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Export Promotion Agencies' Lived Turmoil, Response and Strategies in COVID-19 Times

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Abstract: This paper explores Export Promotion Agencies' (EPAs') lived turmoil amid the COVID-19 crisis. It investigates: the EPAs' perspective on pandemic impact on exporting SMEs; the pandemic impact on EPAs, their operations and response strategies; and EPAs' perception and expectations post-COVID. The research draws on in-depth interviews with three countries' EPA managers (Chile, Ecuador, Peru); five elite informants engaged operationally and strategically. A narrative approach inquiring on human experience is adopted, enabling rich insights on complex dynamics and contextual realities 'from the inside'. Notwithstanding heavy regional impact, no research exists on South America; especially EPAs' role in COVID times. The methodology provides intimate first-hand knowledge on idiosyncratic circumstances shrouded in uncertainty; unprecedented challenges faced at ground zero, addressed in unconventional ways. Country-specific complexities compounded pandemic impact. EPAs were compelled to rediscover their purpose, devising novel responses to help exporting SMEs. Notwithstanding reduced budgets and layoffs, the EPAs persevered, innovating resource-light solutions to pragmatically surmount turmoil; effectively serving their mission amid uncertainty and adversity. In/formal emergent trust-based cooperation strategies proved crucial. Also accentuated was production and consumption environmental sustainability. Detailed front-line perspectives provide valuable insight and important lessons on complex challenges endured and effective EPA action. Post-COVID perspectives, best practice and policy support recommendations are forthcoming.



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1. Introduction

Conceived at the dawn of 2020, the COVID-19 pandemic swept across the globe swiftly, rapidly stalling economies—world trade registering a sudden 32% drop [1]. This hard step on the brakes of global trade presents the context of our article, focussing on Export Promotion Agencies' (EPAs') realities in supporting exporting SMEs. We focus on South America, where economic structural features render the region more “vulnerable to this unprecedented shock” [2]. Such was the regional drop in trade and economic activity, that its effect was observed to have had marked environmental impact beyond [3].

To help firms persevere and survive this unimaginable crisis, governments worldwide scrambled to put together trade policy initiatives and assistance, often channelled through EPAs. This amplified EPAs' strategic significance, rendering their role extremely important for exporting firms' activity [4]. When facing the additional complexity of international markets, Catanzaro and Teyssier [5] identify firms' main challenges as: numerous cultural or psychic distance barriers to entry; difficulties in identifying and exploiting opportunities

in international environments; and a lack of resources and capabilities to assume specific international risks. This underlies a fundamental importance in generating, exploiting and sharing knowledge [6]; especially in emerging economies [4,7]. In crises characterised by uncertainty and instability, relevant knowledge and timely information become more operationally and strategically crucial. In this heightened context, EPAs' role as established tools for effectively motivating firms' export activity [8] is accentuated in mitigating the above-mentioned obstacles—seeking to enhance SMEs' prospects to thrive and survive amid disruption.

Although COVID-19 is gradually emerging as a topic of interest in international business research [9,10], not much research has been conducted specifically on EPAs, export promotion and associated support initiatives in COVID-19 times. Furthermore, research more generally addressing South American EPAs is especially scarce. This area is particularly relevant given its active involvement in international business; notably participating in global value chains, especially through agri-food exports, mining and raw materials [11,12]. Indeed, only circa 15% of the region's last decade total were high technology exports [13]. Consequently, South American countries are very sensitive to global trade dynamics, especially with China, where almost one third of exports are destined [14].

In view of these convergent observations, we believe analysing the role, circumstances and response of these EPAs during this pandemic presents an important learning opportunity. Organisational resilience perspectives and frameworks posit organisations should be prepared for the worst, strive to evolve, and develop 'standard' approaches and rapid mitigation responses [15] for heightened critical situations such as those posed by COVID-19. As inferred, international operations at the best of times present exporters multiple layers of additional complexity and dynamic variables. With COVID-19 exponentially increasing uncertainty, EPAs in this context stand to play an important role. Moreover, to the best of our knowledge the role of South American EPAs in such circumstances has not yet been studied. In this regard, besides current topicality in understanding the dynamics of this extraordinary phenomenon, we believe there also exists important value addressing this gap in the literature—through conducting research at these three convergent contexts: the COVID-19 pandemic situation, EPAs' role amid this disruption, and the South American region.

Additionally, while most prior general research contends with analyses of EPAs' roles at firm level [5,16,17], we further contribute by studying the EPAs' function and lived experience during this crisis from a first-hand perspective. Insights and sensemaking provided directly by the managers themselves—the key actors intimately dealing with their idiosyncratic, complex realities. We believe researching such in-depth direct accounts of EPAs' experience and action in particularly difficult and uncertain COVID times is of great importance on many fronts—towards overcoming unprecedented challenges posed.

In this regard, we explore the lived challenges and realities of these EPAs in COVID-19 times—their perspective, as they faced up to the crisis. Hence, our research objective is to investigate and understand: (1) the EPAs' perspective on the pandemic's impact on exporting SMEs; (2) the pandemic impact on EPAs, their operations and response strategies; and (3) the EPAs' perception and expectations post-COVID. Our research focuses on three neighbouring South American countries: Chile, Peru and Ecuador.

Towards this end we engage an exploratory qualitative methodology enabling us to deeply investigate the evolution and impact of this complex major event in context. We research these EPAs in their circumstances 'on their own terms' [18,19], by adopting a narrative approach directing inquiry on human experience, enabling rich insights on complex dynamics and contextual realities [20] 'from the inside' [21].

Our novel approach researching the EPAs' lived experience at the pandemic front-line opens a new line of enquiry. The direct problems EPAs faced, their sensemaking and means for overcoming them, and action [22,23]. Their, at times improvised, emergent solutions and workarounds as they creatively responded, enterprisingly seeking to endure

and effectively serve their mission in unimaginable circumstances—and their perceived visions for the future.

Our findings provide important lessons and first-hand insight on the complex challenges and multifaceted realities faced by these EPAs in their context—which in instances also observed regionally distinct circumstantial characteristics compounding the pandemic's impact. We offer insight on nuanced best practice and support for policy response—also contributing to the literature on export promotion and convergent domains in such situations.

Our paper proceeds as follows: We continue with a concise overview of contributing literature and theory informing our study, followed by our methodology approach. Then follow our detailed findings in the form of consolidated narratives drawn from extensive in depth interviews. Our results are consolidated and discussed next. Finally, we present our conclusions highlighting novel insights and contributions, while also noting any potential limitations and areas for further research.

2. Supporting Literature

Organisational resilience perspectives highlight the growing importance of resilience for survival in the face of mounting uncertainty and shocks [15]—the literature mandating the need to innovate and adapt to changing conditions in markets and technologies [24,25]. Indeed, COVID-19 has driven companies around the world to be resilient and adapt their ways of operating [26], leading to dramatic changes in how businesses act and consumers behave [27,28]. Thus, to mitigate the effects of this crisis, new strategies are required [10,29,30].

Despite COVID-19 gradually emerging as a frequent topic in business discourse [10,27] and although it is broadly acknowledged that the pandemic crisis requires urgent policy responses from governments to support individuals and businesses alike; however, no studies in the business domain have addressed the impact of COVID-19 on export promotion, specifically on EPAs. More generally, this also seems to have been the case in previous crises: Eggers [9] found only 8.7% of previous crises studies covered this institutional context.

While there exists a scarcity of literature on the role of EPAs in COVID times, extensive research on EPAs in normal times acknowledges and widely confirms the effectiveness of their export promotion programmes (EPPs); export support services such as for example, training and information dissemination, trade fairs, trade delegation missions and so on [5,17,31].

