

## Contact Questions

### Contact Types:

Primary  
 Administrative  
 Alternate  
 Purchaser  
 Recipient/End User  
 Requestor  
 Decision Maker  
 President/CEO  
 Auditors  
 Shareholders  
 Board of Directors  
 International Marketing  
 Manager  
 Banker  
 In-country representative  
 Mission sponsor  
 Principal US Subcontractors

### Organization Types:

Client Organization  
 Associate organizations  
 Division or Subsidiaries  
 Ownership/Parent Organization  
 Bank  
 Corporate  
 Headquarters  
 Sponsoring organization

### Organization Type:

### Data:

Salutation  
 First Name  
 Last Name  
 Title  
 Telephone  
 Fax  
 Email  
 Cell/Mobile Number  
 User ID and Password

### Data:

Name  
 Address 1  
 Address 2  
 City  
 State  
 Zip code  
 Website  
 Telephone

### Data:

Manufacturer  
 Service provider  
 Educational Institution  
 Franchisor (Master, Unit)

### Client Type:

### Data:

US organization  
 Foreign organization  
 Student/General Public  
 Researcher  
 Other

### General information:

### Data:

Name and contact info for company official in charge of international sales/marketing

Name and contact information for company official in charge of financing  
If this company is a subsidiary, the parent company(ies) and any controlling individual(s)

Are you currently working with a US Export Assistance Center, Dept of Commerce, US Embassy or other government organization

**Domestic only**

Product/service contain 51 percent US content

Share information with other TPCC agencies

**International only**

Agent/Rep/Distributor

Importer

Area Developer

Delegation

**Organization Questions**

**Organization Types:**

- Client Organization
- Associate organizations
- Division or Subsidiaries
- Ownership/Parent Organization
- Bank

**Data:**

- Number of employees
- Ownership percentage
- Securities Exchange Commission affiliation/reporting
- Organization description
- Annual sales
- Percent of revenue generated through exports
- Year organization established
- Federal Tax ID number or EIN
- Trade License Number
- NAICS code/category
- HS code
- IRS waiver form
- ISO 9000 registered
- TQM/Six Sigma certified
- Working towards certification
- Anticipated year to complete certification
- Product/service description
- Preferred business language
- Foreign-language speaking staff
- Staff with applicable qualifications to work on foreign enterprise projects
- Chamber registration number

Safety record  
Financial data information  
Capital structure  
Countries in which sales are made in order of importance  
Under which state's law is your organization organized  
Is your company register with the state or Commonwealth and provide name  
Duns and Bradstreet number  
Not counting your profit margin, what percent of the cost to your foreign buyer derives from US sources  
Agreement concerning bribery and corporate policy prohibiting bribery  
Certification  
Who are your major competitors  
List the most important end-users or end-user industries for this product  
Export Control Classification Code  
Does the product require any special technical support or after-sales service  
Is your company willing to modify its product to meet foreign standards  
Does the product have patent/trademark/copyright registration  
Describe product/service competitive advantages, unique selling proposition, applications, and unique features that differentiate your product from competition  
Is product/service currently being sold in US  
Benefits/unique features  
US good provided by your company  
List name and location of other companies  
US services provided by your company  
What is your organization's primary function the XXX industry  
If you don't manufacture the product, provide name and location of manufacturers' headquarters  
If not manufacturer, does your firm have documented sales or distribution authorization for the product  
Please list end-users and/or industries that use this product  
Will patent/trademark/copyright protection abroad be necessary  
Can the company promptly fill any new export orders from its present inventory  
How is your product typically distributed and marketed in the US and other countries  
Product/service wishing to export  
Is the company's product sourced/produced entirely in the US?  
Does US content represent at least 51% of the value of the finished product?  
How would you describe your firm's top management commitment to supporting export activities?  
Does your firm have a US marketing plan?  
If no, does your company need help developing one?  
What are the company's international sales objectives for the next 3 years (as % of total sales)  
What prompted your company to export?  
How is your company planning to develop sales in target markets?  
What domestic channels of distribution does you company employ?  
Number of employees whose jobs are attributable to exporting:  
Export stats: Year, total sales, export sales, percent exports to total sales, income from licensing agreements.  
Name key exporting problems

Name factors that could inhibit international sales of your company or company's products/services.

What specific innovations can you offer to foreign enterprise?

Trade references (name/product, country, year, volume)

If export rights are limited to a number of countries, please list countries.

Referral OIO, ODO, IBP, Trade Missions, Partner, CS Event

Under which state's laws is your organization organized

Are you the rights holder or do you have the legal right to sell or distribute the export for which you are asking for assistance in the foreign market or markets in question?

Provide relevant industrial economic sector(s)

Provide overall economic value of the project or transaction

Value and detailed description of all projected US export content

States from which the projected US export content will be sources

How will this project/transaction affect the environment?

Type of educational institution

Total number of undergraduate/graduate students

Accrediting body

Number of international students on campus

Number of international students from the country of interest

List degrees offered

Brief description of your educational institution

Describe the programs/degrees and any unique programs or characteristics

Do you have the following available for international students (check all that apply)

Minimum TOFEL score required

Do you accept IELTS?

Do you have an international marketing plan?

What international marketing and promotional methods have you used?

Have you ever participated in any of the following CS services (check all that apply)?

What type of contacts are you seeking (check all that apply)?

