CBI Market Intelligence Studies

Terms of Reference

(tender 2027-2031)

Table of contents

A. Context

I. About CBI

CBI is the centre for the promotion of sustainable production and trade between low- and middle-income countries and the Netherlands/Europe. CBI is part of the Netherlands Enterprise Agency and is funded by the Ministry of Foreign Affairs of the Netherlands. We currently have active projects in 15 low- and middle-income countries across 13 sectors.

As an important organisation in the implementation of Dutch foreign trade and development policy, CBI has operated in over 70 low- and middle-income countries, working with over 10,000 local SME exporters and 250 Business Support Organisations. We have provided them with guidance, export coaching, training, and market information. We facilitated thousands of connections between exporters and importers. We are well known for our 50+ year of experience working with SMEs and their ecosystem. We are unique in terms of our high-quality knowledge of European market trends and market access requirements and have great learning capacity through a comprehensive methodology.

II. CBI Approach

CBI's mission is to promote the transition to sustainable production and trade. We believe that small and medium-sized enterprises (SMEs) can play a key role in this transition. Within value chains with Dutch/European export potential, we partner with SMEs and their ecosystems to strengthen their economic, social and environmental sustainability. We promote the creation of decent jobs, particularly for women and youth, stimulate innovation and implementation of sustainable production practices, and facilitate the SMEs access to European – particularly Dutch – export markets.

We engage in projects where there is a win-win for SMEs, their workers and communities in our partner countries, as well as for market actors in the Netherlands and Europe. We contribute to transforming sectors into becoming more socially and/or environmentally sustainable.

Most projects focus on a specific sector in a specific country and address a specific sustainability challenge and focus on multiple root causes. While project interventions are implemented locally, they are closely connected to European – and in particular Dutch – market demand. By actively involving our network of Dutch and European buyers and other system stakeholders, projects contribute to building reliable, sustainable trade relationships that support Dutch and European businesses, while creating lasting impact in partner countries.

III. Market research

CBI commissions a lot of market intelligence (MI). Our market intelligence aims to:

1. **Develop** the export and sustainability skills of SMEs in low- and middle-income countries. One of the main constraints for SMEs from low- and middle-income countries seeking to export is a lack of good, reliable market information. This information gap creates an uneven playing level field, making it more difficult for SMEs to compete internationally and meet European buyer requirements. CBI aims to remove this constraint by providing free high-quality market studies. Our market intelligence lowers the barriers to international business by helping potential exporters from low- and middle-income countries understand the opportunities and requirements of the European (and specifically Dutch) market. We provide practical insights on which products are in demand, what the quality standards are, the safety requirements that are expected, etc. In short; Our market studies help SMEs to capitalise on export opportunities and to increase their sustainability impact locally.

2. **Increase** the visibility and accessibility of the European market, by promoting the European Union, and particular the Netherlands, as an attractive and reliable export destination for exporters from low- and middle-income countries. This is especially important for (sustainable produced) products that cannot be produced (sufficiently) in Europe.

3. **Maintain** the reputation and position of the CBI Market Information as a trusted source for SMEs with export ambition and Business Support Organisations in low-and middle-income countries (LMIC). With almost 2 million pageviews and 900,000 users per year, the CBI market research platform has a broad global reach. It contributes to our reputation, which leads to increased interest in our projects and strengthens our appeal to (potential) partners.

4. **Support** the CBI management and programme managers to make informed choices concerning the programming and planning for new and ongoing CBI projects. Our MI also helps to select potential new sectors and finetune the CBI strategy over the coming years. In sum, CBI's market information helps CBI to achieve its mission more effectively and maximise its impact.

In our research we focus on:

- Sectors in low- and middle-income countries with high potential for export to the European Union (EU). The EU's frontrunner's role in setting standards for quality, food safety (particularly for agricultural products) and sustainability is an important reason to maintain a strong focus on the European market in our studies.
- Products and services from the CBI focus countries that show high potential for export to the EU, and specifically the Netherlands (including niche products for which limited information is available) which

have a positive local impact on sustainability and inclusiveness.
- Opportunities for the SMEs from low- and middle-income countries and how to seize them, translated into practical tips.
- Making this information available for free, in an easily accessible and visually attractive way.

IV. CBI target group

CBI's main target group are (potential) SMEs exporters from low- and middle-income countries that want to sell or aspire to sell their products or services on the European market) as well as business support organisations. Low- and middle-income countries are all countries that are listed on the OECD-DAC list of ODA recipients .

In our definition, SMEs are companies with 25 up to 500 employees. Depending on the sector or product, these SMEs can be exporting producers (e.g. farmers, cooperatives), exporting processors, traders (those that are not involved in production or processing, but do cover sales to foreign markets) or providers which sell their services to the European market (e.g. tour operators or IT outsourcing providers from low- and middle-income countries).

A second, indirect target group are European (and specifically Dutch) importers. By connecting supply from low- and middle-income countries with European market demand, importers play a crucial role in helping SMEs access and succeed in the European market. CBI involves importers in its activities, such as matchmaking, webinars, focus groups and interviews to ensure that our market intelligence reflects current market needs.

V. Writing for the target group

All Market Intelligence studies target those SMEs which fulfil the role of exporter. Some characteristics of these exporters may be:

- They often focus on short-term priorities and immediate business needs, even though to enter the European market, long-term efforts and investments are needed.
- They are constantly looking for new business opportunities and balance multiple priorities at the same time.
- Building relationships with European buyers can be difficult for them due to limited networks and international business experience.
- Market research is not always prioritised, and many SMEs lack the time and resources to thoroughly analyse their target market and audience.
- Limited access to finance can restrict investments in certifications, marketing and export readiness.
- Language and communication can be barriers, as English may not be their native language.

These characteristics must be taken into consideration when working on the market studies. The criteria in this ToR are tailored to the characteristics of the target group: writing in plain British English, organising information in a clear, logical way, often choosing for visualisation (charts, tables, visual and photo content) over text, including only the most relevant and relatable content and keeping paragraphs as short as possible.

In addition, the CBI studies should be written with the target audience in mind by using inclusive language, avoiding Western-centric assumptions, and reflecting the audience's context, needs, and realities. CBI welcomes conversations with its suppliers to further improve diversity and inclusivity in our Market studies (see chapter N of the writing criteria).

VI. Dissemination

Our market research is primarily disseminated as online HTML content on the market information section of the CBI website. Online information consumption differs greatly from consumption of offline, printed information. On the web, people for example scan, rather than read (on average people read about 20-28% of the text on a page). Therefore, writing for online content differs from writing for print publication. Online information for example must be offered in small chunks, with clear headings. For inspiration, check this article about "writing effective web content".

Furthermore, the market information is shared in CBIs development projects, via business support organisations in our target countries, via consultants, via experts and via international partners. CBI is also often cited as a trusted source in international media.

B. Assignment

I. Description of the assignment & deliverables

The assignment includes the delivery of the CBI Market Intelligence studies listed below (according to the criteria in this ToR as defined in the last chapter, and according to the learning goal, content and presentation as described in each chapter).

Nr.	Deliverable	Learning goal of the study	Content of the study / deliverable
(1)	**Market Statistics and Outlook**	What is the demand for [sector] on the European market?	Provides key insights into the European market, and separately the Dutch market, for the sector based primarily on statistical analysis. This includes insights on: • What makes Europe/the Netherlands an interesting market for the sector; • Which European countries offer most opportunities; • Which products (or services) from low- and middle-income countries have most potential on the European market.
(2)	**Trends**	Which trends offers opportunities or pose a threat on the European [sector] market?	Analysis of the 8-10 major trends on the European market for the sector (based primarily on qualitative information from Dutch importers). Attention is given to the most important sustainability aspects of this sector and what the transition to a new market looks like.
(3-a)	**Product Factsheets (Market Potential Part)**	What are the opportunities on the European [product] market?	Provides key insights into the European market – and separately the Dutch market – for a specific product or product group in the sector, including insights on: • What makes Europe/the Netherlands an interesting market for the product or service; • Which European countries offer most opportunities; • Which trends offer most opportunities.
(3-b)	**Product Factsheet (Market Entry Part)**	How to enter the European [product] market?	Provides key insights into the European market for a specific product or product group in the sector, including insights on: • What requirements the product must comply with; • what additional requirements have Dutch buyers/importers/retailers; • The competition the target group faces on the European market for the product; • The channels through which the product ends up on the market; • The prices given for the product.
(4-a)	**Country Factsheets (Market Potential Part)**	What are the opportunities on the [country] market(s)?	Provides key insights into the European market for a specific country in the sector, including insights on: • What makes (country) an interesting market for the sector; • Which products (or services) low- and middle-income countries have most potential in the country; • Which trends offer most opportunities.
(4-b)	**Country Factsheet (Market Entry Part)**	How to enter the [country] market(s)?	Provides key insights into the market of a specific country(s) in the sector, including insights on: • What are specific country requirements products and services must meet; • The competition the target group faces in the country; • The channels through which the product ends up in the country; • The prices given for the product in the country market.

(5)	**Buyer Requirements**	What requirements and certification must products (or services) meet to be allowed on the European [sector] market?	Analysis of the requirements the target group faces when trying to get their product(s) or services on the European market (in the specific sector) and how to deal with them. Focus on: • Mandatory requirements (legal and non-legal); • Additional requirements and certifications buyers ask for, specifically for Dutch buyers; • Niche market requirements.
(6)	**Tips on how to find buyers in the European market**	How to find European [sector] buyers?	6-10 practical tips for the target group on how they can find European/Dutch buyers (in the specific sector) for their product(s) or services (e.g. finding online lists of European buyers, opportunities to meet buyers e.g. on trade fairs and tips on where to advertise to attract buyers).
(7)	**Tips on how to do business with European buyers**	How to build a successful relationship with European [sector] buyers?	6-10 practical tips for the target group on building and improving relationships with European and specific Dutch buyers (in the specific sector) and gaining a competitive edge.
(8)	**Tips on how to organise your exports to Europe**	How to get your product (or services) on the European [sector] market?	6-10 practical tips for the target group on how they can practically get their product(s) or services on the European market (in the specific sector). Topics include e.g. laboratory testing, transportation, documentation, packaging, insurance, customs and payment.
(9)	Tips on how to use digital tools	How to use digital tools and benefit the most from digital tools and innovation in [sector]?	6-10 practical tips for the target group on what types of digitalisation and innovation take place in their sector; which new technologies play a role and can offer SMEs growth opportunities; which e-commerce platforms are important or will become important in the future (if the sector requires it); the role of big data and data collection; the channels that make it possible to source these digital technologies; the use of Artificial Intelligence that can offer SMEs opportunities for growth (in terms of quantity/scale, quality improvement, branding/marketing, buyers/customers approach); the most promising AI tools in the sector and how to get the most out of them.
(10)	**Tips on how to go green**	How to make your business greener (more environmentally friendly) and benefit the most from applying ecological sustainability in [sector]?	6-10 practical tips for the target group on what types of activities they can undertake to make their businesses more environmentally friendly. Focus on: • which products have less/more ecological footprint? • which new technologies play a role and can offer SMEs growth opportunities; • which new business models exist, and; • what possibilities are there to find funding or to find partners in becoming a more environmentally friendly exporter?
(11)	**Tips on how to become a socially responsible exporter**	How to make your business socially sustainable and benefit from such a policy?	6-10 practical tips for the target group on how they can organise their business in the specific sector in a socially sustainable way, which makes you more attractive for the European market and comply with the main social certification standards. Topics include e.g. living wage, gender equality, and health and safety.
(12)	**Webinar**		A 1.5 hour online live presentation of the sector's market study findings, most often hosted on GoToWebinar (or alternative software) as part of a wider team of speakers. For an overview of past online events, check out the past events on the CBI website and the Webinar recordings on CBI's YouTube channel.

The assignment is either to conduct a **new study** or to **update an existing study**. Updates may include updating a study created earlier by the same author, or updating a study created previously by another author.

II. Difference between a new study and an update

An assignment consists of a combination of new studies and/or updates of existing studies.

Type	Description
New study	A new study should be written according to the requirement in the latest ToR of the Market Studies. The study must be based on **new market research**, following the lines as proposed by the Contractor in the Tender (or otherwise agreed upon with CBI). The contractor must: • be transparent about text that has been copied or previously written by the contractor for another CBI study. Although CBI encourages as much unique content as possible in its studies, duplicating text that was earlier written by the same contractor is allowed when it improves the accuracy and consistency of the MI studies (e.g. in the case of legislation, market entry channels). For questions, contact the CBI Programme Manager. • In the case of copied text, the contractor must indicate this with a comment in the margins directed to the CBI proofreader → @CBI Proofreader: *xx text comes from yy study*. The contractor has to make sure that the copied text comes from the CBI website; meaning, the text that has already been checked by the CBI language editor. The contractor must then also highlight the copied text green.
Update of existing study	An existing study from **preceding year(s) is updated**. About 30-40% of the old study should be revised, based on new research **and the latest ToR**. The Contractor should make sure: • all information is up-to-date and where relevant, changes should be made to the study based on e.g. new developments; • the latest data is included (meaning also the graphs, maps etc. should be updated); • where relevant, the analysis related to data is updated and related tips are updated; • new examples and case studies must be included; • all hyperlinks should be checked and updated to the latest available sources; • all images in the study need to be checked and uploaded again; • minimum 2 new interviews per update study are held; • provide a new quote from the interviewee; • all of the content that is updated in the first draft is highlighted in yellow. Changes to the second and final draft must be made using track changes and also highlighted yellow. The contractor must: • be transparent about text that has been copied or previously written by the contractor for another CBI study. Although CBI encourages as much unique content as possible in its studies, duplicating text that was earlier written by the same contractor is allowed when it improves the accuracy and consistency of the MI studies (e.g. in the case of legislation, market entry channels). For questions, contact the CBI Programme Manager. • Ensure that update studies do not only include copied text. There should be a good balance between old and new text. Inform and discuss with the CBI Programme Manager before delivery of the first draft if the study is unable to meet this threshold. • In the case of copied text, the contractor must indicate this with a comment in the margins directed to the CBI proofreader → @CBI Proofreader: *xx text comes from yy study*. The contractor has to make sure that the copied text comes from the CBI website; meaning, the text that has already been checked by the CBI language editor. The contractor must then also highlight the copied text green. The CBI proofreader will remove the highlighted green text during the review of the final draft. **Important:** • CBI will make the versions that should be used as a basis for the updates available on its sharingknowledge platform (PLEIO). It is mandatory to start updates with the supplied version of the study. Visuals will also made available for you to re-use

III. Interviews and interview planning

Interviews are a key component of the research process, providing first-hand insights that help to verify information, validate research findings and identify new trends and developments. Part of the research are interviews with European/Dutch buyers, industry associations, sector experts, certification bodies, SME exporters and producer groups in low- and middle-income countries, etc. The interview findings need be integrated in the market research report (e.g. via quotes, latest trends, buyer perspective(s), latest market development).

The contractor shares their interview planning for the field-research phase with CBI in advance per batch. CBI is offered the possibility to join in on one or two interviews per batch (physically or virtually). This will allow CBI to get first hand insight and interaction with the target group(s) and the interviewee the possibility to connect with CBI. Please inform the CBI programme manager in time so he/she can schedule it. For an overview of the full working process see section O in the final chapter of this ToR.

IV. Use of Artificial Intelligence

The contactor must be transparent whether and for which purpose(s) artificial intelligence (AI) has been used for the delivery of the market study. Artificial Intelligence is only permitted for supportive tasks. The market researcher is under **no circumstance** allowed to pass AI-generated content as original work. For each batch, the market researcher must share in advance with CBI a completed template (Appendix 12) on the use of AI. For a full overview of CBI's policy on the use of AI, read section M of the criteria for the assignment. Read also the full working process in section O in the final chapter of this ToR.

V. Use of plain English

The primary target audience of our studies (see **IV. target group**) consist of non-native speakers whose English reading and writing level on average is not higher than 'intermediate', which we refer to as **B1 English readers**.

From our market researchers we expect that they deliver their content in plain English. This means as much as possible in B1 English. To get a good understanding of the level of your text, you can use (free) online text analysers (for example: RoadtoGrammar, grammerly, hemmingway editor).

Guidelines and tips for writing in B1 English can be found in:

- the RVO style guide;
- the appendix 11a called "clear and understandable English (B1)";

The latest versions of all these documents can be found on Pleio (RVO's platform for sharing documents). Please note that after final approval of your studies by a CBI proofreader, the studies are once more checked and if necessary edited by a (language) editor contracted by CBI. This editing will focus solely on corrections of grammar and spelling.

VI. Visualisation in studies

Each study should include several visuals, such as photos, pictures, images, charts, and/or diagrams.

For photography the following applies:

- Stock photos and images generated by artificial intelligence are **not allowed**. Even when these are royalty- and attribution-free.
- It is possible to take and use a photo yourself, provided it complies with the corporate identity and image guidelines. See appendix 11d'Style guide-RVO photography'.
- Please note that you (as the contracted supplier of the market studies) are only responsible for the delivery of visuals in the study. CBI will provide the banner image for all the market studies.
- CBI also can help to create new visuals with the use of our designers at Xerox and other contracted suppliers that do graphic design for us. This needs to be discussed with the CBI Programme Manager.

VII. Approval process

For each study, the Contractor delivers a first and second draft, which are reviewed following the criteria of the assignment by a CBI (contracted) proofreader. A final draft should be ready for approval. For an overview of the full working process see section O in the final chapter of this ToR.

I. Market Statistics and Outlook

A. Learning goal

Market Statistics and Outlook answers the central question: ***What is the demand for [sector[1]] on the European market?*** The study provides key insights into the European market for the sector, including on why Europe is an interesting market for the sector, which countries offer most opportunities and for which products there is most demand. The study focuses on the European demand and import from low- and middle-income countries. In this study, Europe is defined as the European Union market (EU27).

