

Global Expansion Program Guidelines



Government
of South Australia

Department of
State Development

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Global Expansion Program grant process chart

Stage 1	Program is launched Department of State Development (DSD) publishes program guidelines on DSD website
	Submission of application Applicant prepares and submits an online application via DSD website in conjunction with the program guidelines
	DSD eligibility review DSD reviews application for completeness (all fields completed, supporting documentation attached etc.) and eligibility against program guidelines
	Eligibility outcome Eligible and Non-eligible applicants notified
	DSD panel assessment Independent assessment panel review shortlisted applications against assessment and weighting criteria
	Applicant approval Recommended applicants sent to DSD delegate for Grant Approval and progression to Stage 2
Stage 2	Business reviews by external contractor External professional service contractor/s appointed to provide business reviews to all stage 2 applicants consisting of advice on gaps to be addressed for increased export growth
	Action plan development Applicants work with allocated DSD case managers to develop a 12 - 18 month action plan to identify the activities and service providers to be engaged, to support and address gaps identified through business review
	Quotes for activities Approved applicants obtain financial quotes from service providers to deliver the activity in the action plan
	Approval of action plan DSD approves action plan, nominated service providers and quotes and prepares grant offer
Stage 3	Grant execution DSD executes grant and processes 1st payment
	Action plan implementation Approved applicants work with case managers to implement the action plan as described in the grant offer
	Grant offer milestones and reporting DSD works with applicant to undertake the milestones and reporting obligations of the grant offer including processing final payment
	Completion of grant Export outcomes reported, all expenditure reported, finance acquitted and grant finalised

This process may be updated or modified as needed.

1 The Program – Global Expansion Program



The South Australian Government Economic Statement recognises the need to increase the complexity and value-add of South Australia's services, technology and merchandise exports.

Growing the number of South Australian businesses exporting and the value of their exports is critical to building a smart, sustainable and inclusive economy. On average, companies that export generate more jobs, contribute more value-added to the economy, are more productive and pay higher wages when compared with non-exporting companies.

The Global Expansion Program (the Program) will focus on supporting South Australian business producing scalable and high value-added services, technologies and products to expand their international footprint.

The Program provides South Australian businesses with financial assistance, external business reviews and export advisory services to support growth in target sectors and target markets.

The objectives of the Program are to:

- Grow the value of innovative services, technologies, and products exported from South Australia
- Assist South Australian companies to implement their export strategies in existing and new markets to achieve an increase in export sales in the short or medium term
- Increase the number of South Australian companies exporting high value-added and innovative services, technologies and products
- Increase the number of South Australian companies pursuing growth through well-planned and sustainable export strategies.

1.1 Funding details

The South Australian Government has committed \$2 million over four years to deliver the Program. The Department of State Development (DSD) will hold competitive funding round(s) throughout the year, calling for applications from South Australian businesses meeting eligibility requirements.

The primary purpose of the Program is to support South Australian businesses to increase their export sales. DSD will prioritise businesses that can demonstrate the ability to secure export outcomes or in-market agreements within 12-18 months of funding approval.

Applicants recommended for the Program will undergo a business review, funded by DSD and delivered by an external professional service contractor. The purpose of the business review is to help determine applicant export capability and capacity, and to identify specific exports needs for achieving long-term sustainable growth.

Following the business review process, applicants will be required to develop an action plan with support from a DSD case manager. The action plan will be developed in response to the Business Review and the applicant's own export ambitions. The action plan will outline:

- Strategies and activities to help drive export growth
- How program funding will be used
- Proposed third party service providers engaged to execute the action plan.

Applicants will be required to obtain quotes from third party service providers to execute their action plan prior to funding approval. Funding of up to \$50,000 is available for recommended applications.

Applicants should note that expenses must be incurred, paid for and undertaken during the 12-month funding period, which commences on the date a grant offer is executed by both parties. **Expenses incurred prior to the start of the grant agreement are ineligible.**

This Program is fully funded by the South Australian Government and no financial co-contribution is required from approved applicants.

DSD accepts no liability for any loss arising from the actions of an applicant who assumes any level of payment. Applicants are advised not plan or make any financial commitments which assumes such payment.

1.2 DSD case managers

Successful applicants will be appointed a case manager to provide guidance and support throughout the Program. DSD's case managers will help applicants develop their action plan and provide connections with potential third-party service providers to help with implementing the action plan. The case manager will regularly check-in with participants throughout the grant period to share their specialist export knowledge and provide local and international connections through DSD's and Austrade's global offices and networks.