Describe any preferences, qualifications, servicing capabilities, requirements, or pre-qualifications that ideal prospects must have, such as English language ability, etc.

Please List any specific educational institutions, associations, agents, etc., that you would like us to contact.

Please List any specific educational institutions, associations, agents, etc., that we should not contact.

If setting up an overseas campus, please describe the financial benefits to the US.

Is your institution seeking representation on an exclusive basis in this market?

Do you have an exclusive arrangement with your current partner?

Is your representative aware that you are seeking additional representation?

Desired Locations/Cities

Additional Services (please note any other assistance that would be required)

If academia, please check which best describes you: Faculty/Business;

Faculty/Education; Faculty/Other; Student/Business; Student/Education;

Student/Other

Exporting Experience/Information

Number of years exporting

Products exported

### Exporter Types

New-to-exporting

New-to-market

## Increase-to-market

Annual exports (% of total sales)

Novice, Intermediate, Successful

Countries exporting to (please provide the names of the countries to which you exported and the approximate dollar value of the organization's worldwide exports for the last two calendar years)

Are you currently selling your product or service online to consumers in overseas countries?

Please list the ecommerce sales channels in which you sell your products/services online:

Countries of interest

Does the product/service to be exported require any special technical support of after-sales service?

Have you inquired about IP requirements in foreign markets?

Which international distribution channels does your company currently use?

Provide additional information that CS should be aware of to fully understand your company and its requirements.

Are there specific export issues that you would like to discuss?

Not counting your profit margin, what percent of the cost to your foreign buyer derives from US sources?

Does the product/service to be exported require any special technical support of after-sales service?

Do you have access to capital and can that money be dedicated to developing market share in one or more foreign countries?

Do you have enough excess capacity to handle foreign sales orders?

Do you have the resources in your company to learn about and comply with US export controls, foreign government import controls, foreign government regulations, and foreign cultural and business norms?

Have you exported in the past two years and, if so, was it based on a deliberate plan or strategy?

Company Export Profile

How did you learn about this program?

What promotional methods does your company use domestically?

What type(s) of information were you looking for when visiting Export.gov

How would you rate the overall usability of Export.gov?

How would you change or improve the site?

What enhancements would make it more useful?

Did you know that you could sign-up for e-mail updates from Export.gov?

Have you signed-up for any of our e-mail updates?

How would you rate the overall usefulness of our e-mail updates?

How could we make our e-mail updates more useful to you?

How did you find out about this event: e-mail, media; printed press; website; other

Do you have (foreign language)-speaking staff members with applicable qualifications that could work on foreign enterprise projects

Other services or activities

US goods provided by your company

What markets/product categories does your organization represent or plan to represent in the (industry name) industry? Consumer Electronics: Audio; Emerging Technology; Automotive Electronics; Entertainment/Content; Computer Hardware & Software; Connected Home; Lifestyle Electronics, Content Distribution;

**Marketing Client Types**

US exporters

Researcher

Student

General population

Telecomm./Infrastructure; Digital Health and Fitness; Video; Digital Imaging/Photography; Wireless & Wireless Devices; Electronic Gaming; Other (Industry category names and subcategories selected via radio buttons change based on industry)

What is your organization's primary function in the (industry name) industry?  
Consumer Electronics: Buying Organization; Government; Services; Industry Organization; IT/MIS; Finance & Investment (Organization primary functions, category names and subcategories selected via radio buttons change based on industry)

Associated Companies/Division or Subsidiaries

What markets/product categories does your organization represent or plan to represent in the (industry name) industry? Consumer Electronics: Audio; Emerging Technology; Automotive Electronics; Entertainment/Content; Computer Hardware & Software; Connected Home; Lifestyle Electronics, Content Distribution; Telecomm./Infrastructure; Digital Health and Fitness; Video; Digital Imaging/Photography; Wireless & Wireless Devices; Electronic Gaming; Other (Industry category names and subcategories selected via radio buttons change based on industry)

What is your organization's primary function in the (industry name) industry?  
Consumer Electronics: Buying Organization; Government; Services; Industry Organization; IT/MIS; Finance & Investment (Organization primary functions, category names and subcategories selected via radio buttons change based on industry)

Trade license number

BSP categories

Additional BSP listings

Authorization of overseas post to disclose name of client to the target company/individual

Organization's objective

Product/service wishing to import

What type of business contacts are you seeking?

Is your firm seeking representation on an exclusive basis in this market?

Describe any preference, technical qualifications, servicing capabilities, requirements, or pre-qualifications that ideal prospects must have.

Describe any special features of your company's operations, interests or objectives in the target market that can help us identify potential business partners.

Is your company represented in the country/region?

If yes, is this arrangement exclusive?

Is your representative/partner aware you are seeking additional representation?

List the most important end-users or end-user industries for this product

How is your product typically distributed and marketed in other countries?

Firms' objective to import: (Choose all that apply)

What is the outcome or result you expect to accomplish by working with CS?

What new markets are you targeting to expand future sales?

List priority countries of most importance to you.

For each market you have selected above, please specify questions/topics you would like to discuss with the Commercial Specialists

The U.S Commercial Service has offices at US Embassies/Consulates in 82 countries. Can we be of assistance in any other markets?

Are there any specific companies, or types of companies, you would like us to contact? If so, please name them.