B. Content

The study consists of 3 sections, which all answer one sub-question:

1. What makes Europe an interesting market for this sector?

This section describes what makes Europe an interesting market for this sector for the target group of low- and middle-income countries (defined as: **the OECD-DAC list**) based on statistical analysis and qualitative analysis. The analysis covers at least:

- *An analysis of **EU imports** divided in Intra-EU, Low- and middle-income countries, and Rest of world imports.*
- *Identification of **major trade hubs**, if applicable, from where imports are further distributed to the rest of the EU.*
- *An analysis of the EU's **relative's size and importance versus other world regions** (Asia, Africa, Americas etc.) as an importing region, and its development over time, providing nuance to the answer 'how interesting' the EU really is.*
- *An analysis of the size and importance of demand for **sustainable niche products** (e.g. organic, fairtrade, sustainable) relevant for this sector. At minimum the role of **organic** (as share of the market, if little data is available use estimates) and **fairtrade** are discussed for those markets where these niches have a presence. For other sectors such as tourism and, outsourcing the closest substitute can be used.*
- ***Developments and events** (over the past year/since previous study) that have had a **major impact on demand**. Think political/social developments like wars, developments in trade blocs, the Green Deal, economic developments like mergers, trade-deals, tariffs or other barriers to trade, and climate events among others.*

  Each analysis and every answer should focus and zoom in on the opportunities and risks for SMEs from low- and middle-income countries. Other opportunities and developments can be given for context (e.g. a negative trade balance, EU exports, EU import dependency, EU production levels) but should not lead the focus away from answering the main question of this study: *What is the demand for (sector) from low- and middle-income countries on the European market?*

2. Which European markets offer most opportunities?

In this section the different EU country markets are described for the sector and the 6 most interesting countries for the target group (defined as: **OECD-DAC list**) are identified. Each country is discussed separately and relevant country-specific opportunities are given. Where applicable, the most interesting niche markets are given.

3. Which products (or service) from low- and middle-income countries have the most potential in the European sector market?

Analyse the market for products from low- and middle-income countries (defined as: **the OECD-DAC list**) which are part of this sector (as defined by CBI) and identify the 6 most interesting products for the CBI target group of SMEs. Each product is discussed separately (in a header 3 type paragraph) and relevant product-specific opportunities are given. Where applicable, the most interesting **niche market opportunities** are provided as well.

The analysis for each of these questions must at least take imports into account (looking both at developments over the last five year and at predictions for the short term (1-3) years and the long term (beyond 3 years). Other statistical indicators must be used, for example:

- Consumption statistics, point of sales-data, sales and revenue data;
- Production statistics, export statistics, price developments;
- Questionnaire and survey statistics, poll results;
- Statistics on product introductions etc.

Statistical indicators are, where applicable, both analysed in terms of volume as well as in value. Where needed the statistical analysis is complimented with information from qualitative sources. Where relevant, in the analysis reference is made to

[1] Specific for tourism: 'What is the demand for outbound tourism on the European market?'.
Specific for IT/BP outsourcing: 'What is the demand for IT outsourcing services on the European market?'

trends that underlie the developments described (these must then be described in the CBI Trends study).

Market Statistics and Outlook and the Trends study should complement each other. The analysis and conclusions are consistent between the studies, overlap between the studies is avoided as much as possible, there are no contradictions between the studies, and where relevant, reference is made to the other study). Where the Trends study analyses the market primarily from a qualitative viewpoint, the Market Statistics and Outlook study analyses the market primarily from a quantitative viewpoint. Claims about trends can be substantiated with statistical information, just as a statistical analysis can be complemented referring to trends.

C. Structure

The study starts with the title ***What is the demand for [sector] in the European market?*** *(H1 heading)* (for example: *What is the demand for processed fruit, vegetables and edible nuts in the European market?*). What follows, is an introduction.

Each of the 3 sub-questions is then answered in its own chapter. The chapters start with *H2 headings* :

- ***What makes Europe an interesting market for [sector]?*** (For example: *What makes Europe an interesting market for coffee?*)
- ***Which European markets offer most opportunities for [sector]?*** (For example, *Which European markets offer most opportunities for cocoa?*)
- ***Which products (or service) from low- and middle-income countries have the most potential in the European [sector] market?*** (For example: *Which products from low- and middle-income countries have the most potential in the European apparel market?*)

Per chapter a short introduction follows, which summarizes the conclusion of the chapter (maximum of 5 lines). Then all relevant data is given (using tables, graphs) as well as the textual analysis (complemented with examples, images etc.).

Answers to sub-questions are discussed in paragraphs that start with a header 3 type heading. For the second sub-question the top 6 countries are each discussed in a section that starts with a header 3, and for the third question each of the top 6 products is discussed in a h3 section. If any further structuring is needed at maximum a level 4 header can be used above a paragraph.

Each section is concluded with a number of tips. Additional information can be presented as an annex. Annexes can be linked to and will be published as PDF next to the study on the CBI MI platform.

The study has a length of **min. 6000 and max. 9000 words** (based on MS Word wordcount).

D. Visualisation

- The top banner for this study is provided by CBI.
- Besides charts and tables, include at minimum:
  - 2 in-study RF photos or images.

E. Additional analysis for CBI internal use

As input for CBI internal meetings (such as the discussion session), one additional analysis is requested that focuses on the question: ***Which products from CBI countries have most potential on the European market?***

Similar to section 3 of the study the focus is on the products with most potential on the European market, but instead of using the OECD-DAC list, it uses the list of CBI countries where CBI can start new projects as source region. The output of this analysis is not fixed (e.g. Excel, Word or a different format all can be used) but should clearly rank the potential of the different products for the CBI countries only.

F. Adaptations for the Tourism and IT/BP Outsourcing sectors

Due to the different nature of these services sectors, the research questions that are used slightly differ.

Sector – Tourism:

What is the demand for outbound tourism on the European market?

- *What makes Europe an interesting market to target?*
- *Which European countries offer the most opportunities for tourism suppliers in low- and middle-income countries?*
- *Which tourism products (or services) from low- and middle-income countries are most in demand from European markets?*

Sector – IT/ BP Outsourcing:

What is the demand for IT and Business Process outsourcing services on the European market?

- *What makes Europe an interesting market to target?*
- *Which European markets offer the most opportunities for IT and BPO suppliers in low- and middle-income countries?*
- *Which ITO and BPO services from low- and middle-income countries are most in demand from European markets?*

II. Trends

A. Learning goal

The Trends study answers the central question: ***Which trends offer opportunities or pose threats on the European (sector) market?*** The study provides a brief analysis of the major trends in a specific sector in Europe that are relevant for the target group.

The target group can use the study to respond to these trends, e.g. finding new applications for their products (or services), adapting their products, introducing new products, investing in new technologies, entering new country markets, leaving country markets, focusing on specific niche markets, changing their communication approach, making sure they can meet new buyer requirements or new legal requirements. In this study, Europe is defined as the European Union market (EU27).

B. Content

The trends study identifies and analyses the 8-10 most important trends within a specific European sector. It provides foresights on how these trends will develop in the short term (1-3 years) and long-term future (beyond 3 years), defines the opportunities and threats related to these trends and offers tips on how to seize opportunities and/or threats.

The study also provides a broader perspective on where the sector as a whole is heading towards; what 'sector transformation' can be observed on the long term.

Focus on developments and core transformations that will shape the sector for the future.

What does this mean for:

a. Import volume,
b. Supply chains,
c. Markets and consumers,
d. Prices

After this, the study also looks at least at one or more of the following types of trends:

- **Sustainability trends:**

  Note: Sustainability is a broad concept. Make sure to first define it for this specific sector and to break it down into smaller actionable parts that are important for SMEs to know about and act upon. Include, if relevant, the effect that climate change has on future supply of the product and how to adapt. Also include CSR policies of buyers, why these are important, and where the sector is moving towards on the long term, and how SMEs can anticipate.

- **Business trends:** changing forms of co-operation and / or shifts of power between buyers and sellers within a supply chain; new buyer requirements with regards to quality, product safety, or corporate social responsibility that impact suppliers further down the supply chain; the effects of changing or new business models on market demand; the influence of disruptors and innovators on business models and the business-climate within a sector.
- **Consumer trends:** changes in the attitudes of consumers towards products and services.
- **Economic trends:** economic changes that occur on a global, European or national level that have a direct impact on the outlook of a sector on the European market, e.g. of economic crises, booms, or bubbles.
- **Environmental trends**: trends that relate to use of resources, (renewable) energy, climate change and sustainability. Please note that CBI has Euromonitor sustainability country reports available for all European an most low- and middle-income countries that can be used as a source
- **Political and legal trends**: political and legal changes that occur in Europe (or in other parts of the world, affecting the European market), which have a clear effect on a sector, e.g. Wars and conflicts, new consumer protection laws, rising protectionism, introduction of import tariffs or free trade agreements.
- **Social trends**: demographic and socio-cultural changes that affect European consumer behaviour and preferences towards (the products from) a sector, e.g. the health trend results in sugar reduction and/or the use of alternatives to sugar in new food and drink applications.
- **Technological trends**: new or changing technologies that lead to different production, processing, product development, design and marketing and sales processes; the influence of alternative (raw) materials on new product development; the influence of new modes of transport and or packaging materials; the influence of digitalisation on co-operation within a sector; the influence of new online technologies on sales and marketing or procurement etc.

Trends and Market Statistics and Outlook study should complement each other. The analysis and conclusions are consistent between the studies, overlap between the studies is avoided as much as possible, there are no contradictions between the studies and where relevant, reference is made to the other study. Where the Trends study analyses the market primarily from a qualitative viewpoint, the Market Statistics and Outlook study analyses the market primarily from a quantitative viewpoint. Claims about trends can be substantiated with statistical information, just as a statistical analysis can complemented referring to trends.

- This study includes at least **3 examples or case studies of SMEs from the target group** that with their products (or services) have successfully tapped into one or more of the trends that are identified.

C. Structure

The study starts with the title: Which trends offer opportunities or pose threats on the European [sector] market? (H1 heading) (for example: Which trends offer opportunities or pose threats on the European spices and herbs market?). What follows, is an introduction that reflects the essence of the study or highlights the most important trends. The introduction has no hyperlinks and contains a maximum of 100 words.

Start with the visionary outlook

Each of the 8-10 trends is then described in their own chapter. The chapter starts with a heading in H2 that captures the trend. A short introduction follows, which summarizes the trends and what the trend means for the target group. This introduction has a maximum of 90 words. Then a brief analysis is given, which:

a) describe the trend and the underlying causes and developments and why it will become more important in the future.

b) Provides insight in the opportunities or threats that arise from this trend for producers and exporters.

c) Provides foresights (short and long-term) on the future direction of the trend.

d) Describe how to best capitalise on these opportunities or prepare for in case of threats. Optional: describe what can happen if a producer/exporter will not react on the trend.

Each trend (chapter) closes with a block of tips (maximum 5 tips per block, maximum 150 words per block of tips). In at least 3 trends/chapters an example is included of SME(s) from the target group that with their products (or services) have successfully tapped into the trend described in the chapter. A hyperlink to the SME must be included. This example gets a yellow block.

The total study length is min. 4500 and max. 6500 words (based on MS Word wordcount). Each trend has a maximum of 700 words.

D. Visualisation

- The top banner for this study is provided by CBI.
- Besides charts and tables, include at minimum:
    - 4 in-study RF photos or images.
- The study includes at least 1 quote (and at most 2 quotes) of people that were interviewed about the trends that are featured.

III. Product Factsheet (2 parts)

A. Learning goal

Product Factsheet answers the following central question: *What are the opportunities on the European [product/service] market?* The study provides key insights for a specific product or product group in Europe. In this study, Europe is defined as the European Union market (EU27).

B. Content

Product Factsheet analyses the opportunities for a product (or service) in the European market. This can be a specific product (e.g. cashews), a product group (e.g. dried fruit) or a niche product (e.g. organic cocoa). The full Product Factsheet consists of 2 deliverables which are often requested together, but can also be requested separate. The deliverables are published as separate studies on the website, see e.g. this study. The two Product Factsheet deliverables consist each of 4 sections:

Exporting [product/service] to Europe

I. The European market potential for [product]

1. Product description
2. What makes Europe an interesting market for [product/service]?
3. Which European countries offer the most opportunities for [product/service]?
4. Which trends offer opportunities or pose threats in the European [product/service] market?

II. Entering the European market for [product/service]

5. What requirements and certifications must [product/service] meet to be allowed on the European market?
6. Through which channels can you get [product/service] on the European market?
7. What competition do you face on the European [product/service] market?
8. What are the prices of [product/service] on the European market?

For more information about each section, see below:

1. Product description

A description of the product on the European market, which includes at least the common trade names mentioned in HS-codes and/or in other classifications that are commonly used. When more than one HS code is at the basis of the factsheet display them in a table. When relevant, discuss the species, types or varieties of the product (e.g. for cocoa: Forastero cocoa, Criollo cocoa and Trinitario cocoa or for active tourism: climbing, caving, canoeing etc.), the forms of the product (e.g. for spices: crushed, ground, packed or for adventure tourism: soft adventure, hard adventure) and the use of the product on the European market is discussed (e.g. it is used in food products, such as product x and product y). When the product factsheet focuses on a product group, this section also includes a clear overview of all the products within the group (e.g. for FFV: fresh exotic fruits).

2. What makes Europe an interesting market for [product/service]? *(For example: What makes Europe an interesting market for denim?)*

This section describes what makes Europe an interesting market for the target group (defined as: **the OECD-DAC list**), based on statistical analysis. This analysis must at least take imports into account, looking both at developments over the last five years and at predictions for the short- (1-3 years) and the long term (> 3 years). Other statistical indicators are not limited to, but may include:

- consumption statistics, point of sales-data, sales and revenue data
- production statistics, export statistics, price developments
- questionnaire and survey statistics, poll results
- statistics on product introductions and other relevant statistics for the sector

Where relevant, the statistical analysis is complemented with a qualitative analysis (e.g. for further explanations). Reference can e.g. be made to the trends. Several tips are given (related to entering the market, doing business etc.).

3. Which European countries offer the most opportunities for [product]?

In this section the top 6 EU markets that offer the most export opportunities for the product are identified, based on statistical analysis. This analysis must at least take imports into account, looking both at developments over the last 5 year and at predictions for the short (1-3 years) and the long term (> 3 years). Particular attention is given to opportunities in **organic, Fairtrade,** and/or other **sustainable niches**. Other statistical indicators are not limited to but may include:

- Consumption statistics, point of sales-data, sales and revenue data

- Production statistics, export statistics, price developments
- Questionnaire and survey statistics, poll results
- Statistics on product introductions, number of companies, logistical hubs etc.

Where relevant, the statistical analysis is complemented with a qualitative analysis (e.g. for further explanations). Reference can e.g. be made to the trends identified in the section below.

Each country is analysed in their own subsection. The subsection starts with a short, descriptive heading, which includes the name of the country and captures its main export potential. A short introduction follows, which summarizes the export opportunities and explains what these mean for the target group (OECD-DAC list).

Then a brief analysis is given, which:

a) shows the market demand, based on statistical analysis
b) explains the export opportunities, underlying causes and developments that contribute to its importance
c) provides insight in the opportunities or threats that arise from this opportunity for the target group (and how to best capitalize on these opportunities or prepare for them in case of threats)
d) provides short- (1-3 years) and long-term (> 3 years) foresight on the future direction of the export potential
e) where relevant relates to the trends on product level (as discussed in the next section)

Where possible to underline opportunities in specific countries examples are used. These can be examples of European importers, of sustainability schemes/certifications important in the country, and innovative products amongst others.

Several tips are given (e.g. related to entering these identified markets, sustainability, doing business on these markets).

4. **Which trends offer opportunities or pose threats in the European [product] market?** ***(For example: Which trends offer opportunities or pose threats in the European cashew market?***)

This section provides a brief overview of the 2-4 most important trends or threats related to this product (where relevant with focus on the specific countries that are identified as most interesting). These are preferably trends which are product-specific. On occasion these can also be trends that are identified on the sector level that are translated to the product level. The section looks at least at the following trends: Business and Economic trends, Consumer trends, Social trends, Environmental trends, Political/legal trends, and Technological trends. The section includes **at minimum one trend about sustainability**, covering one or more of the following questions and trends types:

- *How much growth there is for sustainable and/or organic [product]? How big (or small) this segment relatively is?*
- *What are the main sustainability issues in the [product] value chain and how are they seen in the European market?*
- *How does climate change affect (future) supply and demand of [product]? What about the Co2 footprint of exporting [product] to Europe?*
- *Which new business models (with growth potential) that focus on circular or sharing, social & environmental values exist for [product]?*

Each of these trends are analysed in their own h3 subsection. The trends subsection starts with a short, descriptive heading that captures the essence of the trend. Briefly the trend is summarized and an explanation is given of what the trend means for the target group (maximum of 5 lines). Then a brief analysis is given, which:

a) explains the trend and the underlying causes and developments that contribute to its importance
b) provides insight in the opportunities or threats that arise from this trend for the target group (and how to best capitalise on these opportunities or prepare for in case of threats)
c) provides short (1-3 years) and long-term (beyond 3 years) foresights on the future direction of the trend
d) where relevant relates to the trends on the sector level

Where relevant, a link is made with the analysis in the earlier sections of this study. Claims about trends can be substantiated with statistical information, just as a statistical analysis can be complemented referring to trends.

This section includes at least 1 case study or example of a SME from a low- and middle-income country (with preference for a CBI focus country) or product/service that has successfully tapped into the trends that are identified. Several tips are given at the end (at least tips related to tapping into trends and a referral to the trends study on sector level).

==================Start of part 2: Entering the European market for[product/service]==============

5. What requirements and certifications must [product/service] meet to be allowed on the European market? ***(For example: What requirements and certifications must sustainable coffee meet to be allowed on the European market?)***

This section provides a brief but concrete overview of relevant buyer requirements **<u>on the product level</u>** (when relevant with focus on countries that are identified as most interesting). A selection of requirements analysed may be based on:

- topics (e.g. restricted substances)
- standards (e.g. GlobalGAP)
- themes (e.g. water management)

The requirements are presented in 3 sections (which are indicated with a header 3):

- What are mandatory requirements?
- What additional requirements and certifications do buyers often have?
- What are the requirements for niche markets?
    - Premium, Organic, sustainability, Ethnic and/or other relevant niches for [product]

This study discusses at least these **mandatory** and **additional requirements** (which can be both legal and non-legal):

- Legal rules necessary for entry (e.g. tariffs, border control, phytosanitary inspection, control of contaminants, mycotoxins, pesticide MRLs etc.)
- Quality requirements (where relevant with focus on the market that are identified as most interesting)
- Labelling requirements, Packaging requirements
- Payment terms, Delivery terms
- Intellectual property (IP) rights (if relevant for the product)

The study must include **<u>content on sustainability</u>** within the requirements, addressing:

- What EU legislation and private standards, certification and other schemes that focus on sustainability exist (include at least organic, fairtrade and/or other for the product important standards) for the products or service? Include at minimum (if applicable) the European Green Deal , and its future implications for buyers and exporters in this sector. Make clear what SMEs can do to anticipate, and what benefits it will have for them.
- If any significant differences exist between markets within Europe, please highlight these.