Among enterprise populations, small and medium-sized firms (SMEs) are universally acknowledged as the motor of their country's economy; and entrepreneurship recognized as a catalyst for growth and national development [32]. Sustaining such business activity becomes acutely critical in crises of this magnitude [33]. In this sense, it is established that government export assistance can help firms overcome international entrepreneurship hurdles towards achieving better internationalisation and export prospects [34]. Thus, EPPs can facilitate firms' entrepreneurial initiatives in exporting, by providing 'external resources' (and capabilities) essential in overcoming various obstacles found at different stages of the export development process [16,17,31]. For example, tacit knowledge and advisory services providing SMEs insights are likely more valuable in times of crisis and uncertainty. Furthermore, given pandemic disruption, small businesses must be agile and open to market diversification [35]. Freixanet and Churakova [36] also stressed the need for diversifying national export destinations when exploring EPPs' impact on export performance in cases where activity is similarly characterised by sector-concentrated commodity exports sensitive to volatile market prices. Indeed, overnight, COVID-19 highlighted the vulnerability of supply chains and international production networks to unforeseen catastrophic phenomena [14]. This implies the need to also diversify supplier networks across different companies and countries; and potentially the relocation of critical processes. Finally, researchers recommend government assistance institutions should promote adoption

of digital platforms to facilitate firms' operations and enhance competitiveness in such times [35,37,38].

In this regard, firms' own realistic 'self-perception' and acknowledgement of their vulnerabilities in such critical contexts is considered a key prerequisite for resilience [15]. The precarious pandemic scenario emphasised firms' urgent need to turn to EPAs for assistance. In similar crises (albeit the 2009 global financial crisis) Freixanet et al. [39] and Van Biesebroek et al. [40] observed firms availing of EPA support having better export performance. Nonetheless, Freixanet et al. [39] note EPA programs did not prevent weaker or less diversified companies from failing during the crisis; although an improvement in the average firm survival rate was evident.

In international contexts, increased business risks generally see SMEs suffer more than their larger counterparts due to lacking capabilities [16,41]. For this reason, local and national governments are increasingly also concerned with the lack of risk management capability among SMEs—consequently often attempting to provide them risk management training and capability building [42]. In this regard, Dias et al. [43] underline the importance of exporters implementing risk management models to enhance operational sustainability when engaging in specific supply chains.

EPPs are a source of intellectual or experiential resources; and specialized knowledge about export markets and associated risks [16,34]. Indeed, research observes exporting firms mostly demanding, and rating as most useful, specific knowledge on given international markets [44]. In this sense, EPPs raise firms' risk management and exposure awareness, providing advice and information on risk potential in targeted markets [24]. Catanzaro and Teyssier [5] observe a correlation between EPP participation and SME performance in risky international contexts.

To our knowledge, up to this point during the COVID-19 pandemic, only the Economic Commission for Latin America and the Caribbean (ECLAC) explored the South American scenario in 2020; proposing specific measures directed to improve trade in the region. Their report underlines the drop in global economic activity, especially in the United States, China and Europe, as particularly detrimental to South American trade—more so for commodities, since key production sectors in the region form part of global value chains linked to these countries [14]. This was also underlined by Mohiuddin [45] reporting the traditional failure of conventional supply chains, especially in the case of commodities from developing countries.

Increased vulnerability to market price declines is evident in ECLAC's predictions for the region, forecasting a 17.6% drop in trade [14]. This aligns with Arfaoui and Rejeb's [46] work stressing the increasing international financial integration process of commodity markets and the importance of US dollar exchange rates. On the current pandemic situation, the report indicates Argentina, Brazil, Chile and Peru (the region's largest exporters of such products to China), as South America's most exposed countries. Overall, deterioration in global financial conditions is projected to be as bad as in the 2008–2009 global financial crisis; some indicators worse. Besides falling commodity prices exacerbating matters in this sub-region, and the abovementioned disrupted supply chains and falling global growth; ensuing lower profitability and greater difficulty servicing debt further complicate the contextual scenario [14].

Echoing the ECLAC report, Petrunenko and Podtserkovnyi [29] note South American countries' high dependency on natural resources and raw material exports, sees them forced to sell at unfavourable prices in times of crisis—incurring huge losses. Characterised by high levels of informal labour, combined with low ability to work from home, SMEs suffered disproportionate disruption in these circumstances [47]. In consolidation, regional characteristics "turned the health crisis into the worst economic, social and production crisis the region has experienced in 120 years" [48].

3. Materials and Methods

This study investigates the impact ensuing from the COVID-19 pandemic outbreak on South American EPAs—adopting the perspective of the EPA. We focus on three neighbouring countries along the west coast of a particularly hard-hit region [47,48]. Indeed, recent reports and analysis have accentuated the need for more research here [24,47,48]. Aligned with our objectives, we specifically seek first-hand insights into the EPAs' lived experience—their operational challenges endured and sensemaking, and their strategic responses to the pandemic crisis, in their context [49,50]. Within their realities, we furthermore seek insights into their perceptions looking ahead, and post-pandemic expectations. We investigate the EPAs in these circumstances 'on their own terms' [18,19].

For this reason, given this disruptive 'black swan' event's magnitude and novel nature; and the dearth of literature or theory directly informing EPA studies in such contexts—we adopt an inductive exploratory approach. Based on learning from experience, inductive research starts with detailed observations; and searching for emergent patterns and explanations, progresses towards developing more abstract empirical generalisations [51,52]. The researcher flexibly directs the process following observations and evolving insights as the research advances, towards eventual ensuing findings [53].

Addressing our research objective, our qualitative methodology explores this major phenomenon, seeking deep understanding of direct experiences in the context of the EPAs' specific circumstances and complex realities [54]. We investigate: (1) the EPAs' perspective on the pandemic's impact on exporting SMEs; (2) the pandemic impact on EPAs, their operations and response strategies; and (3) EPAs' perception and expectations post-COVID.

Such approaches seek to understand phenomena 'from the inside' by analysing experiences of individuals or groups [21]. This aforementioned exploratory approach is appropriate in seeking understanding on the dynamics surrounding this unique event [20].

Our ontological stance draws from subtle realism—influenced by idealism and open to interpretivist perspectives [55]. We acknowledge an external reality may exist independently of individuals' subjective understanding, however, given the nature of our study, this is only accessible through the respondents' own lived experience. Aligned with our research objectives, this approach emphasises critical importance in our participants' own interpretations of the issues we explore and accept that their varied vantage points yield different valuable insights. Thus, any external observable reality of the pandemic's impact is itself diverse and multifaceted, as EPAs, economies, and indeed humanity the world over, idiosyncratically experienced and continue to endure the effects of this crisis in varying ways—depending on their unique circumstance and context.

Given regional focus, and the fact that they are among the most exposed to the pandemic's effects [14], perspectives from the national EPAs of Chile and its' neighbouring countries along the continent's west coast, Peru and Ecuador, were sought. ProChile, PromPeru and Pro Ecuador—all three, public government-funded organisations.

Investigating front-line observations direct from the horses' mouth, perspective diversity and intimacy add richness to our understanding of various ways in which aspects of this calamitous reality have been experienced and addressed. Conveying as full a picture as possible of the nature and extent their multifaceted lived circumstances [56]. Useful insights from 'ground zero' augur further value in informing regional policy, as well as best practice addressing operational and strategic needs.

As our investigation explores this outbreak's impact and crisis phenomenon as lived by the EPAs, we engage a narrative approach. This directs inquiry at narratives of human experience—enabling rich insights and understanding primarily from interview data. Analysis entails thick descriptive narratives and vignettes, explaining situations in their context [57,58].

Five elite participants, professionals and directors within their respective EPAs were engaged in extensive in-depth interviews (Table 1). Elite informants are key decision makers having extensive and exclusive information, and the ability to influence important firm outcomes, either alone or jointly with others (e.g., on a board of directors) [59].

This is appropriate for our study—given their managerial insights and responsibilities, decision-making capacity and organisational involvement at both strategic and operational levels [60]. Furthermore, given their status and representation, vivid personal accounts and experience tend to transcend that of their organisations [55].

Table 1. Elite participants and respective roles.

EPA	Participant	Role
ProChile	CL1	Director/Head
	CL2	Trade Advisor
PromPeru	PE1	Director/Head
	PE2	Director/Head
Pro Ecuador	EC1	Director/Head

All in-depth interviews were undertaken between November 2020 and January 2021, each session with an average duration of 90 min. Given pandemic physical distancing requirements, interviews were conducted via the videoconferencing Zoom platform [27]. Conducted in English, interview audio and video were recorded, capturing the richness of participants' accounts. Extensive notes were taken during and immediately following the sessions; and verbatim transcripts drawn up.