Are there specific companies you would not like us to contact? If so, please name them.

If applicable, please provide the necessary contact information of your current representative/partner:

Short Business Service Provider Description

Complete Business Service Provider Description

Description of company/products/services/objectives

Benefits/unique features

If you do not manufacture the product, provide name and location of manufacturer's headquarters

If not the manufacturer, does your firm have documented sales or distribution authorization for the product?

Please list end users and/or industries that use this product

Describe product/services competitive advantages, unique selling proposition, applications, and unique features that differentiate your product from competition.

Who are your major competitors?

List the most important end-users or end-user industries for this product

HS Code

Import Control Classification Code

Does the product require any special technical support or after-sales service?

Is your company willing to modify its product to meet foreign standards?

Does the product have patent/trademark/copyright registration?

Will patent/trademark/copyright protection abroad be necessary?

Can the company promptly fill any new import orders from its present inventory?

Number of years importing

Challenged, Mixed effective, effective

Have you previously tried to import from the U.S.?

Are you looking for representation in <country>?

Does the product/service to be exported require any special technical support or after-sales service?

Discuss Intellectual Property:

Which international distribution channels does your company currently use?  
Provide additional information that CS should be aware of to fully understand your company and its requirements  
Are there specific import issues that you would like to discuss?  
How would you describe your firm's top management commitment to supporting import activities?  
Does your firm have an international marketing plan?  
If no, does your company need help developing one?  
What are the company's international sales objectives for the next 3 years (as % of total sales)  
What prompted your company to import?  
How is your company planning to develop sales in target markets?  
Name factors that could inhibit international sales of your company  
What specific innovations can you offer to (foreign enterprise)?  
Trade references (name/product, country, year, volume)  
If import rights are limited to a number of countries, please list countries  
How did you learn about this program?  
What promotional methods does your company use domestically?  
What type(s) of information were you looking for when visiting Export.gov  
How would you rate the overall usability of Export.gov  
How would you change or improve the site? What enhancements would make it more useful?  
Did you know that you could sign up for e-mail updates from Export.gov?  
Have you signed up for any of our e-mail updates?  
How would you rate the overall usefulness of our e-mail updates?  
How could we make our e-mail updates more useful to you?  
How effective is your company with the following activities: Conducting market research; developing business plans; marketing/selling internationally/ finding business partners; protecting intellectual property; ensuring compliance with US or foreign laws; managing payment/financing; shipping/preparing export documentation; ensuring sufficient production capacity.

## Events & Activities Questions

### Events & Activities

Organization's objective

What type of business contacts are you seeking?

Is your firm seeking representation on an exclusive basis in this market?

Describe any preference, technical qualification, servicing capabilities, requirements, or pre-qualifications that ideal prospects must have.

Describe any special features of your company's operation, interests or objectives in the target market that can help us identify potential business partners.

Is your company currently represented in the country/region?

If yes, is this arrangement exclusive?



Is your representative/partner aware you are seeking additional representation?

What is your organization's objective to export?

What is the outcome or result you expect to accomplish by working with CS?

Do you currently sell online to overseas consumers?

Have you done website search engine optimization (SEO) to your online promotional content in advance of this event?

What new markets are you targeting to expand future sales?

Potential services: Market Research, Gold Key Service, International Company Profile, Advocacy, etc.

Are there any specific companies, or types of companies, you would like us to contact?

If so, please name them.

Are there specific companies you would not like us to contact?

If applicable, please provide the necessary contact information of your current representative/partner.

Business Service Provider categories

Additional Business Service Provider listings

authorization of international posts to disclose name of client to the target company/individual

Event name and date

Event location

Booth number at show

Name of building and street address

Name of fair grounds or other location which event will occupy

Attach authority to occupy event site

Attach license or permit to operate the event

Date event opens

Date event closes

How is the event financed (state whether financed wholly by event operator or if supported or underwritten financially in whole or in part by other organizations. List organizations and financial obligation of each, including chambers of commerce, associations, business firms, city, state, or other government organizations).

If no license or permit is required, please indicate this.

Person(s) attending show

Contact Titles and names at show

What are your business objectives for attending (Name of trade show).

Type of export counseling desired.

International business in which your company is interested.

Where are you most interested in marketing your product?

Would you like a free subscription to Commercial News USA?

Desired dates for services

Alternate dates

Desired locations

Additional services (needed/requested)

How interested are you in establishing a business connection with (name of organization) for export sales to (location)?

Would you be able to establish a reliable supply chain to (organization)

Explain advantages you can provide

Describe the event in which the USG official is to participant (e.g., site visit, announcement, ribbon-cutting, business agreement signing).

Identify all foreign and domestic entities involved, including ownership and control and role of each entity in the project. Entity/ownership, percent ownership of this project.

Please identify decision makers for this event (Name, title, organization).

Describe role of foreign business partner (s) (i. e. JV, etc)

Provide name (s) address(es) and CEOs of foreign business partner or buyers

What if any agreements/approvals have preciously occurred in connection with this project?

What is your latest information on the status of this event?

What additional actions must occur before the event can materialize (e.g., financing needs to be secured, permits obtained, Ministry approval, etc.)?

List all signatories for any agreements to be witness (name, title, organization)

Please describe the legal nature and impact of any document that will be signed.

A draft press release from your company announcing the event.