1.3 Key dates

Key dates for each funding round of the GEP will be available to view on the DSD's website <https://statedevelopment.sa.gov.au/export-trade-and-investment/global-expansion-program>.

Key dates will include:

- Opening date for applications
- Closing date for applications
- Notification of eligibility
- Notification of successful/unsuccessful applications.

It is important to note that whilst DSD aims to ensure key dates are met, there are times where dates may be subject to change. Interested businesses should contact the Trade Grant team to discuss any questions around dates.

The Trade Grant team can be contacted during business hours on (08) 7085 1533 or at DSD.GEP@sa.ov.au

2 Eligibility criteria

Applicants will be required to demonstrate how they fall into one of the following export categories:

- **Infrequent Exporter:** Sporadic or opportunistic export history with the ambition of achieving sustainable and ongoing international growth
- **New Market Entry:** Exporting well in existing market(s) but have a clear specialised barriers to entry in new markets
- **In-Country Focus:** Exporters that lack in-country partnerships, expertise and knowledge
- **New Exporter:** Business that may have maximised domestic markets and are seeking to execute an international growth strategy.

Applications that do not meet the eligibility will not proceed to the assessment panel and will be notified of the outcome at the completion of the assessment process. Refer to section 5 for further information.

If an applicant has previously received funding from the South Australian Government for the same project (or a stage of the project), the applicant is not eligible for further funding from the Program.

An applicant is permitted to apply for a different or subsequent stage of the project having demonstrated progress and acquittal of previous funding from the South Australian Government.

2.1 Eligible applicant

To be eligible, an applicant must:

- Have an active South Australian registered ABN or be able to demonstrate significant operations in South Australia
- Be registered for GST
- Have generated revenue in South Australia for 24 months or more from date of application (evidence is required, refer to section 4.1 for more information)
- Have an exportable service or product for an identified market(s)
- Produce the service or product primarily in South Australia under their own brand (this program is not for aggregators, traders or businesses who sell services or export on behalf of businesses)
- Be from one of the following industry priority sectors:
 - Defence and space
 - Health and medical
 - Renewables, energy and green economy
 - Creative industries
 - Food, wine and agribusiness
 - Critical and enabling technologies
- Be currently exporting or considered export-ready
- Have met all previous South Australian Government grant obligations
- Not be a previous grant recipient of the Program in the last three years.

2.2 Eligible expenditure/activity

Eligible activities for the Program that help address export challenge barriers include but are not limited to:

- Development of an export plan
- Development of specific market entry or growth plan, including market research to determine target customers and channels in new markets
- Advice on market dynamics, logistic/freight cost analysis, structuring and credit risk advice
- Marketing and communications strategy, including digital marketing capability and overcoming digital deficits
- Product or service development, testing or optimisation (e.g. customer insights, packaging, regulations) for targeted customers/segments
- Overcoming jurisdictional barriers to trade (e.g. regulations, documentation, government licenses, taxes, legal, etc.)
- Registration of IP rights relating to trademarking through the Chinese Trademark Office (CTMO) or through World Intellectual Property Office (WIPO) processes, domain name registration, translation, securing social media handles
- Cultural awareness advice relating to the target customers
- Connections and networking opportunities to key buyers/influencers both face-to-face and through online platforms
- Exhibition costs for international tradeshow or events (note flights, accommodation and travel other expenses are not eligible).

The type of services to be funded will be shaped and tailored to individual business needs through the action plan process. If successful for the Program applicants must work with the DSD's nominated external professional service consultants to undertake a business review, complete an action plan and obtain quotes for the activities that you propose the Program to fund.

Successful applicants will be appointed with a DSD case manager to assist with action plan development and selecting appropriate service provider(s).

2.3 Ineligible expenditure/activity

Ineligible expenditure includes, but is not limited to, the following:

- Services provided by existing providers to the business (e.g. accountants, lawyers, existing business advisors for existing activities, etc.)
- Payments to related entities of your organisation
- Expenditure on assets/capital items
- Staff wages
- Costs of routine business export activities (e.g. servicing customers or supporting supply chain partners in existing export markets)

- Services that are not direct export support services (e.g. routine engineering services on plant and equipment, IT support, export training or other support already provided through other export support programs)
- Funded activities currently or previously received that meet the eligibility for support under Austrade's Export Market Development Grant (EMDG)
- Expenses incurred by a related business entity
- Cost that are paid, subsidised or reimbursed by other government programs or initiatives
- Commissions, incentives or discounts
- Payment of an Australian tax, levy or charge
- Grant application or administration costs
- Flights, accommodation, travel and other expenses including meals, per diems and transport costs including taxis, Ubers or other rideshare applications
- Expenses incurred by non-approved activity, quotes and service providers listed in the action plan
- Expenses incurred outside of the grant offer funding period.