Interviews started with general inquiring open questions associated with the study's broad themes, setting the scene—inviting participants to share detailed accounts of their experienced realities. Following that, we directed the conversation asking further probing questions, gaining deeper contextual understanding of 'whys' and 'hows' [61,62]; also enabling an extent of cross comparison across the EPAs.

In the latter 'guided' component, we asked key questions on the basis of a loose structure consisting of a few open-ended questions defining the area under study and to which the participant may either agree or diverge from, in order to pursue an idea or emerging theme in more detail [63]. Guided, it is neither an open everyday conversation nor a closed questionnaire [21]. In this way, we sought to understand themes of the lived world from the subjects' own perspectives. Moreover, with this approach, the researcher registers and interprets the meanings of what is said, as well as how it is said; and through observation, also be able to interpret vocalization and facial expressions [21]—adding further meaning and emphases to particularly critical episodes.

Data from transcripts, video and any documentation provided by the interviewees were initially reviewed, analysed and imported into NVivo (qualitative data analysis software). Aligned with the aforementioned method of inquiry, the transcripts were coded using directed content analysis. Directed content analysis is appropriate when "existing theory or prior research exists about a phenomenon that is incomplete or would benefit from further description" [62] (p. 1281). This technique—using open, followed by directed questions probing participants' experiences—is particularly useful in "qualitative interviewing methods based on story telling [which are] powerful in eliciting narrations that are structured according to interviewees' relevance systems" [64] (p. 403).

A strategy used in directed content analysis is to begin coding the predetermined broad codes—in our case associated with our core research objectives. "Data that cannot be coded [initially] are identified and analyzed later to determine if they represent a new category or a subcategory of an existing code" [62] (p. 1282) and [64].

Following analysis, our findings are presented in consolidated narratives. Bringing together several individual interviews, telling a single holistic story [65]—the story of COVID-19's impact experienced by these three South American national EPAs. It allows us to consolidate findings and "present complex, situated accounts from individuals, rather than breaking data down". Given the exploratory nature of our study, it also contributes "to 'future-forming' research, by presenting findings in ways that are useful and accessible to those outside academia" [65] (p. 471). We safeguard against any potential limitation from

this approach by building the narrative directly from original data, conveying findings accurately through verbatim quotes and vignettes, while also maintaining provenance through direct reference to respective participants [65]. This way, “narratives allow research to be presented in a way which acknowledges the complexities of individual motivations and outlooks, whilst drawing out more generalized learning and understanding” [65] (p. 476). This enables us to effectively present areas of convergence as well as differences and unique responses in the EPAs’ experiences, in a meaningful way. Furthermore, to ensure accurate portrayal of events and participant voices towards maintaining validity and trustworthiness, member checking was used—both informally throughout participants’ exchanges, as well as formally in later stages [66–68].

In consolidation, the detailed information gathered and rich findings also garner useful insights on various important operational aspects through the crisis. Among these, for example, understanding what approaches were more effective, and which weren’t, in their respective contexts—as the EPAs sought to face up to the crisis, while assisting SMEs promote their exports. This aligns with our intent in carrying out research providing useful insights helping inform policy and best practice for enterprises and practitioners, from detailed experiences endured and challenges surmounted [56].

4. Findings

Following, we present our findings; direct EPA perspectives and lived experiences on the effect the global COVID-19 pandemic outbreak had on their respective realities. In line with our quest for broad empirical insight, we structure and present our findings in alignment with our stated research objectives—seeking understanding on: EPA perspectives on the pandemic’s general impact on indigenous exporting SMEs; the pandemic’s impact on the EPAs, their operations, and response strategies; and looking ahead, the EPAs’ perceptions, expectations and strategic considerations post-COVID and beyond.

4.1. EPA Perspectives and Observations on Exporting SMEs’ Pandemic Impact

4.1.1. Extent of SMEs’ Disruption—Compounded by Regional Contextual Circumstances

Noting the pandemic’s impact on global market dynamics and production operations, the additional complexity and severity it presented their SMEs was extensively emphasised across all EPA perspectives as being a critically disruptive (CL1, CL2, PE1, PE2, EC1):

“[very] negative, and especially for SMEs here in Chile. Because they ... well, generally speaking, but especially in Chile, they face a lot of asymmetries [resource limitations]—so that’s why our focus has been, during the last years, on supporting SME exporters.” (CL1)

“A very complicated situation—especially for exporters”. Many stopping export activity to normally lucrative foreign markets such as China. Citing industry union figures, around 150,000 companies stopped working in some way or another due to complications arising from the pandemic (CL1).

Similarly, in Peru, SMEs struggled more, for example:

“... the large companies were the first to implement all the protocols ... for the workers, in terms of our labour legislation ... the very first to get the COVID test, allowing people to go back to work. And the small and medium companies—were not that fast in the adoption of all these risk assessments. And this was also a very hard situation for them—to start again. To start [operating] again with new restrictions ... our lockdowns [recently] relaxed, but we also still have some ... hours that people are allowed to go to work. Transport [restrictions] etcetera ... ” (PE2; also CL1)

The Ecuadorian perspective likewise highlighted liabilities of smallness compounding devastating pandemic impact: for SMEs it “was very complex. Because at that moment, definitely the small and medium enterprises—definitely didn’t have much opportunities” (EC1).

“First shock was terrible” (EC1), besides impacting markets and operations, it also presented SMEs shifting trade regulations and documentation. For example, Ecuador exports stalled as international agencies sought to adjust to countries’ diverse new hygiene and sanitary certifications. Not yet universally established, this “first big obstacle” saw exports refused foreign market entry for days. Only persistent diplomacy and sustained effort surmounted this early impasse—migrating new documentation to digital formats, signatures and platforms (EC1).

An evident contextual perspective shared upfront across EPAs, was nuanced political and socio economic dynamics: “for us the pandemic was actually the ‘second’ big wave of pressure on our exporters” (EC1). Associated implications on market perception directly inferred:

“Things were not very positive towards trade from our countries because of the political circumstances we faced in our countries [. . .] Latin America. [. . .] We had very difficult political struggles in Peru, in Chile, in Columbia, and of course Ecuador [. . .] big, big strikes effected definitely.” (EC1)

Compounding restricted mobility, unrest further effected export operations:

“Can you hear some sounds from the streets? [Car horns and live protest sounds audible over Zoom]. At this moment we are facing a [protest sounds interrupt conversation] . . . I mention this because at this moment we are facing some strikes in some ports. In this region there are 6 ports, and 3 of them are at this moment with strikes. [. . .] So this is a specific situation that is related with the [COVID] context . . . [the industry association says] at least 150,000 firms have closed . . . unemployment is rising. For specifically SMEs, it’s a very complicated situation—especially for exporters. . . . companies get in this situation [. . .] some of them have stopped to export—to send their containers.” (CL1)

Such disruption, beyond periodic lockdowns, is particularly noteworthy from a regional context perspective. Especially since international demand for food products generally increased during the pandemic—and typically labour-intensive agribusiness is a key export sector for the three countries (EC1). Thus, where market demand albeit exists, restricted mobility combined with port disruptions however present exporting SMEs substantial additional operational and logistical challenges (CL1).

Querying whether SMEs’ ceased operations resulted from receding markets and drying up demand—the reply offered broader reasons:

“That is one of the reasons. But there are other factors too”, in some sectors and regions “productivity dropped . . . also because there are some problems for people to work in some places. Some social problems . . . there have been some violent situations” (CL1).

Public domain media reports attest to unrest in the region coinciding before and after the pandemic outbreak. Objective scientific insight further concurs participants’ observations: though reaching the region later than other continents, “COVID-19 in Latin America . . . began as a health crisis but is now a humanitarian crisis” [69] (p. 1463). Acute health concerns inextricably linked to ensuing economic hardship and uncertain employment combined with national elections imminently due in all three countries—further amplifies uncertainty for businesses (or indeed EPAs) striving to look ahead beyond immediate survival.

4.1.2. SME Uncertainty, Information Needs and Regional Sectoral Structure

Reinforcing uncertainty’s impact as the crisis unfolded, participants highlighted SMEs’ need for information being particularly important: “first it’s the information asymmetry”—related to markets, lockdowns, regulations and all matters related to conducting business in a world gripped by pandemic chaos (CL1).