Specific points you would like the US government official to highlight regarding the event.

Are you a member of the Industry Business Association/Club or Chamber of Commerce?

Brief description of current business

If you are an exhibitor at (event name), with is your booth number?

Basic history or description of show.

Specify product categories within this fair.

Number of exhibitors/participants (US and others) expected

Number of visitors expected

If government, please check which best describes you:

federal, state, local

Please provide a description of your event.

Outline your goals and objectives.

Indicate names of VIP leaders, if appropriate.

Proposed itinerary. Please give as much detail as possible.

Services/assistance requested from the post if status in approved (e.g., one-on-one business appoints, plant visits, translators, reception, hotel and transportation arrangements.

Product categories/industries to be promoted.

Target date of advance trip, name of advance officer.

List any specific organizations, from the private and public sectors, with whom you know you, wish to meet.

Outline of promotional campaign to be conducted in recruiting mission (e.g., mailing, fax campaign, brochure distribution at other trade events, radio spots).

Be as specific as possible and include target dates, when available.

Deadline for accepting applications from participants.

Proof, such as a copy of letter of invitation, that your mission has a host organization in countries that require such as arrangement (e. g., China).

Specify any need for special space and/or equipment for audiovisual presentations or technical programs.

Please rank organization's top three objectives in participating in this trade mission (1=highest, 3=lowest).

Choices are: finding a sales representative, finding licenses, finding joint venture partners, exposure to new business prospects, product testing/market research, immediate sales, finding a distributor, government meetings, other

Please provide a brief description of how organization's participation is consistent with the goals and objectives of this mission, as set forth in the accompanying mission statement.

Organization may provide any information that it considers relevant to the purpose of the trade mission regarding diversity and/or traditional under-representation in business.

Application Information: Type of Application Choices: E Award for Exports; E Award for Export Service; E Star Award for Exports; E Star Award for Export Service

E Star Applicants: Year of previous E Award receipt:

Company/Organization Name

Division or subsidiary

of: \_\_\_\_\_

Business or organization type (Manufacturer, Distributor, Trade Association, etc.):

## E-Awards

Description of product or service

exported: \_\_\_\_\_

Total number of countries currently exporting

to: \_\_\_\_\_

Top three countries of export for the previous four years:

E Award for Exports or E Star Award for Exports Applicants:

U.S. Export Statistics: Provide figures for each of the past four (4) years (either calendar or corporate fiscal), plus your most recent quarterly data. Data should include shipments to Canada and Mexico, but not Puerto Rico or the U.S. Virgin Islands. Do not include income from licensing agreements in sales figures; list licensing income separately

1. What market research do you conduct?
2. What is your international sales model? (E.g. direct sales, distributors/agents)
3. What government and private sector export promotion events do you participate in?
4. Describe any instances in which you had to retrofit or redesign products or services to sell them in an international market.
5. What exporting-related training have you conducted for your employees and/or international customers?
6. How do you overcome language obstacles with your international customers?
7. Describe any trade barriers your organization has faced and how they were overcome.
8. If applicable, describe how you have developed a market abroad for products not previously exported.
9. If applicable, describe how you have opened a new market previously closed or extremely limited to American companies.
10. Describe any other strategies you employ for increasing international sales.
11. Describe how increased exports have affected employment for your organization.
  1. What seminars, workshops, or conferences has your organization conducted?
  2. How have you notified exporters of trade opportunities?
  3. What documentation assistance have you provided to exporters?
  4. Describe any overseas trade missions that you have sponsored.
  5. Describe any programs you provided for international businesses.
  6. Describe any other export services that you provide.
  7. Provide three cases studies describing exporters that have increased exports as a result of your help, being sure to

describe the ways in which your activities helped; alternately, describe how the organization's activities have resulted in community-wide export expansion.

**Payment Information**

Credit Card Information

Cardholder name  
Credit card type (Visa, Master card, etc)  
Expiration date  
Card number

Check Payment

Account holder name  
ACH/Routing number  
Account number  
Check number

# Trade Leads Intake Form

U.S. Embassy/Consulate Commercial Specialist Responsible for Lead:

U.S. Embassy/Consulate Post:

Organization Name:\*

Organization Address 1:\*

Organization Address 2:

Organization City:\*

Organization Country:\*

Organization Web Site\*:

Contact First Name:\*

Contact Last Name:\*

Title Within Organization:\*

Email Address:\*

Daytime Phone Number:\*

Organization Type:\*

Distributor/Representative

National Government

Export Management Company

Service Company

Franchiser

Retailer

Other, Please Specify

Brief Company/Entity Description:\*

Companies You Currently Represent:

For Tenders Trade Leads - Companies That are Already Pre-Qualified:

Is there a Local Content Requirement? If So, How Much?

Yes

If Yes, How Much?

No

Is There a Sovereign or Corporate Guarantee for This Project? \*Imperative to Know this For ExIm Financing.

Yes

No

Can Bid be Submitted in English?

Yes

No

## Information

Describe the product/service(s) you are looking for. Please be as specific as possible.\*

If You Already Have a U.S. Supplier(s) in Mind, Please Indicate the Company of Interest Below.