3 Assessment process criteria

Applications will be assessed by an independent assessment panel using the scoring criteria outlined in the below table. Applications will be ranked by the points received by the assessment panel - 75 points is the maximum score than an application can receive (max 25 points per application x3 panel members = 75 points).

The applicant must score at least 52 out of 75 points **and** rank among the top 15 applications to proceed to the 'due diligence' process conducted by the South Australian Government Financing Authority, followed by final approval.

Applications are subject to a competitive process and final decisions on eligibility and funding will rest with DSD. Applicants should note there is no guarantee that an offer of funding will be made.

3.1 Scoring criteria

Application responses will be assessed on the following criteria:

Assessment criteria	Maximum points
Complexity and innovation in the product/service being exported	5
Unique Selling Proposition and competitive advantage in target market(s)	5
Demonstrated understanding of export capabilities, challenges and opportunities	5
Demonstrated commitment to export	5
Potential economic impact and demonstrated benefits to South Australian exports and job opportunities	5
Financial position	Assessment only
Total	25

4 Process

The diagram below shows the high-level stages in the application and selection process.



4.1 Application and eligibility assessment

Applications are to be submitted through DSD's online grants portal in accordance with the instructions provided on the website and received by the specified date.

DSD will review all submitted applications and reply within 10 business days to confirm if eligibility has been achieved. If eligibility cannot be determined, DSD may request additional information.

Applicants are required to submit financial statements for the most recent two full financial years. The financial statements **MUST** be signed and prepared in accordance with Australian Accounting Standards and include a balance sheet and profit and loss statement.

A current cash flow projection can be submitted in addition to the financial reports if needed.

Financial documents must support your application in terms of turnover and generation of sales revenue for a minimum of 24 months to meet the program eligibility.

It is the responsibility of the applicant to ensure their application is completed in full and correct. Intentionally giving false or misleading information is a serious offence. DSD will not accept responsibility for any misunderstanding arising from the failure by an applicant to comply with the guidelines or arising from any discrepancies.

Incomplete applications or applications received after the published closing date will not be considered.

DSD may consider extending the closing date for an applicant under extenuating circumstances, provided an alternative timeframe has been agreed in writing, prior to the closing date.

Should the delay of an application submission be the result of any issues with DSD's information and communication technology (the portal), a request for extension will be approved for those applicants who have contacted DSD.

Applicants can contact DSD by submitting a formal request for an extension of time to lodge, by emailing the Grant Program Manager: DSD.GEP@sa.gov.au

Applicants experiencing difficulties accessing or using the online application portal can request assistance by contacting the GEP team by emailing DSD.GEP@sa.gov.au or calling (08) 7085 1533 prior to the application closing date.

4.2 Panel review and assessment

An independent assessment panel will shortlist recommended businesses to progress to the business review stage. The panel will shortlist businesses by scoring and ranking applications against the selection criteria. The assessment panel will be led by the Manager Trade Grants Programs as a non-voting chair and will include three representatives with export knowledge and expertise.

All members of the assessment panel will complete conflict of interest declarations prior to assessing applications.

4.3 South Australian Financing Authority (SAFA) review

Applicant financial position will be reviewed by the South Australian Government Financial Authority (SAFA). SAFA will review the finance information provided and perform other due diligence checks as part of the assessment process.

Applications will not be considered if the correct financial information is not provided with the application.

4.4 Approval notification

All applicants will be notified in writing of the outcome of their applications. Non eligible applicants will receive notification within 10 working days of the closing date. Successful/unsuccessful applicants will be notified within 6-8 weeks of the closing date.

Unsuccessful applicants can apply for future rounds of funding under the Program, if eligibility has been met.

Applicants will be required to keep the outcome of the decision confidential unless approved otherwise by DSD and/or an announcement is made by the Minister and/or DSD.

Feedback may be sought by the applicant from DSD by contacting DSD.GEP@sa.gov.au

4.5 Business review

Applicants recommended for the Program will undergo a business review by an external professional service contractor. The business review will be funded by DSD. The purpose of the business review is to help determine the applicants' export capability and capacity and identify specific exports needs for achieving long-term sustainable growth.