Notwithstanding SMEs’ questioned survival and precarious realities (CL1, PE1, PE2, EC1)—larger exporting companies generally also suffered devastating impact (CL1, EC1).

An example cited was Chile's badly hit forestry sector, representing 70% of total exports in their Southern Macro Region—China being their “most important market” (CL1).

This also highlighted longstanding regional dependence on narrowly defined large-scale “traditional exports” in normally price-sensitive commodity and natural raw material sectors, including industrialised agribusiness (CL1, PE1, PE2, EC1). Affecting balance of trade, concentration in such export activity was cited as restricting, “in the global context, there are very few countries [we export to]. Those with open borders, for our products” (EC1).

Similarly, the regional economies' structure and nature of key industries were also underlined as further accentuating enterprises' pandemic impact. Logistics and infrastructure strained by the crisis and health concerns also played a part. PE2 conveys:

“... forced to lockdown from one day to another. So that impacts a lot, especially in the agribusiness and seafood sectors—[especially smaller] companies. [...] as a developing country, our industries are very labour intensive. So, workers cannot go to the farms, to the factories to work. [...] And logistics were highly impacted also. [...] large distances to cover, difficult geography ... and it's kind of difficult to reach the production areas. So facing the lockdown ... with more strict measures of transit [restrictions], of services, of transport, that impacted ... our industries” (PE2).

While all EPA perspectives ascertained the devastating impact of COVID-19 on businesses—doom was not meted out equally across industries.

4.1.3. From Shock and Hesitancy, to Realisation and Action: Industry Differences, Digitalisation Prospects and Enterprising Opportunities

The Chilean perspective noted SMEs already using e-commerce or familiar with online channels were “less negatively impacted” (CL1). Meantime, most other SMEs scrambled to migrate to digital platforms seeking to restore functionality.

“[first] forced to implement some digital transformation. ... So the companies have been forced to adapt ... And now they are facing new challenges such as approaching [foreign clients] through new channels; with new buyers, such as e-commerce for instance. But not only, also doing business through different media, leaving behind the traditional ones, like the trade shows or the in-person meetings. Turning to these kinds of [remote, digital] negotiations or meetings, a new method of meeting ... ” (PE1).

Others, initially still under shock, at first simply ‘hibernated’, holding their breath hoping and praying it would all just go away quickly.

Regarding export market demand, CL1 and EC1 observed, unlike hard-hit commodities, sometimes “in the case of higher value products, when you move up the value-added chain [...] the impact has been less negatively strong” (CL1).

Notwithstanding dire predicaments, some sectors saw “winners” (EC1), notably in agribusiness or fisheries—dominant sectors in the three countries—aligned with a crisis growth trend in food consumption, especially demand for health-oriented ‘superfoods’ (PE1, CL1, EC1). Several SMEs exporting these products experienced growth—“getting benefits from the pandemic!” (EC1). This complemented the EPAs' ongoing strategy branding and promoting their countries' ‘superfoods’.

The Chilean perspective cited 47% blueberry export growth among others, due to pandemic-enhanced demand (CL1). PE1 noted their agricultural sector was the only one registering export growth in Peru: 7.2%, surprisingly higher than the previous year's (PE data). The Ecuadorian EPA observed growth for SMEs exporting banana, shrimp, coco, coffee and frozen broccoli (EC1). Stressing export growth notwithstanding comparatively higher imposed import tariffs at circa 30%, and only sparse free trade agreements, unlike its established trading neighbours—EC1 illustrated the case of an SME that enterprisingly started making bread from cassava:

“They used to export very little, probably once every 3 months 100 kilos [. . .] Now they are exporting three containers, every month”.

EC1 mentioned another perceived crisis trend: consumers shunning premium “famous” global brands, for functional, quality, healthy food alternatives—noting “this is the opportunity our smaller exporters were handed—and they took it”. SMEs innovated developing new products: higher added value “healthy snacks”, “quinoa spaghetti” and “powdered broccoli” exported to European and niche markets as far as Japan, Korea and Indonesia (EC1).

EPAs also noted countries running campaigns urging consumers to support domestic businesses and ‘buy local’—detrimental to their exports (CL2, PE2).

In consolidation, market and operational problems, uncertainty and inability to plan ahead—in seeking to mitigate the pandemic’s impact; particularly with respect to time-frames in relation to resource availability—were perceived as key SME debilitating factors across all EPA perspectives.

4.2. Pandemic Impact on EPAs: Challenges, Operational Changes and Response Strategies

4.2.1. Initial Shock, Fundamental Soul-Searching and Mission Reconfiguration

The outbreak impact on the EPAs was profound and intense. “A shock” (EC1). Initially confusion and “panic” reigned as they sought to respond and overcome extreme dramatic realities and turmoil materialising ‘overnight’ (CL2; and PE1, EC1). Global uncertainty, like fog restricted visibility: policies and lockdowns shifting continuously in tandem with surging contagion, death tolls and evolving scientific opinion (CL1, PE1, PE2, EC1).

Like everyone around the world—“We were in total uncertainty . . . nobody knew what was going to happen” (PE1; and PE2, CL1, CL2, EC). Seeking focus and purpose, the EPAs were compelled to ask the most fundamental of questions—reflecting the crisis’ suddenness and magnitude:

“the challenges that we lived, and I saw in the first few months: it’s, ‘what are we going to do now?’ What are we going to do with this big structure? We are 57 offices around the globe, and in Chile we have 16 . . . so what are we going to do?” (CL2)

Searching for answers, the EPAs started collaborating intensely, using all means and channels, formally and informally—seeking to understand, learn, and make sense of the chaos—to gradually re-establish purpose, a sense of direction and start evolving plans to deliver on their mission:

“And in asking this question, we started working with everyone—you know—we are going to do this workshop, we are going to do this panel, we are going to do forums . . . and in this panic situation, we started to do everything . . . and we can [then start to] see the focus, good . . . you can [start to] see what is going to be our goal. So I think in the first place it was, [the challenge to] organise this, because we have to focus . . . and then, [figure out] what we are going to do with the other priorities” (CL2)

Amid lockdowns and enforced physical distancing, the EPAs’ first priority was to urgently restore an extent of work capability (remotely); scrambling to re-organise operations to resume functionality, “and in parallel, . . . what can we do to help the companies?” (PE1; and CL1, CL2, PE2, EC1).

4.2.2. Back to Basics, Digitalisation Challenges and Operational Realities—Human Trials, Remote Challenges and Reaching Out

Although to different extents, digitalisation had been a future contemplation, and pre-pandemic they enjoyed typically good office ICT infrastructure—like many across the world, the EPAs were unprepared for what hit them (CL1, CL2, PE1, PE2, EC1). Urgent investments and migration to digital platforms and VPN secure servers for work, communication and service provision were top priority—draining, “it has been very time

consuming doing this remote thing” (PE1); “it wasn’t easy, but it was the only way to continue supporting firms” (CL1). Respective governments and ministries supported as best they could facilitating this rushed transition (CL1, PE1, EC1).

EPA staff needed to go back to basics, learning new technologies required to do everything: “how to approach the clients, how to conduct the meetings itself” (PE1). An immediate important challenge was plugging crucial skills gaps including soft-skills for delivering professional services in new ways—“capacity building” (CL1). Besides steep learning curves and demanding new processes, employees faced personal stress, working very long hours from home amid family distractions. PE1 vividly illustrates the EPAs’ lived experience:

“At home [. . .] having the families, and the children having to have their own computer, and having to make your own office at home. Having the little kids doing their work at home, and everybody at home [. . .] a big challenge. [. . .] Some days, we started with meetings in Korea at 7 a.m., and ended with a conversation with China at 8 p.m. . . . So, it was a 12 hour day of work. And if you sum up this with the proper stress of being at home all day, and the pandemic itself. It was a big challenge”.

Noting they were comparatively technologically better equipped than many other local organisations and businesses (EC1, CL1, PE1, PE2), and notwithstanding significant additional advances made, digitalisation nonetheless remained an important operational concern ten months in: “it is still a challenge, an important challenge” (PE1; and CL1). In this remote-first ‘new normal’, “gaps” persist and “digitalisation of all the processes [services]” is yet to be realised for all EPAs (CL1, EC1). Now fully dependent on it, sometimes the technology itself fails too! (PE1).