Quantity Needed:

Price Range/Dollar (\$) Value:

Purchase Needed By/Submission Deadline:\*

What Type of Business Contacts You Are Seeking:\*

Manufacturer

Joint Venture Partner or Licensee

Agent / Sales Representative

Franchisee

Other, Please Specify:

**Thank you for submitting a trade lead! Please continue by filling out the next section. Although this section is optional, this information will help us find you the right U.S. partner.**

Sales Frequency:

Long Term Supplier

Short Term Supplier

Irregular Purchases

Single Purchase

Should Responding Firms Write in English or Another Language:

English

Other, please specify:

Do You Want Responses from U.S. Manufacturers Only or Are Agents and Distributors Acceptable?

U.S. Manufacturers Only

Agents and Distributors Acceptable

What Specific Information Do You Want U.S. Suppliers to Provide to You When They Respond?

List the Most Important End-Users or End-User Industries for This Product / Service:

What Type of Licensing or Registration Does the Product You Are Seeking Require in Your Country?

Is a Service Contract Required?

Yes

No

Is your company (check all that apply):

- Woman-owned (Organization is at least 51% owned, operated, and controlled by a minimum of one U.S. citizen whose gender is female)
- Veteran-owned (Organization is at least 51% owned, operated, and controlled by a minimum of one U.S. citizen who has served or currently serving in the U.S. armed forces)
- Minority-owned (Organization is at least 51% owned, operated, and controlled by a minimum of one U.S. citizen whose ethnic background is at least 25% Asian-Indian, Asian-Pacific, Black, Hispanic, or Native American)
- Disabled-owned (Organization is at least 51% owned, operated, and controlled by a minimum of one U.S. citizen who is disabled as defined by the Americans with Disabilities Act)
- Religious Minority-owned (Organization is at least 51% owned, operated, and controlled by a minimum of one U.S. citizen whose religion is considered to be a minority within the United States)
- LGBTQ+ owned (Organization is at least 51% owned, operated, and controlled by a minimum of one U.S. citizen who is part of the lesbian, gay, bisexual, transgender, and queer + community)
- Minority Serving Institutions (an accredited academic institution whose enrollment of a single minority or a combination of minorities exceeds fifty percent of the total enrollment, including graduate and undergraduate and full- and part-time students.)
- None of the above / Don't know

If respondent selects Minority-owned, ask the following question:

Please select the racial category or categories with which you most closely identify. (Mark all that apply)

- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic
- Native Hawaiian or Other Pacific Islander

## Certification Statements

(1) I certify that the product or products for which export or investment-related assistance is requested is not regulated under the U.S. Controlled Substances Act.

(2) I certify that any components of the product or products for which export or investment-related assistance is requested that are sourced or otherwise derived from the cannabis plant were to the best of my information and belief cultivated, processed, and/or produced in compliance with applicable Federal laws.

(3) I certify that the product or products for which export or investment-related assistance is requested and all marketing and other activities related to the product or products comply with all applicable U.S. regulatory requirements, including as applicable the Food, Drug, and Cosmetics Act and any other regulatory requirements imposed by the U.S. Food and Drug Administration.

## Advocacy Center Questions

### ADVOCACY QUESTIONNAIRE

*By submitting this Advocacy Questionnaire, the applicant agrees to allow the Advocacy Center to share this document and the information contained herein and in any supplementary materials, on an as-needed basis, with other United States Government agencies to carry out appropriate due diligence and to more effectively advocate for your interests. (Supplementary materials include, among other items, written correspondence and verbal*



communication.) Please note that the Advocacy Center uses student interns to assist us in the due diligence process. If you object to having one review your case under the supervision of an Advocacy Center regional manager, please inform us when you submit your questionnaire. Otherwise, a no-reply will mean you consent to interns working on your case, which includes having access to your company's business confidential information. You may contact the Advocacy Center at any time to withdraw your consent.

Your responses to the questionnaire, and any supplementary materials provided by your company, are considered business confidential and will not be shared with any other person or organization outside the U.S. Government unless the Advocacy Center is given permission to do so by your company. All business confidential information will be protected from disclosure to the extent permitted by law.

### Project

Name of Project: \_\_\_\_\_ Location: \_\_\_\_\_ Country: \_\_\_\_\_

### Applicant

Full Corporate Name: \_\_\_\_\_

Headquarters Address: Street \_\_\_\_\_ City \_\_\_\_\_ State/Province \_\_\_\_\_ Postal Code \_\_\_\_\_ Country \_\_\_\_\_

Place of Domicile: \_\_\_\_\_ Ownership: \_\_\_\_\_

(Identify any parent companies and the percentage of ownership of each parent.)

Annual Sales (\$): \_\_\_\_\_

Number of Employees: In U.S.A. \_\_\_\_\_ Outside U.S.A. \_\_\_\_\_

Website (URL): \_\_\_\_\_

### Contact Person

(Designated point of contact for the Applicant, which may be an independent third-party representative, if applicable)

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_ Company: \_\_\_\_\_ Telephone: \_\_\_\_\_ Title: \_\_\_\_\_ E-mail: \_\_\_\_\_

### Certification

The undersigned, being so authorized, certifies on behalf of the applicant that, to the best of his/her knowledge, the information provided herein is complete and accurate, all supplementary materials (as defined above) that may be provided shall be complete and accurate, and that the applicant is in compliance with applicable U.S. law.

