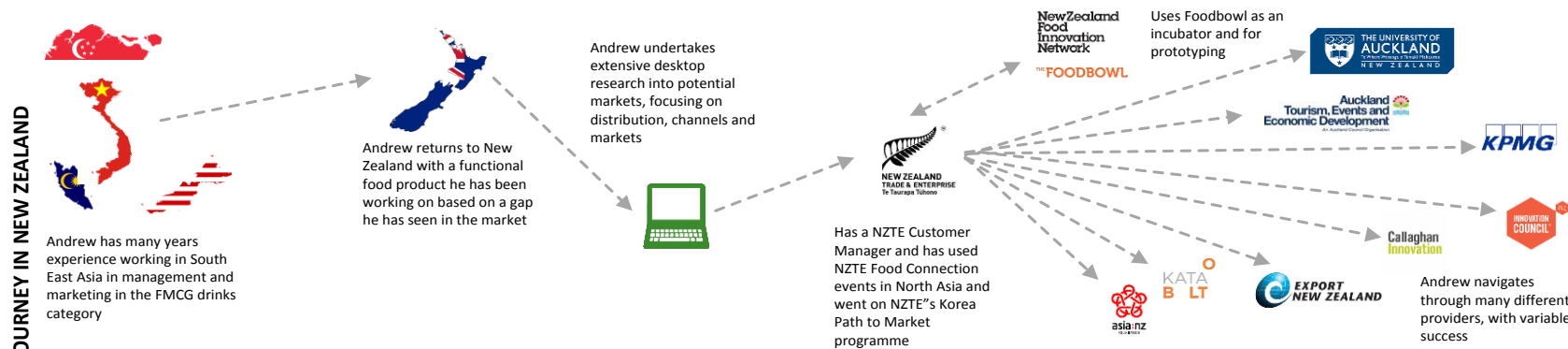
“Even when you're in market, you've got to find 50 people to get feedback from, on packaging, on taste, etc ... our budget only allows us a [small spend] on customer insights as part of market validation work”

Andrew has recently found an investor. Up until then, he has funded the business from personal capital.

Andrew needs:

- A clear road map of all the internationalisation services offered in New Zealand and how to access these quickly
- A way of gathering customer insights for his target markets which is cost-effective for a SME
- Greater financial support whilst remaining in control of his business







Robert

Fiercely independent and wants to go it alone

Product/service

Added value dairy

North Asia markets

Hasn't been able to enter Japan

Has been in China for 5-6 years, now exited

About to export to Korea

Knowledge and skills

Korean distributor initiated the relationship. Mutually beneficial

Robert is an owner/manager of a dairy manufacturing and retail business. He is protective of his product and feels that letting in others would mean he would lose control of his business. He tends not to seek advice from others, and as a result has had little or no support from internationalisation service providers in New Zealand. However, he has found NZTE staff in Indonesia to be excellent and helpful.

Robert has attempted to enter China in the last 5-6 years using two different distribution models. Both have failed, so he is no longer looking to try again in the near future.

- The first attempt involved a Chinese customer in his shop suggesting that she had relatives in China who could help. Robert worked with them for two years. He felt that the Chinese are not patient enough to wait for returns on their investments, and the contact also did not have

the right networks in China in order to succeed. He also had to compromise quality for price in order to gain some contracts.

- In his second attempt, Max employed a Chinese agent who had approached him at a New Zealand trade show. He exported a pallet of product to China for another trade show. While the trade show was successful, 'it yielded nothing'.

He has found Korea to be a better market mainly due to the strong and mutually beneficial relationship he has with his Korean distributor. The distributor approached him via email, and he felt that their business ethics and values were more aligned with 'the West' and with a focus on quality. The relationship has been 'extremely easy' due to the distributor's fluent English and helpfulness in getting his business into Korea.

For me, compared to anything else, it's been easy as. Compared to dealing with Australia, governments, China... They helped me out with export regulations. They've helped me register in Korea. It's taken 12 months from start to finish with Korea, I'm about to start exporting. We started from scratch together.

Regulatory barriers have hindered Robert's ability to export to Japan due to their zero bacteria tolerance in dairy products. Robert has invested in new plant which he will run for a year to see if he can get his bacteria levels down to zero. Only when that is achieved, he will consider exporting to Japan.

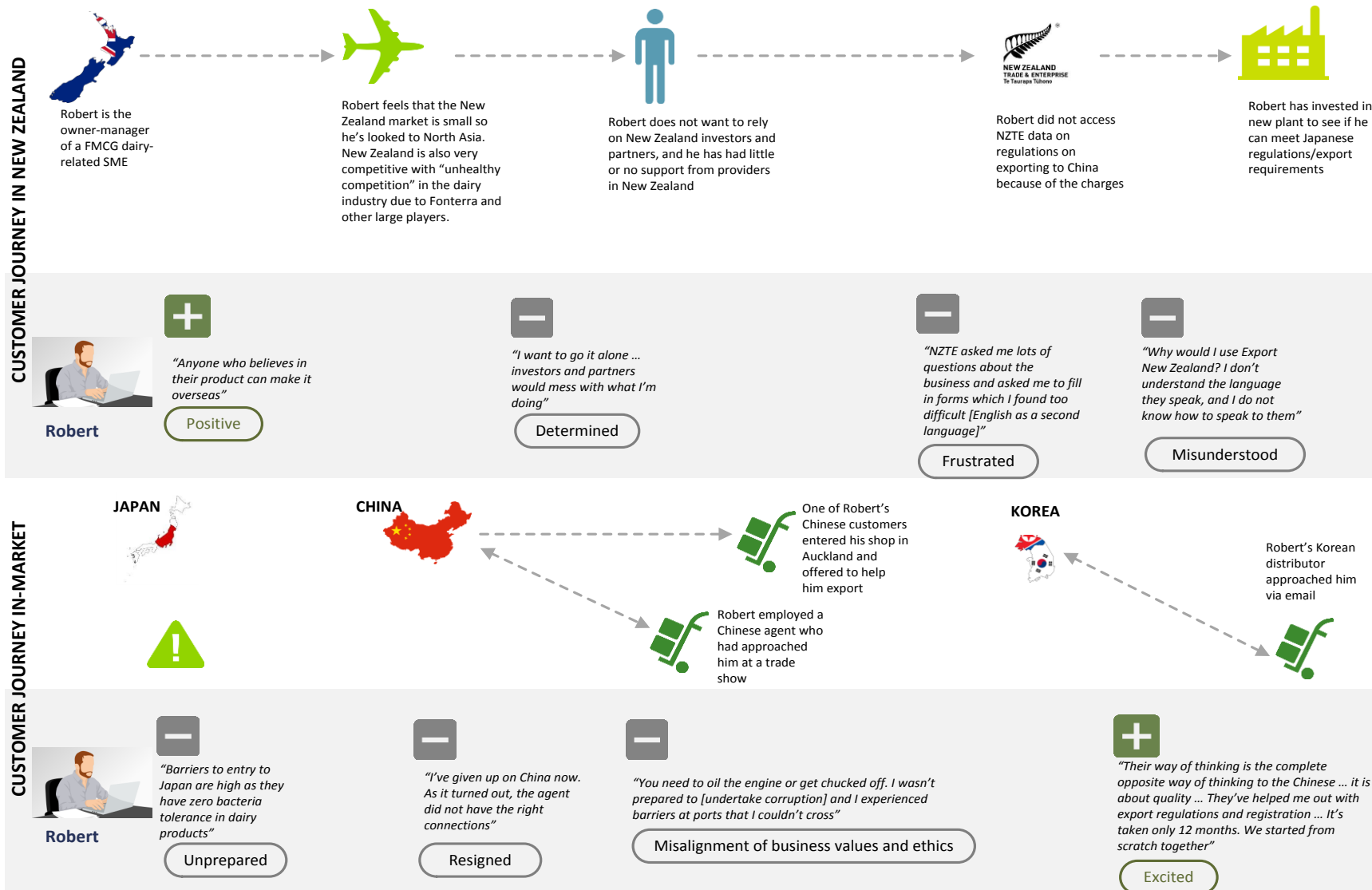
He believes New Zealand has too much focus on China:

New Zealanders think that China is the answer to all questions. China raises more questions than answers.

Robert needs:

- Advice from a quality trusted advisor
- The ability to vet and assess potential distributors before partnering with them







Lillian

A considered and research-based approach to market entry

Product/service

Food and ingredients

North Asia markets

China is their first export market

Knowledge and skills

Did five years research before entering China

Networking onshore and offshore

Active social media presence

Lillian is Managing Director of a food and beverage SME. She has had a steep learning curve exporting into China and has spent time learning more about the culture, protocols, how to do business and understanding consumer needs. Lillian recognised that they had to take a long-term perspective if they wanted to get into China. As such, they had to:

- confirm they had the capability to service a Chinese market
- have the capacity to scale up when required
- have enough cash to ensure they did not jeopardise the business in New Zealand
- commit to stay in the market
- ensure they had the competitiveness to be there.

Lillian has used her own capital to finance her business and is not actively looking for investors. She says she is put off by 'the paperwork that has to be filled out. You need a team member just to fill this out'.

The SME's own research and work developing relationships and networks have been the cornerstone of their export strategy. Lillian has put significant resource into networking with the Chinese community in New Zealand as well as the community in China. This has led Lillian to finding one of their Chinese market partners who also had an understanding of New Zealand and their products. Additionally, she's been able to identify an interpreter/advisor who has helped them in New Zealand and in China.

She has recognised that doing business in China differs compared to business in New Zealand:

For example, it's the norm in China to do business over a meal. So a lunch or dinner can go on for hours. And there's a lot of protocol and a hierarchy you need to understand.

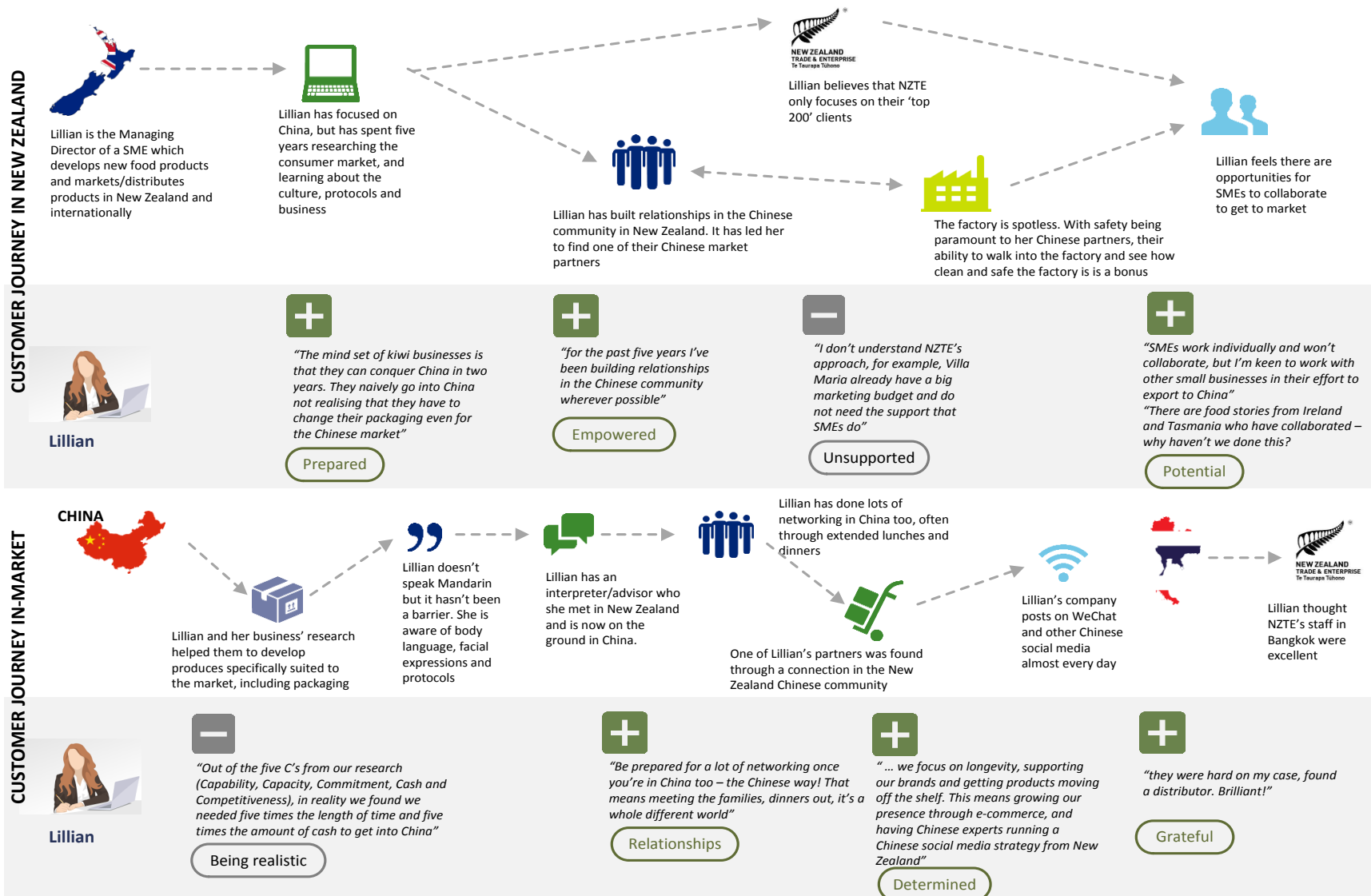
Lillian has worked with NZTE but noted that several changes in her customer relationship manager meant that she had to keep starting afresh with new staff members. However, Lillian has had a good experience with NZTE offshore staff in Bangkok.