The business review will be completed by an external professional service contractor and all information provided will be treated as commercial in confidence.

4.6 Action plan

Following the business review process, applicants will be required to develop an action plan with support from a case manager. The action plan will be developed in response to the business review and the applicant's own export ambitions. The action plan will outline:

- Strategies and activities to help drive export growth
- How program funding will be used
- Proposed third party service providers engaged to execute the action plan.

Applicants will be required to obtain quotes from third party service providers to execute their action plan prior to funding approval. Funding of up to \$50,000 is available for recommended applications, however the final grant amount will be determined based on the total value of quotes received.

Once the applicant's action plan is approved, DSD will provide a grant offer outlining the condition of funding, reporting requirements and other grant obligations. Applicants should await confirmation from DSD before purchase/contracting can commence.

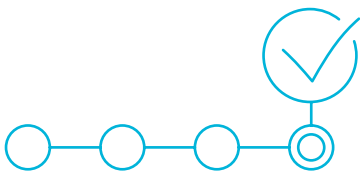
4.7 Contract and payments

To receive grant payments, an approved applicant will be required to sign a contract in the form of a grant agreement with the South Australian Government that stipulates all deliverable and reporting obligations and all terms and conditions under which the grant funding is provided.

An approved applicant cannot claim grant payments until a formal agreement (contract) is executed by both parties, which includes the applicant and a South Australian Government representative.

The applicant will be required to return the executed grant offer by the specified date in the approval letter, otherwise the offer will lapse.

Payments will be provided at the times and in the manner specified in the grant offer. A payment schedule will be determined based on the proposed project milestones. The first payment is made in advance to allow coverage of expenses related to the milestones. The final payment is made in arrears once a project completion report is validated.