\_\_\_\_\_  
[Signature of Authorized Official  
of Applicant]

\_\_\_\_\_  
[Signature of Contact Person or  
Independent Third-Party  
Representative, if Applicable]

\_\_\_\_\_  
[Signature of Authorized Official  
of Bidder of Record, if Applicable]

\_\_\_\_\_  
[Print Name]

\_\_\_\_\_  
[Print Name]

\_\_\_\_\_  
[Print Name]

\_\_\_\_\_  
[Title]

\_\_\_\_\_  
[Title]

\_\_\_\_\_  
[Title]

\_\_\_\_\_  
[Company]

\_\_\_\_\_  
[Date]

\_\_\_\_\_  
[Company]

\_\_\_\_\_  
[Date]

\_\_\_\_\_  
[Company]

\_\_\_\_\_  
[Date]

**I. PROJECT**

1. Please provide a description of the project or procurement the applicant is pursuing (“the project”).

2. Please list the foreign government entity or entities responsible for awarding the project and other officials who may have influence over the project.

3. What is the current status of the project? (Please include applicant interactions with foreign government decision- makers to date.)

4. Please provide the specific timeframe for when project actions will take place and when decisions will be made (if known).

Interim Decision Date(s): \_\_\_\_ Final Decision Date: \_\_\_\_\_

5. In U.S. dollars, please indicate the best estimate or actual values contributed to the project by the applicant and other companies, including partners or suppliers, if applicable:

a) U.S.-Sourced Goods Provided by Applicant \_\_\_\_\_

b) U.S.-Sourced Services Provided by Applicant \_\_\_\_\_

c) U.S.-Sourced Goods Provided by Other Companies \_\_\_\_\_

d) U.S.-Sourced Services Provided by Other Companies \_\_\_\_\_

e) Total U.S.-Sourced Goods and Services

$(a + b + c + d)$

\_\_\_\_\_

f) Foreign-Sourced Goods Provided by Applicant \_\_\_\_\_

g) Foreign-Sourced Services Provided by Applicant \_\_\_\_\_

h) Foreign-Sourced Goods Provided by Other Companies \_\_\_\_\_

i) Foreign-Sourced Services Provided by Other Companies \_\_\_\_\_

j) Total Foreign-Sourced Goods and Services

$(f + g + h + i)$

\_\_\_\_\_

k) Total Project Value  $(e + j)$

\_\_\_\_\_

l) Percent U.S.-Sourced Goods and Services \_\_\_\_\_%  $(e \div k) \times 100$

6. Please list all project goods and/or services, whether U.S.- or foreign-sourced. Please include quantity, if applicable:

Please identify which of the project goods and/or services will be U.S.-sourced:

a) U.S.-Sourced Goods and/or Services Provided by the Applicant:

b) U.S.-Sourced Goods and/or Services Provided by Other Companies:

Please list the names and locations of other companies supplying U.S.-sourced goods and/or services as part of the applicant's bid or proposal: *(If needed, list any additional companies in a separate attachment.)*

Company: \_\_\_\_\_  
Company: \_\_\_\_\_  
Company: \_\_\_\_\_

Location: \_\_\_\_\_  
Location: \_\_\_\_\_  
Location: \_\_\_\_\_

c) From which U.S. state(s) would exports be made, should the applicant be awarded the project? (If needed, list any additional states in a separate attachment.)

State: \_\_\_\_\_

State: \_\_\_\_\_

State: \_\_\_\_\_

State: \_\_\_\_\_

State: \_\_\_\_\_

State: \_\_\_\_\_

Please identify which of the project goods and/or services are foreign-sourced:

d) Foreign-Sourced Goods and/or Services Provided by Applicant:

[Empty rectangular box for listing foreign-sourced goods and/or services provided by the applicant.]

e) Foreign-Sourced Goods and/or Services Provided by Other Companies:

[Empty rectangular box for listing foreign-sourced goods and/or services provided by other companies.]

Please list the name and location of companies supplying foreign-sourced goods and/or services as part of the applicant's bid or proposal: (If needed, list any additional companies in a separate attachment.)

Company: \_\_\_\_\_

Location: \_\_\_\_\_

Company: \_\_\_\_\_

Location: \_\_\_\_\_

Company: \_\_\_\_\_

Location: \_\_\_\_\_

7. Bidder of Record:

a) Is the applicant the bidder of record? (Please check one.)

Yes  No

b) If no, please provide the name and nationality of the bidder of record:

Name: \_\_\_\_\_ Nationality: \_\_\_\_\_

**II. PARTNERS**

1. Is the applicant bidding as part of a partnership, consortium, joint venture, or other form of association with other companies?

Yes  No

a) If yes, please list below: *(If needed, list any additional partners in a separate attachment.)*

	Partner 1	Partner 2	Partner 3
Company Name			
Contact Name:			
Title:			
Nationality:			
Telephone:			
Email address:			

**III. COMPETITORS**

1. Please identify the competitors for the project: *(If needed, list any additional competitors in a separate attachment.)*

a) U.S. competitors:

Company: _____	Company: _____
Company: _____	Company: _____
Company: _____	Company: _____

b) Foreign (non-U.S.) competitors:

Company: _____	Nationality: _____	Company: _____	Nationality: _____
Company: _____	Nationality: _____	Company: _____	Nationality: _____
Company: _____	Nationality: _____	Company: _____	Nationality: _____

**IV. LICENSING AND APPLICATIONS**

1. Advocacy Type:

a) Is this a request for (please check only one):

Commercial (non-Defense) Advocacy?  Defense Advocacy?

b) If this is for Defense Advocacy, is this a (please check only one):

Foreign Military Sale (FMS)?  Direct Commercial Sale (DCS)?  To be Determined

2. Export Licensing:

a) Are there items or technology to be exported in connection with the project that require U.S. Government marketing or export licenses?