Lillian believes New Zealand SMEs need to collaborate more to get to market, and that NZTE could play a role in this.

Lillian needs:

- Information and data on consumer/market insights that are readily available for SMEs
- A collaborative model for exporting to North Asia
- Support from the New Zealand government and business services system





STOCKTAKE AND EVALUATION OF EXISTING SERVICES

What services exist in the market?

Our stocktake of existing services finds that the market is relatively crowded with public sector organisations, non-governmental organisations and private sector organisations providing a spectrum of services to businesses to advance their internationalisation activities in North Asia (Figure 3).

Services include:

- Language training and cultural training
- Management capability training
- Awards for good practice
- Events and networking
- Specialist market entry and strategic advice
- In-market assistance
- Internships
- Legal, accounting and immigration services
- Information
- Certification
- Marketing and market research
- Online trading platforms
- International business-to-business opportunities.

This situation is mirrored in Australia. Like businesses in New Zealand, a survey of Australian businesses internationalising in Asia found that

Australian businesses sought the assistance of a number of organisations to help overcome challenges. Sources of assistance include industry associations, Austrade, professional services firms, Chambers of Commerce, State government entities and purchased industry or market reports (Asialink Business, 2014).

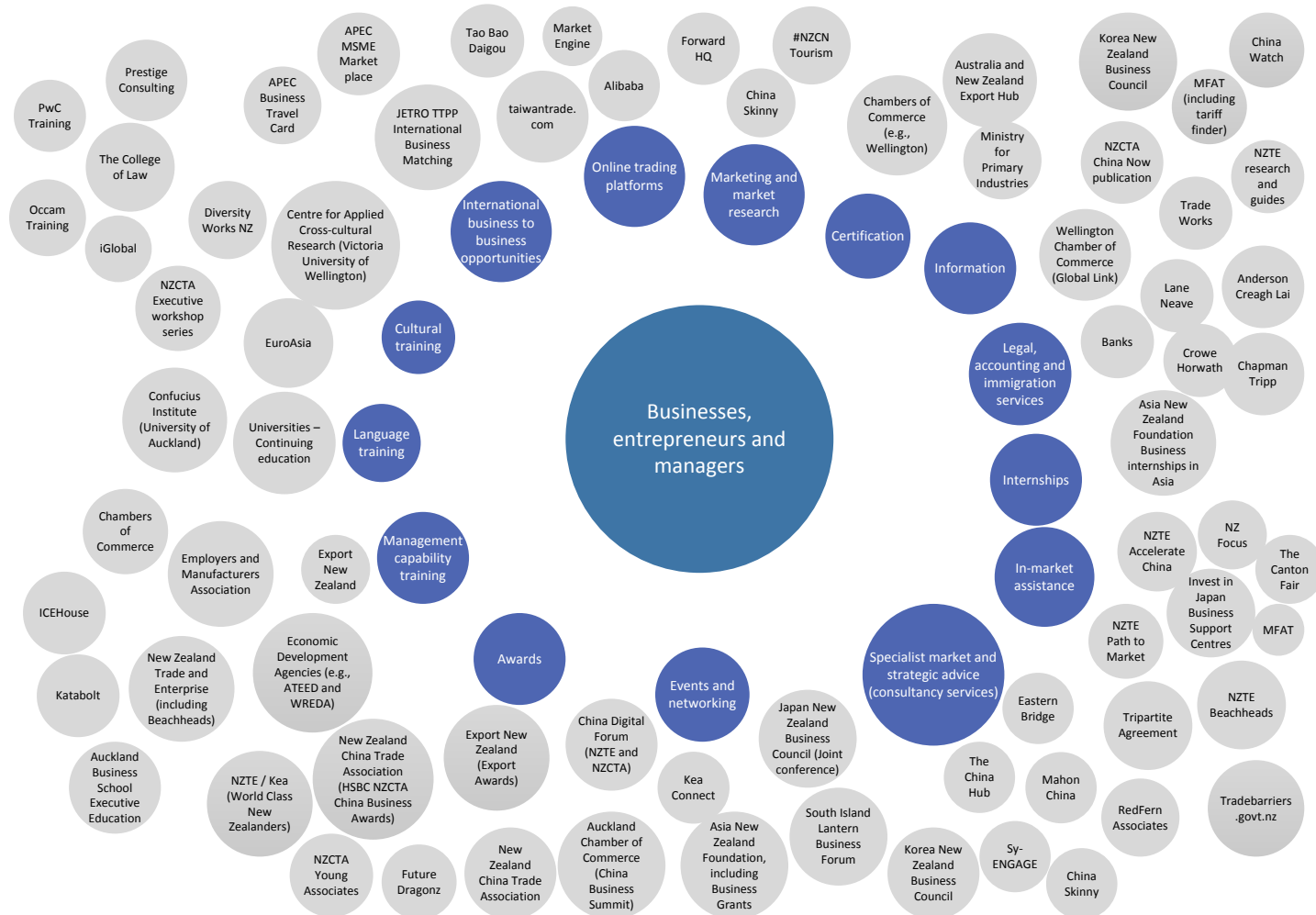
Almost every day in Auckland, you can attend a seminar on doing business in Asia put on by ASB, NZTE, Deloitte. Everyone is offering these seminars.

Our providers, informants and businesses commented that there are a multitude of services available which relate to internationalising in North Asia, of variable quality. Additionally, providers mentioned that in many cases course and workshop participants are providers seeking business, which is a source of concern and frustration for exporters. There was a sense from those interviewed that there is fragmentation in the market and that consolidation and/or collaboration is required. Providers and businesses perceived that there was a lack of a single 'front door' or dedicated programme for business internationalisation services for North Asia.

Effectively, there are services available to help businesses address all of the issues they face in entering and developing North Asian markets. The issues for businesses are understanding what services are relevant to their circumstances, distinguishing high quality from low quality services, and navigating their way through the system of support.



Figure 3. The landscape of services for businesses internationalising in North Asia



The private sector organisations listed are not exhaustive. They are provided as examples of the types of organisations in that particular area.



Market segmentation

In general, there are services that are aimed at both small businesses and larger businesses. New Zealand Trade and Enterprise (NZTE) provides an intensive suite of services to the Focus 700 (tends to be the larger firms), and there are a range of consultancy and professional services who provide market strategy and market entry advice (this tends to be taken up by the larger exporters). At the small business or small and medium enterprise (SME) end, Export New Zealand, Chambers of Commerce, economic development agencies, and industry and employer associations provide a range of services. NZTE's information-based and lighter-touch services are also offered to SMEs. Country-specific Chambers, Business Councils and Trade Associations have broad membership and often provide capability development services, events and networking.

Consultancy and professional services are perceived to be cost prohibitive for SMEs, while the services offered by NZTE to SMEs and larger businesses is offered on a free or 50:50 basis. Additionally, membership organisations like Export New Zealand and Chambers offer training and advice on a fee payment basis, with discounts to members.

The main market focus of providers tends to be China, with less focus on Japan and Korea. Several of the interviewees commented that New Zealand businesses should pay more attention to Japan, Korea, Hong Kong and Taiwan when internationalising, as they are 'easier' to do business with, and can be a good way to build up expertise and skills before entering mainland China. Some providers have already established historical linkages with these markets, for example, the Wellington Chamber of Commerce has a strong linkage with the Taipei Economic and Cultural Office and has regular delegations and trade missions involving Wellington businesses seeking opportunities in Taiwan.

A few providers commented that there were less internationalisation services offered in New Zealand regions compared to major centres.

However, one interviewee recognised that while take up of these types of services are good in the regions, the market gets saturated quickly so that service delivery is often 'lumpy'.

What works?

Other than programmes and services provided by NZTE, there are few evaluations on the outcomes and impact of programmes, training, services related to internationalising in North Asia. See Appendix 1 for a summary of available evaluations of services.

The form of programmes and services that have been evaluated vary, as do the evaluation results:

- Grant programmes to implement market development plans
 - Improved business attitudes on the benefits of market development and how to go about market development (but many firms also received other forms of business assistance, and it was concluded that needs for information about exporting in general and market opportunities could be delivered through other programmes) (Ministry of Economic Development, 2009)
 - Contributed to improving firm performance (Ministry of Economic Development, 2009) including increased employees, revenue and export revenue (Ministry of Business, Innovation and Employment, 2015a)
 - Limited evidence of spillover benefits to other New Zealand firms (Ministry of Economic Development, 2009)
- Vouchers for half of the cost of management capability development services (Ministry of Business, Innovation and Employment, 2015b)
 - Appreciable but variable impact on management capability
 - Supply of training has increased



- Peer learning networks facilitated by a large, internationalised business (Ministry of Economic Development, 2011)
 - Increased confidence and improved management and business knowledge
 - Improved mentoring and training capabilities of facilitators from large, internationalised businesses
- International network of New Zealand business people (LECG, 2009)
 - Attracted capital and facilitated increased exports from New Zealand businesses
- Beachhead in-market advisors and mentors (note that Australia have launched Landing Pads which are similar to Beachheads Version 1 which includes a free 90-day residency in an international co-working space) (Ministry of Economic Development, 2012)
 - Helps businesses reduce barriers encountered in entering global markets, and accelerated entry and growth in export markets
 - Some spillover benefits are shared with the wider New Zealand business community
- Trade missions (Swinburne University of Technology, 2017)
 - Statistically and economically significant positive impacts on businesses' export revenue

Most participants indicate that funding and/or support enables projects or market development to go ahead at a faster rate than it would otherwise, or go ahead in its entirety (that is, without funding or support the project would only have partially gone ahead).

Metrics used by other providers include growing membership (for membership organisations), feedback from members or participants, and attendance rates at events and networking.

In contrast, university-based providers like the Centre for Applied Cross-cultural Research at Victoria University of Wellington and customised training provided by the University of Auckland Business School Executive Education were more sophisticated in their approach, undertaking pre- and post- testing of participant knowledge, awareness and confidence. The Centre for Applied Cross-Cultural Research found that participants undertaking their intercultural training courses/packages were improved in all facets after taking their training. However, they did not test behaviour on a longitudinal basis.