The buyer requirements study on sector level will be taken as a starting point (see chapter V of this ToR). Relevant requirements on a sector level will be translated to and analysed further on the product level. Emphasis should be on **<u>product specific requirements</u>** (e.g. MRLs for the product) **and certifications.** Overlap and repetition of information must be avoided. However, it is important to make clear which buyer requirements and certifications on sector level also apply on product level.

Several tips are given (at least a tip referring to the study on sector level, but also e.g. tips related to dealing with European buyer requirements specifically for the product).

6. Through which channels can you get [product] on the European market? (***For example: Through which channels can you get dried ginger on the European market?***)

This section identifies the most interesting channel the target group can use to get their product on the European market (when relevant with particular focus on the countries that are identified as most interesting). It should give the target group insight into which route to market they can best take when trying to export to Europe. Focus should be particularly on the markets which are identified as most interesting. The section consists of several consecutive sub-sections:

a) **How is the end-market segmented?**

This section starts with a segmentation of the European end-market (relevant from the perspective of the exporter). For example a segmentation based on quality (e.g. low, medium, and premium quality) or industry use (e.g. for processing by the food industry, for direct consumption by the consumer).

Describe each of the segments and provide examples of some of the most important players. In the description, include information on the size of the segment, growth, relevant requirements (additional to what is already described in the former chapter) etc. Also relate the description of the end-market segments to the product requirements described in the first chapter of this factsheet.

If more than one type of segmentation is used, start with the dominant segmentation and then also discuss the others. <u>Include a visualisation of the segmentation.</u>

1-3 tips are given (related to entering specific market segments and referrals to relevant information sources).

Example end-market segmentation from the coffee sector:

- *low-end:* blended coffee of lower quality (mainly Robusta, sold in supermarkets with minimum certification, market in decline)
- *mid-end:* good quality coffees (e.g. blend of Arabica and Robusta, mainly sold in supermarkets, certification at least by Rainforest Alliance-UTZ, some organic and fairtrade, stable market and large market)
- *high end:* high quality coffee, 80-85 cupping score (mainly washed Arabica and Robusta, sold in specialty channels and boutiques, often single country origin, sold through specialty channel, growing market)
- *upper end:* excellent coffee, 85+ cupping score (single origin and fully traceable to a cooperative, washing station or farm. Fully washed, naturals, honeys. small market, but growing)

b) Through which channels does a product end up on the end-market?

Identify the most important channels through which products end up in the described end-market segments (focus on the most important channels, max. 5).

Describe each of the channels briefly. Include the roles and function of the types of actors in the channel (e.g. traders who sell to wholesalers, wholesalers or distributors who sell to business to business (b2b) customers who further process a product, or b2b customers who sell directly to consumers, or suppliers /exporters selling directly to the consumers themselves). Give some examples of each type of actor in the channel (at least some dominant players). If available, include data related to the channels as well (e.g. the volumes traded through a specific channel, the amount of players).

Include a visual presentation of the channels (a flow chart of the export value chain).

1-3 tips are given.

c) What is the most interesting channel for you?

Identify which channels are the most interesting for the target group (max 3). Explain why these channels are most interesting (e.g. in terms of ease of finding buyers, negotiation position, margins). In the description, further elaborate on the "nr 1. most interesting channel" (the obvious target group of SME exporters). Describe their role, position in the supply chain in more detail (down-stream, starting with their relation with their buyers, including how they make their product available) and give examples of important players, amount of players, negotiation positions of these players, where they are located (geographically), how to find these players, how they are organised, what their requirements are etc.

1-3 tips are given (at least related to finding buyers in the channel).

7. What competition do you face on the European [product] market? (***For example: What competition do you face on the European shea butter market?***)

This section provides the target group a clear understanding of competition on the European market for the product, and describes where opportunities and threats lie (when relevant with particular focus on the countries that are identified as most interesting). Competition is analysed on 3 levels:

a) Which countries are you competing with?

This sub-section identifies the 4 **main supplying countries** to the EU market (based on statistical analysis, but also based on qualitative sources). Primary focus is to include and describe the **non-European suppliers** from low- and middle-income (and rest of world) countries who export to the EU market.

Intra-EU and re-exporting countries (e.g. export from the Netherlands to Spain) are not included and discussed as such within the main competitors. Exception are those cases where EU production is dominant (e.g. olive oil) and must be included to portray an accurate picture of supply to the market. In cases like these, try to group EU countries as much as possible together to leave room for discussion of non-EU suppliers (Example top 4: 1. Turkey 2. EU 3. Morocco 4. Senegal).

Each of these countries should be analysed and discussed in their own paragraph (heading 3), covering:

- The strengths and/or weaknesses of each country (looking at both competitive and comparative position)
- The image of each country on the European market (both how the country positions itself / how the sourcing country is perceived by buyers)
- The changes and future developments of trends, opportunities and threats that can be identified for the competition on a country level

Where relevant, relate competition on country level to the end-market segments and channels discussed.

1-3 tips are given (at least related to positioning yourself against competing countries).

b) Which companies are you competing with?

This sub-section identifies successful companies supplying to the European market (from of the 4 main supplying countries identified in the sub-section above). Each of these selections of companies should be analysed in their own paragraph (heading 3), including:

- The strengths of the company (what can SMEs learn from them)
- The image of the company (both how the supplying company position themselves and how it is perceived by buyers in the sector)

Where relevant, relate competition on company level to the end-market segments and channels discussed.

1-3 tips are given (at least related to what the target group can learn from the companies identified).

c) Which products are you competing with?

This sub-section identifies existing and emerging substitute products on the European market. For the most important substitute products an analysis is made of:

- Strengths and weaknesses of the substitute product, compared to the product
- Developments, opportunities and threats

If the product is unique and cannot be replaced by other products, focus on competition within the same category (between product alternatives, e.g. in terms of cost, quality, technology or product characteristics).

Where relevant, relate competition on product level to the end-market segments and channels discussed.

1-3 tips are given (at least related to how the target group can position their product in comparison to the other products).

8. **What are the prices of [product] on the European market? (For example: what are the prices of denim on the European market?)**

This section analyses the prices for the product on the European market (when relevant with particular focus on the countries that are identified as most interesting). It looks at prices for the product in different steps of the value chain (starting from the end-market prices, going back as far as possible). In the analysis developments in terms of prices over the last 5 years are included as well as expectations for the short (1-3 years) and long term (> 3 years).

If organic (or other sustainable niches) are part of the market, differentiate between price levels for conventional and organic products in this section.

Moreover, a price breakdown is given, showing the margins each actor in the supply chain receives. This price breakdown is presented in a graphic overview. Good examples in highcharts of a piechart & linechart can be found here and for an example of a simple graphic check here).

Example: snapshot of price breakdown (calculating back from the retail price)

Raw materials: 20%
Processor/exporter: 20%
Shipment: 5%
Importer: 5%
Retail: 50%

Where relevant, relate prices to the end-market segments and channels that are identified.

Specific **for the ITO/BPO sector**: focus on the main factors that influence the price and the use of different price models for calculating the price

Several tips are included. Include at least one tip, referring to free and paid sources that can provide the reader with up-to-date export price information.

C. Structure

The study starts with the title: ***Exporting [product] to Europe***. Different headings in MS Word translate to a different layout on our website. Therefore, take note of the layout instructions. The title is given the layout: Heading 1 (H1).

What follows is a **main introduction** for the full study of 6-9 lines . By reading the first sentences, readers should know what to expect on the page. Therefore, start by mentioning there is quite a bit involved in exporting [product] to Europe and what studies you provide in order to help them prepare for exporting. The second part of the introduction consists of the biggest opportunities for exporting [product] to Europe.

The sections of the product fact sheet are grouped together in 2 chapters. Both start with a Heading 1 (H1).

- Chapter 1 - The European market potential for [product]
- Chapter 2 - Entering the European market for [product]

Each chapter starts with a 4-5 line ***chapter introduction***, summarizing the main opportunities and findings as presented in its 4 sections. Each section gets the section's research question as a title and is marked (as stated) as H2.

After the chapter introduction follows a table of contents. This table of contents is automatically generated and displayed on the CBI website on the basis of the section titles. Section titles get the header type: Heading 2 (H2).

To provide structure within sections it is, furthermore, allowed to make use of subheadings for one or more paragraphs. These then get header type: Heading 3 (H3). Only if really necessary it is allowed to use Heading 4 (H4), to create an extra division under a subheading (for more information see our content criteria).

The tables on the next page give an overview of the structure:

Study title: Exporting [product] to Europe	**H1**
Main introduction (addressing sections 1-8) on study homepage	*Plain text*

Sections 1-4 are part of the 1st chapter, the "Market Potential":

Chapter 1 title: The European market potential for [product]	**H1**
Table of contents	Automatically generated
Chapter introduction – Analysing the market potential (sections 1 – 4)	*Plain text*
1.Product description	H2
2.What makes Europe an interesting market for [product]?	H2
3.Which European countries offer the most opportunities for [product]?	H2
4.Which trends offer opportunities or pose threats in the European [product] market?	H2

Sections 5-8 are part of the 2nd chapter, "Market Entry"

Chapter 2 title: Entering the European market for [product]	**H1**
Chapter introduction – Entering the market (sections 5 – 8)	*Plain text*
Table of contents	Automatically generated
5.What requirements and certifications must [product] meet to be allowed on the European market?	H2
6.Through which channels can you get [product] on the European market?	H2
7.What competition do you face on the European [product] market?	H2
8.What are the prices of [product] in the European market?	H2

Chapter 1 and chapter 2 are published as separate studies on the CBI website, see this study for an example

Each chapter is min. 3500 and max. 6000 words (based on MS Word wordcount).

D. Visualisation

- The top banner for this study is provided by CBI.
- Besides charts and tables, include at minimum:
  - 3 in-study RF photos or images for the market potential, and 3 for the market entry part.

- Each chapter is accompanied by **at least 1** and at most 2 quotes (from interviewed importers, exporters, experts).

E. Adaptations for the Tourism sector

Tourism ad1 -> The main Study title is different from other CBI sectors:

Study title: What opportunities are there on the European [product] market? *e.g. What opportunities are there on the European [adventure tourism] market?*	**H1**
Main introduction (addressing section 1-8) on study homepage	*Plain text*

IV. Country Factsheets (2 parts)

A. Learning goal

The Country Factsheet answers the following central question: *What are the opportunities on the [country] market for [sector]?* The study provides key insights for a specific sector or product group on a European country market. In this study, Europe is defined as the European Union market (EU27).

B. Content

Country Factsheet analyses a country in the European Union (EU). This can be a specific country (e.g. Germany), or a group of countries (e.g. Nordics, or Southern Europe). The full Country Factsheet consists of 2 deliverables which are often requested together but can also be requested separate. The deliverables are published as separate studies, see e.g. this study, both have 4 sections:

Exporting [product/sector] to [Country}

The [country] market potential for [product/sector] ***(e.g. The German market potential for fresh fruit and vegetables)***

1. Country description
2. What makes [country] an interesting market for [product/sector]?
3. Which [products] offer the most opportunities for the [country] market?
4. Which trends offer opportunities or pose threats in the [country] [sector] market?
   Entering the [country] market for [product]
5. What requirements and certification must [product/sector] meet to be allowed on the [country] market?
6. Through which channels can you get [product/sector] on the [country] market?
7. What competition do you face on the [country] market?
8. What are the prices of [product/sector] on the [country] market?

→ ***Only section 1-4 are part of the first study, the market potential part. Sections 5-8 are part of the second 'market entry' part.***

For more information about each section, see below:

1) **Country description**

A short description of the country chosen as topic, it's main characteristics (population, economic metrics, location in Europe (include an image of the country on the map), language, trade hubs and other key features).

If instead of on a [sector] the country fact sheets focuses on a [product] group different from the sector as a whole (e.g. speciality coffee instead of 'coffee') a short description of the selected products is given, which includes at least the common trade names mentioned in HS-codes and/or in other classifications that are commonly used.

2) **What makes [country] an interesting market for [product]?** ***(For example: What makes Germany an interesting market for coffee?)***

This section describes what makes [country] an interesting market for the target group (**the OECD-DAC list**), based on statistical analysis. This analysis must at least take imports into account, looking both at developments over the last five year and at predictions for the short term- (1-3 years) and the long term (> 3 years). Other statistical indicators are not limited to, but may include:

- consumption statistics, point of sales-data, sales and revenue data
- production statistics, export statistics, price developments
- questionnaire and survey statistics, poll results
- statistics on product introductions and other relevant statistics for the sector.

Where relevant, the statistical analysis is complemented with a qualitative analysis (e.g. for further explanations). Reference can e.g. be made to the trends identified in the section below. Several tips are given (at least related to entering these identified markets, doing business on these markets).

3) **Which [products] offer the most opportunities on the [country] market?** ***(for example: Which fresh fruit and vegetables offer most opportunities on the Dutch market? Or : Which coffee products offer most opportunities on the German market)***

In this section the 6 top products that offer most export opportunities on the sector for the [country] market are identified, based on statistical analysis and/or interviews. This analysis must at least take imports into account, looking both at developments over the last 5 year and at predictions for the short (1-3 years) and the long term (> 3 years). Particular attention is given to opportunities in **organic, Fairtrade,** and/or other **sustainable niches**. Other statistical indicators are not limited to but may include:

- consumption statistics, point of sales-data, sales and revenue data
- production statistics, export statistics, price developments
- questionnaire and survey statistics, poll results
- statistics on product introductions, number of companies, logistical hubs etc.

Where relevant, the statistical analysis is complemented with a qualitative analysis (e.g. for further explanations). Reference can e.g. be made to the trends identified in the section below.

Each product is analysed in their own subsection. The subsection starts with a short, descriptive heading, which includes the name of the product and captures its main export potential. A short introduction follows, which summarizes the export opportunities and explains what this means for the target group (OECD-DAC list).

Then a brief analysis is given, which:

f) shows the market demand, based on statistical analysis
g) explains the export opportunities, underlying causes and developments that contribute to its importance
h) provides insight in the opportunities or threats that arise from this opportunity for the target group (and how to best capitalize on these opportunities or prepare for them in case of threats)
i) provides short- (1-3 years) and long-term (> 3 years) foresight on the future direction of the export potential
j) where relevant relates to the trends on product level (as discussed in the next section)

Where possible to underline opportunities in specific products examples are used. These can be examples of European importers, of sustainability schemes/certifications important in the country, and innovative products amongst others.

Several tips are given (e.g. related to entering these identified markets, sustainability, doing business on these markets).

4) **Which trends offer opportunities or pose threats on the [country] [product] market?** ***(For example: Which trends offer opportunities or pose threats on the German coffee market?)***

This section provides a brief overview of the 2-4 most important trends or threats related to this country (these can either be trends that are identified on the sector level, translated to product level of they can be trends which are very specific to the product and/or country. The section looks at least at the following type of trends (for more information about these types of trends, see chapter II of this ToR):

- Business trends;
- Consumer trends;
- Economic trends;
- Environmental trends;
- Political and legal trends;
- Social trends;
- Technological trends (for more info about these also see chapter II of the ToR Market Analyse).

The section includes **at minimum one trend about sustainability**, covering one or more of the following questions and trends types:

- *How much growth there is for sustainable and/or organic [product]? How big (or small) this segment relatively is?*
- *What are the main sustainability issues in the [product] value chain and how they seen in the European market?*
- *How does climate change affect (future) supply/ demand of [product]? What about the Co2 footprint of exporting [product] to (Country)?*
- *Which new business models (with growth potential) that focus on circular or sharing, social & environmental values exist for [product]?*

Each of these trends are analysed in their own h3 subsection. The trends subsection starts with a short, descriptive heading that captures the essence of the trend. A short introduction follows, which summarizes the trends and summarizes what the trend means for the target group (maximum of 5 lines). Then a brief analysis is given, which:

a) explains the trend and the underlying causes and developments that contribute to its importance
b) provides insight in the opportunities or threats that arise from this trend for the target group (and how to best capitalize on these opportunities or prepare for in case of threats)
c) provides short -, (1-3 years) and long-term (beyond 3 years) foresights on the future direction of the trend
d) where relevant relates to the trends on the sector level

Where relevant, a link is made with the analyse in the earlier sections of this study. Claims about trends can be substantiated with statistical information, just as a statistical analysis can complemented referring to trends.

This section includes at least 1 example of a SME from a low- and middle-income country (with preference for a CBI focus country) or product/service that has successfully tapped into the trends that are identified. Several tips are given at the end (at least tips related to tapping into trends and a referral to the trends study on sector level). Where relevant, links to the Trends study are included.

5) **What requirements and certifications must [product] meet to be allowed on the [country] market?** ***(For example: What requirements and certifications must sustainable coffee meet to be allowed on the German market?)***

This section provides a brief but concrete overview of relevant buyer requirements on the product level for the country (when relevant with focus on a larger group of countries). A selection of requirements analysed may be based on:

- topics (e.g. restricted substances)
- standards (e.g. GlobalGAP)
- themes (e.g. water management)

The requirements are presented in 3 sections (which are indicated with a header 3):

- What are mandatory requirements?
- What additional requirements and certifications do buyers often have?
- What are the requirements for niche markets?
  - Premium, Organic, sustainability, Ethnic and/or other relevant niches for [product]

This study discusses at least these **mandatory** and **additional requirements** (which can be both legal and non-legal):

- Legal rules necessary for entry (e.g. tariffs, border control, phytosanitary inspection, control of contaminants, mycotoxins, pesticide MRLs etc.)
- Quality requirements (where relevant with focus on the market that are identified as most interesting)
- Labelling requirements, Packaging requirements
- Payment terms, Delivery terms
- Intellectual property (IP) rights (if relevant for country)

The study must include **content on sustainability** within the requirements, addressing:

- What EU and EU legislation and private standards, certification and other schemes that focus on sustainability exist (include at least organic, fairtrade and/or other for the product important standards) for the products or service in [country]? Include at minimum (if applicable) the European Green Deal, and its future implications for buyers and exporters in this sector. Make clear what SMEs can do to anticipate, and what benefits it will have for them.
- If any significant differences exist between countries within the EU please highlight these.

The buyer requirements study on sector level will be taken as a starting point (see chapter V of this ToR). Relevant requirements on a sector level will be translated to and analysed further on country level. Emphasis should be on country specific requirements and certifications. Overlap and repetition of information must be avoided. However, it is important to make clear which buyer requirements and certifications on sector level also apply on country level.