As soon as some operational functionality was restored, upon catching their breath, EPAs’ attention instantly refocussed on “how to keep trade running” (CL1). ProChile started providing SMEs regular updated information on what was evolving in the international sphere. All EPAs’ first responses entailed rudimentary fact-finding by directly telephoning exporters as well as foreign importers to make sense of “what was going on out there” (CL1; and PE1, CE1). Directly asking, “hey, what do you need? What market do you have? What info do you need? What’s your needs regarding joint ventures, infrastructure?” (PE2). Pro Ecuador harnessed new channels and commenced using social media platforms extensively; Instagram, Facebook to “reach new customers” (EC1).

4.2.3. Necessity the Mother of Invention: Getting Things Done through Perseverance, Goodwill, Relational Dynamics and Collaboration

The Ecuadorian EPA experienced an additional prolonged trauma when the pandemic exploded. SMEs’ products just stopped in limbo at foreign market borders. Newly digitalised alternative hygiene and sanitation certificates were not recognised by foreign countries’ validation agencies. Pro Ecuador took on the gruelling complex “commercial diplomacy” role; working 24/7 for days, liaising with international embassies, ministries and health authorities globally, sometimes outside formal channels, to surmount this impasse—for exports to flow again. Tact, persistence, trust-based relationships and goodwill were providential. Such ‘diplomacy’ still constitutes circa 80% of the EPA’s tasks as the crisis wears on (EC1).

Also, heavily impacted were EPAs’ resources. Mirroring stalled economies, these EPAs also had to suffer significant financial budget cuts at short notice; and in Ecuador’s case, substantial employee layoffs too (EC1, CL1, PE1). Resource reductions when most needed, necessitated further adjustments in critical times. CL1 consolidates the circumstances:

“ . . . but we have to deal also with the impact about the budget. [. . .] the budget destined for the promotion agency, was a big cut for us. So, we have to adapt our strategy. What are we going to do with this less budget?”

Pro Ecuador had to restructure, emerging a leaner more effective EPA with recalibrated strategies. Fragmented duplication at all foreign offices was replaced with regional centres of specialisation serving all their Latin American offices. Additionally, a ‘business intelligence’ unit was established, with statisticians collecting and preparing “Wow . . . amazing data” to inform strategies helping exporters—already generating results (CE1).

Amid all this, something strongly evident emanating from all EPA participants, was their immense sense of commitment and professionalism. Honour as well as pride, in tirelessly striving to help their country and assist their businesses through the crisis (CL1, CL2, PE1, PE2, CE1). Even grateful to have a job, and the opportunity to work hard for this purpose.

Facing a global crisis inflicting universal problems, all EPAs stressed huge value realised in extensively leveraging their networks, collaborating with (normally “competitor”) EPAs. “Immediately, we started cooperating” (EC1; and CL2, PE1), seeking to share and help each other through the crisis. A pervasive genuine will to help—in times of crisis, far more effective than any “fancy and politically correct” formal speeches and agreements (EC1). This informal “win-win” collaboration, trusting goodwill, was deemed to be very strategically important (CL1; and CL2, PE2, EC1)—“outstanding” for dealing with the crisis. “A [simple] phone call and a relationship was more important than signing a memorandum of understanding!” (EC1).

4.2.4. EPA Services in COVID Times—Repackaged and Creatively Deployed: Reinvention Amid Budget Cuts and Layoffs

Meantime, SME demand for EPA services varied. CL1 noted take up for certain instruments “dropped significantly”; interest in funded public contest applications for agribusiness and other sectors’ export support dropped by 50%:

“I would say one of the reasons is that most SMEs targeted [. . .] are worried at this moment about keeping alive—[to] keep selling the products internally [in the absence of exports]” (CL1)

On the other hand, PE2 observed an “increase in exporters . . . joining virtual meetings . . . they just contact us . . . everybody wants to participate with us right now—but they are already exporters [as opposed to first-time exporters]”.

EPAs also observed some SMEs initially reluctant to learn new approaches and participate in virtual activities. Culturally also preferring personal physical interaction, they supposed they’d try to wait for the pandemic “to pass”, in order to travel and join the usual in-person trade missions later—however by September 2020 they realised the crisis had no end in sight and started exploring alternative possibilities (CL1).

Using digital platforms such as Zoom and Google Meet, the EPAs also sought to pass on important ‘new normal’ insights and skills to SMEs. EC1 sums it up:

“aggressively initiated training programmes in every single field—from packaging, labelling . . . even psychological aspects of negotiations . . . export processes”.

The EPAs stated no specific new pandemic-response instruments were created:

“same services in a different way”, existing offerings were, “aggressively improved” (CE1; and CL1) in format, delivery, access and communication channels—“focussed on how to cope with the pandemic—having to try to find new opportunities between these, this whole chaos” (PE1)

However, one observes the EPAs indirectly did offer several new complementary facilitating services that were essential for SMEs in learning and making sense of the crisis—for mitigating challenges, adjusting, surviving, and in some cases exploiting unexpected export opportunities.

Necessity is the mother of invention, and evidently the EPAs were enterprising in different ways—innovating and improvising, creating value through effective frugal solutions.

For example, ProChile, innovatively leveraged its extensive foreign networks to start bringing together businesses from both sides (local and foreign)—seeking complementarity, prospecting SME strategic alliances for mutual gain, and synergies facing up to the pandemic (CL1).

PromPeru, assisted small exporting SMEs by collecting their product samples and dispatching them to prospective foreign importers—that they may see, touch and taste, before bringing both together for virtual meetings—promoting new export market development (PE2).

Attending very large virtual trade fairs and congresses, Pro Ecuador investigated further. It transpired they were not so effective, besides being “very expensive”. EC1 explained the experience of physical interaction attending trade expos simply cannot be transposed to digital platforms. Prospects for serendipitous encounters or trust building are compromised. Instead they more successfully organise targeted virtual meetings between parties sharing mutual interests—“basically what the buyers need is a Zoom conference, they don’t visit the virtual set, the virtual platform, virtual congress! [...] A 45 min meeting. And that’s it” (EC1)—at much lower cost!

4.2.5. Strategic Redirection and Response in Times of Uncertainty and Resource Scarcity

Beyond obligatory operational adjustments, the EPAs’ pandemic response strategies emerged in vivo as the crisis evolved in line with their learning and sensemaking. Although the pandemic presented universal problems, and commonalities were apparent—each EPA’s disruptions and idiosyncratic realities were closely linked to national circumstances. The following consolidates the EPAs’ own account of their key emergent response strategies deployed, from among various ongoing initiatives.

For example, CL1 noted additional urgency:

“there are different impacts COVID has had. We are adjusting our strategy. We need to move forward, but fast at this moment. You know, the government term in Chile is only four years, it is quite short—at this moment, 471 days left—So that’s one fact that’s important to mention”.

Pandemic turmoil and political expectations come together heightening the need to deliver—now with less financial resources, and in instances, reduced human capacity.

CL1 explained emergent strategies incorporated a redefined mission to extend existing exporters assistance to enter new different markets; leveraging their network of 56 foreign offices. International collaboration intensified, new “different types of meetings” seek to bring together “different initiatives” between trans-national SMEs exploring potential for mutually advantageous strategic alliances in facing up to the pandemic (CL1). Organisation-wide training initiatives enhancing human capital and collaboration with universities and centres of excellence were also stepped-up, in line of Wipulanusat et al. [70] highlighting the importance of collaboration between institutions to enhance performance. Besides proactively augmenting relevant services for their SME clients.

PE1 and PE2 explained their strategy is underpinned by seeking direct links with as many of its SME clients as possible—to have a pulse on their realities. They further increased training and skilling for SMEs, started extensive promotion of e-commerce offerings, and initiated small focussed trade promotion meetings, confirming what Glavič’s [71] emphasis on the importance of education for sustainable development.