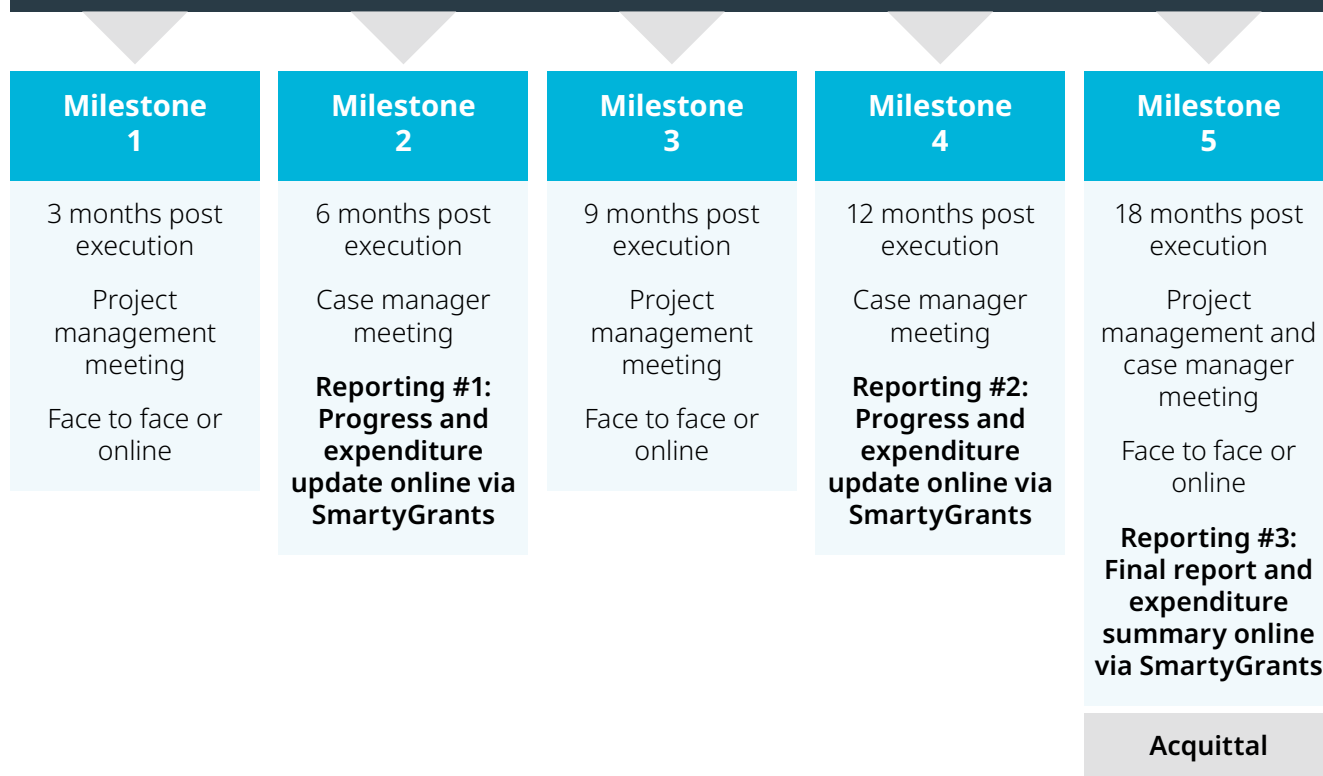
5 Management of grant offer

Grant offers will have a 12-month funding period (to expend the grant) with an 18-month grant period (to finalise all grant obligations) that will commence once the offer has been executed and accepted by the applicant.

The approved action plan will form part of the grant agreement and the application will be required to report on progress against the action plan and be available for quarterly project management/case management meetings throughout the grant period.

The reporting requirements are a key obligation of the grant funding. It is expected that upon execution of the grant, recipients fully understand and commit to achieving all reporting requirements. These obligations must be completed using DSD's online grant management platform - SmartyGrants.

Client and project management milestones



GEP grant recipients must retain copies of all valid tax invoices together with evidence (including but not limited to EFT remittance or bank statements) of payment paid and submit to DSD as a requirement of the expenditure reporting milestones. This evidence will validate the total grant expenditure.

Non-compliance of the grant purpose, conditions and reporting may result in the return of all or part of the grant funding provided.

5.1 Grant payments

To receive grant funds, a successful applicant must enter into a grant agreement with the South Australian Government.

The first payment of 50% of the approved grant amount will be paid upon:

- The execution of a grant agreement by both parties

The final payment of up to 50% of the grant (based on total grant expenditure) will be paid at the end of the funding period upon:

- Submission and acceptance of the action plan
- Submission and acceptance of all milestones and reporting obligations listed in the grant agreement

5.2 Reporting obligations

Successful applicants are required to submit detailed reports, including a **mandatory** progress report at both the 6-month and 12-month marks, as well as a final report at the end of the grant period. These reports are to thoroughly document all activities undertaken, grant expenditure, outcomes achieved, and the impact on export sales. All reports will be submitted through the grant portal.

In addition, applicants **must** maintain and submit copies of all invoices, receipts, and financial records related to the grant. **These documents are not optional** and are to be included with each progress and final report.

The Trade Grant team will provide successful applicants with information and ongoing support to correctly undertake and complete the reporting obligations.

Non-compliance with these reporting and documentation requirements will impact future funding opportunities and may result in penalties. **Strict adherence** to these obligations is essential for continued grant eligibility.

5.3 Grant agreement variations

DSD understands that external factors and uncertain nature of the economy can impact on a business and/or project.

Should any significant changes occur to the applicant, their financial position, or the nature and/or scope of the project, the applicant should immediately contact the Trade Grant team to discuss if a grant variation can be accommodated. Any variation will be at the discretion of DSD.

If the grant has terminated or expired (i.e. the expiry date has passed), then a grant variation can no longer occur.

6 Additional information

6.1 Announcement of grant

By applying for funding under this program, if successful, the applicant consents to general information being publicly disclosed by the Minister in an official media release and published on the DSD's website and social media platforms. Applicants should ensure that information contained in the proposed project title and summary description is not commercially sensitive or would not, if released, compromise requirements for confidentiality including protection of intellectual property.

Published details may include but are not limited to:

- The business name of the successful applicant
- The title and summary description of the project
- The amount of the grant funding awarded.

GEP recipients may also be asked to participate in promotional activities such as videos, good news stories, interviews and surveys.

6.2 Freedom of information

Applicants should be aware that all documents in the possession of the government, including those about this grant opportunity, are subject to the Freedom of Information Act 1991 (SA) (FOI Act). Information submitted in applications and all related correspondence, attachments and other documents may be made publicly available under the FOI Act.

The FOI Act gives members of the public a legally enforceable right to access documents – subject to certain exemptions – held by government agencies, local government authorities, statutory and regulatory bodies and South Australian universities.

6.3 Privacy and information policy

DSD complies with the South Australian Government's Information Privacy Principles Instruction. DSD collects information (including personal information) as reasonably necessary for the purposes and functions of:

- Administering our grants and funding programs
- Keeping you informed about the program, relevant upcoming events, grant funding initiatives and outcomes, our services, special events or client feedback surveys, as well as our activities in general
- Improving our websites and other services.