Several tips are given (at least a tip referring to the study on sector level, but also e.g. tips related to dealing with [country] buyer requirements specifically for the product).

6) **Through which channels can you get [product/sector] on the [country] market? (For example: Through which channels can you fresh fruit and vegetables on the German market?)**

This section identifies the most interesting channels the target group can use to get their product on the [country] market. It should give the target group insight into which route to market they can best take when trying to export to [country]. Focus should be particularly on the markets which are identified as most interesting. The section consists of several consecutive sub-sections:

a) **How is the end-market segmented?**

This section starts with a segmentation of the [country] end-market (relevant from the perspective of the exporter). For example, a segmentation based on quality (e.g. low, medium, and premium quality) or industry use (e.g. for processing by the food industry, for direct consumption by the consumer).

Describe each of the segments. In the description, include information on the size of the segment, growth, relevant requirements (additional to what is already described in the former chapter) etc. Also relate the description of the end-market segments to the product requirements described in the first chapter of this factsheet.

If more than one type of segmentation is used, start with the dominant segmentation and then also discuss the others.

Include a visualisation of the segmentation.

1-3 tips are given (at least related to entering specific market segments and referrals to relevant information sources).

Example end-market segmentation from the coffee sector:

- low-end: blended coffee of lower quality (mainly Robusta, sold in supermarkets with minimum certification, market in decline)
- mid-end: good quality coffees (Can be blend of Arabica and Robusta, mainly sold in supermarkets, certification at least by Rainforest Alliance-UTZ, some organic and fairtrade, stable market and large market)
- high end: high-quality coffee, 80-85 cupping score (mainly washed Arabica and Robusta, sold in specialty channels and boutiques, often single country origin, sold through specialty channel, growing market)
- upper end: excellent coffee, 85+ cupping score (single origin and fully traceable to a cooperative, washing station or farm. Fully washed, naturals, honeys.

b) Through which channels do a product end up on the end-market?

Identify the most important channels through which products end up in the described [country] end-market segments (focus on the most important channels, max. 5).

Describe each of the channels briefly. Include the roles and function of the types of actors in the channel (e.g. traders who sell to wholesalers, wholesalers or distributors who sell to b2b customers who further process a product, or b2b customers who sell directly to consumers, or suppliers /exporters selling directly to the consumers themselves). Give 1 or 2 examples of each type of actor in the channel (at least some dominant players). If available, include data related to the channels as well (e.g. the volumes traded through a specific channel, the number of players).

Include a visual presentation of the channels (a flow chart of the export value chain).

1-3 tips are given.

c) What is the most interesting channel for you?

Identify which channels are the most interesting for the target group (max 3). Explaining why these channels are most interesting (e.g. in terms of ease of finding buyers, negotiation position, margins). In the description, further elaborate on the first actor in the channel (the target group of exporters). Describe their role, function in the channel more details (down-stream, starting with their relation with their buyers, including how they make their product available) and give examples of important players, number of players, negotiation position re these players, where they are located (geographically), how to find these players, how they are organised, their requirements etc.

1-3 tips are given (at least related to finding buyers in the channel).

7) What competition do you face on the [country] [product] market? (For example: What competition do you face on the German market for fresh fruit and vegetables?)

This section provides the target group a clear understanding of competition on the [country] market for the product and describes where opportunities and threats lie (when relevant with particular focus on the countries that are identified as most interesting). Competition is analysed on 3 levels:

- Which countries are you competing with?

This sub-section identifies the 6 main supplying countries to the [country] market (based on statistical analysis but also based on qualitative sources). Primary focus is to include and describe the **non-European suppliers** from low- and middle-income (and rest of world) countries who export to the EU market (EU27).

Intra-European and re-exporting countries (e.g. export from the Netherlands to Spain) are not included and discussed as such within the main competitors. Exception are those cases where European production is absolutely dominant (e.g. Olive oil) and must be included to portray an accurate picture of supply to the market. In cases like these, try to group EU countries as much as possible together to leave room for discussion of non-European suppliers (Example top 6: 1. Turkey 2. EU 3. Morocco 4. Senegal 5. United States 6. China).

Each of these countries should be analysed, including:

- The strengths and weaknesses of each country (looking at both competitive and comparative position)
- The image of each country on the [country] market (both how the country positions itself / how the sourcing country is perceived by buyers)
- The changes and future developments of trends, opportunities and threats that can be identified for the competition on a country level

Where relevant, relate competition on country level to the end-market segments and channels discussed.

1-3 tips are given (at least related to positioning yourself against competing countries).

- Which companies are you competing with?

  This sub-section identifies successful companies supplying the EU market (from of the 6 main supplying countries identified in the sub-section above). Each of these selections of companies should be analysed in their own paragraph (heading 3), including:

  - The strengths of the company (what can SMEs learn from them)
  - The image of the company (both how the supplying company position themselves and how it is perceived by buyers in the sector)

  Where relevant, relate competition on company level to the end-market segments and channels discussed.

  1-3 tips are given (at least related to what the target group can learn from the companies identified).

- Which products are you competing with?

  This sub-section identifies existing and emerging substitute products on the [country] market. For the most important substitute products an analysis is made of:

  - Strengths and weaknesses of the substitute product, compared to the product
  - Developments, opportunities and threats

  If the product is unique and cannot be replaced by other products, focus on competition within the same category (between product alternatives, e.g. in terms of cost, quality, technology or product characteristics).

  1-3 tips are given (at least related to how the target group can position their product in comparison to the other products).

  Where relevant, relate competition on product level to the end-market segments and channels discussed.

8) **What are the prices of [product] on the [country] market? (For example: what are prices of sustainable cocoa on the German market?)**

   This section analyses the prices for the product on the [country] market. It looks at prices for the product in different steps of the value chain (starting from the end-market end market prices, going back as far as possible). In the analysis developments in terms of prices over the last 5 years are included as well as expectations for the short (1-3 years) and long term (beyond 3 years).

   If organic (or other sustainable niches) are part of the market, differentiate between price levels for conventional and organic products in this section.

   Moreover, a price breakdown is given, showing the margins each actor in the supply chain receives. This price breakdown is presented in a graphic overview (see the example below). Good examples in highcharts of a piechart & linechart can be found here and for an example of a simple graphic check here).

   Example: snapshot of price breakdown (calculating back from the retail price).

Raw materials: 20%	Importer: 5%	Shipment: 5%
Processor/exporter: 20%	Retail: 50%	

   Where relevant, relate prices to the end-market segments and channels that are identified.

   Several tips are included. Include at least one tip, referring to free and paid sources that can provide the reader with up-to-date export price information.

C. Structure

The study must start with the title: ***Exporting [product] to [country }***. Different heading types in MS Word translate to a different layout on our website. Therefore, take note of the layout instructions. The title gets the layout: Heading 1 (H1).

The sections of the country fact sheet are grouped together in 2 chapters. Both chapters are given the H1 header type.

- [country's] market potential for [product], for example: Germany's market potential for oilseeds
- Entering [country's] market for [product] . For example: Entering Germany's market for oilseeds

Both chapters are downloadable as separate PDF files on the CBI website.

The first table shows the chapter and sections (1-4) that are part of the Market potential part/study:

Study title: Exporting [product] to [Country]	**H1**
Main introduction (sections 1-8)	*Plain text*
Table of contents	Automatically generated
Chapter 1 title: The [Country] market potential for [product]	**H1**
Chapter introduction – Analysing the market (sections 1 –3)	*Plain text*
1.Country description	H2
2.What makes [country] an interesting market for [product]?	H2
3. Which [products] offer the most opportunities on the [country] market?	H2
4.Which trends offer opportunities in the [country] [product] market?	H2

Sections 4-8 are part of the Market Entry part/study:

Chapter 2 title: Entering [country's] market for [product]	**H1**
Chapter introduction – Entering the market (sections 4 –7)	*Plain text*
4.What requirements and certifications must [product] meet to be allowed on the [country] market?	H2
5. Through which channels can you get [product] on the [country] market?	H2
6. What competition do you face on the [country] [product] market?	H2
7.What are the prices for [product] on the [country] market	H2

Chapter 1 and chapter 2 are published as separate studies on the CBI website, see this study for an example

Each chapter is min. 3500 and max. 6000 words (based on MS Word wordcount).

D. Visualisation

- The top banner for this study is provided by CBI.
- Besides charts and tables, include at minimum:
  - 3 in-study RF photos or images for the market potential, and 3 for the market entry part.
- Each chapter is accompanied by **at least 1** and at most 2 quotes (from interviewed importers, exporters, experts).

V. Buyer Requirements

A. Learning goal

Buyer Requirements answers the central question: ***What requirements must [sector] meet to be allowed on European market?*** The study provides an analysis of the most important requirements the target group faces when marketing their products and/or services in the European Union. It will help the target group to get a clear understanding of which requirements they can expect on European markets as well as how to deal with these requirements. In this study, Europe is defined as the European Union market (EU27).

B. Content

The study provides an overview of the most relevant requirements the target group should meet to enter the European market. This includes **mandatory requirements** (legal and non-legal), **additional requirements** (requirements that offer a competitive edge or are necessary to keep up with competitors) and **niche market requirements** that exporters face. These requirements are analysed from the perspective of the target group. Moreover, the study contains foresights (short term and long term) on their future development and the possible impact of these future developments on exporters.

The selection of requirements analysed may be based on:

- topics (e.g. restricted substances, food safety and contaminants,)
- standards (e.g. GlobalGAP)
- themes (e.g. water management)

The requirements are presented in 4 sections (which are indicated with a header 3):

- What are the mandatory requirements for (sector name)?
- What additional requirements and certifications do buyers ask for in sector (sector name)?
- What are the requirements and requested certifications in the niche (sector name) markets?
  - Premium, Organic, sustainability, Ethnic and/or other relevant niches for [sector]

This study discusses at least these **mandatory** and **additional requirements** (which can be both legal and non-legal):

- Legal rules necessary for entry (e.g. import procedure and tariffs, border control, phytosanitary inspection, control of contaminants, mycotoxins, pesticide residue MRLs etc.)
- Quality requirements (where relevant with focus on the market that are identified as most interesting)
- Labelling requirements
- Packaging requirements
- Payment terms
- Delivery terms
- Intellectual property (IP) rights (if relevant in the sector)

Next to the mandatory and additional requirements, the study should explain requirements that European buyers use to select and approve suppliers. These insights are supposed to help SMEs in low- and middle-income countries gain understanding into the way European buyers think. Describe step by step the criteria for getting selected. What happens after the first contact with a European buyer and what are the subsequent steps? Think of steps such as: screening, reference checks, sampling, trial order, farm visits, long term contract, etc. The explanation must reflect real practices based on interviews with buyers within [sector name]. Each stage must include key requirements, common challenges for SMEs and typical rejection reasons.

Furthermore, the study must include at least one case study on either a successful or failed exporter in the sector market on an issue related to buyer requirements. Preferably, the information should be based on interview data. The aim is to inform the reader about what went well or what could be improved. Exporters can only be identified by name if they have given prior approval. An example of a case study could be; how company 'A' managed to prevent mycotoxins in their warehouse. Another example could be why company 'X' received a recall on passion fruits due to excessive Maximum Residue Levels (MRL).

The study must include **content on sustainability** within the requirements, addressing:

- What EU legislation and private standards, certification and other schemes that focus on sustainability exist (include at least organic, fairtrade and/or other for the sector important standards)? Include at minimum (if applicable) the European Green Deal, and its future implications for buyers and exporters in this sector. Make clear what SMEs can do to anticipate, and what benefits it will have for them.
- Translate sustainability requirements into concrete actions for SMEs including a timeline of expected results.
- If any significant differences exist between countries within the EU please highlight these.

Each requirement is analysed, with emphasis on why it is relevant, how the market deals with the requirement and how the target group can prepare. Where relevant, include the name or names of legal requirements and standards and make references to the legal documents (Directive no. or Regulation no.).

Lastly, the study must include an SME Readiness Checklist. This sub section addresses the minimum conditions that an SME must meet to be considered ready by European buyers. This included a checklist on the following:

- Legal compliance (does the SME meet all EU regulatory requirements?
- Product and quality readiness (Does the product meet EU quality standards and can consistency be ensured?)
- Certification and standards (Does the SME have the necessary certifications?)
- Operational capacity (Can SME deliver consistent volumes, meet deadlines and scale up production if needed?)
- Documentation and traceability (Are systems in place for traceability, record keeping, transparency?)
- Financial and commercial readiness (Can SME handle payment terms, currency risk, logistics costs?).

The study does not contain a complete overview of requirements, nor does it discuss technical, factual details of the requirements. For this information reference is made to the following sources:

- Access2Markets formerly known as "EU Trade Helpdesk" (for legal requirements)
- ITC Sustainability Map or ITC standards Map (for additional voluntary standards)
- EPing (for an overview of country specific measures that effect trade and differ from the international standards as well as to the contact persons per country that WTO has defined)
- Open Trade Gate Sweden (for information about preferential arrangements, trade procedures and documentation, technical products requirements)

Gaps that may exist due to incompleteness of these sources are filled by briefly describing the requirement with reference to a direct online source for more information (e.g. to an EU legal text, or European Commission information page, to the websites of European associations or institutes or to the website of a certification scheme).

C. Structure

The study must start with the title ***What requirements must [sector name] meet to be allowed on the European market?*** *(H1 heading)* followed by an introduction. The requirements are presented in 5 sections (*h2 heading*):

- What are the mandatory requirements for [sector name]?
- What additional requirements and certifications do buyers ask for in sector [sector name]?
- What are the requirements and requested certifications in the niche [sector name] markets?
- How do European buyers select a new sourcing partner or supplier?
- A case study on a successful or failed story

These questions will be the main headings of the sections.

The part(s) on sustainability needs to be clearly indicated with a header 5 type heading within the main sections.

For each individual requirement (theme, topic or standard) listed, a heading is used (see criteria for headings in the ToR). This heading is followed by a brief analysis that:

a) Explains the requirement and its effects (showing why this requirement is relevant for the target group).
b) Provides short (1-3 years) and long term (> 3 years) foresights on the direction of the requirement where applicable (market impact and possible new/stricter requirements to expect – how does the market deal with the requirement?).
c) Explains in a concise and concrete manner how this requirement (will) affect(s) exporters from a low- and middle-income country.
d) Explains how European buyers select a new sourcing partner or supplier, focusing on the main criteria for getting selected. The section should include real practices that are based on interviews with buyers and also reflect common challenges that SMEs might face.
e) Explains a real example of an exporter who has successfully met or failed to meet European buyer requirements. The case study must be added to a yellow text box, and if possible, include a visual.

The **6-10 most important certifications** as analysed under questions 2 (additional requirements) and 3 (niche markets) are **summarized in a table** that is positioned in section 2. Column headers include at least the categories: name, type, cost, most used in European end-markets, and further information (with a link). See below for an example.

Several tips are given (at least tips related to dealing with the requirement described (e.g. how to prepare, where to get support, what information sources to use).

At least the following (type of) tips should be included somewhere in the study:

- Visit the EU Access2Markets portal for more information on import rules and taxes in the European Union.

- Contact Open Trade Gate Sweden if you have specific questions regarding rules and requirements in Sweden and the European Union.
- For a full overview of certification schemes in the sector consult the ITC Sustainability Map.

When relevant, make reference to specific information on the EU's Access2Markets portal (or other EU websites) or the ITC sustainability map. For example:

- Read more about the FSSC 22000 and IFS schemes in ITC Sustainability Map.
- See Regulation (EC) N° 1223/2009 on cosmetic products for the main rules and regulations for cosmetics.

Table with most important certifications (example)

Table 1: Most important certifications requested by buyers in sector [sector name]

Name of certification	Type	Cost for companies	..	Most used in European end-market(s)	Further Information on getting certification
Rainforest alliance	Sustainability	An annual Chain of Custody Risk Assessment (CRA) fee, currently US$ xx per site.	..	Germany The Netherlands Italy	Make use of the Rainforest alliance guide to get certification for companies.
	…		..		

Source: Market Research company X

The study is min. 5500 and max. 8000 words (based on MS Word wordcount).

D. Visualisation

- The top banner for this study is provided by CBI.
- Besides charts and tables, include at minimum:
  - 2 in-study RF photos or images.

- The study is accompanied by **at least 1** and at most 2 quotes (from interviewed importers, exporters, experts).

VI. Tips on how to find buyers in the European [sector] market

A. Learning goal

<number>Tips on how to find buyers in the European <sector name> market answers the following central question: ***How (and where) can I find European buyers for my product or service?*** The answer is provided in a list of tips, which briefly summarize the most important topics that an exporter needs to address to be successful in his search for European buyers within a sector, with a specific focus made on the Dutch market in the study. In this study, Europe is defined as the European Union market (EU27).

B. Content

Tips on how to find buyers in the European (sector name) market consists of a list of 6-10 tips for finding buyers within a specific European sector, including tips regarding the 5 European countries with the biggest opportunities and a specific focus made on finding buyers in the Dutch market (even if The Netherlands is not part of the top 5). These are concrete tips about where to find lists of buyers, where to meet buyers, where to advertise etc. The tips need to be as practical and actionable as possible. The target group should need minimal efforts to find information which is important for them and should immediately know what to do with this information (e.g. when making reference to a sector association member list, provide a direct link to the member list (not to the homepage) or provide suggestions on how to get the list (e.g. downloading contact data via a button, or that the target group will have to make an account). Visual aids must be used as much as possible (e.g. tables, graphs, images, and photos).

The following tips must be included:

- **A tip related to knowing which buyers to target (e.g. know your buyers before contacting them)**

  A brief explanation is given on the importance of knowing the strengths and weaknesses of your businesses when targeting buyers. Then a rough categorisation of the different types of buyers the exporter is likely to encounter in the sector is included (this can be a table, chart, image, or in text) with an indication of how dominant/common each type of buyer is. Segment buyers by indicators that are relevant in this particular sector (e.g. by company size (revenue, number of employees, average purchase order in currency/tons, production in tons, (raw) materials sourced in tons etc.), product portfolio size, position in the value chain (traders, intermediaries, end-businesses) etc. Indicate which type of buyer might be a logical target for which type of exporter. Connect knowing your own business, with targeting the correct type of buyers (and include concrete tips for at least 2 types of exporters and give examples of some of the top players as a reference). Give concrete advice on how to approach these buyers by explaining how to write an attractive and personalized message or e-mail (use of a shortlist, avoid mass mailing, show research was made regarding the prospect's profile to enhance your credibility and presentation etc).