Assisting small rural SMEs, they collect and dispatch physical samples to importers, improving success rates and prepping for Zoom meetings. They too are exploring and encouraging strategic alliances between SMEs to better face the pandemic. A new strategic direction is targeting and promoting direct business-to-consumer (B2C) business models, given consumer awareness and pervasive online shopping. They have furthermore engaged outside consultants to start making sense of a strategy overhaul for 2021.

EC1 noted their strategy ensued in parallel with a forced need to restructure due to severely reduced budgets and employee redundancies—now leaner and more capable, however still ruing lesser finances. Strategic decisions, now based on data via their new

“Business Intelligence unit”, maximise effectiveness and projections. Their new emerging strategy involves international collaboration as well as tight coordination with national ministries and agencies to ensure one cohesive direction and concerted effort. They maintain “commercial diplomacy”—and their top objective is to promote and protect the national brand: Ecuador. All crucial in addressing potentially more severe consequences and reputational issues, already experienced at different points during the crisis. They aggressively initiated training programmes for SMEs including soft skills and embarked on extensive social media use. Realising greater efficacy—they focus more on their smaller targeted virtual trade missions between hand-selected interested parties.

4.3. *Quo Vadis? EPAs’ Expectations Looking Ahead Post-COVID*

Though COVID-19 vaccines were due to be rolled out, global pandemic cases and death rates ebbed and then surged again, to new record levels. Once more, strict lockdowns, restrictions and boarder closures were reinstated the world over. The EPAs noted that even around a year following the outbreak, the pandemic was clearly persisting.

Though the allure that some semblance of ‘normality’ may seem likely at some future point, was evident; yet the EPAs remained cautious amid major pandemic disruption, knowing much uncertainty remains, and furthermore new behaviours and trends would likely persist in tomorrow’s ‘new normal’.

That, said, the EPAs; with many months’ pandemic experience behind them, and habituated to putting out fires in disruptive realities; were mostly already engaged on evolving their pandemic response strategies. Naturally, aspects from their crisis measures transcend, also shedding light on their perceptions on the future—since by its nature, strategy requires looking ahead.

The respective EPA participants’ perceptions and post-COVID expectations, follow.

4.3.1. Perceptions on Economic Recovery and Future Engagement with Exporters

Looking ahead, CL1 noted Chile’s economic projections:

“[we] will be near to the situation prior to the pandemic as soon as 2024—not before”. It was stressed “the recovery will take a long time. A long time before exports are back to normal . . . And for bigger companies, its maybe not a big deal, if you can say that, but for SMEs it’s quite critical.” (CL1)

CL1 stated ProChile now sees increased value in identifying and establishing clearer insights on ‘potential exporters’—close-to-export-ready SMEs in specific sectors, who with additional assistance have potential to internationalise successfully. This forms the basis of future-looking outreach support strategies. It aligns with their awareness of needing to enhance service “coverage”, since “not all exporters come to us”, and “gaps” where certain sectors may be underserved exist (CL1). In this regard, a drive already initiated and expected to be intensified post-COVID is greater emphases in promoting exports in service and creative industries—citing their impact increasing qualified professional employment and socio-economic value.

In combination, CL1 observed indigenous SMEs often need to improve efficiency and productivity to enhance exportability in competitive international markets. Acute for post-pandemic recovery, CL1 anticipates an important role helping SMEs innovate up the value-added ladder in line with changed consumption patterns. Indeed, “incorporating a lot of innovation” was awarded their wish list top spot.

As part of their future plans, besides intensifying marketing efforts promoting national brands, such as ‘Coffees from Peru’ and other superfoods—PromPeru’ will now look to new investments embarking on strategically targeting connected consumers, using B2C models (PE1, PE2).

Economically, the Ecuadorian perspective anticipates that while some countries might recover in 3 years, “in the case of Ecuador, I believe at least 4 years is the time we expect to have fully recovered . . . 5 years—not less”.

4.3.2. Sustainability and Environmental Dynamics Expectations Post-COVID

The EPAs anticipate amplification of trends driving sustainability requirements and environmental awareness in markets and supply chains post-COVID.

Sustainability was mentioned as both a challenge, and important future vision component—in relation to a more connected and aware, ‘smaller’ world. Increasingly informing policy and shaping global markets—they perceive changes in consumer behaviour intensifying environmental concerns—particularly important for Chilean agribusiness exports. CL1 cited damaging negative publicity Chile and one of its main superfood exports endured on international media—emphatically indicating that national reputation and green credentials should also be promoted in foreign markets.

Similarly, from a post-pandemic consumer perspective, PE1 also perceives:

“There will probably be more demand for more sustainable products. People are more aware of the causes of this pandemic, and probably, the most sophisticated markets, like Europe, and maybe the US or Japan—they will probably be more demanding for the organic and sustainable products. But I will say that also here, at a regional level, there will be some kind of changes in the pattern of the consumer. I would think that after all this crisis, some things will have to change!”

This corroborates Rehman et al.’s [72] argument stressing the importance of increasing the sophistication of a country’s exports to foster economic growth. In the same vein, Hosein et al. [73] describe how the current COVID-19 pandemic has deeply damaged Trinidad and Tobago’s traditional energy exports, in this case suggesting diversification to exports of other goods (non-traditional energy-related).

4.3.3. Future Casting a New Normal: Future of Work, Operational Shifts and Innovative Adaptation

Looking ahead, PE1 notes a key need the Peruvian EPA requires for 2021 and beyond, is: “to try to have forecasts and any kind of information that can give us some light about what can happen. It will be hard, but this is what everyone is expecting. So, we have to do our best to try to get this information for us, and for the companies [we serve] obviously”.

Clarity helps adapt operations to unfolding realities, facilitating establishment of ensuing strategies (PE1). Operationally, PE1 anticipates adopting a hybrid workspace—mixing physical and virtual contexts for both employees and export promotion activities. This deemed to: “have benefits not only for work, but also for the environment and for the quality of life for the citizens” (PE1).

An extent of remote working from the pandemic era would remain, leveraging investments made, newfound technology familiarity, and changed behavioural patterns.

Noting pandemic accelerated trends, PE1 declared they will “continue with betting for digitalisation”. A key strategy already mooted includes a marketplace concept entailing “a mixture of in-person and virtual activities” promoting Peruvian offerings internationally 24/7. PE2 observed: “Everything is virtual now. Everybody is researching and curious, using software networks and the internet in general. So our exposure in the virtual [world] will bring us closer to/approach the consumers—not only with the importers. I believe that is going to change ... our strategy”.

EC1 mentioned looking ahead post-pandemic also depends on imminent election outcomes due May 2021: “that crystal ball would first have to tell us who will be the next president”. However, it was pointed out that “Ecuador, regardless of government, depends on exports. So, any government will always protect the exporting sector—and we need also investments”.

In this regard, the EPA’s recent restructuring into a leaner, responsive and data-driven organisation forms an important foundation for their post-pandemic strategy (EC1). Already generating valuable insights, they feel further investments in business and market intelligence will be a future requirement. Near term, from 2021, existing “key performance

indicators" (KPIs) are to be extended to include client and stakeholder perspectives—enhancing strategic client/market alignment (EC1).

Intent on strengthening national and agency exposure, as well fostering relationships with importers, the EPA is contemplating new regional events, including promotion—such as overseas award ceremonies for "Best Importer of Wellness Products". EC1 infers "innovating in the way we approach buyers" will be an important requirement for the future.

At an industry level, EC1 perceives post-pandemic 'future of work' trends will see workplaces and offices around the world transformed and redecorated, as "people will prefer the hybrid modality of working, and people will prefer open spaces". Pro Ecuador is already gearing up to provide training and support for furniture manufacturing and related SMEs that they may recognise and exploit any post-pandemic opportunities—should they materialise. Though seeking new opportunities is central, EC1 however stressed it would always be critical for their strategy to "maintain the current exports—that's very important".

Post-pandemic, the EPA intends to further experimentation with industry 4.0 and technology applications to facilitate exports. An existing blockchain pilot project logging major shrimp exports supply-chains will be extended. This is where they believe the future is headed. EC1 noted secure, internationally recognised technologies ensure efficiency, continuity and validity—safeguarding against bureaucracy or disruption. Facilitating and enabling Ecuadorian SMEs to catch-up in adopting e-commerce and digitalisation, is seen as a required strategic thrust for the coming years.