Overall, there is limited information available for providers and businesses about the impact of the available services.

Format of service delivery

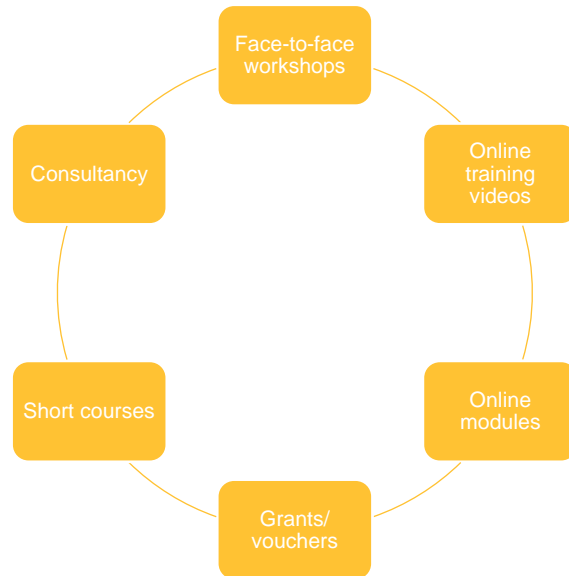
The services on offer use different modes of delivery (Figure 4). Often the same supplier will offer all modes of delivery. Mode preferences are a function of willingness to pay and the outcomes participants wish to achieve. The businesses we spoke to did not mention any preferred modes of delivery, as they were struggling to gain assistance in the first place.

However, they did mention that there appeared to be a need for a coordinator of all the services and providers (see 'Andrew'), and an online portal for market research, reports and data (see 'Lillian'). The syndicated/collaborative approach to providing market research and data used by MBIE for the tourism sector, via #NZCN

<http://www.nzcntourism.co.nz/>, is a model that could be replicated. Businesses were willing to share knowledge on this portal, pay a subscription cost and/or share the costs of market reports.



Figure 4. Different modes of delivery



One informant commented that the University of Auckland has strengths and a depth of knowledge and experience in adult pedagogy, and knowledge and skills acquisition. This should be drawn upon by the North Asia CAPE in developing and marketing the service offer.

One provider presented a good overview of their approach to service design. There was a recognition that business owners and employees are time-poor and that the main focus was not on the acquisition of knowledge through more traditional means but that learning was often through a process of 'learning by doing'. Their tailored language courses were delivered over an eight-week period (depending on the client) where participants were:

1 Pressured, but not pressured too much. Learning is manageable.

- 2 There is recognition that there is no time for homework. Participants must be able to leave the room with what they have learnt and practice it immediately.
- 3 That it is likely that classes will be missed, so classes are designed so that previous lessons are incorporated into the current lesson.
- 4 Culture is not explicitly mentioned but transfer of cultural knowledge is achieved through providing context for how language is used.

The University of Auckland Business School Executive Education noted that there was a push toward blended models of learning, but this tended to be the view of human resources departments, rather than individual preference. Additionally, courses that require longer project work (such as four months) often received 'push-back'. NZTE has a Service Design team that designs, tests and prototypes new services and programmes based on client need, feedback and information on impact, and further discussion with that team may be useful when deciding on the detail of any services that North Asia CAPE may offer.

The College of Law offers a 'Working with' series which currently includes China, Japan and Korea only. These sessions are held on business premises to a minimum of six participants, in one, two or four hour blocks. The majority of their participants are law firms (80 percent) who in a fee-for-service environment are not able to attend training that goes beyond these parameters. The College of Law has noticed increased demand for this 'Work with' series in the last nine months. The sessions are also eligible for NZTE capability development vouchers, but as yet no business has used their voucher for this service.

The use of virtual reality was mentioned by two providers as a tool they were developing to bring the North Asian market to New Zealand, and to market test New Zealand products in market without having to be based in North Asia.



GAP ANALYSIS

There are many services and offerings to businesses internationalising in North Asia and in our view there are no major gaps per se. However, services are of variable quality and the system is crowded.

The businesses, providers and informants we spoke to provided many ideas for services (sometimes not knowing that services were already available). There were no commonly identified gaps, with most ideas offered by interviewees supported by usually one other interviewee. There were a range of potential services/offerings mentioned (Table 3). We group the ideas offered by:

- **Content:** Suggestions for what the key content of services should be
- **Mode of delivery or segmentation:** Suggestions for method of delivery (one-on-one, one to many, webinars, etc) and characteristics of the businesses that should be targeted
- **Specific programme or offering:** Suggestions for standalone programmes
- **Alliances:** Suggestions for what partnerships need to be established in order for the offering to be successful.

Table 3: Ideas offered by interviewees

	Description
Content	Language and culture
	Digital, online market places, social media
	Finding good distributors and partners
	Market research, data and reports
	Sharing good research from the Universities

	Description
Mode of delivery or segmentation	Delivery in regional New Zealand
	SMEs, including identification of SMEs with potential to grow
	Peer-to-peer learning
	Professional development of lower tier managers (as most services are aimed at owner-managers)
	A bridge or broker for services
Specific programme/ offering	Promotion of existing services
	Commercialisation of the Victoria University of Wellington inter-cultural success assessment tool
	Syndication of market research and market development (#NZCN model) and subscription based portal for access to this information
	International student placement, internships and secondments
	Graduate placement and internships
	Collaborative approaches to market entry
	Utilising migrants in initial market research panels
	Improving the ethnic diversity of governance and senior leadership in New Zealand companies
	Pool all funds for government programmes into a Development Bank approach. Funding for feasibility studies, loans, spend on specialist advisors and consultants
	Increasing the focus of North Asian languages and cultures in the New Zealand Curriculum
	Playing an influencer role, for example, speaking out against xenophobia/anti-Asian sentiments and regularly being in the media
	Increasing non-replicable goods and services in New Zealand's export mix



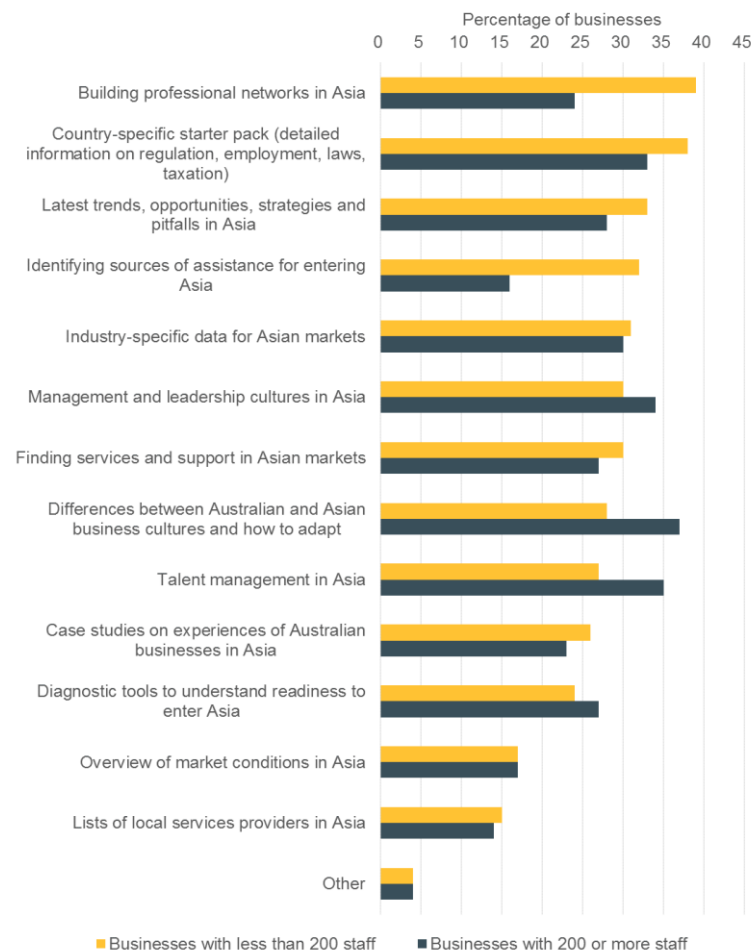
	Description
Alliances	Sponsored by NZTE to gain credibility and engagement of businesses
	Strategic partnerships with Asia New Zealand Foundation and others in the sector
	International institutions and universities

A survey of Australian businesses identified many gaps in resources available, including building networks, country-specific information and advice and cultural capability (Figure 5, Asialink Business, 2014). Interestingly, culture appeared to be a higher priority for the larger businesses (with over 200 staff), while building networks was the most commented on gap for businesses with less than 200 staff.

However, our study finds that while the suggestions offered by providers and informants are many and varied, it is our view that most of these are already being offered to a greater or lesser extent. We believe that the key issues appear to be:

- Helping businesses find the most relevant support
- In some areas, extending the reach or modes of delivery and developing and implementing collaborative approaches
- Improving the evaluation of support.

Figure 5. Areas in which insufficient resources are available to support businesses' operations in Asia



Note: Respondents were able to select multiple responses



The role of North Asia CAPE

In the context of the crowded space of service provision for North Asia internationalisation services, providers, informants and businesses felt that the entrance of North Asia CAPE could potentially add to further confusion, duplication and fragmentation in the market. As noted, businesses already struggle to navigate the array of business services on offer. Businesses commented that if the North Asia CAPE is to be part of the landscape of services, it needs to clearly communicate what it is and what it intends to do and focus on partnering as much as possible with others.

A consistent view expressed by providers, informants and businesses was that an academic institution is perhaps not the most appropriate 'face' of business-facing services.³ Providers and informants felt that businesses would perceive that services would not be practical enough.⁴ Businesses suggested that the North Asia CAPE should not be academic led, but be business led. For example, there were views that although businesses can be happy to work with researchers or students on research projects and case studies, often the timeframes involved are not suited to their needs (e.g., there are often requests for research over the holiday period when businesses are actually busy). There were also views that most research outputs were not 'business-friendly' as they could be lengthy and theoretical to meet the needs of the course requirements rather than being short and practical.

At the same time, many providers we spoke to welcomed the opportunity to work with the North Asia CAPE to enhance their own services and/or reach. Taking a partnership and strategic alliance approach was mentioned by

several providers, informants and businesses as the best way forward, in order to:

- build trust and relationships between North Asia CAPE and existing providers
- mitigate duplication and overlap between North Asia CAPE and existing providers
- ensure there is a united front and seamless approach to businesses.

In the first instance, we consider that the North Asia CAPE needs to establish an engagement and work plan with existing key providers of services (e.g., NZTE, ATEED and other economic development agencies, Asia New Zealand Foundation, Export New Zealand, Chambers of Commerce, Greater China/Japan/Korea Business Councils and Trade Associations, MFAT). This approach will clearly communicate that the North Asia CAPE aims to work with current providers to help improve and extend existing services and to make it easier for businesses to find relevant support, rather than competing and duplicating services.

The engagement and work plan could be developed through facilitated discussion between key service providers and North Asia CAPE. One approach would be to start with a smaller group of providers that have signalled they are interested and willing to work with the North Asia CAPE, including NZTE, ATEED, MFAT, Export New Zealand and the New Zealand China Trade Association. Following the development of a work plan with these organisations, the North Asia CAPE could then expand its engagement with a broader range of partners. Effectively this would provide

³ However, we note that the University of Auckland Business School delivers Callaghan Innovation's Better by Lean programme across New Zealand.

⁴ In our interviews with the researchers undertaking the New Zealand Asia Institute's New Zealand businesses engagement with Asia research programme they commented that while they had a good

relationship with NZTE (NZTE staff often came to their events, helped with presentations and were speakers at their lectures), NZTE never approached them for help, while in their native Germany they found that it is the opposite.



some 'early wins' and would also demonstrate to others how a partnership approach can work.