  Example: *If you export organic niche products, start your search for buyers by looking at small and medium sized manufacturers, who market directly to end consumers (for example company x). Most small and medium buyers are concentrated in market x (>10,000 SMEs), market y (5000-8000 SMEs), and market z (5000-6000 SMEs). On the other hand, If you sell in bulk, you are more likely to successfully find buyers within this sector by targeting commodity traders. Examples of important traders in this sector are company x, y, and z.*

- **A tip related to (online) trade fairs (e.g. Exhibit at trade fairs; Visit the main trade fairs; Visit smaller regional trade fairs; Avoid trade fairs) and/or industry events (seminars, summits) where buyers can be found**

  Briefly describe the role of trade fairs and industry events in this sector. After that a list of the most important trade fairs/events in the sector follows in order of importance. Include trade fairs that focus on sustainable niche markets. The names of the fairs are linked to their website. One sentence describing the fair is given as well, focusing on their benefit. Explain the types of buyers attending to the trade fair and mention the dates, city and country of the event.

  European buyers not only visit nearby fairs but also travel to places outside Europe to look for new suppliers. Therefore, please differentiate between the most important fairs in Europe and those on other continents where European buyers can be found. Next to the European fairs, name at least 1 relevant fair in Africa and 1 in Asia.

  Do not forget to mention online trade fairs / matchmaking events relevant to the sector.

- **A tip related to sector associations (e.g. Visit the websites of sector associations; Contact sector associations)**

  A short general explanation is given, referring to the role sector associations play in representation and promotion of the sector; the kind of members they have; referring to the fact that many sector associations publish lists of members on their website, which can be potential buyers; how to best reach the sector associations. And then a few specific recommendations are given. Including the recommendation to focus on the associations in those countries where there is most demand for the product.

After that a list of the most important sector associations for the biggest markets in the sector is given (about 5 – 15 associations). European sector associations as well as sector associations from the main European target markets should be included. The names of the sector associations are linked to their website. One sentence describing the sector associations is given as well. If lists of members are available on the website of the association, a direct link to that list should be provided.

- **A tip related to online advertising**

  Provide a brief explanation about the importance of online advertising for being found online by potential buyers. And then give a few specific recommendations, for example:

  - which types of online actions/promotions/tools are commonly used (if any) and likely to generate more sales (e.g. price promotions; e-vouchers, e-commerce) and/ or visibility
  - which websites are often visited by buyers to look for new suppliers
  - specify the costs of a specific online advertising tool as an example and select advertising platforms with strong conversion rates
  - specify which search terms are commonly used in this sector when googling for new suppliers
  - how to best generate online visibility in this sector; e.g. using blogs, vlogs, or via news content etc.
  - how to present your company effectively via its own website, and how to present your business successfully online and how to make your website visible on the internet (search engine optimization); Provide links to best practice, examples of company websites and online advertisements and explain what is done well by these companies.

- **A tip related to company databases**

  Provide a brief explanation on getting access to free (e.g. via chambers of commerce, e.g. for the Netherlands Kvk.nl) and paid resources (e.g. company.info) that the target group can use to create lists of potential customers to target.

- **A tip related to online buyer-seller platforms.**

  Provide a brief overview of the most important online buyer-seller platforms specific for products of [sector].

- **A tip related to organisations that can provide support**

  Describe how to get help trough government organisations (e.g. European organisations such as Dutch CBI, the Swiss SIPPO, the German IPD or embassies of the target country in Europe) and non-governmental organisations (e.g. Institute for Agriculture and Trade Policy (IATP) etc.) that are active in supporting export growth. List the 5-10 most important organisations for the sector and describe their activities.

Next to the mandatory tips other relevant tips for finding buyers should be included, with a maximum of 3 additional tips. Tips can be written both in the positive form *(do advertise offline, do use trade agents, do use buyer-seller platforms)* or in the negative form *(don't advertise offline, don't use trade agents, don't use buyer seller platforms)*. Also note that the tips must be inspired by feedback and interviews made with sectors experts (like importers, manufacturers, BSOs).

To finalize the Tips for Finding European Buyers study a link is provided to CBI's other tips study: CBI Tips for Organising your Exports to Europe and Tips for Doing Business with European Buyers. Write a short description (1-2 lines) of what kind of information can be found there.

C. Structure

The study must start with the title: ***[Number] tips on how to find buyers in the European [sector name] market** (H1 heading)*, followed by an introduction. The introduction mentions the fact that these are just tips to find buyers (we can't guarantee finding buyers). Many other things such as the quality of the product offered, the amount of suppliers that are already on the market, their competitive advantage etc. influence success.

Then the list of tips, according to the following chapter structure follows:

1. Tip title (for example: Exhibit regularly at trade fairs)
Start with a short explanation of 1- 3 paragraph of 3-5 lines, which includes context, examples etc. and which mentions the advantages of following this tip or the consequences of not following this tip.

Include an analysis of relevant trends, developments and foresights (max. 1 paragraph of 3-5 lines). Make where possible use of graphics, product images, photos and infographics as much as possible to illustrate the main message.

End with max. 5 specific tips in a green tips box per chapter.

2. Tip title (for example: Look for buyers through sector associations)
Start with a short explanation of 1- 3 paragraph of 3-5 lines, which includes context, examples etc. etc.

- End with max. 5 specific tips in a green tips box per chapter.
- It is not needed to number the chapters.

The study is min. 3500 and max. 5500 words (based on MS Word wordcount).

D. Visualisation

- The top banner for this study is provided by CBI.
- Besides charts and tables, include at minimum:
    - 2 in-study RF photos or images.
- The study is accompanied by at least 1 and at most 2 quotes (from interviewed importers, exporters, experts etc.). Mention the country coverage of the company/expert. Try to include quotes from players active on the Dutch market (at least one of the 2 quotes).

VII. Tips on how to do business with European Buyers

A. Learning goal

<number>Tips on how to do business with European <sector name> buyers answers the question: ***How to build a successful business relationship with European buyers?*** The answer is provided in a list of tips on how to successfully do business with buyers in a specific European market sector. SMEs which are already doing business in Europe can use these tips to improve their relationship with buyers and gain a competitive edge. SMEs that have not yet done business in Europe can use these tips to prepare for their first contacts with buyers. The tips help exporters with convincing purchasers, agents, importers etc. to buy their product. In this study, Europe is defined as the European Union market (EU27).

B. Content

Tips for Doing Business with European Buyers consists of a list of 6-10 tips for doing business within a specific European market sector. The tips need to be as practical and actionable as possible. The target group should need minimal efforts to find information which is important for them and should immediately know what to do with this information. Visual aids must be used where they add value (drawings, tables, graphs, images, and photos). At least two tips provided should focus tip on how to do business with Dutch buyers.

The following tips must be included:

- **A tip about dealing with the business culture in the sector**

  How to characterise the interactions between businesses in the sector? For example:

  - What are common denominators for the sector? What are common misconceptions?
  - Is there a common language; written or verbal slang that is often used by people working in this sector?
  - What communication style works best in approaching a potential business partner for the first time? What communication mode works best (e.g. e-mailing a presentation, mailing documents in print, setting up teleconferences, face-to-face meetings etc.)?
  - Is it common to bring gifts to business conversations, and what is considered appropriate?
  - Are there notable differences between countries? Etc.

- **A tip about quotes, pricing strategies, margins, discounts and promotions**

  Describe what is included in a successful quote within this sector. Give insight on how to best make a quotation. Include for example:

  - If you should use long or short product descriptions, make use of attachments, price lists etc.
  - If businesses work more often with gross or net prices, if they often use price scales per quantity on their quotations (e.g. the higher the quantity, the lower the price)
  - What is typically included in the price (and what not). For example: do you work with a basic price, and can extra services be added, or do you work with all-inclusive offers?
  - What type of margins are considered normal in the sector and what types of discounts are given (percentage discounts, net discounts or other). How much discount is considered normal (if nothing general can be stated, please focus on the top-selling products only).
  - What type of promotions works best. What other type of incentives are applied to increase a business relationship (e.g. kick-back fees).

  Please be as specific as possible. Including a visual example of a good sales-quote, or hyperlinking to examples is highly recommended.

- **A tip about unique selling points (USPs) to include in sales-pitches and marketing materials**

  In the tip include e.g. what the most valued USPs are that you could possess to be successful in selling to European buyers in this sector and which selling points turn European buyers on and which turn them off. Give examples on how to best match buyer requirements with selling points (and your USPs) in your sales pitch and marketing materials (both offline and online). Highlight if marketing stories, e.g. provenance plays a big role in this sector, please illustrate this tip with an analysis of a successful marketing story applied by an SME in a low- and middle-income country.

- **A tip related to government agencies** (e.g. the Centre for the Promotion of Imports from low- and middle-income countries (CBI), the Swiss Import Promotion Programme (SIPPO), the Import Promotion Desk (IPD), the International Trade Centre (ITC), Open Trade Gate Sweden) **and non-governmental organisations** (e.g. Africrops, Institute for Agriculture and Trade Policy (IATP) etc.) that are active in supporting export growth.

  Below this tip a short (2-4 lines) explanation is given, referring to: How being part of a sustainable development programme (BEC) can help to increase your chances of doing business with European buyers.

And then a few specific recommendations are given.

Each agency and NGO has a different sector focus and/or approach. Please list the 5-10 most important agencies for the sector and briefly explain for each agency what they are best known for when it comes to activities related to successfully doing business in Europe (e.g. vocational training, consultancy, with links to particular training that focus on doing business).

- **A tip on how to reduce risks**

  This tip must explain how exporters can identify, understand, and reduce the risks that European buyers associate with sourcing from low- and middle-income countries. Provide tips on how to reduce risks such as (quality inconsistency and delivery reliability). Include 3-5 common reasons why buyers reject suppliers (for example; inconsistency samples versus shipment, slow communication and overpromising).

- **Provide a practical exporter checklist**
  End the study with a clear actionable checklist that will increase the reader's chance of being selected.

  For example: To increase your chances of being selected make sure to:

  - Prepare a professional products datasheet;
  - Ensure sample quality matches production;
  - Respond to emails within 48 hours.

Next to the mandatory tips other relevant tips for doing business should be included. Topics can include:

- organising your product offer in a logical manner to buyers
- organising your product documentation in datasheets, databases, that mimic what buyers are looking for
- how to prepare product samples in the right way
- meeting common buyer requirements (e.g. related to food safety, CSR)
- how to do laboratory testing and sampling for your (potential) buyer
- organising your salesforce (e.g. by country, by sub-sector, by company-size) in a way that best matches buyers' structures. What are realistic targets for the frequency in which you should contact customers in the sector
- what preparations to make before visiting an industry fair, a customer visit or other event where sales orders are made
- how open are European companies to support for local value addition, where lie opportunities?
- how to best organise your company to maintain and continue doing business once the first deals are made (e.g. think of pre-sales, yearly evaluations, customer/after sales service, separating export from domestic sales etc.)?
- meeting contractual / financial requirements
- new technology / techniques used
- the role of the image of the supplying country
- professionalism

To finalize the Tips for Doing Business section a link is provided to CBIs other tips study: Tips for Finding Buyers and Tips for Organising your Exports to Europe. Followed by a short description (1-2 lines) of what kind of information can be found there.

C. Structure

The study must start with the title: ***[number] tips on how to do business with European [sector name] buyers*** *(H1 heading)*. Followed by a short introduction of 3-4 lines explaining why exporters need to know about and understand the wishes and needs of European buyer in order to be successful in export.

Then the list of tips, according to the following chapter structure follows:

1. Tip title (For example: Meet your buyers in person)
Start with a short explanation of 1- 3 paragraph of 3-5 lines, which includes context, examples etc. and which mentions the advantages of following this tip or the consequences of not following this tip.

If relevant, also include an analysis of relevant trends, developments and foresights (max. 1 paragraph of 3-5 lines). Make where possible use of graphics, product images, photos and infographics as much as possible to illustrate the main message.

End with max. 5 specific tips in a green tips box per chapter.

2. Tip title (For example: Try to build long-lasting relationships)
Start with a short explanation of 1- 3 paragraph of 3-5 lines, which includes context, examples etc.

If relevant, also include an analysis of relevant trends, developments and foresights (max. 1 paragraph of 3-5 lines). Make where possible use of graphics, product images, photos and infographics as much as possible to illustrate the main message.

- End with max. 5 specific tips in a green tips box per chapter.
- It is not needed to number the chapters.

The study is min. 3500 and max. 5500 words (based on MS Word wordcount).

D. Visualisation

- The top banner for this study is provided by CBI.
- Besides charts and tables, include at minimum:
    - 2 in-study RF photos or images.
- The study is accompanied by at least 1 and at most 2 quotes (from interviewed importers, exporters, experts etc).

VIII. Tips on how to organise your export to Europe

A. Learning goal

[**number**] ***tips on how to organise your [sector name] exports to Europe*** answers the question: ***How to get your product (or services) on the European market?*** The answer is provided in a structured and practical tips that guide SMEs through the entire export process, from order confirmation to delivery in the European market. SMEs which are already exporting to Europe or already have clients in Europe for their services can use these tips to increase their efficiency, reduce risk, strengthen relationships with buyers and gain a competitive edge. SMEs that have not yet exported to Europe or do not have clients in Europe for their services can use these tips to prepare for organising their first shipment or their first transaction. The study helps SMEs with finding quick answers to the most pressing issues that come into play when organising a (first) shipment of their product to Europe or delivering their first service. In this study, Europe is defined as the European Union market (EU27).

B. Content

Tips for Organising your Export to Europe consists of a list of 6-10 tips for exporting a product or service to Europe within a specific sector. The tips need to be as practical and actionable as possible. The target group should need minimal efforts to find information which is important for them and should immediately know what to do with this information. Visual aids must be used where they add value (drawings, tables, graphs, images, and photos). At least two of the tips provided should focus on common practices on how to organize your export to the Dutch market.

The following tips must at least be included:

- **A tip about international payment terms**

  What payment terms are most often used for import-export or service transactions in the sector? What should be offered in exchange for payment to take place (e.g. goods, documents)? How can an exporter or service provider gain a competitive advantage through its international payment terms?

  With international payment terms we mean among others e.g. open account, documentary collection (D/P, C.A.D., D/A), documentary letter of credits (L/C) like for example export/import LC, transferable LC, un-transferable LC, revocable LC, irrevocable LC, standby LC, confirmed LC, revolving credit, and furthermore the use of bill of exchanges, guarantees etc.

  Focus **on short term transactions** (where the moment between delivery and payments of the goods lies between 0-12 months). If long term transactions (the moment between delivery and payments of the goods > 12 months) play a role in this particular sector, also mention the specifics for these type of transactions. Finalize with examples of financial institutions that are often used in doing exports to large European markets in this sector.

- **A tip about export insurance**

  What types of insurances are used most often for import-export transactions or for services in this sector? Give particular attention to the topic of **export credit insurance**. What is the best type to use, what type of coverage to choose, and what are particular risks that need to be covered on the policy. Also briefly mention other types of insurance that are often used in this sector (e.g. transport insurance, sellers interest insurance etc.). Finalize by indicating where the target group can find insurances, what they need to bring, and a list the most well-known export insurance companies used by the sector.

- **A tip about customs**

  In this tip the most important aspects of EU customs policy are listed. At the least the common tariff for the most important goods in the sector are listed, and the most important preferential origins (reduced tariff agreements) for goods from this sector (if applicable) are listed as well. Links are provided as to where the exporter can look up both of these. Other aspects that could be highlighted under this section are customs procedures, documents, laws and regulations, proofs of origin and other custom related requirements that are in place. Finalize by giving tips on where to find additional information on customs procedures, and where to find a customs broker and/or freight forwarder that can take care of these procedures on behalf of the exporter.

- **A tip about international transport**

  In this tip the most important transport modes are listed for the sector. Relevant information is provided on the logistical and distribution processes (e.g. storing, warehousing) that take place between origin and end-destination. Where possible give indications of the cost of transportation or link to sources where this information can be found. Please mention any particulars (e.g. cold transport temperatures; preparation of a container with chemicals) that might play a role in transporting your goods. Finalize this section by listing INCO terms that are most often used in this sector.

- **A tip about packaging**

  In this tip please describe the most important aspects on how to best package your product for international transport. Take into account: **protection** (risks of storage, handling, transport, theft, contamination etc.), **bundling of goods** (easy to handle, group, and in economically viable units), **information** (what information should be on the packaging concerning the content, e.g. units, weight, symbols and texts according to ISPM, instructions on handling and stowage, e.g. forbidden to combine with, free of dust, moist etc., type of handling, origin, required data for foreign governments), and **marketing** (although this function is more often attributed to the unit packaging of a product, what are still marketing opportunities on the transport packaging itself?). Considering these aspects indicate what is the best type of packaging to use in this particular sector. Photos or hyperlinks to online sources that show examples packaging materials add much value to this section. Finalize this section by looking forward on new packaging developments, also taking into account the many conversation that are currently taking place with concerns to banning plastics.

- **A tip related to government agencies, non-governmental organisations and commercial organisations that provide assistance on the technical aspects of exporting or offering services**

  Below this tip a short (2-4 lines) explanation is given, referring to how these organisations can help you with the technical/practical aspects of organising an export shipment. Think of organisations like EvoFenedex (the Netherlands),, ITC (Europe), Access2Markets (Europe), but also sector specific organisation and consultancy companies. Please list the 5-10 organisations for the sector and briefly explain for each what they are best known for.

For the service sectors (Tourism and Outsourcing), these tips should be adapted or can be replaced by other tips.

Next to these mandatory tips, other relevant tips for organising your export should be included. Examples of topics are:

- Legal aspects of exporting (e.g. resolving legal issues in international purchases, contracts, what laws apply, etc.)
- Risk mitigation (how to minimise possible conflicts over quality)
- Traceability aspects (what data to gather, store and make available to customers and partners)

Note that the EU Access2Markets database contains a lot of relevant information on customs procedures. Refer to this website where relevant (with deep links).

To finalise this section a link is provided to other CBI tips studies: Tips for Finding Buyers and Tips for Doing Business, *f*ollowed by a short description (1-2 lines) of what kind of information can be found there.

C. Structure

The study must start with the title: [**number**] ***tips on how to organise your [sector name] exports to Europe*** *(H1 heading*. Followed by a short introduction of 3-4 lines explaining why exporters need to know have a good understanding of the practical matters of exporting in order to be successful in export.

Then the list of tips, according to the following chapter structure:

1. Tip title (For example: Ensure the right packaging)
Start with a short explanation of 1- 3 paragraph of 3-5 lines, which includes context, examples etc. and which mentions the advantages of following this tip or the consequences of not following this tip.