In consolidation, protecting 'brand Ecuador', international collaboration for mutual gain and knowledge transfer, as well as training—at EPA and SME levels—will all play a central role for the EPA post-pandemic. They believe these will enable them to "maximise the opportunities for the exporting sector".

5. Discussion

A calamitous unknown-unknown, nothing compares to the absolute disruption COVID-19 suddenly wrought on the global economy [38]. Its impact saw world GDP drop 3.2% in 2020; while South America's more acutely affected regional economy plummeted 7.3% [74]. The hard-hit region's health crisis transformed into its "worst economic social and production calamity in 120 years" [48]—"a humanitarian crisis" [69] (p. 1463). These predicaments and international agency indicators were clearly evinced and manifested at 'ground zero' in these three EPAs' vividly corroborated lived experiences—as they actively faced up to the pandemic in their own realities.

Organisational resilience posits uncertain environments require organisations to be adaptable to respond to changing conditions [15]. Van Biesebeek et al. [40] and Freixanet et al. [39] illustrate how EPPs mitigate uncertainty exporting firms face by reducing information asymmetry [25] and lowering transaction costs. For example emerging from our study, and building on various new effective measures adopted by firms with the EPAs' support—EPA managers stressed the need for timely information, provision of practical insights and collaboration in the face of such uncertainty and unanticipated shocks; as well as broad strategic policies targeting and enhancing firms' marketing digitalisation, innovation through the introduction of more sustainable new products, and firms' access to new supply chains for contingency—among others.

Following, we discuss in more detail the salient aspects ensuing from our findings and attendant implications, in line with our stated objectives.

The EPAs' rich narratives evinced the pandemic's effect on the stunned enterprises they serve. Highlighting lockdown devastation halting activity overnight, it was clear regional aspects compounded matters, presenting deeper uncertainty and intensifying impact. This, poignantly expressed by EC1, stating "for us the pandemic was actually [only] the second big wave of pressure on the exporting sector"—the EPAs citing social unrest and political dynamics adding complications. Strikes and discord complementing lockdowns

and boarder closures in halting operations; regional rural geography, infrastructure and the nature of economic activity also played significant parts in impeding resumption of business activity—more so for exports (CL1, PE1, EC1).

OECD-diagnosed global supply chain problems (further challenged by regional circumstances in access and travel, restricted labour mobility, shipping port disruptions, and additional health and safety measures), were evident in the EPAs' accounts—stressing the importance of innovation in relation to seeking different foreign market buyers [31]. Examples highlighted included changing priorities, tastes and behaviours of consumers (CL1, CL2, PE2, EC1); necessitating new product development (EC1, CL1, PE1); as well as the use of new channels including digital platforms and media; and grappling with e-commerce (CL1, CL2, PE1, PE2, EC1).

Emphasising the importance of developing new products [4] none less also for small firms without in-house R&D facilities (as is the case of most firms demanding services from the EPAs under study), Tsuji et al. [75] underline the need for assistance from external sources in helping small resource constrained businesses engage in new product development and innovation.

Mostly positioned at the origin of global supply chains, the severe impact suffered by these SMEs reflects the now more apparent critical vulnerabilities of production networks to such unforeseen crises [14]. Disruption and concerns from export overdependence on raw materials, commodities and agri-food products were highlighted (CL1, PE1, EC1). Typically price sensitive on global markets, the EPAs emphasised SMEs' urgent need to embrace innovation: to differentiate, and move up value chains (CL1, PE2, EC1); and improve lagging productivity and efficiency (CL1, PE1) to enhance international competitiveness. With respect to reducing reliance and dependency on global supply chains, Öberg [76] proposes modifying manufacturing processes enabling greater local orientation to participation in such chains.

Similarly, input-related employee mobility impediments impacted generally labour intensive operations—regional exporters registering circa 30% declines [77]. Also emphasized were human capital and skills gaps; and insufficient digital connectedness (CL1)—aligned with ILO reports [78]. Also, limited flight and travel policies intensify shortfalls [79]. Cultural aspects also emerged, ranging from physical relational preferences initially shunning remote alternatives, to conservative attitudes heightening risk aversion [33]. EPAs here were extremely important in mitigating increased risk perception, providing information and motivating export resumption [8].

Many businesses were on life-support or closed down. The negative consequences of business failures studied by Dias and Teixeira [80] indicate previous failures impact individuals strongly when having to undertake new activities. Nonetheless, some firms however reaped fortunes from the global trend in food consumption rising during crises. EPAs reported enterprising agribusinesses increasing exports (CL1, PE1, PE2, EC1)—notwithstanding regional complexity. This was also reflected in overall growth for the respective countries' agribusiness sectors' exports. Notwithstanding, the EPAs' issued a clarion call that important lessons must be heeded. Manageable exposed shortcomings known pre-pandemic, need to be shored and actively addressed, at firm, agency and national policy levels—if prospecting competitive participation in tomorrow's international markets.

As for other organisations universally, the outbreak for the EPAs was initially debilitating: chaos, paralysis and an inability to look ahead [38]—"total uncertainty" (PE1), "even experts didn't know what was happening" (EC1).

The crisis' magnitude forced fundamental self-questioning of their mission, seeking purpose in unfamiliar calamity (CL2). This was also evinced among 39% of European trade promotion organisations (TPOs) reporting new mandated remit objectives [81]. Once the shock subsided, the EPAs under study left no stone unturned actively adjusting, seeking to assist SMEs' operations—yet not without COVID-19 collateral. While elsewhere EPAs may have benefitted from increased emergency funding, these South American EPAs had

to additionally endure financial budget cuts, and in Pro Ecuador's case also employee layoffs—at a critical time.

That said, many of their evolved response strategies would have been similar to other EPAs': First step, restoring operational capability in a new virtual world of remote interaction. Digitalisation featured extensively in both the EPAs' operational adjustments internally, enabling employees to work remotely; as well as migration of service offerings for SMEs to access online. Establishing regular direct lines of communication with the business community via online channels, including extensive social media presence, were also a top priority—dispensing information updates amid the evolving crisis' persisting uncertainty; and gradually restoring service offerings [38]. In-house, professional and university training was “aggressively” (CL1) pursued, plugging employees' skills gaps, as well as service offerings for SMEs. The EPAs' EPPs were restructured, enhanced and largely moved online—resulting in “new old instruments” [38]. Acknowledging this global remote experiment accelerating digital migration will likely persist [38], the EPAs intend to maintain various hybrid digital operations post-pandemic (CL2, PE2, EC1).

Yet amid such a ubiquitously endured crisis and universally deployed EPA counter measures, what really stands out from our findings is these three EPAs' resolute spirit and resourcefulness in creatively surmounting difficulties. Supporting exporting SMEs in the face of adversity—further acting as custodians to their country's national brand. This amid severely restrained resources, besides pandemic concerns—long hours and disrupted personal lives. Such organisational reconfiguration, enhancing efficiency and effectiveness, thus also saving resources in turbulent times is underlined by Rincón and Albors [82].

Seeking answers to questions “nobody knew” (PE1)—the “outstanding” (EC1) importance of human rapport, contacts and trust-based relationships was highlighted as being of immense value in facing the pandemic's turmoil. In highlighting the importance of relationships, Ortiz et al. [83] find that firms establishing more relationships are able to increase relevant acquired knowledge. Decentralised and informal innovative solutions to challenges were pragmatically established across borders—whether on the fringes of international diplomacy, or among ‘previously-competitor’ EPAs, now engaged in collaboration—where trust and social capital renders a mere phone-call “more important than [. . .] a memorandum of understanding” (EC1). This aligns with ECLAC's, albeit formal initiative seeking to avoid conflict-ridden trade measures, promoting collaboration and multilateralism [14]. Such collaboration through information sharing likely renders better service for customers [24,84], as empirically observed in this study. All three EPAs professed a newfound importance in the need for deeper cooperation.