These discussions may include consideration of how North Asia CAPE could:

- proactively work with providers to help prepare New Zealand SMEs to take up opportunities in North Asia associated with major events and developments over the next three to ten years, for example, the next Tripartite Summit, the Rugby World Cup in Japan in 2019, the World Masters Games in Japan in 2021
- leverage CAPE universities' core capabilities of research, education and capability development and relationships with other research and education institutions in New Zealand and offshore to improve the offerings of providers.

Once the joint engagement and work plan(s) have been agreed, we recommend applying a prioritisation framework to prioritise the potential services or offerings North Asia CAPE would fund or deliver. Working with the Establishment Director of North Asia CAPE, the criteria in Table 4 were settled upon (criteria could be scored out of five).

Table 4: Prioritisation framework

Criteria	Definition
Fills a gap in needs	No one else is doing it
Materiality	How many firms are affected, and to what extent
Problem definition	We know what the problem or opportunity is, and the service addresses a known gap The service has impacts/benefits (evaluation evidence for the service or offering)
Impact	The step change in performance the offering might deliver, relative to cost

Criteria	Definition
Cost of delivery	Relative to impact, including cost to participants
Ability to execute	The extent to which the offering leverages expertise and skills in the four Consortium universities
Sustainability and scale	Can it be scaled up? Is it sustainable (at some scale)?

Below we outline some broad opportunity areas associated with CAPE universities' capability and expertise which could be explored with other providers.

Research

Universities have a clear advantage and depth of expertise in research. Several providers and businesses mentioned that universities should be sharing their research in more accessible ways – through business conferences, digital platforms and in an easily digestible format. We note that the Massey Business School has a Research Translation Competition that seeks to share the work of the university's researchers by communicating their research in a way that is useful and valued by the business community. The competition is judged by business people, and provides a snapshot of the latest research coming out of the Business School. This could be one way North Asia CAPE could ensure knowledge transfer between the universities and exporting businesses.

Interviewees also commented that the development and distribution of case studies, customer insights, market research and data insights would also be useful services the North Asia CAPE could provide, in conjunction with existing providers. Both 'Lillian' and 'Andrew', as well as other businesses we spoke to, identified a need for accessible market research and data. However, as noted, interviewees emphasised that it would be important that the research be 'business friendly' rather than what they regarded as the typical research that a university provides (practical, short, based on 'real-life' examples).



A key undertaking in service delivery which is not well implemented by existing service providers is the monitoring and evaluation of services. The North Asia CAPE could have a role in providing guidance in this area or helping providers with undertaking evaluations. Additionally, it could undertake research to support service development and improvement, ensuring a sound evidence-base for the services/offerings.

Helping businesses find the most relevant support

It is clear that there is a range of support available for businesses but that it can be difficult for businesses to find the support that is most relevant to their circumstances and that fits with their approach to learning.

There may be a role for North Asia CAPE in narrowing this gap by working with other providers to develop a guide or portal that helps businesses chart their path through the maze of service provision and information.

An online knowledge portal was mentioned by a few businesses as a potential delivery mechanism. Businesses said that they would be happy to subscribe to such a service if it delivered value. This portal could also provide access to good, user-friendly university research and market research and data.

Students and graduates

Several providers and businesses indicated that there was room to improve and/or extend the level of internships of university students into New Zealand businesses that are developing markets in Asia. This included domestic and international students in New Zealand and students from offshore institutions. Providers emphasised that the focus should be on students that have a good understanding of the language and culture of the relevant markets and that are studying business-related qualifications, as it is the combination of these skills that is often missing in businesses.

Asia New Zealand Foundation are already funding internships, and this will be a focal point of their activities in the short term. A number of other entities also focus on the professional development of future leaders, such as New Zealand China Trade Association's (NZCTA) Young Associates.

It would be worth North Asia CAPE exploring how it could support the Asia New Zealand Foundation to extend its internship programme through relevant graduate programmes across CAPE universities. North Asia CAPE could also work with the NZCTA Young Associates to create a longer term programme to nurture and develop future leaders with a goal to improve the ethnic diversity of senior leadership and governance in New Zealand.

There may also be a role in North Asia CAPE facilitating international and migrant students into employment in exporting businesses, to improve language and cultural understanding. A number of experimental, in-field studies in New Zealand and various countries show that employers discriminate against job applicants with "foreign" names. A Finnish literature review and field experiment provides a good overview of studies in Greece, France, Ireland, Italy, Sweden, Switzerland, Australia, Canada and the USA (Larja et al., 2012). The study concludes that in European countries an employee with a "foreign" name would have to send out 18 applications to get an interview, compared with 10 for a majority applicant. The relative call back rate is lower in the USA, Canada and Australia.

A study at the University of Auckland found that cues like 'foreign sounding names' and foreign qualifications and experience have a cumulative and negative effect on the selection outcomes of applicants (Wilson, Gahlout, Liu, & Mouly, 2005). The researchers isolate an 'ethnic penalty' that disadvantages those of Chinese ethnicity the most in Anglo Saxon/European work settings.

Some providers also noted that there have been examples of groups of students from offshore business schools that have visited New Zealand as part of their courses and have sought opportunities to work with local



businesses on short-term projects or case studies. The North Asia CAPE could play a role in facilitating the engagement of international business schools and students into relevant firms and then leverage their projects or project outcomes, in partnership with other providers of services.

Providers emphasised that internships and related projects should be focused on the needs of the businesses, rather than on the needs of the students or the university. For example, there were comments that students often seek to do projects with businesses over the summer period, but that is typically a period when business can be slower than usual for some firms and when they do not want additional capability brought into the firm. For other businesses that can be a busy time when they do not have the capacity to dedicate to new research projects and working intensively with students.

A number of interviewees commented on the benefits of existing employees gaining experience in the markets of Greater China, Japan and Korea so that there is a real appreciation of the markets as well as gaining insight on consumer behaviour. This could be an extension of an internship programme that is focused on individuals already in employment in a New Zealand exporting business.

Capability development

Universities have existing offerings that already help build the capability of managers and employees in businesses operating in North Asia (for example, international business and marketing degree courses, short courses in language and culture and executive education/professional development).

There are a large number of other knowledge, skills and capability development programmes provided by others. Some, such as NZTE, Export New Zealand, ATEED and others, have been creating structured programmes to build up the capability and market knowledge of SMEs in

particular. It would be worth exploring with existing providers how the university's courses, or variations of these courses, could support these programmes (for example, by offering a language-based workshop as part of the programme, commercialising Victoria University of Wellington's intercultural success tool for businesses and training to improve cultural capability). An extension of other providers' services could also potentially be by geography (in some regions of New Zealand), by market (areas of China, Japan and/or Korea if appropriate) and specific content.

However, the development of offerings in this area will need to be carefully managed in partnership with other providers. None of the businesses interviewed, and the personas, expressed a need for more workshops, training and/or seminars. From our study, it is clear that any new offering must meet commercial need, rather than simply adding another service. The North Asia CAPE must not fall victim to the classic design fault of designing a solution, then looking for the problem it solves. A co-design approach to designing and extending offerings will be the right way to ensure North Asia CAPE both adds value to business and helps the North Asia CAPE to meet its KPIs.

Leveraging relationships with international universities and institutions

New Zealand universities have multiple relationships with universities and institutions offshore. For example, the University of Auckland has formal engagements in over 40 countries with organisations and institutions across industry, philanthropy, alumni and higher education. The University also has student exchange partners in over 25 countries. China is one of the University's priority countries.

More could be done through these engagements to improve New Zealand businesses' connections with the North Asian markets and to improve capability. The University of Auckland Business School Executive Education recently hosted Executive MBA students from Drucker School of Business in



California for a seven day New Zealand Global Immersion course. Executive Education has recently sent a proposal to partner with Tsinghua University in Beijing to host their MBA students and MBA alumni. However, there may be further opportunities to exchange or send New Zealand employees to academic institutions, technology transfer offices and incubators in North Asia.



RECOMMENDATIONS

There are many services and offerings to businesses internationalising in North Asia. They are of variable quality and the system is crowded.

Given the existing support system, the areas where North Asia CAPE should focus its efforts are, to collaborate with other providers to:

- Improve access to research expertise, including interpretation of market research, practical case studies, and evaluation of, and evidence-base for, existing services.
- Leverage students and graduates to extend internship programmes and develop future business leaders that are capable of working successfully in North Asia.
- Extend the reach, depth and types of delivery of existing support, where there are specific gaps that the universities have capability and expertise in.
- Leverage university international relationships to open doors for New Zealand businesses to research and innovation expertise in North Asia.

This will require that North Asia CAPE initially focus on developing engagement and work plan(s) with key service providers, rather than delivering a range of new services to the market. The aim should be to streamline and improve the current system of support and present a united front to businesses.

Recommendations for implementation:

	How, who and output	Timeframe
Clarify and communicate the intent, purpose and operating model of the North Asia CAPE	<ul style="list-style-type: none"> • Who: Initially start with a smaller group of partners that are interested and engaged, such as NZTE, ATEED, MFAT, Export New Zealand, New Zealand China Trade Association. • How: Facilitated workshop(s) • Output: One page visual 	Mid-November to mid-December
Develop and implement an engagement and work plan jointly with key service providers to improve the system of support for businesses, mitigate duplication of offerings and to capitalise on major event opportunities	<ul style="list-style-type: none"> • Who: With key providers/stakeholders as above • How: Co-design workshop • Output: Plan and/or Memorandum of Understanding outlining 'who does what', calendar of future events and responsibilities 	February to March 2018
Guidance and/or portal to streamline access to the support system, research, data and market information	<ul style="list-style-type: none"> • Who: With potential clients • How: Co-design approach • Output: Design and production of a draft / prototype of North Asia CAPE's products and services. Including evaluation framework 	April to May 2018
Extend existing services with partners or develop collaborative approaches		
Deliver services and offerings which leverage the capabilities and expertise of CAPE universities		