If relevant, also include an analysis of relevant trends, developments and foresights (max. 1 paragraph of 3-5 lines). Make where possible use of graphics, product images, photos and infographics as much as possible to illustrate the main message.

End with max. 5 specific recommendations (using bullets).

2. Tip title 2 (For example: Get control on delivery risks)
Start with a short explanation of 1- 3 paragraph of 3-5 lines, which includes context, examples etc.

- End with max. 5 specific tips in a green tips box per chapter.
- It is not needed to number the chapters.

The study is min. 3500 and max. 5500 words (based on MS Word wordcount).

D. Visualisation

- The top banner for this study is provided by CBI.
- Besides charts and tables, include at minimum:
  - 2 in-study RF photos or images.
- Study is accompanied by at least 1 and at most 2 quotes (from interviewed importers, exporters, experts etc).

IX. Tips on how to use digital tools

A. Learning goal

<number> ***tips on how to use digital tools in the [sector name] sector*** answers the question: ***How to work digitally and benefit the most from digital tools and innovation in [sector]?*** The answer is provided in a list of tips on how SMEs from low- and middle-income countries can use digital tools to their benefit in a specific European market sector. SMEs which are already well-versed in digitalisation can use these tips to stay abreast of the latest digital developments. SMEs that have not yet applied any form of digitalisation to their business models can use these tips to prepare for a digital transformation of their organisation. The study helps SMEs with finding quick answers to the most pressing issues that come into play when applying the principles of digital tools and innovation to their organisation e.g. their sales, sourcing, production, logistics or any other part of their businesses. In this study, Europe is defined as the European Union market (EU27).

B. Content

<number> ***tips on how to [use digital tools] in the [sector name]*** consists of a list of 6-10 tips on digital tools that SMEs from low- and middle-income countries should know about and can apply in their exports to Europe within a specific sector. The tips can apply to any part of the business, whether it is sales, sourcing, purchasing, logistics, finance, production etc. as long as they provide practical and actionable insights. The target group should need minimal efforts to find information that is important for them and should immediately know what to do with this information. Visual aids must be used where they add value (drawings, tables, graphs, images, photos). The tips and the recommended digital tools should be tailored to the realities and capacities of SMEs in low- and middle-income countries, considering their financial resources, digital literacy, and time constraints.

The following mandatory tips must at least be included (in order of appearance):

(1) **A tip about the most common types of digitalisations** (in production, trading, logistics, sales etc.) that take place **in this sector**. Summarize what SMEs need to know to get a birds-eye overview of digital tools in their sector.

(2) **A tip about the role of E-Commerce (if the sector requires its use)** and the most important b2b and/or b2c e-Commerce platforms in this sector. What are the major platforms? How do they work? How do they affect SMEs? What are the opportunities and risks of them?

(3) **Several tips about the use of Artificial Intelligence** that can offer SMEs opportunities for growth (both in terms of quantity / scale, quality improvement, branding/marketing, buyers/customers approach…). What are the most promising AI tools in the sector? What are they used for? How do you get the most out of AI interaction?

(4) **A tip about data collection (Big data).** When is it applied, where is it applied, and how can SMEs benefit from it?

(5) **Additional tips regarding innovation that can be useful for the sector (e.g. drones, IoT, robotics…)**

(10 /or last tip of the study) A tip about sourcing digital technologies (locally or regionally, whenever possible – try to identify technology hubs; focus on possible partners). Where can SMEs find suppliers that can help them take steps to digitalize their businesses? Focus on the most important CBI countries in this sector.

To avoid overlap with the finding buyers and doing business studies, tips related to how to optimize your website or how to make use of social media are not discussed in ***Tips on how to use digital tools.***

Next to the mandatory tips there is room for a maximum of 5 additional chapters relevant to SMEs in this sector.

C. Structure

The study must start with the title: [**number**] ***tips on how to use digital tools in the [sector name] sector*** *(H1 heading)*. Followed by a short introduction of 3-4 lines explaining why exporters need to know have a good understanding of the practical matters of digital tools and innovation in order to be successful in exporting.

Then the list of tips, according to the following chapter structure:

1. Tip title (For example: Gather data at production level)
Start with a short explanation of 1- 3 paragraph of 3-5 lines, which includes context, examples etc. and which mentions the advantages of following this tip or the consequences of not following this tip.

Include an analysis of relevant trends, developments and foresights (max. 1 paragraph of 3-5 lines). Make where possible use of graphics, product images, photos and infographics as much as possible to illustrate the main message.

End with max. 5 tips in a green tips box per chapter. Please note: It is not needed to number the chapters.

2. Tip title 2 (For example: Make use of Direct-to-Consumer (D2C) channels) Etc.

The study is min. 3500 and max. 5500 words (based on MS Word wordcount).

D. Visualisation

- The top banner for this study is provided by CBI.
- Besides charts and tables, include at minimum:
    - 3 in-study RF photos or images.
- The study is accompanied by at least 1 and at most 2 quotes (from interviewed importers, exporters, experts etc).

X. Tips on how to go green

A. Learning goal

<number>tips on how to go green in the <sector name> sector answers the question: ***How to make your business greener (more environmentally friendly) and benefit the most from applying environmental sustainability in [sector]?***

The answer is provided in a list of tips on how SMEs from low- and middle-income countries can apply environmental sustainable practices to their benefit in supplying a specific European market sector. SMEs which are already well-versed in operating a green business can use these tips to stay abreast of the competition. SMEs that have not yet applied any form of environmental sustainability to their business models can use these tips to prepare themselves to "go green". The study helps SMEs with finding quick answers to the most pressing issues that come into play when applying the principles of environmental sustainability to their organisation e.g. their sales, sourcing, production, logistics or any other part of their businesses. In this study, Europe is defined as the European Union market (EU27).

B. Content

<number>tips on how to go green in the <sector name> sector consists of 6- 10 practical tips for the target group on what types of activities they can undertake to make their businesses more environmentally friendly; Learn which products have less/more ecological footprint in this sector? What can be done to improve? Where lie the biggest opportunities to turn environmental sustainability into a Unique Selling Point (USP) in this sector? What are the biggest threats and/or obstacles, and what can be done about them? Which new 'green technologies' play a role and can offer SMEs growth opportunities; which new green business models exist, and what possibilities are there to find funding, investors and to find partners in becoming a more environmentally friendly exporter?

The tips can apply to any part of the business, whether it is sales, sourcing, purchasing, logistics, production etc. as long as they provide practical and actionable insights. The target group should need minimal efforts to find information which is important for them and should immediately know what to do with this information. Visual aids must be used where they add value (drawings, tables, graphs, images, and photos).

The following mandatory tips must at least be included:

(1) **What are the biggest opportunities** for becoming more environmentally friendly **in this sector**? Summarize what SMEs need to know to get an birds-eye overview of sustainability issues in their sector, pair these with opportunities, and illustrate with at least 3 examples from SMEs from the CBI target group (preferably countries on the CBI country list) in low- and middle-income countries that have turned these opportunities into business success. In sum: How to turn environmental sustainability into an **USP** in this sector? And who are doing this successfully already (and can serve as an inspiration to others)? And why this is important.

Try to logically connect challenges, opportunities, and actions that can be turned into USPs. A few examples:

- High energy consumption -> Reduction of greenhouse gasses -> Solar power usage for processing by SME X;
- Soil depletion and erosion -> Switching to agroforestry -> Successful combinations of produce in sector by SME Y;
- High plastic use and microplastics -> Applying circularity in business -> change to recyclable packaging by SME Z.

(2) **A tip about the environmental impact** (**the carbon footprint**) of the products **in this sector**. How much greenhouse gas is emitted to produce products that make up this sector per kilogram (or the closest / most appropriate unit metric for non-food sectors)? Provide an overview (e.g. a table or chart) of at least the top 6 highest and top 6 lowest contributors. Explain what the heavy polluters can do, and what the low contributors can do, and transmit the general message that each product or service (regardless of the starting position) has the potential to become more green.

(3) **A tip about green innovation** where green innovation is referred to as the innovation that emphasizes environmental waste reduction, prevention of pollution and implementation of environmental management so as to ensure ecological wellbeing, which can **increase key resource productivity** substantially and would **reduce costs related to the environment**. Which green innovations can be observed in frontrunning supplying countries in this sector? Which green innovations are most valued by European buyers of [sector] and why?

(4) **What are the biggest risks for entrepreneurs that aspire** to become more environmentally friendly **in this sector**? Provide an overview of the **most important risks** to take in account when greening your business in this sector and illustrate each with at least one example from a low- and middle-income country (preferably pick countries on the CBI country list). What is the impact of these risks? What can an entrepreneur do to mitigate these and be successful in the long term?

(5) **A tip about green legislation and requirements** with a specific impact on this sector. What are the most relevant EU laws and legislation (e.g. corporate sustainability due diligence, EU strategy for Sustainable Textiles or regulation on biopesticides) that affect this sector? Relate them either to the biggest opportunities or threats and risks from tip 1 and 2, and link to sites where readers can dig deeper into these EU legislations and requirements related to ecological sustainability in their sector. Include the EU Green Deal in this tip, and in a green tips box provide a hyperlink to The EU Green Deal – How will it impact my

business?

(6) A tip about incorporating green principles in your code of conduct. How can you do this? What minimum standards should you include; what are best practices in this sector; and what are COC examples of buyers and suppliers that inspire?

(7) – (9) Additional tips

(10 /or last tip of study) A tip about finding funding, investors and partners that can help SMEs to become more green. Focus on where SMEs can find potential partners that want to invest in, fund, or partner with SMEs on their efforts to becoming more green. List the main sustainability initiatives and indicate which routes there are to find potential partners that can help you make the transition.

Next to the mandatory tips, there is room for a maximum of 3 additional tips chapters relevant to SMEs in this sector.

C. Structure

The study must start with the title: [**number**] ***tips on how to go green in the [sector name] sector*** *(H1 heading)*. Followed by a short introduction of 3-4 lines explaining why exporters need to know / must have a good understanding of the practical matters of becoming more green in order to be successful in exporting.

Then the list of tips, according to the following chapter structure:

1. Tip title (For example: Reducing waste, energy consumption and water usage are a good place to start)
Start with a short explanation of 1- 3 paragraph of 3-5 lines, which includes context, examples etc. and which mentions the advantages of following this tip or the consequences of not following this tip.

If relevant, also include an analysis of relevant trends, developments and foresights (max. 1 paragraph of 3-5 lines). Make where possible use of graphics, product images, photos and infographics as much as possible to illustrate the main message.

Please note: it is not needed to number the chapters.

End with max. 5 specific recommendations/ tips in a green tips box.

*2. Tip title 2 (For example: Deforestation remains the main threat in ..)*Etc.

The study is min. 3500 and max. 5500 words (based on MS Word wordcount).

D. Visualisation

- The top banner for this study is provided by CBI.
- Besides charts and tables, include at minimum:
    - 3 in-study RF photos or images.
- The study is accompanied by at least 1 and at most 2 quotes (from interviewed importers, exporters, experts etc).

XI. Tips on how to become more socially responsible

A. Learning goal

[**number**] ***tips on how to become more socially responsible in the [sector name] sector*** answers the question: ***How to make your business more socially responsible and benefit the most from applying social sustainability in [sector]?***

The answer is provided in a list of tips on how SMEs from low- and middle-income countries can apply socially responsible practices to their benefit in supplying a specific European market sector. SMEs which are already well-versed in operating a socially responsible business can use these tips to stay abreast of the competition. SMEs that are lagging behind with social responsibility in their business models can use these tips to prepare themselves to improve. The study helps SMEs with finding quick answers to the most pressing issues that come into play when applying the principles of social sustainability to their organisation e.g. their sales, sourcing, production, logistics or any other part of their businesses. In this study, Europe is defined as the European Union market (EU27).

B. Content

Tips *on how to become more socially responsible in the [sector name] sector* consists of 6- 10 practical tips for the target group on what types of activities they can undertake to make their businesses more socially responsible; What can be done to improve? Where lie the biggest opportunities to turn social sustainability into a Unique Selling Point (USP) in this sector? What are the biggest threats and/or obstacles, and what can be done about them? Which legislation and standards play a role and what possibilities are there to find funding, investors and to find partners in becoming a more socially responsible exporter?

The tips can apply to any part of the business, whether it is sales, sourcing, purchasing, logistics, production etc. as long as they provide practical and actionable insights. Illustrate this with at least 3 examples from SMEs from the CBI target group (preferably countries on the CBI country list) that have turned their activities addressing social risks into business success.

The target group should need minimal efforts to find information which is important for them and should immediately know what to do with this information. Visual aids must be used where they add value (drawings, tables, graphs, images, and photos).

The following mandatory tips must at least be included (~~in order of appearance):~~

(1) **A tip about turning socially responsible activities into business opportunities**. This **first tip** summarises what SMEs need to know about the social risks in their sector and explains how addressing these risks can create opportunities. It serves as an introduction to what social risks are (understood as a potential impact on communities of people such as employees, customers or local residents) and to why it is important to mitigate them or reduce their impact. Choose your own wordings for this fist tip, but as an example, it can be: 'Educate yourself on social responsibility in your business'

(2) **A tip about health and safety at work** can cover the most pressing issues in the sector, such as: how can the company assure a safe and hygienic working environment? What type of protective clothing and safety measures should be taken care of? and what measures should be taken to provide safe accommodation for its workers. Better health and safety conditions should lead to higher productivity and product quality, less work accidents and thus less sick leave.

(3) **A tip about diversity and social inclusion** can cover such topics as: inclusive hiring practices, fair compensation, access to training, promotion, termination or retirement based on race, nationality, religion, age, disability, gender, marital status, sexual orientation, union membership or political affiliation. How can companies become more gender aware, and provide women with equal rights as men? What can the company do to become more gender transformative, challenging cultural, social and economic norms that might be an obstacle?

(4) **A tip about supply chain responsibility** should address the systems a SME must have in place to manage the risks in their supply chain. Companies need an overview of their supplier, be able to do traceability of raw materials. Also monitoring supply chain responsibility through audits, assessments, talks over time, and increasing the number of sustainable inputs or services purchased can be part of this tip.

(5) **A tip about human rights due diligence legislation** addresses the importance of human rights due diligence for the sector. Is the sector considered a high impact sector? What are European companies doing about due diligence? What measures are mandatory and which voluntarily? How are non-European companies from low- and middle-income countries affected?; and, What measures can they take themselves? A good resource with case studies and information is the website Gender-Responsive Due Diligence.

Next to the mandatory tips there is room for a maximum of 6 additional tips chapters relevant to SMEs in this sector. Topics can include the most important social issues present in the sector such as for example:

- Awareness of labour law and employment contract;
- Workers right and freedom of association;
- Wages (living wage), benefits, and working hours;
- Good working conditions (no forced labour, child labour etc.);

- providing a safe work environment (without harassment and abuse);
- opportunities for youth employment in the sector.

Tips include practical advice on ways to improve a social issue, specification of what European buyers may require for a topic, as well as inspiring examples of frontrunners from low- and middle-income countries.

C. Structure

The study must start with the title: [**number**] ***tips on how to become more socially responsible in the [sector name] sector*** ***(H1 heading).*** Followed by a short introduction of 3-4 lines explaining why exporters need to know / must have a good understanding of the practical matters of becoming more socially responsible in order to be successful in exporting.

Then the list of tips, according to the following chapter structure:

1. Tip title (For example: provide equal opportunities for women to ascend to management positions)
Start with a short explanation of 1- 3 paragraph of 3-5 lines, which includes context, examples etc. and which mentions the advantages of following this tip or the consequences of not following this tip.

If relevant, also include an analysis of relevant trends, developments and foresights (max. 1 paragraph of 3-5 lines). Make where possible use of graphics, product images, photos and infographics as much as possible to illustrate the main message.

End with max. 5 specific recommendations (using bullets).

*2. Tip title 2 (For example: A living wage repays itself in productivity)*Etc.

- Please note: It is not needed to number the chapters.

The study is min. 3500 and max. 5500 words (based on MS Word wordcount).

D. Visualisation

- The top banner for this study is provided by CBI.
- Besides charts and tables, include at minimum:
    - 3 in-study RF photos or images.
- Study is accompanied by at least 1 and at most 2 quotes (from interviewed importers, exporters, experts etc).

XII. Webinar

An **1.5 hour online presentation** of the findings of the Market Studies to an audience of CBI companies; SMEs from low- and middle-income (CBI) countries; BSOs and Sector Associations from low- and middle-income countries; EU importers among others.

Its primary goals are strengthening the audiences' knowledge of sustainable exporting through presenting the content of the studies in a presentation form; and making an interaction possible between the target group and the market researchers on the content of the studies; and making interaction possible between the target group and European buyers/experts on their importing experience and the demands they put on exporters. A secondary goal is to strengthen CBI's online presence by adding digital related content on the CBI Website and YouTube channel.

Presenters:

- Market Researcher(s) (Author(s) of Market Research);
- European importer(s), preferably from the EU;
- Additional speaker(s) (Optional but encouraged): Sector expert (Consultants with sector expertise); Topic expert (e.g. sustainability), SME exporter(s), Manufacturer from a CBI focus country, BSO/Trade Association representative or Certification Authority.

Try also to encourage diversity in terms of nationality/age/gender; for selected guest speakers. The session is facilitated by a CBI appointed/hired moderator (either a CBI or RVO moderator or external moderator).

Structure:

- The moderator opens the session and explains the audience the rules of interaction during the webinar;
- This is followed by an introduction by CBI explaining in short who we are, and what we do;
- Introduction of the speakers by the moderator;
- The main body of the webinar are the presentation of the findings of one or more (recent) market studies by the market researcher(s); and a presentation or contribution in which an importer (and other presenters) share his or her experiences from the field, including practical tips for the audience on how to export successfully to the EU.
- One or more question and answer (Q&A) interaction with the audience
- Presentation of CBI's market intelligence and closure by the moderator

Results:

- Inform the audience about the findings of (recently) published CBI market research in a sector;
- Inspire the audience by a presentation of an EU importer that is complimentary to the findings of the CBI market research, translating the theory of the studies into practice, and to provide practical tips on how to export successfully to the EU;
- Provide the audience an opportunity to directly interact (usually via chat or a questions function in the webinar software) with the market researcher and other speakers and ask them all their questions;
- Promote the CBI Market Research platform and the studies on it;
- Sharing the presentation with participants and adding the recording to the CBI Website and YouTube platform.