Yes  No

b) If yes, please list the license and/or application number(s) and status:

License/Application Number(s): \_\_\_\_\_

Status of Application: \_\_\_\_\_

V. FINANCING

1. How will the project be financed? \_\_\_\_\_

2. Is the applicant or any of its partners seeking U.S. Government financing through EXIM Bank or the Development Finance Corporation for the project?

Yes  No

a) If yes, please name the institution(s) and status of the application(s):

\_\_\_\_\_

b) If no, please indicate whether the applicant or any of its partners plan to seek or would like assistance in seeking such financing/support for the project:

Yes  No



3. Is the project financed by any of the following multilateral development banks (MDBs): World Bank, Inter-American Development Bank, African Development Bank, European Bank for Reconstruction and Development, or the Asian Development Bank?

Yes  No

a) If yes, please specify the MDB:

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4. Is the U.S. Trade and Development Agency (USTDA) providing support for the project?

Yes  No  Not Sure

a) If yes, please indicate whether USTDA project support is through feasibility studies, training grants, or other assistance:

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b) If no, please indicate whether the applicant or any of its partners plan to seek or would like assistance in seeking support from USTDA for the project:

Yes  No

**VI. REQUESTED ASSISTANCE**

1. Reason for Requested Assistance:

2. Please highlight the competitiveness of the applicant's bid or proposal in terms of technology, price, full lifecycle

cost, best value, or other factors:

3. Is the applicant or any of its partners receiving advocacy or other assistance from a foreign government for the project?

Yes No

a. If yes, please list the foreign government(s), and partner(s), if applicable:

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AGREEMENT CONCERNING BRIBERY AND CORPORATE POLICY PROHIBITING BRIBERY

Agreement:

\_\_\_\_\_ ("the Applicant") is requesting U.S. Government Advocacy support in connection with its Project to supply \_\_\_\_\_ (goods and/or services) to \_\_\_\_\_ (procuring or other project authority) in \_\_\_\_\_ (foreign country).

In connection with this request, the Applicant affirms that it and its agents and affiliates:

- (1) Have not and will not engage in the bribery of foreign public officials in connection with the above-described Project; and
- (2) Maintain and enforce a policy that prohibits the bribery of foreign public officials.

The Applicant understands that failure to comply with this Agreement may result in the denial of Commercial Advocacy.

Definitions:

For the purpose of this Agreement:

The term "affiliate" means (a) any entity that holds, directly or indirectly, a majority of the voting stock of the Applicant; and (b) any other entity the majority ownership of whose voting stock is held, directly or indirectly, by the Applicant or by an entity described in (a).

The term "bribery of foreign public officials" has the meaning of the "bribery of foreign public officials" in the Convention on Combating Bribery of Foreign Public Officials in International Business Transactions. In addition, for Applicants that are subject to the Foreign Corrupt Practices Act of 1977 (FCPA), as amended, the term "bribery of foreign public officials" refers to practices prohibited by the FCPA (see 15 U.S.C. §§ 78dd-1, 78dd-2, and 78dd-3).

_____ [Signature of Authorized Official of Applicant]		_____ [Signature of Contact Person or Independent Third-Party Representative, if Applicable]		_____ [Signature of Authorized Official of Bidder of Record, if Applicable]	
_____ [Print Name]		_____ [Print Name]		_____ [Print Name]	
_____ [Title]		_____ [Title]		_____ [Title]	
_____ [Company]	_____ [Date]	_____ [Company]	_____ [Date]	_____ [Company]	_____ [Date]

## Digital Readiness Assessment Education-Questionnaire 2.0

*(An Internal Trade Specialist Counseling Tool)*

### CONTACT INFORMATION

Organization Name:	
Address:	
City:	Zip Code:
Contact Person:	Title:
Contact Tel:	Contact Fax:
Contact E-mail:	
Alternate Contact:	Title:
Alternate Contact E-mail:	Alternate Contact Tel:

### ADDITIONAL ORGANIZATION INFORMATION

<p>Educational Institution:</p> <p><i>(Please select all that apply)</i></p> <p><input type="checkbox"/> Four-Year College/University</p> <p><input type="checkbox"/> Two-Year College</p> <p><input type="checkbox"/> English Language Program</p> <p><input type="checkbox"/> Other (Please specify):</p> <p>_____</p>	<p><input type="checkbox"/> Graduate School/Program</p> <p><input type="checkbox"/> High School/Boarding School</p> <p><input type="checkbox"/> Public/Private, Non-Profit</p> <p><input type="checkbox"/> Private, For-Profit</p>
<p>Primary NAICs Code<sup>1</sup>:</p> <p><sup>1</sup> Only complete if a Private, For-Profit Institution</p>	
<p>Average Annual Revenues<sup>2</sup>:</p> <p><sup>2</sup> Only complete if a Private, For-Profit Institution</p>	
<p>Accrediting Type and Body:</p>	
<p>Annual Exports (as % of Total Sales):</p> <p><input type="checkbox"/> Less than 25%</p>	

More than 25%

Brief Organization Description:

Does your product or service contain at least 51% U.S. content?  Yes  No

Are you currently working with a U.S. Export Assistance Center (USEAC)?  Yes  No

If yes, please provide City and Trade Specialist name:

## *LEVEL OF DIGITAL ENGAGEMENT*

### **Internal Client Digital Capacity**

Is your educational institution talking, thinking, or actively engaged in a cross-border digital strategy?