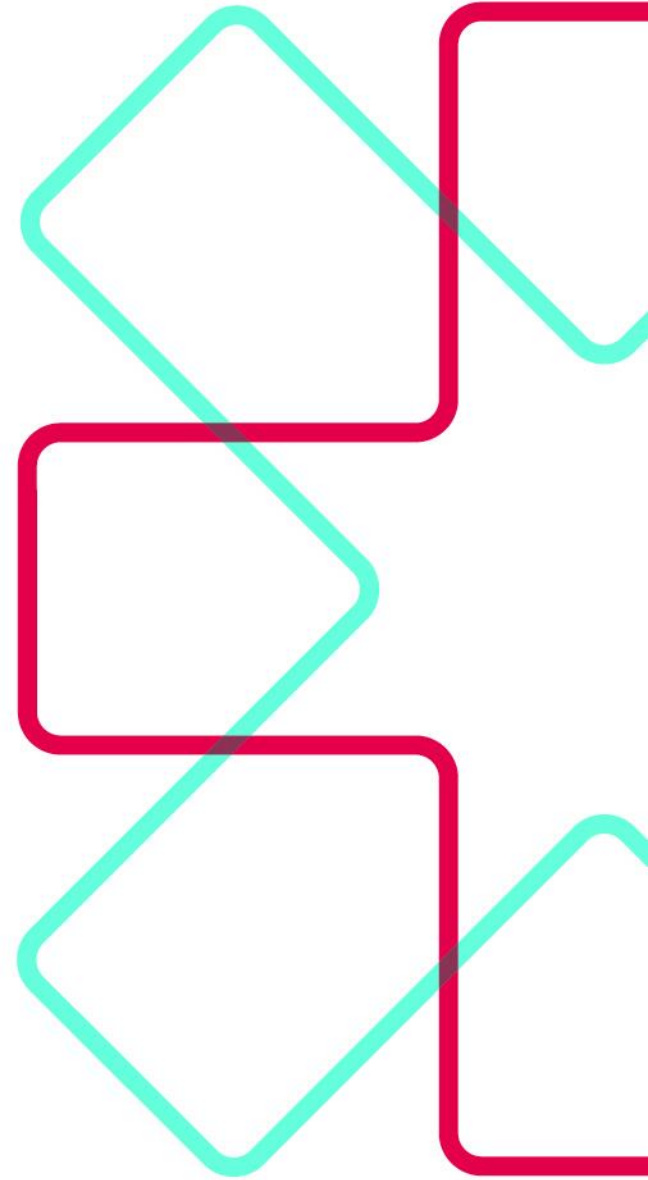


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APPENDICES



APPENDIX 1: SUMMARY OF EVALUATION FINDINGS OF RELEVANT PROGRAMMES

Programme	Programme description	Evaluation findings
PLATO (AucklandPlus) (Ministry of Economic Development, 2011)	PLATO develops management capability in SMEs through their participation in a learning network in the form of monthly group meetings over two years. The key modes of learning come through peer discussion, drawing on the experience of facilitators – experienced managers from large companies – and through short presentations and discussions of topics with expert guest speakers.	<p>The programme attempted and, and to a large degree, succeeded in implementing the international PLATO model in New Zealand. Groups were successfully established with facilitators and run for two years with each group meeting 20 times. In addition, expert guest speakers were brought into the group meetings and seminars were held.</p> <p>'Soft' business performance benefits such as increased confidence and better knowledge were evidenced through the evaluation. The value of the learning network to group members and the 'soft' benefits that resulted have been highlighted by members, and are evidenced by the groups' desire to continue to meet post the conclusion of the programme. It is worth noting that the benefits achieved do not always occur in other business networking environments. The value of the network to group members came through:</p> <ul style="list-style-type: none"> • lessening the degree of isolation many of the members felt • an 'advisory/sounding board' who provided feedback on business issues and ideas • sharing success, aspiring others and being inspired in turn • an 'enforced' time away from the business to reflect and think more strategically • learning from others and from the speakers. <p>Facilitators from large internationalised companies also indicated that their mentoring and training capabilities had improved.</p>
Enterprise Development Grants – Market Development (NZTE) (Ministry of Economic Development, 2009)	<p>Grants to implement strategic market development plans and subsequently:</p> <ul style="list-style-type: none"> • increase the level of market development activity by firms (beyond the level they would otherwise undertake when assessing their own private costs and benefits) • increase the level of spillover benefits to the wider economy, by providing direct financial assistance to offset marketing and travel costs. 	<p>On the basis of discussions with EDG-MD firms and officials, the scheme appears to have contributed to improved attitudes about the benefits of market development and how to go about it. The scheme also appears to have contributed to several measures of private firm performance. However, limited evidence of spillover benefits to New Zealand firms was found.</p> <p>On the issue of information deficiencies, some firms indicated that EDG-MD had been beneficial in getting them to start engaging with foreign markets and to understand the process of exporting. On the other hand, the collected data suggests that a number of EDG-MD firms have also received other forms of business assistance that target broadly-similar policy problems. It is possible that firms lacking information about exporting in general and/or specific market opportunities could be handled through existing programmes and proposed initiatives.</p>
NZTE International Growth Fund (Ministry of Business,	Grant funding. Employs in-market specialist staff, which accounts for 30 per cent of planned IGF expenditure. Other commonly budgeted items include product launch and marketing collateral (17 per cent), market or product development (13	There is evidence of the IGF having a positive impact at a business level, with individual businesses increasing in size as reflected in increased employees, revenue and export revenue.



Programme	Programme description	Evaluation findings
Innovation and Employment, 2015a)	per cent) and other travel to market or trade show/conference (11 per cent). Currently excluded from support are business as usual, capital expenditure and development activities in the New Zealand and Australian markets.	<p>There is evidence of businesses achieving other outcomes including taking on increased risk in international markets, improving strategy and internationalisation processes, greater business confidence to undertake international projects and improved in-market networks.</p> <p>IGF is seen by both NZTE customers and customer managers as part of the suite of NZTE services. Firms receiving IGF grants are in the Focus 500⁵ and have received, on average, two other NZTE services in the last three years, and 58 per cent of IGF businesses had received grants through IGF precursor schemes. Attributing a project's success solely to the IGF grant cannot be done.</p> <p>Additionality of the IGF is difficult to measure – 80 per cent of survey respondents indicated that the project would have at least partially gone ahead without grant funding, two-thirds of those who provided comments indicated that the IGF grant sped up their projects and 22 per cent of firms said the project wouldn't have gone ahead.</p>
Regional Business Partners (Ministry of Business, Innovation and Employment, 2015b)	The Regional Business Partners (RBP) programme was established in 2010. It is a network of 14 regionally based entities – delivery agents or regional partners – that offer support to firms to undertake management capability improvement and research and development (R&D). The programme supports small and medium-size enterprises (SMEs).	<p>The RBP programme has a moderate reported (by client survey respondents) impact on clients overall, with a greater impact when clients receive and use training vouchers. This moderate impact is a positive result for a programme that is designed to be relatively light touch. There is an average of around 65 clients for each business advisor FTE.</p> <p>Appreciable but variable impact on management capability.</p> <p>Administrative data suggests the range of training available has increased</p>
Kea (LECG, 2009)	<p>Kea is a 'loose-tie' network; where membership and participation is on an informal and voluntary basis.</p> <p>It has four key objectives:</p> <ol style="list-style-type: none"> 1 Develop an effective communication and information channel targeted at international talent with a social, economic or professional interest in New Zealand 2 Identify activities and opportunities originating in New Zealand that will encourage global talent to establish and maintain stronger links with the country 3 Develop a growing network of self-funding, self-administering Kea groups in areas of economic and strategic importance to New Zealand 4 Provide New Zealand-based organisations and talent with a vehicle for establishing 	<p>Kea events and activity of a social and/or cultural nature provide strength to the network and allow it to make economic contributions. The evidence supplied for this evaluation suggests that Kea is now producing benefits for firms.</p> <p>Kea-initiated services such as an employment website and mentoring programme have been less successful.</p> <p>Economic activity that has been affected by Kea has included the attraction of capital to New Zealand and the facilitation of increased exports from domestic firms.</p>

⁵ The Focus 500 was expanded to 700 firms in 2014.



Programme	Programme description	Evaluation findings
	commercial or professional contacts in global markets.	
NZTE Beachheads programme (Ministry of Economic Development, 2012)	<p>The objective of the Beachheads programme is to use private sector executives to work with New Zealand exporting firms in order to accelerate their entry and growth in offshore markets. NZTE uses its market knowledge and networks to identify suitable in-market private sector executives (advisors) to advise and mentor high-growth-potential firms on their business strategy and approach in the target market.</p> <p>Some advisors may facilitate contact between firms and other individuals in their personal business networks. Good advisors are able to add value by drawing on their working knowledge of the market, are able to relate well to New Zealand firms, and have a clear understanding of their role.</p> <p>Advice relates to barriers encountered by firms operating in an offshore market (eg. cultural differences, inadequate knowledge of the market or regulation, limited experience). Dynamics vary between markets and the programme is therefore flexible with each Beachhead being shaped for the specific market.</p> <p>At the time of evaluation there were eight Beachheads catering to 100 firms, including in China and Japan.</p>	<p>Qualitative evidence shows that Beachheads has been generally successful in helping firms reduce barriers encountered and accelerating entry and growth to export markets. Participants have valued the mentoring and advice from trusted private sector peers. There is also evidence that some spillover benefits are shared with the wider New Zealand business community.</p> <p>The evaluation suggests a number of market specific operational improvements. For example:</p> <ul style="list-style-type: none"> China has specific issues which need attention, particularly regarding the pool of advisors. The advisory board resigned prior to the evaluation in June 2011. The board's mass resignation indicated some frustration with the rate of growth of New Zealand business in China. The evaluation found that firms in China were more likely to be dissatisfied overall than the average Beachhead firm, and saw less in-market improvement in networking. This may reflect the time and skill needed to establish in China. It is considered that a Beachhead in China is important due to growing exports, increasing number of firms entering the market and the barriers to entry and growth encountered. The China Beachhead is being reformed by NZTE. The low number of participants in Japan has constrained the effectiveness of the programme. The NZTE Board should consider the on-going operation of these Beachheads within 12 months. <p>Provision of co-located office space was a significant part of initial services in what is now referred to as Beachheads Version 1.</p> <p>Version 2 of the programme was developed following the 2006 evaluation, which concluded that resources were best focussed on providing advice and building networks rather than providing physical sites. The focus under Version 2 became providing advice and/or mentoring to New Zealand firms establishing in-market and wanting to grow.</p> <p>Version 3 means that firms are now engaged at a more strategic level and earlier in the market entry process. This was brought about because feedback from advisors and customers suggested that Beachheads engaged too late in firms' market entry and means working more closely with firms to set and then achieve realistic milestones/ objectives ie. helping companies shape their strategy rather than helping with the execution of a strategy.</p>
Victorian Trade Missions Program 2010-12 (Swinburne University of Technology, 2017)	<p>Under the trade mission programme, Department of Economic Development, Jobs, Transport and Resources (DEDJTR) takes Victorian targeted businesses/organisations to key overseas markets to showcase Victoria's capabilities in key industries and to introduce the participants to potential buyers, investors and trading partners.</p> <p>Trade mission programmes include over 100 Victorian businesses/organisations but normal trade missions typically comprise 20-100 Victorian businesses. Eligible businesses and</p>	<p>The methodology employed in the evaluation was a robust quasi-experimental methodology known as matched difference-in-difference analysis which compared the change in export performance before and after programme participation of the 843 participants to the change in the performance of matched/similar non-participants. The matched control group was drawn from 597,091 Victorian businesses.</p> <p>The main finding from the evaluation was that the trade mission programme has statistically and economically significant positive impacts on participants' export performance (export revenue).</p> <p>The finding confirms the notion that Victorian firms face significant informational barriers and/or barriers in establishing contacts when trying to enter the export market and that government funded trade mission programmes can serve as an effective solution (as is the case with this programme) to reducing the impacts of these barriers faced by potential exporters.</p>



Programme	Programme description	Evaluation findings
	organisations are supported with grant between \$2,000 and \$3,000. Since 2010, 3,401 trips have been supported (although some businesses participated multiple times).	The evaluation found that trade mission participation increased the probability of non-exporters becoming an exporter. In the base year, only around 50% of participants were exporters. After participation, the proportion of participants who were exporters increased to 76% within 12 months and 85% within 24 months.