Duration:

- One 1.5 hours Webinar, of which approximately, 30 minutes is reserved for introductions and Q and A's; and usually 20-30 mins presenting by the market researcher; and 20-30 mins presenting by the other speakers.

Content:

- Is determined jointly with CBI in the yearly discussion session.

Venue:

- GoToWebinar or other Webinar software (provided by CBI). The Webinar is always an online session; it is recorded and afterwards will be published on the CBI Website and YouTube platform.

Division of tasks between CBI/ Researcher:

The *researcher*'s tasks/responsibilities include:

- Recruitment of at least one (and at most two) European importer(s) as additional speaker(s);
- Preparing their presentation;
- Coordination with CBI, moderator and speakers, including test session;
- Presenting during webinar; Answering questions during webinar;
- Deliver input (webinar introduction text + speaker bio) for CBI's event/registration page <u>minimum 8 weeks</u> in

advance. If the researcher is unable to deliver the requested input on time after multiple reminders, CBI may decide to cancel the webinar;
- Provide a short summary of the webinar for publication on the CBI website (based on the format of the event's announcement).

CBI's tasks/responsibilities include:
- Invitation of participants; Marketing/online promotion of the event;
- Revising the script of the researcher and helping him to coordinate the content with speakers;
- Introducing CBI (during webinar);
- Providing the Webinar software and logistical support during the Webinar;
- Follow up towards participants (dissemination of the presentation, questions of the audience for the speakers...).

XVII. Criteria for the assignment

All studies must meet the following criteria:

A. Content criteria

All market studies must:

1. Answer the central research question (all information in the market study must contribute to answering this question).
2. Include short-term foresights (1-3 years) and long-term foresights (beyond 3 years).
3. Contain analyses (breaking down developments, trends and foresights in components and uncovering their relationships and prioritising information).
4. Interpret information from the perspective of the target group (translating analytic findings in opportunities and threats)
5. Go beyond what is obvious (e.g. don't just state the market for certified products grows and therefore offers opportunities).
6. Contain practical insights for the target group.
7. Contain concrete, actionable tips (see the criteria for these tips below).
8. Provide explanations.
9. Contain examples, cases etc. (e.g. examples of successful products that tap into trends, cases of companies that have successfully exported a relevant product, examples of companies importing relevant products).
10. Present findings objectively, without bias or subjective influence.
11. Include only what is most relevant for the target group (make a selection; prioritise!).
12. Be based on insights from the European market / industry.
13. Be clear and easy to understand for the CBI target group.
14. Not contain inconsistencies (not within the study, nor with other studies on our website).
15. Not overlap with other studies on our website (if a similar subject is discussed in another study, a hyperlink to that study must be provided).

B. Writing criteria

Language

1. The studies must be written: in **Plain British English**, **level B1** (see Appendix 11a and 11c for more info on this).
2. In British English (use e.g. "organisation", not "organization"; "labour", not "labor"; "licence", not "license"). If third parties use the US spelling in their company or organisation name, then use this spelling. For example, write World Health Organization (WHO).
3. Write as if you are explicitly addressing the reader.
4. Avoid contractions such as "You'll", "Isn't'' or "Don't". Instead write: "You will", "Is not", "do not".
5. Inclusive and gender-neutral language is preferred wherever possible. Use gender-neutral noun forms (chair, spokesperson, police officer etc.) or "their" instead of "he" or "she". For tips, check Oxfam's Inclusive Language Guide.

General

- Information in the studies must be organised in a clear, logical way (no complex categorisations).
- Repetition must be avoided.
- Paragraphs must be short, max. 5-8 lines.
- Each paragraph contains only one message.
- The most important information is placed up front.
- Using clear, noticeable headings and subheadings to break up content and label sections so that people can scan to find only what they're most interested in.
- Phrases should be short and concise and written in an active voice. Every word used in the text should be necessary and meaningful. Any word that can be deleted, should be deleted (e.g. "To get certified…" not "In order to get certified…").
- Don't use difficult words, figures of speech or specific expressions (e.g. "exude", :"in vogue", "off the beaten track", "benchmark", "a piece of cake"). Jargon should be avoided as much as possible (if used, the jargon is explained between brackets the first time in a chapter with abbreviated form in brackets).
- There should be consistency within the texts (e.g. consistency in use of terminology, use of abbreviations).
- The CBI website does not support the use of formulas, subscript or superscript. Write CO2 , not CO_2, 6th and not 6^{th}.

References and hyperlinks

- Links to other studies on our website should be included.
- The studies must contain hyperlinks to trustworthy (and checked) external sources (referring directly to a specific page with relevant information in English). Referring to sources that lack transparency, credibility, or methodological rigor such as anonymous websites or opinion-based platforms (Wikipedia, Social Media posts, online forums) are not allowed.

Similarly, sources that are outdated, contain broken links or geo-blocked content, are also highly undesirable.
- No footnotes are included in the text. If additional information is necessary, it should be provided in brackets within the body text.

Anchor text
- To ensure high readability, accessibility, and good SEO, please use to the following guidelines to create anchor texts (clickable hyperlinked text). When creating an anchor text, make sure it is:

  1. Descriptive
  Do: The anchor text (clickable text) must describe what the user finds when they click.
  Don't: Don't use generic terms such as "click here," "read more" "website", "article", and so on.

  2. Short
  Do: Select specific keywords that are relevant to the target page.
  Don't: Do not link entire sentences or paragraphs as they can appear cluttered and may cause confusion.
  But don't be too short – avoid single-word links (especially generic terms).

  3. Company or brand names
  Do: When listing companies, brand names or organisations, link directly to their name. (This is the exception to the rule of avoiding single-word links).
  Don't: Do not link just a description of the company.

  4. Repetition
  Do: Try to really find the specific keywords that help avoid repetition.
  Don't: Do not use the exact same anchor text multiple times to link to different pages.
  And do not link to the same page excessively within a short text.

Examples to avoid	Instead, try to use
For more information about coffee, [click here].	Read more about the [European coffee market].
[In 2022, the total amount of coffee consumed in Europe was 55,000 bags.] (Linking the full sentence)	In 2022, the total amount of [coffee consumed in Europe] was 55,000 bags.
You can visit the website of Importaco [online].	Major importers include [Importaco] and [Mironous].
Read our [study]. Also, see this [study].	Read our [study on exporting organic cocoa to Europe]. Also, check our [7 tips on how to find buyers in the European cocoa market].

For more information and tips see the Nielsen Norman Group site on writing hyperlinks).

Date and time
- Use the British date format, not the US one. Dates should be written in the following order: [day] [month] [year]. When relevant, add the day of the week + comma. For example:

  You can apply as of 31 March 2020.
  The event takes place on Friday, 13 April 2020.

- In running text, write "between 2019 to 2023", not "between 2019-2023". In headers or tables, write "2019-2023".
- Instead of writing "the 2019–2023 period", remove the word "period" and simply write "from 2019 to 2023".
- Use the 24-hour clock. Write 16:30, not 16h30 or 16.30.
- Add summer or winter time. In case of the Netherlands, we use both Central European Time (CET) and Central European Summer Time (CEST). Use the following rules:

  21 July 2020 09:00 CEST (not 21st of July 2020 or July 21, 2020)
  21 January 2020 17:00 CET
  You can apply from 1 March 09:00 CET to 1 April 17:00 CEST 2020.

Numbers
- Numbers should be presented in digits, not written out (e.g., use 2, 3, 4, 5, 6, 7, 8, 9, 10, 2nd, 3rd, 4th etc). Write "5" or "5th" instead of "five" or "fifth". The only exception here is the number "1" , which is written as "one".
- Use commas instead of full stops to separate thousands: 1,780 or 33,647.
- Use full stops instead of commas to separate decimals: 1,800.99 or €1.9 billion.
- For values below one, the decimal is preceded by a zero: €0.7 million.
- Write numbers below a million in digits: 670,000 instead of 67 thousand. Shorten larger numbers by writing 3.5 million or 16.7 billion. Do not write 3½ million or 3.5M.

- Write ordinal numbers (2nd, 3rd, 4th and so on) without superscript to make sure digital devices read the number out loud correctly.
- Try to avoid a number at the beginning of a sentence. When using a number at the beginning of a sentence, the following word is not capitalised.
- Write percentages instead of fractions. Write 67% (not 2/3 or two-third) or 75% (not 3/4 or three quarters).

Measurements

- Except when a specific context demands it, use metric forms in the English spelling. Write:

  metres, litres, not meters or liters
  tonnes, not metric tons or MT (Ton = US or Imperial ton)
  kilometres (km), kilograms (kg), hectare (ha)
  centimetres (cm), millimetres (mm)

- When writing out measurements, the figure should be followed by a space then the unit of measurement. Write:

  300 kilometres or 300 km
  50 kilograms or 50 kg
  20 hectares or 20 ha

Currencies

- The euro is our standard currency. To avoid confusion always mention the currency.
- Use € and US$ instead of EUR and USD.
- Specify US dollars (US$) to distinguish from Australian/Canadian dollars.
- There should be no space between the currency sign and the number: €10,000 or US$9.99 22.
- The word euro (plural: euros) is written with a lower-case letter.

Geographical locations and names

- The names of countries should always be written in full for the first time. In the case of the United Kingdom, you can use the abbreviation "UK" after first writing it full out.
- Add "the" before these countries: the Netherlands, the United Kingdom and the United States. These countries always take the singular verb form. For example:
  The Netherlands is located in Western Europe.
- In a running text, write "the Netherlands" (with a small letter), instead of "The Netherlands".
- Do not write "developing countries" or "third countries", instead write "low- and middle-income countries" or the "Global South".
- Use the correct country names: Côte d'Ivoire and Türkiye, not Ivory Coast or Turkey.
- Use initial capitals for proper nouns:

  North America
  Eastern Europe
  Northern Ireland
  South Africa
  West Africa
  Southeast Asia

  but use lower case when referring to a general direction:

  south France
  northern Germany

Abbreviations

- Abbreviations should only be used when absolutely necessary (if abbreviations are absolutely necessary, the word is written in full the first time it is used in each chapter with abbreviated form in brackets; thereafter the abbreviation can be used).
- Latin abbreviations such as i.e. and e.g. are not allowed in the market studies. Instead, use "so," and "for example", "like", respectively.
- When first mentioning the European Union, write it out in full, followed by the abbreviation EU. Afterward, you may use the abbreviation EU. Similarly, when first mentioning the United Kingdom, write it out in full followed by (UK), and thereafter use UK. This rule applies to all abbreviations; do not assume that readers will know what they stand for.

Bullet lists and numbered lists

- Use lists if you want to draw the reader's attention. Lists also keep sentences short, the text scannable and highlight examples or elements.

  Regular list style
  Start each item with an uppercase letter and use a full stop at the end.

  For the subsidy you will need:

  - *All required documents.*
  - *A declaration of independence from your local government.*
  - *Completed Quick Scan.*

  Continuous sentence
  With a list that is part of a continuous sentence, put semicolons (;) after each point and start each bullet point with a lowercase letter.

  If you can prove that:
  - *you were somewhere else at the time*
  - *you were not related to Mary; and*
  - *you are over 21;*

  you should be all right.

  Numbered lists
  Use numbered lists instead of bulleted lists when the order of the items is relevant. Items in a numbered list should end in a full stop because each should be a complete sentence.

  1. *Delivery address.*
  2. *Payment.*
  3. *Confirmation.*

- After a colon, use a capital letter. For instance, write "Germany: The largest in apparel" rather than "Germany: the largest in apparel."

C. Introductions

Introductions are an important part of the Market Intelligence studies. They are used for online feeds, CBI newsletters and on social media. They should tempt the CBI target group to click and explore the studies. Introductions must:

1. be a maximum of 5 lines
2. not contain any hyperlink in the first paragraph
3. reflect the essence of the study (readers know the answer to the central research question of the study after reading the introduction).

An example of an introduction for a study about the trends on the European fresh fruit and vegetables sector:

> *"Health, flavour and convenience are all factors that drive the consumption of fresh fruit and vegetables in Europe. At the same time, social standards and certifications are needed for better information sharing and transparency. Consumer behaviour has grown complex, while professional buyers are becoming more demanding due to the concentration of buyer power. The fresh sector requires you to be an expert in your field and integrate into a well-organised supply chain."*

An example of an introduction of a product factsheet about the Entering the European market for walking tourism:

> *"Walking tourism products appeal to European travellers of many abilities, from challenging, difficult routes to easy trails with gentle gradients, and can last from a few hours to a week or more. Good guides and establishing good safety protocols for hiking are an important consideration, as are detailed maps and instructions for self-guided walks. It is also important that walking tourism products are established under sustainable principles to protect the environment and support local communities."*

D. Tips

Tips tell the target groups what they should actually do, i.e. good practices (e.g.: Keep in close contact with your buyer. For example...) or refer to other sources where the target group can find more information (e.g. See the website of the European Commission for more information about the simplified procedure for homeopathic and herbal products). Moderate use of relevant links to other CBI studies is encouraged. This increases views and online ranking of our studies.

Furthermore:

- They are logically connected to the analysis of the study.
- They are provided below the related analysis.
- Per analysis (topic) a maximum of 5 tips is given.
- Bullets are used for each tip.
- Maximum of 150 words for each block of (maximum 5) tips.

In terms of language, tips must be:

1. Directive (e.g. "Pay extra attention to health and safety requirements, as these..." not "It is advised to pay extra attention to health and safety requirements, as...").
2. Specific (e.g. "Consider gift-wrapping your product for a competitive advantage." not "Consider your strategic options in range development and positioning.").
3. Decisive (e.g. "Get ISO certification…" not "Seek to gain ISO certification.")

E. Document layout

1. All studies should be turned in as MS Word documents, with the following characteristics:
   - Font: Verdana; Size: 8 | Language setting: English UK
   - Spacing 0 pt before and 6 pt after | Line spacing: 1
2. Studies should be turned in plain text (i.e. text without any layout or markup), except for headings.
3. In case there is a need to emphasise something, the style "bold" can be used if really necessary (preference is to not use it).
4. The font style 'Italic' can only be used for botanical (plant) names. For example: Saffron *(Crocus sativus L.)*
5. Heading styles should be used in MS Word.
6. After a heading there always follows text (we do not put 2 or even 3 headings below each-other in the studies)
7. The following headers need to be applied making use of Microsoft Word "Styles":
   - Heading 1 (title of the study)
   - Heading 2 (section title; automatically added to the table of content)
   - Heading 3 (sub section title)
   - Heading 4 (paragraph title; only use when absolutely necessary)
8. Tips always start with the title "Tips:", written as plain text. If one tip is provided, write the title as "Tip:", if more than one tip is included, write "Tips:"
9. Numbered lists are indicated with a comment that states: "@CBI content manager : apply a numbered list". For examples of numbered lists, see: HDHT study (chapter 4), Spices study (chapter 2), Tourism study (chapter 4) , FFV study (chapter 3).
10. Graphic elements are used to highlight specific content. Use a:
    - Yellow box: case studies and examples.
    - Grey box: definitions or explanations.
    - Green box: Tips.

    For content that should appear inside a yellow or grey box (case studies or definitions), add the following comment in the sideline: "@CBI content manager: put text in a yellow/grey box". Tips do not require a comment as they are automatically placed inside a green box.
11. Bullets should be used for lists (sub bullets are not allowed).
12. The use of annexes and footnotes in the main text is not allowed. Annexes as attachments are a possibility.
13. When updating an existing CBI study, added/changed content should be marked in yellow (use the text marking function of MS Word). This includes all content added to the first, second, and final draft.
14. Copied text should be marked green (use the text marking function of MS Word).
15. In the final version, there should be no comment left in the margins, except for those directed at the CBI Content Manager.
16. End the study with the following two phrases, separated by a blank line :

Company name (include link to market research company) carried out this study on behalf of CBI.
Please review our market information disclaimer.

F. Charts and maps

Charts (e.g. a bar, line, pie chart) and maps (see examples in the demand for tourism study) must be used to visualise what can't easily be put in writing (e.g. to visualise developments over a longer period or to show comparative sizes of markets).

For charts and maps the following criteria apply:

1. A maximum of **10 charts or maps** can be used per market study (if more are needed discuss this with the responsible Programme Manager).
2. Charts and maps are complemented by a textual analysis and interpretation for the target group (this text does not spell out what people can already see for themselves in the charts and maps).
3. Charts and maps must have a title in plain text above, a figure number (figure 1, 2, etc.) and a source must be added below

them.
4. Write titles as follows: “Figure 1: Title name. Use a colon (:) after Figure 1,2,3.. and capitalise the title. Do not write: “Figure 1. title name” or “Figure 1 – Title name”.
5. Make sure that the titles are short and concise.
6. All charts or maps that use external sources must include a source citation below the figure. The source citation must be written as follows: “Source: sourcename, year”. Do not write “Source: sourcename (year).” Preferably, a hyperlink is included to the source.
7. If all data is available, charts should be delivered in an MS Excel document so that CBI can create a Highchart or Highmap (see below), rather than as a visual (png or jpg).
8. Charts and maps should be easy to understand. Therefore, the following guidelines apply. Exceptions can be discussed with your responsible CBI Programme Manager.
9. When information about countries is presented in charts, a maximum of six countries can be included.
10. Standard bar-, stacked-, column-, line-, and pie charts and maps can be used.
11. Multiple charts cannot be combined in one single figure (e.g. a bar chart and a line chart in one).
12. Only one indicator is used per chart.
13. Only two variables are used per chart.
14. Charts must include information in the chart title about the x and y axis (e.g. 2019 – 2015, and million litres), and a source and year.

Data used for the charts and maps should be delivered in a separate MS Excel document.

CBI will use this data to develop online charts and maps online using Highcharts and Highmaps JavaScripts.

To make sure the data can be used for online publication through Highcharts and Highmaps JavaScripts the MS Excel file needs to be build up according to a fixed setup. PLEIO (the extranet / collaboration platform of the Netherlands Enterprise Agency (RVO.nl)) contains an example of a MS Excel document with this fixed setup (the document contains data for a pie chart, a (stacked) bar chart, a line chart, a map, and a column chart).