It is in turbulent times, when public organisations see their resources severely reduced, that necessity becomes the proverbial mother of invention—requiring adaptations to such situations [82]. Thus pushed hard, all three South American EPAs were creative in effectively serving their mission. Entrepreneurially leveraging their limited resources, they frugally and creatively generated value and brokered solutions. Various examples ensued from our findings: PromPeru assisting rural exporters, collecting samples from small firms for dispatch to prospective foreign importers, landing new contracts. Forced to restructure with fewer employees, leaner Pro Ecuador set up a business intelligence department and reorganised operations to better effect. Shunning expensive, not-so-effective large virtual trade expos, they successfully run tailored Zoom sessions between mutually motivated prospecting partners; while ProChile brings indigenous and foreign SMEs together fostering collaboration, prospecting alliances for facing COVID-19.

The EPAs coincided in highlighting severe difficulty in planning ahead amid undulating pandemic waves, intermittent lockdowns, shifting policy and impending national elections. Plans morphing flexibly and EPAs' strategies emergent—“much coming from little [. . .] in a highly uncertain environment” [85] (pp. 195–196) and [86]. Anticipating their economies restored to pre-pandemic levels in circa 5 years, nevertheless, the EPAs were optimistic about the future; while also acknowledging defined challenges at firm and national levels—valuable opportunities if addressed strategically. Noting consumer behaviour

patterns would likely endure post-pandemic [38], all three EPAs underlined the importance of environmental sustainability for both products and processes; and the recognition of national green credentials internationally (CL1, PE1, PE2, EC1). Also expecting pervasive online activity and purchasing to continue, the EPAs are intent to “continue betting for digitalisation” (PE1), e-commerce and B2C national initiatives—while also exploiting technology to maximum effect for hybrid (including remote or virtual) trade promotion activity (CL2, PE2, EC1). This is in line with OECD’s [87] suggestion for supporting teleworking and digitalisation, especially in the case of SMEs. Technology is also notably seen by the EPAs as a useful tool mitigating disruption from potential regional instability, ensuring continuity, with blockchain cited as one example (EC1). In consolidation, it was also well founded that the EPAs emphasised importance in strategically promoting innovation at all levels, targeting indigenous growth in diversified, value-added and service sectors for export—if international market competitiveness is to be maintained. The overall sentiment underpinning the EPAs’ weary yet resiliently positive gaze looking ahead is summed up by PE1, “after all this, some things will have to change”. Nevertheless, in marketing firms’ innovation capability, institutions must also warrant such capability translates into specific outputs that meet destination market demands, thus realising added value potential [88].

In consolidation, from a broader perspective our in-depth exploration of interrelated cases in the context of such tumultuous and precarious circumstances can be construed as valuable insights on “discrete experiments that serve as replications, contrasts and extensions to emergent theory” [89] (p. 25). Our approach emphasises the rich and real lived context within which the phenomena occur—rather than isolating the two, as is typical in laboratory experiments [89]. In this regard, we draw from core aspects of our emergent findings and qualitative evidence; and propose the following general propositions for potential consideration and further investigation.

P1: in times of unanticipated major external crises, such as that presented by COVID-19, EPAs’ assistance leads to an increase in firms’ export performance, and a greater propensity to survive.

This draws from support and offering insight on disrupted market dynamics, seeking to promote firms’ adjustment and the development of new portfolios of more relevant, sustainable and value-generating products better aligned with morphing circumstances and shifting foreign market demands.

P2: in times of unanticipated major external crises, such as that presented by COVID-19, EPAs have potential to effectively support exporting firms.

EPAs may accomplish this in various ways, among them most markedly by: Helping them modify their (in the first instance, mainly marketing) internal processes via e.g., digitalisation and multichannel marketing techniques; Providing resources enabling adaptation to overcome operational challenges and (internal/external) exporting barriers; Extending collaborative international networks and brokering operational and strategic alliances with potential partners, customers, and suppliers; and Exploring the prospects for diversifying supply chains and/or the export market destinations targeted.

6. Conclusions

This study explored the lived challenges and realities of EPAs in COVID-19 times—their experience, as they faced the crisis. We analyse these South American EPAs’ experiences and perspective on the pandemic’s impact on exporting SMEs; their own operations and strategic response; and their post-COVID expectations. Our main contribution lies in direct vivid detail derived from the privileged first-hand viewpoint of elite informants—intimately engaged at operational and strategic levels. Embedded in specific realities, we shed light on best practice in such contexts, and offer insights for policy response—government support for exporting SMEs, as well as the EPAs that support them. We contribute to literature in the international business domain, providing knowledge about COVID-19’s impact on export promotion, specifically in the case of South American EPAs [9]. We adopt a novel approach in employing detailed consolidated narratives for

our exploratory qualitative methodology; seeking rich insights and deeper understanding ‘from the inside’ on this major phenomenon—complementing the mostly quantitative studies treating COVID-19 in the field.

The pandemic is evidently having particularly disruptive impact on SMEs in South American countries. Besides observing the implications of regional complexities, our findings align with Catanzaro and Teyssier [5], stating that in an international context in which business risks are magnified, SMEs could really suffer more than their larger counterparts as a result of restricted capabilities and resource limitations.

Hardly any research exists on the role of EPAs in COVID-times in South America. In this regard, our study provides useful insights on how generic policy perspectives broadly determined by other papers [33,38] may be implemented in the South American region.

Our findings also confirm Verma and Gustafsson [10], Wang et al. [30], and Petrunenko and Podtserkovnyi's [29] observations, stating that to mitigate the effects of this crisis, new strategies are required. In our study the EPAs were compelled to devise novel response strategies to rediscover purpose and help exporting SMEs. They used different specific instruments, and digital platforms to facilitate SMEs' operations, migrating most activities online—complementing De P. [37], ITC [35], and Rokosz and Pietrasinski [38]. This corroborates that some ‘digital’ innovations (such as databases, techniques and software tools) may lead the firm to realise competitive advantages [90], especially in such situations.

Our paper opens a new line of enquiry researching EPAs' perceptions and expectations post-COVID. Other potential future research streams emanating from our findings, and specifically relating to the COVID-19 pandemic, include exploring: cooperation strategies between EPAs, as Pérez et al. stress [25]; risk management in exporting SMEs; export managers' risk perception, opportunity recognition and resilience; and evaluating EPP conduciveness to digital or hybrid format migration. This follows Moon et al.'s [91] recommendation to address environmental problems and to seek sustainable development through voluntary and cooperative efforts—essentially going against the grain and traditional mentality typically emphasizing the individual and competitive optimisation. Such alternative perspectives become key in maintaining the sustainability of complex social and ecological systems.

Indeed, this effort by South American EPAs promoting innovation has shown to serve as a catalyst for instigating productive efficiency in the region [92]. In this line, Kamasak [93] stresses the importance of intangible resources (such as e.g., interconnectedness), and the capabilities to deploy them (e.g., business processes), towards enhancing firms' competitive advantage.

COVID-19 heralded the dawn of a new world reality for SMEs, and EPAs. It is clear that changes and awareness brought about by COVID-19 in relation to consumption patterns and production—such as sustainability matters—also merit further research attention. Regarding these EPAs' efforts, we have to stress how they creatively; and with very limited and reduced resources; found resource-light approaches and pragmatic solutions or ideas to effectively serve their mission.

Despite various contributions, our study needs to be interpreted with caution, mindful of potential contextual limitations—which in themselves, present opportunities for further research. Our research only included perspectives from three South American national EPAs; and while similarities likely exist, regional representation cannot be assumed. Similarly, our research only engaged elite EPA participants. Besides the propositions articulated earlier, future research may also solicit the involvement of SME managers; or alternatively adopt an in-depth, single case approach engaging several of the EPA's participants at different levels, leading to broader perspectives and varied insights. While the advantage of rich descriptive detail derives from our qualitative approach, quantitative research could also yield additional valuable insights on for example organisational performance, contributing towards a more holistic perspective. On the other hand, an oft recurring critique directed at South American counties is the lack of institutional transparency. Noting that government transparency in relation to the sustainability of public services is of interest to stakeholders

and academics [94], it may be relevant to analyse how transparency might moderate the effect of EPAs in uncertain times. Moreover, we believe it would be interesting to undertake a post-hoc study of the effectiveness of any implemented EPA strategies—once the currently still-raging pandemic subsides. Finally, it would also be useful to analyse how entrepreneurial performance may be affected by other external institutional agents, such as universities for example [95]; especially in uncertain contexts such as the one researched here.

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