APPENDIX 2: SERVICES STOCKTAKE

Provider	Service name	Service description	Market focus	Fees	Clients	Format
CULTURAL CAPABILITY DEVELOPMENT						
Centre for Applied Cross-cultural Research (Victoria University of Wellington)	'Building Cultural Competency' course	<p>There are two modules in the course – 'An introduction to intercultural communication' and 'Developing intercultural communication skills'. The first module develops awareness of the importance of communication in intercultural contexts, and teaches about the impact of differences in communication styles and the influence of cultural values on intercultural interactions.</p> <p>The second module is designed to simulate common intercultural experiences, give insight into individual reactions to cultural differences, and help explain the underlying values behind behaviours. The lesson is activity-based, and involves participation in small groups and presentation to the larger group.</p>	Domestic workplace	\$600 for the public course via Professional and Executive Development	The course is suitable for anyone who manages or works with culturally diverse employees or clients. It also suits people who plan to travel, work or live outside New Zealand. Ministry for Primary Industries, Auckland Transport and Immigration New Zealand.	1 day workshop
Diversity Works NZ	Improving cultural intelligence	<p>Cultural intelligence is a key competency in being able to connect with diverse markets and create an inclusive workplace.</p> <p>New Zealand's population is made of more than 200 ethnic groups and it's imperative that businesses have initiatives in place to harness the opportunities and manage the challenges of a culturally diverse workforce.</p> <p>In the half-day workshop, participants explore the connection between New Zealand's diversity landscape and the diversifying of ideas and talent,</p>	Domestic workplace	<p>Members \$165.00 + GST</p> <p>Non-member \$225.00 + GST</p>		Workshop, 1/2 day



Provider	Service name	Service description	Market focus	Fees	Clients	Format
		understand how they personally interact in a culturally diverse environment and learn strategies and actions that increase their ability to work effectively in cross-cultural teams and environments.				
iGlobal	Intercultural communications consultancy and coaching	One on one, workshops, training and i-coaching platform. Business in China offering.	China		Fisher&Paykel	Workshops and one-on-one
Centre for Applied Cross-cultural Research	Intercultural success	Assessment tool which assesses the extent to which a person will be successful working in/with other cultures		In development	In development	In development
EuroAsia	Diversity training	<p>Generic areas: Definitions of culture, The range of cultural diversity, The fundamentals of cross-cultural interaction, The multicultural workforce, Appreciating cultural expectations, Understanding other cultural expectations, Benefiting from differences, Motivating and leading a culturally-diverse team, Raising issues and dealing with conflict, Learning on the job, Appropriate personal behaviour</p> <p>Culture-specific areas: People and language, Recent history, Political situation, Current issues, Economy, Key cultural points, Practicalities of daily life, Introductions, How to gain respect, Values and misconceptions, Forms of address and levels of formality, Social protocol, Business meetings and entertaining, Ways of doing business and styles of negotiation, Decision-making, Avoiding awkward situations, Local sensitivities, Personal security and conduct in public places</p>	North Asia			Tailored to client.



Provider	Service name	Service description	Market focus	Fees	Clients	Format
EuroAsia	Cross cultural advice	Facilitation of cross-cultural business dealings. Marketing advice and lead generation. Facilitating introductions and sourcing market intelligence. Training for staff from outside New Zealand on the cultural expectations of New Zealanders. In-depth briefings on the people, the culture and the business environment of specific countries. Full training programme on generalities or specifics relating to particular cultures. Translation, interpreting and other language requirements.	North Asia			
The College of Law	Working with China	This session, in association Occam, provides delegates with a thorough introduction to the way that China conducts its business and how to engage prospects and clients with the respect and cultural understanding that is key to successful business dealings. AGENDA - China Today, Business Ethics & Values, Introduction to Meeting & Greeting	China	\$2,300		1-day workshop
The College of Law	Working with Japan	AGENDA - Japan, its economy and its business; Business Ethics & Values; Introduction to the culture of business in Japan	Japan	\$2,300		1-day workshop



Provider	Service name	Service description	Market focus	Fees	Clients	Format
The College of Law	Working with Korea	<p>This session, in association the Korea New Zealand Business Council, provides delegates with a thorough introduction to the way that Korea conducts its business and how to engage prospects and clients with the respect and cultural understanding that is key to successful business dealings. Topics covered include:</p> <ul style="list-style-type: none"> • Korea Today • Business Ethics and Values • Introduction to Meeting and Greeting 	Korea	\$2,300		1-day workshop
Occam Training	China capability training	<p>Practical and realistic, this training transfers knowledge, understanding and capability by covering a progression of topics necessary for successful interactions with China and the Chinese.</p> <p>These include: background knowledge, sector-awareness, cross cultural influences on mindset, effective communication, appropriate behaviours, tools and strategies to fulfil your role and meet your goals with China and the Chinese.</p>	China		Government – NZTE, MPI, Customs, Immigration SMEs and large organisations	Face to face and online
Shine People Consulting	HRM consulting	Cross cultural awareness and communication training - mostly in relation to the New Zealand workplace.	Domestic workplace			
New Zealand China Trade Association	China exec workshops	<p>NZCTA is running a “round table” China executive workshop series. Each session will be limited to no more than 25 with the aim of providing a platform around specific China related topics. These are designed to encourage round table discussions. The format will be a short presentation followed by a Q&A session with 2-3 panellists.</p>	China		NZCTA members	Workshop



Provider	Service name	Service description	Market focus	Fees	Clients	Format
PwC Training	Maximising results with China for New Zealand Businesses	Facilitated by founder and director of Occam Consulting, the maximising results with China workshop will show participants how to understand the China market, recent changes and trends, understand the behaviours, influences and expectations of Chinese with whom they do business and provide insight into some basic systems of China which will help improve business outcomes.	China	\$862.50 per person		1 day
LANGUAGE DEVELOPMENT						
Confucius Institute (University of Auckland)	Business Chinese	Individually tailored to meet business/organisational need. Can be delivered at the University or at an organisation's premises. Basic language and cultural training.	China		Fisher and Paykel, the Auckland Council, Lanzatech and the ANZ Banking Group. University of Otago office – Dunedin City Council, Otago Chamber of Commerce, Business and tourism industry alliance	Tailored to client Otago – 3 day crash course, 2 hours per day
EuroAsia	Language for Business	Euroasia is New Zealand's premier private provider of services in the area of foreign languages and cultures. We operate in a multi-lingual environment, where every staff member speaks at least 2 or 3 languages fluently (including the management and administration team). The Euroasia brand is amongst the oldest and most reliable in our industry.	North Asia			
University of Auckland	Business Mandarin	Level 1 course is designed for business executives, professionals, entrepreneurs, business graduates and employees who wish to build Mandarin language confidence and to develop fluency and accurate pronunciation. No previous knowledge is required for this course. Goes on to Level 2 and Level 3.	China		Public programme (Continuing education)	



Provider	Service name	Service description	Market focus	Fees	Clients	Format
IN-MARKET PROGRAMMES						
MFAT	In-market embassies	Advice, help, hosting events				
NZTE	Accelerate China	<p>Accelerate China is a multi-stage immersion programme of four parts, delivered across New Zealand and China.</p> <ol style="list-style-type: none"> Part 1: Half day preparation workshop to: This includes what to test and what to validate in-market, understand, explore and articulate the market model for China, be fully briefed on the in-market immersion experience Part 2: In-market visit : Six days in China where you are joined by our local team, our Beachheads advisors and in-market experts. Research – facilitated in-home visits, store visits, and company visits, site visits including a tier 2 city, facilitated workshops, networking events, advisory sessions Part 3: Half day post-immersion workshop to: share insights gained and key learnings, review your strategy and develop a plan reflect on your time in-market Part 4: On-going support: You'll work with your customer manager and our China team to further develop and execute your market strategy. 	China	\$5,000 + GST per person, excluding your flights. This covers two half-day preparation and post-immersion sessions, as well as up to six days in China	NZTE Build and Focus	Immersion, in-market visit and workshops



Provider	Service name	Service description	Market focus	Fees	Clients	Format
NZTE	Path to market	<p>Path to Market programmes are run with groups of companies from the same sector or industry, all with an interest in entering the same market or region.</p> <p>NZTE works with participants over a three-month period to deliver:</p> <ul style="list-style-type: none"> • A workshop customised to your industry covering export training and advice. We cover topics like all the must-know details around market and regulatory changes. • An expert panel session - an assessment of the participant's sales pitch by a panel. The panel provides feedback on the pitch and presentation; costing and manufacture; market entry strategy; evaluation of the product and packaging and promotional material • An in-market visit – we tailor an in-market visit specifically to the sector of the participant. The visit may include attendance at a trade event, presentations from industry experts, introductions to key contacts and networking opportunities. • Finally, we run through a follow-up debrief reviewing participant insights and agreeing on next steps. 	North Asia	\$1,250 + GST per person to attend and \$2,000 + GST for two people from the same company. You're also responsible for your travel costs to attend events in New Zealand and offshore.	NZTE Build and Focus	Industry workshops and in-market visits
NZCTA	The Canton Fair (China Import and Export Fair)	Occurs every two years in Guangzhou – three weeks over October, putting businesses in front of over 200,000 overseas buyers.	China		NZCTA members	Trade fair



Provider	Service name	Service description	Market focus	Fees	Clients	Format
ATEED	Tripartite Agreement	<p>The Tripartite Agreement (economic alliance between Auckland, Guangzhou and Los Angeles). Currently focused on facilitating over 50 companies/100 people to go to the 2017 Tripartite Economic Summit to be held in Guangzhou in November.</p> <p>Has a focus on food innovation, advanced manufacturing, digital and creative, bio-medicine, tourism and urban design. Businesses will explore collaboration opportunities at the Summit. Has also been running workshops to prepare businesses to go to the Summit (e.g., on IP issues, on the China market).</p>	China		Has three types of target companies for the Summit – those that are thinking about exporting, those with some experience and those that are expanding. Different activities are targeted to firms at the different levels.	Summit
NZ Focus	Showcase	NZFOCUS was established by New Zealand Trade Enterprise (NZTE), the New Zealand Government's Economic Development Agency in 2006 at the heart of Hennessey Road, Hong Kong. Originally designed to showcase premium imported food and beverages from New Zealand to consumers in Hong Kong SAR the operations have been commercialised by agreement with NZTE and today have offices in Auckland, Hong Kong, Guangzhou and Shanghai, China.	China			In-market promotion
JETRO	IBSC Invest Japan Business Support Centre	One stop centre for establishing and expanding business in Japan. In six major cities of Japan. Free individual consultation, temporary office space (free) wide range of information.	Japan	Free		Incubator, information services and consultancy
WREDA (Wellington Regional Economic Development Agency)	Trade missions/delegations	<p>The Wellington region has four sister/friendly city relationships in the Northern Asian region.</p> <p>The focus will likely be based on targeting cities they can assist</p>	China (regional priorities are 1. Singapore, 2. West			



Provider	Service name	Service description	Market focus	Fees	Clients	Format
		<p>businesses into, including a Chinese city.</p> <p>WREDA works in with the council/Mayor and is currently looking at a business delegation (Creative, Film) into Seoul and Beijing. The trip also includes Xiamen and Satai.</p> <p>In the Food & Beverage sector, WREDA is bringing potential buyers to Wellington to encourage trade and investment and taking producers to market.</p> <p>There is also a programme of work being developed to encourage connection to Korean game developers.</p>	Coast of USA, 3. China)			

SPECIALIST CONSULTANCY

The China Hub	The China Hub	<p>The China Hub Inc. is a New Zealand professional service company specialising in assisting Kiwi Small to Medium Enterprises (SME) with China market trade development, China market entry, and portfolio and project management for inbound Chinese investors. Including in-market consumer validation, market entry strategy planning, and in-market commercial execution.</p> <p>The company is supported by The Icehouse and has strong working relationships with various institutions at both public and government sectors.</p>	China			
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Provider	Service name	Service description	Market focus	Fees	Clients	Format
RedFern Associates	Consultancy	<ul style="list-style-type: none"> • Market Entry & Business Strategy • Market Research - Sector, Channel & Partner Identification • Product and Market Monitoring • Company Reorganization & Restructure • Mergers and Acquisitions - Process Management • Corporate Services - Company Establishment, Statutory Compliance & Finance • Financial Services - Accounting, Taxation, Due Diligence • Investment Advice • Legal Advice 	China			
Eastern Bridge	Consultancy	<p>International relations service, social media service and strategy development.</p> <ul style="list-style-type: none"> • International relations service: Components of the International Relations Service: Communications - Developing marketing material, responding to incoming correspondence, general translation and interpreting, meeting minutes, contracts and legal documents; Due Diligence and Briefing Reports - Light due-diligence on incoming delegation and business requests. Providing recommendations and preparing briefing documents • Ethnic Media Management; Content translation, media releases and interpretation. Managing relationships with ethnic media outlets (domestic) 	North Asia	Starting from \$500 per month the services is fully customisable to fit your requirements (International Relations Service). Social media service - This service starts from \$800 per month, information on larger packages are available on request	Local and regional government	