The collection and use of information extends to use of such information by the Minister for the purposes as outlined above.

Any information contained in or relating to an application, including information identified by an applicant as confidential information for the purposes of applying for funding under this Program, may be disclosed by DSD, or used by DSD:

- To its employees, advisers or third parties in order to manage the Program (including but not limited to), for the purpose s of evaluating and assessing the application
- For the purpose of verifying other funding income for your project – DSD may provide information to other agencies nominated in your application
- For due diligence, monitoring, reporting and audit purposes
- Within the government where this serves the legitimate interest of DSD
- In response to a request by a House or Committee of the Parliament of the Commonwealth of Australia or South Australia
- For training, systems testing and process improvement, including compiling statistics and reports
- If an application is successful, for promotion of project activities and outcomes
- Where information is authorised or required by law to be disclosed
- Where the information is already in the public domain.

It is the intent of the government to be transparent with regards to financial assistance provided to industry. The government intends to publicly disclose details of all financial instance provided by the government for this program (which will include, but is not limited to, the name of the successful applicant, details of the project activity and amount of grant funding).

6.4 Disclaimer

No responsibility for any loss or damage caused by reliance on any of the information or advice provided by or on behalf of the state of South Australia, or for any loss or damage arising from acts or omissions made, is accepted by the state of South Australia, their officers, servants or agents.

6.5 Conflict of interest

Any conflicts of interest could affect the performance of the grant. There may be a conflict of interest, or perceived conflict of interest, if DSD staff, you and/or any of your personnel:

- Has a professional, commercial or personal relationship with a party who is able to influence the application and final selection process, such as a DSD officer
- Has a relationship with or in an organisation which is likely to interfere with or restrict the applicants from carrying out the proposed activities fairly and independently
- Has a relationship with, or interest in, an organisation from which they will receive personal gain because the organisation receives funding under the Program.

Applicants will be asked to declare, as part of your application, any perceived or existing conflicts of interest or that, to the best of your knowledge, there is no conflict of interest.

If you later identify that there is an actual, apparent or potential conflict of interest or that one might arise in relation to a grant application, you must inform DSD in writing immediately.

DSD reserves the right to reject an application if it is not satisfied that arrangements are in place to address or manage a perceived or actual conflict of interest.

DSD will maintain a register of notified conflicts of interest throughout the application and assessment process. The register will list applicants' conflicts of interest and those of the DSD assessment panel and authority officers. Those involved in the assessment process must sign and keep up-to-date conflict of interest declarations to ensure identification and management of any conflicts of interest.

7 Reservation of rights

DSD reserves the right to amend these guidelines and application terms as required.

If any information in an application or report (including acquittal) is found to be false or misleading, or grants are not used pursuant to the terms of funding, the grant will be repayable on demand.

8 Enquiries and support

For more information, please visit the DSD website

<https://statedevelopment.sa.gov.au/export-trade-and-investment/global-expansion-program>

The Trade Grant team can be contacted during business hours on (08) 7085 1533 or at DSD.GEP@sa.ov.au



Definitions

Department means the Department of State Development.

DSD case manager means advisers supporting businesses to develop export growth plans, assess market selection, entry strategies, grants and assistance information and connect them with international opportunities through South Australia's global offices and Austrade's TradeStart network.

Expenditure means eligible items approved to be funded by the Program and included in the grantee's action plan. Expenditure is acquitted by providing a paid tax invoice with evidence from the grantee that the invoice was paid in full.

Funding period means 12 months from the date of execution of the grant offer.

Government means the South Australian Government unless specified otherwise.

Grant period means 18 months from the date of execution of the grant offer.

High value goods and services means goods or services involving high value adding activities, technological solutions, advanced production or significant innovation.

Minister means the Minister for Trade and Investment.

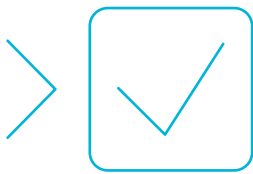
Produced primarily in South Australia means the goods or services primarily made or designed in South Australia.

Professional services contractor means the contractors appointed by the department to undertake the business reviews.

Program means Global Expansion Program.

Service providers means a third-party provider engaged by successful applicants and listed in the action plan.

Trade Grant team means the Program Manager and Project Officer managing the Program.



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**Government
of South Australia**

Department of
State Development