Does your educational institution have cross-border sales channels for online courses for credit or offer online classes of any kind? If so, is it being offered through your own website, marketplace, social media or in-country partner?

Does your educational institution employ in-house talent to manage your online presence? If so, in what capacity, (e.g. C-suite, digital marketing department, single webmaster, or do you use a contracted 3<sup>rd</sup> party service provider?

Is your educational institution aware of what your competition is doing online? If so, what have you learned about your competition?

Does your educational institution have established Key Performance Indicators (KPIs) to track your website and digital marketing progress? If so, are you willing to share those with us to establish baseline performance benchmarks?

### **Digital Sales Channels**

Does your educational institution have an established digital strategy that supports your ability to conduct online cross-border campaigns?

Does your educational institution use online platforms overseas to promote the institution? If so, which platforms promote your education institution?

Does your educational institution website include a translation mechanism (i.e. Google translate)?

If your educational institution website is translated, have you assigned someone to reply to inquiries in that language?

Do you have recruitment partners selling your courses online?

Do your in-country agents have an established online recruitment reputation and robust online recruitment channel network?

When your educational institution is assessing potential partners, including recruitment agents in target markets, is the ability of partners to assist with online program promotion and/or recruitment a primary qualifier?

Is your educational institution utilizing any 3rd party service providers to help manage your online presence in your target markets? (e.g. social media and marketplace linking)

Does your educational institution understand online transaction options and patterns for your courses and training in target markets? (e.g. market intel on consumer behavior in the education sector)

### **Digital Regulatory Compliance (e.g. GDPR/Privacy Shield)**

Is your educational institution familiar with the international regulatory requirements that impact cross-border digital activity (e.g. consumer privacy, fiscal thresholds, customs fees and tax such as Value Added Tax (VAT) or Digital Service Tax (DST) obligations)? If so, what is your institution doing to meet these requirements?

Has your educational institution taken General Data Protection Regulation (GDPR) into consideration?

Does your educational institution have an IT security program, and have you updated it in the last 6 months to address new online cyber security issues?

### **Other Information**

Is there any additional information you would like to provide about your website or digital strategy?

**Educational Institution****WGR Intake Form 2.0***INSTITUTION ONLINE INFORMATION*

Institution website address:
Please provide your top three competitor website URLs for benchmarking purposes.
1. _____
2. _____
3. _____
Please provide 2-3 keywords that visitors would use to search for your school in a search engine:
When was your website designed or last updated?
How is your website managed?
<b>In-house</b> web designer: <input type="checkbox"/> creates content <input type="checkbox"/> updates site <input type="checkbox"/> search engine optimization
<b>External</b> web designer: <input type="checkbox"/> creates content <input type="checkbox"/> updates site <input type="checkbox"/> search engine optimization
Do you track your website's analytics? If so, can you share them with us in order establish a performance baseline?

**ITAC Application****Applicant Information**

1) Name:

Title:

Affiliation:

Contact Information:

Office Phone:

Email Address:

2) ITAC(s) of Interest

3) I certify that I represent:

- A U.S. entity that is directly engaged in the import or export of goods or services or that provides

- A U.S. organization<sup>2</sup> that trades internationally, represents members that trade internationally, or, consistent with the needs of an ITAC as determined by the Secretary and the Trade Representative, represents members who have a demonstrated interest in international trade.<sup>3</sup>

### Sponsoring Entity or Organization Information

1) Size (number of employees?)

- 0-50
- 51-100
- 100-250
- 250-500
- 500+

2) General description of trade activities and products and services of the U.S. entity to be represented.

3) If the applicant is representing a trade association, identify all foreign and domestic entities involved, including percentage of ownership and control and role of each entity.

### Affirmation

I make the following affirmative statements:

- I certify that I am not registered under the Department of Justice's Foreign Agents Registration Act (FARA); and
- I meet all the requirements set forth in the *Federal Register* notice.

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Applicant Signature

<sup>2</sup> A "U.S. organization" is an organization, including a trade association, labor union or organization, and nongovernmental organization (NGO), established under the laws of the United States, that is controlled by U.S. citizens, by another U.S. organization (or organizations), or by a U.S. entity (or entities), as determined by based on its board of directors (or comparable governing body), membership, and funding sources, as applicable. To qualify as a U.S. organization, more than 50 percent of the board of directors and more than 50 percent of the membership of the organization to be represented must be U.S. citizens, U.S. organizations, or U.S. entities.

<sup>3</sup> Applicants can find information on the additional requirements for consultants and legal advisors, which vary depending on the nature of the entity or organization and the interests the individual will represent, on the International Trade Administration website at [www.trade.gov/itac](http://www.trade.gov/itac) or by contacting the Industry Trade Advisory Center at [ITAC@trade.gov](mailto:ITAC@trade.gov).