Provider	Service name	Service description	Market focus	Fees	Clients	Format
Mahon China	Consultancy	For three decades Mahon China has advised multinationals and small/medium enterprises on their China strategies. The firm's expertise includes China's agriculture, food & beverage, specialised manufacturing and technology, and services sectors.	China			
Zino Ventures		First Chinese Venture Fund in NZ	China			
MARKET RESEARCH AND MARKET STRATEGY						
New Zealand Trade and Enterprise	Market research	Information resource				Online
Sy-ENGAGE	Consultancy	Consulting, training and social media marketing services to China	China			
China Skinny	Consultancy	Market entry and market growth. China Skinny is a full-service marketing, research and online agency that has delivered successful projects for clients across a wide range of industries. Our tools, advice and execution help international businesses entering China, as well as brands already in the market who are looking to grow their share. China Skinny's team will take the time to understand your objectives and then deliver the most effective solutions to meet and exceed your goals.	China			
MBIE and ForwardHQ	#NZCN	Tourism operators have told us that, to build the value they offer to Chinese visitors, they need more practical information about the preferences and interests of Chinese visitors, especially those travelling independently. To help meet this need, the Tourism Policy team in the Ministry of Business, Innovation and Employment (MBIE)	China	Free (development was funded by MBIE)	Tourism industry	Modules, online and workshops



Provider	Service name	Service description	Market focus	Fees	Clients	Format
		<p>commissioned Forward Insight & Strategy to undertake market research and develop the resources you will find on this website.</p> <p>The resources are largely based on fresh qualitative and quantitative research. Surveys, interviews and focus groups were conducted in key areas, including Beijing and Shanghai, and with Chinese visitors holidaying in New Zealand.</p>				
ForwardHQ	International market research	Forward Insight and Strategy, a New Zealand-based research organisation with extensive experience in tourism-focused research and strategy. We have working knowledge of many export markets and excellent current insight into the Asia Pacific region – including consumer preferences, business and retail environments, cultural practices, distribution channels, market optimisation and brand/category development.	North Asia		Generally larger firms	Fee for service, project-based

LEGAL, ACCOUNTING AND IMMIGRATION SERVICES

Chapman Tripp	Consultancy	<p>International trade and investment. We work with New Zealand companies doing business in Asia, Australia and the Pacific Islands – from business setup, to joint ventures, and restructuring of state-owned assets.</p> <p>We advise on all aspects of international trade and investment, including free trade agreements. Our team is fully conversant with the impact of international trade treaties and regimes, and related legislation, and we liaise with New Zealand's government agencies regarding international trade, international treaty</p>			China Desk clients are Chinese investors	
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Provider	Service name	Service description	Market focus	Fees	Clients	Format
		obligations and associated legislative proposals.				
Crowe Horwath	Consultancy	Given its geographic proximity, the spotlight is firmly on the relationships between businesses in Asia-Pacific and New Zealand. To help you harness the potential of this lucrative market, we will assist you with a regionally focussed strategy, along with the language and cultural capabilities you need in Asia-Pacific.	North Asia			
Lane Neave	Consultancy	Whether assisting corporates to meet their recruitment aims with overseas staff or advising individuals and families in fulfilling their dreams of living, working and investing in New Zealand, Lane Neave provide industry leading advice that can be relied upon.			Auckland, Wellington, Christchurch and Queenstown with a local and global client base.	
New Zealand China Trade Association	Visa arrangement service	Take advantage of our Visa arrangement service. We can also assist you and your business with letters of introduction and invitation	China			
Industrial and Commercial Bank of China		ICBC (NZ) aims to be "a bridge between New Zealand and China" and offers services including remittances back to China in yuan, the UnionPay bank card that is accepted in both countries, and an account opening witness product, which allows a local account to be opened via a branch of the parent bank in China. The New Zealand unit also "provides thoughtful Chinese services to help you avoid inconveniences caused by different culture and language," according to its website.	China			



Provider	Service name	Service description	Market focus	Fees	Clients	Format
Shanghai Zhong Wo Law	Legal services	Our law firm consists of IP Department, International Department, Financial Department, Real Estate Department and Litigation Department.	China		Multinational organisations, financial institutions, businesses, banks, insurance companies and other companies home and abroad.	
ONLINE MARKET PLACES						
Market Engine		Market Engine's retail platform offers an easy to use cloud based interface that enables your business to manage a fully translated E-commerce store, from your local office. Our secure cloud retail platform manages all aspects of online retail for your brands in different markets. This includes local online shop front designs translated from English into the local language, real time reporting and sales analysis, multi-currency payments, payment processing, customer enquiries and support, and door to door logistics and delivery.	China		Australian-based	



Provider	Service name	Service description	Market focus	Fees	Clients	Format
Alibaba	Advice, Tmall and Taobao	<p>A strategic alliance was established between Alibaba and the New Zealand Government last year. The memorandum of understanding (MOU) signed by NZTE formalised discussions for strengthening trade between China and New Zealand, with an aim to foster greater trade opportunities for businesses seeking to enter the Chinese consumer market.</p> <p>Since the MOU was signed, Alibaba and NZTE have run workshops across New Zealand, helping exporters to gain insights into doing business with China and Chinese consumers, evaluate their business models and provide education about Alibaba's various platforms, ie Tmall and Taobao.</p>			<p>At the time of signing, NZTE chief executive Peter Chrisp said: "New Zealand businesses are already using Alibaba's channels to sell a wide range of products including dairy, meat, seafood, fruit, wine, beverage, cereal, skincare and health supplements.</p> <p>By providing dedicated services for New Zealand products, this new arrangement offers significant opportunities for New Zealand businesses to reach more consumers as well as advocating New Zealand's reputation as a place of open spaces, open hearts and open minds."</p>	
Tao Bao Daigou		<p>http://www.taobaodaigou.co.nz/ Daigou is the Chinese term given to buying items overseas on behalf of others. Products are purchased and brought into China by professional personal shoppers - or bought through online channels - with international students often acting as the intermediary.</p> <p>This grey market is a multibillion-dollar business, and it can be argued that daigou can help put innovative new products on the radar.</p>	China			Online
BUSINESS TO BUSINESS PLATFORMS						
APEC	APEC MSME Marketplace	<p>http://apecmsmemarketplace.com/ The "APEC MSME Marketplace" is an interactive repository of APEC activities and member economies' individual efforts as a tool to promote cooperation and linkages across MSMEs and other</p>	North Asia			Online portal



Provider	Service name	Service description	Market focus	Fees	Clients	Format
		<p>stakeholders with interest in MSME development.</p> <p>The initiative is an online portal which has the following functionalities: facilitating business matching for MSMEs, funders, innovation centers, incubators, and other stakeholders with interest on MSME development; providing information about international trade standards and regulations; disseminating information on available trade promotion assistance packages that APEC economies individually or collectively provide for MSME development and internationalization; and building networks and linkages.</p>				
Taitra, Taiwan External Trade Development Council	Taiwantrade	<p>taiwantrade.com. Founded in 2002, Taiwantrade is the official B2B site of Taiwan. Taiwantrade is organized by Taiwan's Bureau of Foreign Trade, Ministry of Economic Affairs and operated by the Taiwan External Trade Development Council, the nation's largest nonprofit trade promotion organisation.</p> <p>With a global network of 60 offices, Taiwantrade is dedicated to helping worldwide businesses find quality suppliers and products from Taiwan. As a comprehensive trade promoting platform, Taiwantrade offers reliable, trustworthy, and efficient services, including trade matching, customized sourcing, magazine publications, and newsletters.</p>	Taiwan			
JETRO	TTPP International Business Matching	TTPP (Trade Tie up Promotion Programme) International Business Matching. Helps find partners for international business.	Japan			Online



Provider	Service name	Service description	Market focus	Fees	Clients	Format
		https://www.jetro.go.jp/ttppoas/index.html				
APEC	APEC Business Travel Card (ABTC)	<p>The ABTC allows business travellers pre-cleared, facilitated short-term entry to participating member economies. The ABTC removes the need to individually apply for visas or entry permits, saving valuable time, and allows multiple entries into participating economies during the three years the card is valid.</p> <p>Card holders also benefit from faster immigration processing on arrival via access to fast-track entry and exit through special APEC lanes at major airports in participating economies.</p> <p>The ABTC also helps to enhance border integrity and security in participating economies by providing benefits to border agencies as it increases the number of low risk travellers since each applicant is checked against 'watch lists' of other participating economies. Therefore, it carries savings not only for business people but for governments, too.</p> <p>APEC member economies fully participating in the scheme include Australia, Brunei Darussalam, Chile, China, Hong Kong (China), Indonesia, Japan, Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russia, Singapore, Chinese Taipei, Thailand, and Viet Nam. Canada and the United States are transitional members of the scheme.</p>	North Asia	<p>According to a study conducted by the APEC Policy Support Unit, the ABTC scheme reduced transaction costs for ABTC holders by 38% between March-July 2010 and March-July 2011, representing a total savings of USD3.7 million. Total at-the-border immigration time savings experienced by ABTC holders for the period March-July 2010 through March-July 2011 is 62,413 hours, a monetary value of USD1.9 million.</p>		

INTERNSHIPS



Provider	Service name	Service description	Market focus	Fees	Clients	Format
Asia New Zealand Foundation	Business internships in Asia	Opportunities for New Zealanders to work in Asia and then to bring that knowledge back with them. The internship programme aims to help New Zealanders build a better understanding of the people, place and culture of their Asian host country.	North Asia		Students studying business-related subjects; however, there are also a few opportunities for engineering and science students.	Visas, pastoral care, contribution to living expenses The internships currently range in length from six weeks to six months, with most currently lasting for three months

NETWORKS AND EVENTS

Hong Kong Economic Trade Office, Asia New Zealand Foundation and the Christchurch City Council	South Island Lantern Business Forum	<p>The inaugural South Island Lantern Business Forum, held at the Christchurch Transitional Cathedral.</p> <p>The forum provides an opportunity for New Zealand organisations to learn more about doing business with China and to hear from international speakers such as Maggie Zhou from Alibaba Group, and Paul O'Brien former CEO of Easiyo.</p> <p>Bernard Lo, Deputy Director of the Hong Kong Economic and Trade Office will also deliver a keynote speech. The forum will conclude with a panel discussion on how to market successfully into China, followed by an audience Q&A session.</p>	China		200 business delegates from around the South Island sharing ideas on growing business relations with China.	Forum with speakers and panel discussion
NZTE and NZCTA	China Digital Forum	In 2016, keynote speakers at the China Digital Forum, as well as a group of panellists representing New Zealand brands and daigou wholesalers, shared their expertise on navigating the daigou channel.	China		NZTE clients	Forum/conference



Provider	Service name	Service description	Market focus	Fees	Clients	Format
		Next year the forum will focus on social media channels.				
Asia New Zealand Foundation	Business grants	To bring speakers over from Asia. Business networking events and conferences open to the general public, and also invitation-only events held for the benefit of senior business audiences.	North Asia		Organisations that are able to deliver high-quality learning and networking opportunities. Not intended to fund business development activities by commercial entities.	\$2,000 to \$10,000
Auckland Chamber of Commerce	China Business Summit	<ul style="list-style-type: none"> Setting the scene - building on what we know How should New Zealand respond to new challenges Chinese economy, a view from inside/outside and new regulation Dancing with the trade elephants (FTA's upgrades) E-commerce session Digital opportunity An Auckland perspective of opportunity Winners and war stories 	China	\$454.25 Single Ticket \$483.00 (non-Member)		One day summit
Ice Angels	Showcase	Established in 2011 by ICE Angels, the Showcase is an annual investment event that attracts a dozen of the most high profile, high potential start-ups in New Zealand to pitch to an audience of more than 300 investors. These investors span local and international family offices, angel investors and VC funds.	North Asia		Members	
Ice Angels	Investment evenings	Monthly events where ICE Angels members get together to hear from up to 5 start-ups. These events serve as the primary opportunity for entrepreneurs to share their opportunities with the ICE Angels members.	North Asia		Members	