Note that:

- For every chart, data is provided in a new tab, with the tab name indicating the figure number (Figure 1, Figure 2, etc).
- For every MI study, a separate excel file needs to be uploaded on pleio.
- The current CBI website does not support the English numerical notation, where a period or dot (.) is used as the decimal separator (for example 10.50), and a comma (,) to separate thousands (ten thousand = 10,000) for **Highcharts**. Until the issue is being resolved, it is important that you do not use spaces or punctuation in the data besides for indicating the decimal. This is done with a comma. For example, ten thousand euro and 50 cents is “10000,50”. Note that this means you may need to change the settings of the MS Excel document you are working in. Other punctuations (like %) are not allowed.
- An image of the chart or map should be included in the MS Word document. Include the title above and the source below the chart or map (make sure the title and source are the same in the MS Word and MS Excel files).
- An image of the chart or map should not be (remain) included in the MS Excel document.
- Only the data that forms the basis of the chart or map is allowed in the MS Excel document. No other data (e.g. calculations, print screens or images) should be included.

G. Tables

When data needs to be presented, and using charts and maps does not make sense, MS Word tables should be used:
1. Tables are complemented by a textual analysis and interpretation for the target group (this text does not spell out what people can already see for themselves in the table).
2. A title must be included.
3. A table number must be included (Table 1, 2, etc.)
4. Write table titles as follows: “Table 1: Title name. Use a colon (:) after Table 1,2,3.. and capitalise the title. Do not write, “Table 1. title name” or “Table 1 – Title name”.
5. Make sure that the titles are short and concise.
6. A source and year must be included.
7. All tables that use external sources must include a source citation below the table. The source citation must be written as follows: “Source: sourcename, year”. Do not write “Source: sourcename (year).” Preferably, a hyperlink is included to the source.
8. When information about countries is presented, a maximum of 6 countries can be included (note that for the CBI Market Statistics and Outlook more countries can be included).
9. Commas are used in numbers of four figures or more (Example: 2,321,000).
10. The table format / style should be clear and calm and not too big (no longer than 1 page).

H. Diagrams

Diagrams help to convey complex information clearly and concisely. Examples include **flowcharts, schematics, tables, or conceptual diagrams**. Diagrams can simplify explanations, highlight relationships, and support your written arguments. Diagrams must meet the following criteria:

1. They must be simple and easy to understand;
2. They must be of sufficient image quality (in case of photos, always share the highest quality version available).
3. Landscape images must be at least **1920 × 1080 px**, and square images at least **1080 × 1080 px**.
4. All text must be in **Verdana** font, with a minimum size of **20 px** or **15 pt**.
5. Create diagrams as much as possible in CBI's colour palette:
    - Dark yellow: HEX #ffb612, RGB 255-182-18, CMYK 00-36-98-00
    - Dark green: HEX #275937, RGB 39-89-55, CMYK 93-19-94-69
    - Dark blue: HEX #154273, RGB 21-66-115, CMYK 100-45-06-28

See for example, figure 2 in **Market Entry study on the European urban experiences tourism market.**

6. All diagrams should be included in the MS Word document. Include a title (name convention is always "figure 1, 2, 3" in accordance with the charts and graphs) above and the source (and correct attribution) below the diagram.
7. Write titles as follows: "Figure 1: Title name. Use a colon (:) after Figure 1,2,3.. and capitalise the title. Do not write, "Figure 1. title name" or "Figure 1 – Title name" .
8. Make sure that all figure titles are short and concise.
9. All diagrams that use external sources must include a source citation below the diagram. The source citation must be written as follows: "Source: sourcename, year". Do not write "Source: sourcename (year)." Preferably, a hyperlink is included to the source.

I. Visuals

Visualisation is an important aspect of the MI studies. Visuals can be used to present information in an easy way (for example photographs or images). Also embedding YouTube videos are possible. Variety in visual options is recommended. Visuals must meet the following requirements:

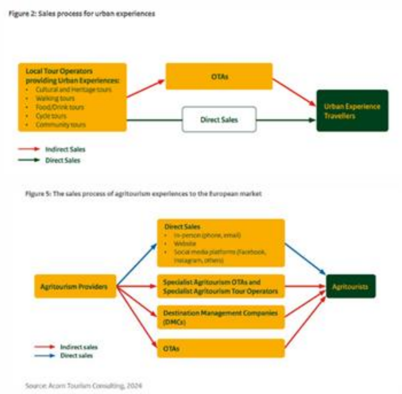
1. They must be simple and easy to understand;
2. They must be of sufficient image quality (in case of photos, always share the highest quality version available);
3. Landscape images must be at least **1920 × 1080 px**, and square images at least **1080 × 1080 px**. Photographs should be uploaded in **JPEG** format, while visuals containing text, logos, or transparent elements should be uploaded in **PNG** format.
4. All visuals should be included in the MS Word document. Include a title (name convention is always "figure 1, 2, 3" in accordance with the charts and graphs above) and the source (and correct attribution) below the visual.
5. Write titles as follows: "Figure 1: Title name. Use a colon (:) after Figure 1,2,3.. and capitalise the title. Do not write, "Figure 1. title name" or "Figure 1 – Title name" .
6. Make sure that all figure titles are short and concise.
7. All figures that use external sources must include a source citation below the figure. The source citation must be written as follows: "Source: sourcename, year". Do not write "Source: sourcename (year)." Preferably, a hyperlink is included to the source. All visuals must also be handed in separately as .JPG or .PNG file next to the version in the MS Word document.
8. CBI also can help to create new visuals with the use of our designers at Xerox and other contracted suppliers that do graphic design for us. This needs to be discussed with the CBI Programme Manager.

Specifically for photography the following applies:

- Stock photos and images generated by artificial intelligence are **not allowed**. Even when these are royalty- and attribution-free.
- It is possible to take and use a photo yourself, provided it complies with the corporate identity and image guidelines. See appendix 'Style guide-RVO photography'.
- Please note that you (as the contracted supplier of the market studies) are only responsible for the delivery of visuals in the study. CBI will provide the banner image for all the market studies.

Additional requirements
In addition to the above description, we have included guidelines regarding the use and delivery of visuals in CBI market intelligence studies. The instructions provides guidance on the use of visuals owned by the market researchers themselves, as well as the use of pictures owned by others, including the need to check copyright and obtain permissions. It also mentions the availability of a budget for delivering visuals.

When creating your own images/diagrams, use the CBI house style (see the example below taken from the study Entering the European agritourism market):



CBI font & size
- Verdana font, with a minimum size of 20 px or 15 pt.

CBI's colour palette
- Dark yellow: HEX #ffb612, RGB 255-182-18, CMYK 00-36-98-00
- Dark green: HEX #275937, RGB 39-89-55, CMYK 93-19-94-69
- Dark blue: HEX #154273, RGB 21-66-115, CMYK 100-45-06-28

It is of great added value for our target group when good visuals are used, for example to show a certain type of packaging or to show how a certain product is labelled. As described in this TOR, each study must therefore include several visuals that need to add value to the Market Intelligence product. The required numbers are described in the Terms of Reference per study. It is the responsibility of the market researcher to deliver these visuals with(in) the studies.

- You can use pictures that are owned by you/ the market research company. This includes pictures made by your own staff, or made by someone (e.g. a photographer or expert) for you. By delivering the pictures to CBI, the contractor assigns the intellectual property rights to RVO/ CBI, or grants RVO/ CBI a non-exclusive and irrevocable right of use for an indefinite period (see ARVODI, article 24).
- Especially when a picture is made by non-professional photographers, it is important to pay attention to the quality of the pictures. More information about a good quality picture can be found in Appendix 11d style-guide-RVO-photography. In case a picture is not of sufficient quality, the CBI proofreader will reject it.
- In case trademarks, logos, brands, recognisable people's images and works of art or authorship are in the picture, you need to permission of the owner or individual to use these pictures for publication in CBI market studies for an indefinite period.
- In case you cannot get the necessary permission, but you would really like to show a specific picture, you can include a hyperlink to another website as text in the study (not a visual).

J. Quotes

Quotes make the study more attractive (e.g. from an importer, a sector expert, an employee from a certification body). In particular, quotes from within the industry add to the reliability of the study and make the study more personal (something which the target group appreciates). Quotes must:
1. Be from people interviewed/consulted for the study to which it is added.
2. Be related to the content of the study (for example in a study about doing business with European buyers: "Not responding to an e-mail within two days can be a deal breaker for us." Eric McDonald, Purchasing Manager Fruit Imports Ltd. United Kingdom.
3. Be relevant and up to date. For example, do not write: "During the Covid-19 pandemic, it is important to be resilient…".
4. Be added at the end of the MS Word document, in plain text.
5. Not exceed the maximum of 70 words.
6. Include a portrait of the quoted person in .JPG format if possible.
7. A maximum of 2 quotes can be added per study.
8. Quotes cannot come from the contractor (or their fellow colleagues).
9. Be written in B1 English, and not include any vague language or figurative speech.

Note that for the publication of the quotes on our website, written approval of the quoted person is needed. The quoted person can remain anonymous in the publication/on the CBI website, but the CBI Programme Manager would still like to receive his/her name, which is treated confidentially.

K. Intellectual property rights

All intellectual property used in the market studies is assigned to CBI. For more information about intellectual property rights (related to e.g. use of data, charts, maps, visuals, photographs, content from other sources) see the General Government Terms and Conditions for Public Service Contracts (ARVODI).

The Contractor must have the right to assign all intellectual property used in the CBI Market Studies and related deliverables to the Contracting Authority, or is able to guarantee that all needed licenses are available for Contractor or can be obtained by the

Contracting Authority. This concerns, among others, the visuals (figures, photos pictures, tables, or other images) as well as any data used in the (textual) analysis. Any claims for unlawful use are for the costs and risk of the Contractor. See Appendix 4 (ARVODI 2025) for more information.

As the rightful owner of all intellectual property in the CBI Market Studies, CBI has the right to transform and present the studies in a different format (for example: video, presentation, infographic, webinar, podcast, etc.) at any time. CBI may choose, but is not obliged, to involve the Contractor herein.

L. Defining sub sectors, product groups and products

CBI's product tree should be used when defining and describing sub sectors, product groups and products throughout the studies. PLEIO (the government intranet) always contains the last version of the product tree. You can find a copy of the tree on Pleio.

M. Artificial Intelligence

With over 35 years of experience in producing high-quality market studies, CBI is recognised as a trusted source of market intelligence for SMEs from low- and middle-income countries seeking to export to Europe. While artificial intelligence (AI), and specifically Generative AI (GenAI) offer many opportunities to support market research, it also presents serious risks, including inaccurate or misleading information (hallucinations), (Western) bias, intellectual property and data protection issues and other unethical uses with potentially significant societal and environmental impacts.

CBI only allows the use of AI and GenAI tools as a supporting tool during the preparation of the CBI Market Studies. AI is allowed for specific tasks such as for generating ideas, structuring content, grammar and spelling checks, language editing, or summarising text. AI cannot replace the Contractor's own research, analysis, interpretation, conclusions or professional judgement. The Contractor remains fully responsible for the accuracy, quality and originality of all deliverables.

The Contractor must ensure that the use of AI complies with all applicable legislation and regulations, including the EU Artificial Intelligence Act, the General Data Protection Guidelines (GDPR), relevant Dutch government (RVO) AI guidelines, as well as other copyright and intellectual property legislation. The Contractor is not allowed to enter confidential, personal, or otherwise sensitive information into AI tools unless appropriate safeguard measures are in place.

All use of AI during the making process of a study will also have to be documented and delivered to CBI in a separate document (see template in Appendix 12: *CBI policy for AI use*), in line with the CBI content policy rules (also described in Appendix 12). If AI is used in the study, it will have to be specified at the end of the study by including the following statement: "This study has been written by [Name researcher/company] in cooperation with [Name(s)], and used GenAI for [describe purpose, e.g. grammar review, structure suggestions, language editing]".

CBI reserves the right to request revisions to the work or reject any deliverable that does not comply with these requirements. Given the rapid developments of AI technologies and regulation, CBI reserves the right to update its AI policy during the contracting period. The Contractor must comply with the most recent version of the CBI AI policy and is expected to remain informed about relevant developments in AI legislation during the contracting period.

For questions regarding the use of AI, the Contractor is advised to contact the CBI Programme Manager.

N. Diversity & inclusion

At CBI, we value diversity and inclusion as part of our work, including in our Market Intelligence studies. We highly encourage our suppliers to take principles of diversity and inclusion into their work. Suppliers are specifically encouraged to include a diverse and inclusive pool of perspectives and consulted individuals in their research, including diversity across geographical location, gender, age, and (socioeconomic) background. We expect suppliers to demonstrate their awareness of diversity and inclusion and reflect on these in their methodologies and output. With this ambition, CBI aims to deliver Market Intelligence that is valuable across a wide audience.

O. Working process (per sector)

<table>
<tr><th>Step</th><th>Activity</th></tr>
<tr><td>1. Kick-off</td><td>At the start of the contracting period, CBI invites the Market Research team for a kick-off meeting to introduce CBI (vision, mission, goals, CSR policy), the market intelligence team and clarify expectations and alignment of the assignment.</td></tr>
<tr><td>2. Request for Quotation</td><td>Every year the Contractor receives a Request for Quotation (RFQ) for the market studies assignment from the Netherlands Enterprise Agency. A work package specifies the deliverables and the planning. The work is usually divided into 2-4 batches of multiple studies.

The Contractor answers to this request with their quotation for the assignment, according to the RFQ and following the prices as tendered. The contractor gives a reaction to the proposed planning and batch division and has the opportunity to propose necessary changes.</td></tr>
<tr><td>3. Contracting</td><td>CBI contracts the Contractor for the research with a letter of contract that contains the agreed upon final planning and batch division.</td></tr>
<tr><td>4. Discussion session</td><td>During the discussion session, CBI and the Contractor discuss:
The selection and number of Market Intelligence studies to be written during the (upcoming) year.
The specific topics for the CBI Product Factsheet(s) or selected country/countries for the Country Factsheet(s).
Whether studies will be updated or completely written new.
The topic and date for the webinar.
determine the topics for any other deliverables (e.g. tailor-made studies, additional primary research, etc.) to be made.
In addition, CBI will share input from the CBI projects or other internal (strategic) changes within CBI (e.g. changes to the CBI focus countries, priorities etc).</td></tr>
<tr><td>5. Start of Research / Desk Research Phase</td><td>The contractor starts its desk research and the preparation of the field research. Secondary market research concerns desk research of statistical trade data, industry reports, legal texts, websites of companies, authorities, sector associations and certification bodies etc.</td></tr>
<tr><td>6. Interview planning</td><td>Before the delivery of the market studies, the contractor shares their interview planning for the field-research phase per batch with CBI, offering CBI the possibility to join in on one or two interviews. This will allow CBI to get first hand insight and interaction with the target group(s) and the interviewee the possibility to connect with CBI. CBI should be informed two weeks in advance of scheduled interviews.</td></tr>
<tr><td>7. Field Research Phase / End of Research</td><td>Primary research includes interviews with European/Dutch buyers, industry associations, sector experts, certification bodies, SME exporters and producer groups in low- and middle-income countries, etc. Other forms of primary research are for example: company and shop visits, trade fair visits or surveys (conducted by market researcher).

Per new studies a minimum of 3 interviews is conducted. For updated studies, a minimum of 2 interviews is conducted. For each batch, new interviews must be carried out.

After completing the interviews for the batch, the contractor shares interview notes or recordings with CBI and an actualised interview planning indicating which interviews really took place and at what time. The interview notes and the complete list of interviewees (full name, organisation, position) must be uploaded on PLEIO together with the <u>first draft of each batch</u>. The CBI MI programme manager will use this solely for verification. No personal information will be made public without prior permission.

In addition, for each batch the Contractor must upload on PLEIO the template in Appendix 12 on the usage of artificial Intelligence upon delivery of the first draft.</td></tr>
<tr><td>8. Proofreading Phase</td><td>A CBI contracted proofreader reviews the 1st draft of the studies, makes suggestions for changes using MS Word track changes, and the comment functionality, based on whether:
the research questions posed in the ToR for the specific studies are answered;
the content criteria mentioned in this ToR are met;
all other criteria mentioned in this ToR (writing, layout, use of charts, maps, visuals, interviews etc.) are met;
the research is conducted according to the method proposed by the contractor in the tender (or according to the otherwise agreed upon method);
if the criteria are not met, the proofreader may request additional research if needed.
duplicated or copied texts (from other CBI studies) are highlighted green with a comment from the contractor where the text has been taken from. The proofreader does not need to review this text again but needs to check if a good balance between new/updated vs copied text has been maintained.
The contractor processes or reacts on all feedback, and turns in a 2nd draft of the studies.</td></tr>
</table>

	• New and changed content between drafts are indicated to the proof-reader **making use of MS Word track changes.** For update studies, newly added content must also be highlighted yellow. CBI reviews the 2nd drafts, focusing on whether or not the comments on the previous draft have been sufficiently processed. • The proofreader deletes comments that are sufficiently addressed. If needed comments are clarified. Comments that are not 'solved' in a sufficient manner, remain for the final draft. The contractor can react to the comment, but may not delete it or click on resolved. The contractor processes or reacts on all remaining comments, and turns in the final drafts of the studies. • Studies are final approved by CBI after completion of the third correction round.
	→ **NOTE:** please use the following format for naming the different draft versions of studies: [year] _ [sector name] _ [type of study] _[subject] _ [new/update] _ [draft version] *Examples:* • 2027_apparel_PFS_denim_new_1st draft • 2027_FFV_Tips-to-do-business_update_1st draft • 2027_Outsourcing_Trends_new_2nd draft And save the documents in the appropriate folder as created by CBI on PLEIO. <u>Do not create folders yourself on PLEIO</u>. All visuals are uploaded in the visuals folder, and make use of a similar format as used above: [year] _ [sector name] _ [type of study_subject] _ [**figure number**] *Example:* • 2027_apparel_PFS_denim_figure 1 • 2027_FFV_Trends_figure 5 Make sure all visuals are of sufficient size and dpi for online publishing.
9. Invoicing	After final approval by CBI, the Contractor can turn in the invoice for work carried out, according to the requirements of the Netherlands Enterprise Agency.
10. Editing	CBI contracts professional editors to edit the CBI Market Studies. This editor only focuses on grammar correction, use of British English and use of numbers. The Contractor must be available to answer questions from the editor, including after the study has already been approved by CBI.
11. Publication	Studies will be formatted and published on the CBI website by CBI's content manager. The contractor must remain available to answer questions from the CBI content manager before publication. CBI will promote the studies through a mix of online and offline channels.
12. Promotion	Although most readers visit the studies as a result of organic search, CBI periodically invests in online promotion via such tools as Google Ads, and paid advertisement via social media. Furthermore, studies are promoted on CBI's own channels, such as the CBI news section on the website and an e-mail newsletter.
13. Evaluation	At the end of each year, an evaluation meeting takes place to review the work carried out during the year.

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