Provider	Service name	Service description	Market focus	Fees	Clients	Format
Japan New Zealand Business Council	Conference	Joint Meeting of the Japan New Zealand Business Council. The JNZBC is New Zealand's longest standing business grouping with Asia. Established in May 1974, the Council has national committees in both countries. The Chairman on the Japanese side is Mr Kiyotaka Shindo, Chairman of Oji Holdings (parent company of Pan Pac Forest Products, and more recently also Carter Holt Harvey Forest Products). The Chairman on the New Zealand side is Mr Ian Kennedy, a former career diplomat with the NZ Ministry of Foreign Affairs and Trade who was posted three times to the NZ Embassy in Japan, most recently as Ambassador from 2007 to 2012.	Japan		Members	The two sides of the Council meet once a year, alternatively in New Zealand and Japan. Last year was in Wellington, and this year the conference is in Osaka, Japan, on 20-22 November.
Korea New Zealand Business Council	Presentations and networks	Presentations to members; Seminars relevant to doing business in Korea;				
Kea New Zealand	Kea Connect	Kea Connect, supported by ASB, connects Kiwi businesses to global New Zealanders helping them break into new markets. With a network of industry experts around the world, it works to make sure no Kiwi has to make a cold call	North Asia		Members	<ul style="list-style-type: none"> • Make warm introductions to members of the Kea network who may be able to give you business advice, market insights and/or further connections. • Post your business connection



Provider	Service name	Service description	Market focus	Fees	Clients	Format
						<p>request on our website here and in our next newsletter, increasing the chances of finding the right introduction for you.</p> <ul style="list-style-type: none"> • Help connect you to other organisations with resources and expertise that we don't have.
Kea New Zealand	In-market events	Usually co-hosted with the local NZ embassy			Members	
New Zealand China Trade Association	Informal meal	NZCTA & HKNZBA Monthly Yum Cha				
New Zealand China Trade Association	Young Associates	<p>Formed in late 2013 as the younger contingency of its parent organisation. Seeks to empower New Zealand for a prosperous future with China.</p> <p>Equips youth with the experience, knowledge, and skills essential to strengthening the trade and investment relationship between New Zealand and China. Supports members through a programme of personal and professional development. This includes training on leadership, trade, and investment - all within the New</p>	China			Professional development programme and events



Provider	Service name	Service description	Market focus	Fees	Clients	Format
		Zealand-China context. Events, networking, internships, scholarships, etc				
New Zealand Chinese Association	Future Dragonz	Chinese young professionals' network, offering social networking and learning opportunities to local and overseas born Chinese.	China			Social networks and events

AWARDS

Export New Zealand	Awards	Export Awards	North Asia			
Kea	World Class New Zealanders	Every year the Kea World Class New Zealand Awards recognise inspirational, world-leading Kiwis and friends who are making outstanding contributions to New Zealand's economic, social and cultural development.				
New Zealand China Trade Association	NZCTA China Business Awards	The HSBC NZCTA China Business Awards are a fast track to business and investment success with China. The supreme winner wins airfares to China, as well as access to expert business advice in New Zealand and China.				

CERTIFICATION

Australia and New Zealand Export Hub		The Australia and New Zealand Export Hub has partnered with the China Certification and Inspection Group (CCIC), the Chinese agency which monitors food safety and traceability, and issues export and import certificates. Hub general manager Brent Thornton		The hub was targeting small to medium sized New Zealand and Australian companies that lacked the expertise or connections to		
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Provider	Service name	Service description	Market focus	Fees	Clients	Format
		<p>said the company had achieved a world first with the opening of its new \$5.9 million Wigram warehouse supervised by CCIC.</p> <p>Sensitive products, such as meat or infant formula, could be tested at an accredited New Zealand laboratory before export, instead of when they arrived in China. The hub is funded by Christchurch company Best Health Products Ltd, and director James Gu said their first shipment of Nuztri infant formula went through testing and certification here late last year.</p>		<p>market into China.</p> <p>Gu said the company's service fee was "modest" and similar to what a customs broker would charge.</p>		
Wellington Chamber of Commerce	International and export services	ATA Carnets, Certificates of Origin				
Ministry for Primary Industries	Export certification	<p>An export certificate is a type of official assurance, providing an importing country with confirmation from the New Zealand Government (MPI) that your product or commodity meets certain standards and requirements. Many export certificates are processed through MPI's electronic certification (E-cert) systems. These online systems are used by exporters, verifiers, MPI staff, and others in the export chain to ensure that products are eligible for certification and to issue the certificates themselves.</p> <p>Other certification is undertaken through paper-based systems but is still typically printed on security paper.</p>				



Provider	Service name	Service description	Market focus	Fees	Clients	Format
INFORMATION SERVICES						
Ministry of Foreign Affairs and Trade		Practical advice, guidance and tools, as well as work with other governments to minimise rules that could be blocking you from exporting.				
Wellington Chamber of Commerce	Global Link	Here you will find information on exporting, trade fairs from around the globe, delegations that may be visiting New Zealand or the Chamber, overseas companies looking for importers or suppliers, ICC publications and more.				Online
NZTE	Market guides	Information resource				Online
New Zealand China Trade Association	China Now	Receive our regular newsletter, CHINA NOW, which offers insight and analysis of the risks and opportunities facing Kiwi businesses doing business in China.				
MahonChina	China Watch	Quarterly China business report	China	Free	20,000 users	
Korea New Zealand Business Council		Email bulletin of trade/economic news from or about Korea, a monthly email bulletin of Korea-related news from the NZ end, and the Website. Bilateral joint discussions, through our annual meeting, held alternately in Korea and NZ, with our Korean counterpart organisation;				
MFAT	Tariff Finder	Compare the tariff rates for goods across different free trade agreements and ensure that you are maximising your returns.	North Asia	Free		Online
MFAT	Exporter helpline	The MFAT Exporter Helpline: 0800 824 605 Email exports@mfat.govt.nz				



Provider	Service name	Service description	Market focus	Fees	Clients	Format
MPI	Exporting requirements	The requirements you need to meet will depend on what your product is and the destination country. MPI plays 2 vital roles in exporting – helping exporters access international markets and ensuring our primary industry export products are safe and free from pests and diseases.	North Asia			
New Zealand International Business Forum	TradeWorks	Website with information about trade and investment and why these are important for New Zealand. Information on NZIBF governance and projects, and sister organisation the APEC Business Advisory Council (ABAC).	North Asia		NZIBF members	Online
NZGovernment	Trade Barriers	Non tariff barriers portal. Aimed at exporters to lodge trading issues they face. Triage is done in NZ so can resolve collectively - MFAT, MBIE, Customs, MPI, Education New Zealand. We'll get back to you within 2 working days, and work out next steps within 6 weeks.	North Asia			
MANAGEMENT CAPABILITY DEVELOPMENT						
Export New Zealand	Excelerate100	<p>Businesses committed to achieve global growth aspirations Current export revenue \$1million - \$5million Network activation & targeted support for 100 businesses nationwide Price:</p> <p>Includes: Complimentary attendance at 8 Better Exporting seminars Complimentary attendance at 3 Master Class workshops Attendance at Dec and Mar Excelerate Global seminars Excelerate100 tool-kits: regular</p>		<p>Members: \$590 + GST- this price is only for those who attended the Excelerate Global seminar on Friday 11th August 2017 Non-members: \$1300 +GST - this price is only for those who attended the Excelerate Global seminar</p>		



Provider	Service name	Service description	Market focus	Fees	Clients	Format
		podcasts, video content Targeted wrap-around support for a 12-month period		on Friday 11th August 2017		
Katabolt	New exporter	Delivers NZTE's Export Essentials workshop	North Asia			
Katabolt	Established exporter	Delivers NZTE's Export Essentials workshop	North Asia			
Export New Zealand	Excelsator	1. ExportNZ Excelsator Program - 30 min survey 2. Export Mentor Program (for ExportNZ members only)		Free to members		
NZTE	Export Essentials	Guide, workshop, tools and templates	North Asia	This two-day workshop, 90-minute coaching session and entry to our LinkedIn alumni group is \$1,000 + GST per person.		Online and workshops
NZTE	Digital Kickstarter	8 online modules to build business digital capability (e.g., developing a digital product, running social media campaigns, measuring digital media results)	North Asia		Foundation, Build and Focus	Online
ICEHouse	Workshops	Peer to peer workshops - succession and transition, grow your financial skills, improving business planning and performance, preparing to raise capital, grow your sales skills	North Asia			
ICEHouse	BIQ, Business of International Quality	The BIQ™ Barometer is an easy to use online tool designed to help you identify your business strengths and opportunities for improvement in under an hour.		To purchase the BIQ™ Barometer for \$249,	The BIQ™ Barometer is free for alumni and current participants of Icehouse programmes that are more than a day in length. Use of the online tool is free for BNZ customers too.	



Provider	Service name	Service description	Market focus	Fees	Clients	Format
ICEHouse	Business coaching	6 month, 12 month or project coaching		<p>\$5,950 + GST for 6 months coaching (\$992 per month); \$9,900 +GST for 12 months coaching (\$825 per month)</p> <p>Valued at \$11,650 + GST</p> <p>Valued at \$7,680 + GST</p>		
ICEHouse	Programmes	Range of management capability programmes - owner manager programme, owner manager exchange, leadership development programme, business coaching, market validation, in-company programme, owner-operator programme, effective leadership programme	North Asia			
Wellington Chamber of Commerce	Quarterly Business Accelerator workshop	effective and practical world-class planning process, that provides focus and accountability, resulting in a 1-page Plan for your next quarter of accelerated consolidation, growth & success ...		<p>Members: \$180 + GST;</p> <p>Non Members: \$215 + GST;</p> <p>Other Price: Members' Early Bird: \$150 + GST (ends 27 Aug)</p>		1/2 day workshop



Provider	Service name	Service description	Market focus	Fees	Clients	Format
ATEED	Regional Business Partner network	<ul style="list-style-type: none"> gain outside perspective from an independent, experienced business advisor in a confidential environment identify the next steps for your business connect you with the local business community, industry networks and clusters. match you with a mentor from Business Mentors NZ provide access to Capability Development vouchers provide access to research and development (R&D) funding. 	North Asia	A small matching fee applies to Business Mentors NZ services and eligibility criteria apply for vouchers and R&D funding.		
ATEED	NZTE Capability development vouchers	Management training	North Asia		SMEs	50:50 up to \$5,000 pa
Auckland Chamber of Commerce	Training	The Auckland Chamber offers a variety of training events throughout the year including seminars; workshops; customised, on site corporate training; presentations and online training.				
Employers and Manufacturers Association	Training and events	Gain practical skills, knowledge and cultural understanding to lead your organisation to growth, with the help of EMA's courses on 100+ topics.				Online courses and short courses



APPENDIX 3: ACKNOWLEDGEMENTS

Thank you to the 13 business representatives who took part in the one-on-one interviews, particularly 'Robert', 'Andrew' and Lillian'.

Thank you to the following organisations for taking part in the one-on-one provider and informant interviews.

- Asia New Zealand Foundation
- Auckland Tourism, Events and Economic Development (ATEED)
- Chapman Tripp
- China Skinny
- Eastern Bridge
- Eden Ventures
- EuroAsia
- Export New Zealand
- Forward HQ
- Japan External Trade Organisation (JETRO)
- Katabolt
- Mahon China
- Ministry of Foreign Affairs and Trade (MFAT)
- New Zealand China Trade Association (NZCTA)
- New Zealand Trade and Enterprise (NZTE), onshore and offshore staff and trade commissioners
- Occam Training
- University of Auckland Business School
- University of Auckland Business School Executive Education
- University of Auckland Confucius Institute
- Victoria University of Wellington, Centre for Applied Cross-cultural Communication
- Wellington Chamber of Commerce
- Wellington Regional Economic Development Agency (WREDA)

