

# Engaging Micro, Small and Medium Enterprises in International Standards Development

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APEC Sub-Committee on Standards and Conformance

January 2026







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APEC Project: SCSC 02 2024S

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# 1. Background

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Approximately 97% of all businesses in the Asia-Pacific region are micro, small and medium enterprises (MSMEs), and they play a vital role in driving economic growth and fostering innovation in global markets. Thanks to advancements in information technology, greater availability of e-commerce platforms and better transportation, MSMEs now have more opportunities than ever to expand into export markets and integrate into global value chains.<sup>1</sup> However, regulations, standards and conformity assessment procedures can vary across economies. While these measures are often crucial to protect the health and safety of consumers and the environment of the importing economy, they risk becoming significant barriers to trade if they are overly burdensome, discriminatory or outdated.<sup>2</sup> This is particularly challenging for firms exporting to multiple economies and is especially daunting for MSMEs.<sup>3</sup>

Technical barriers to trade arise when a technical regulation, standard or conformity assessment procedure creates an unnecessary and/or discriminatory obstacle to trade. Exporters of all sizes often need to make costly investments to comply with various technical requirements in different export markets, such as different packaging/labelling standards, multiple certification processes or even changing production processes. Compared to larger firms, MSMEs typically have fewer resources, and they face more difficulties in accessing information about and complying with diverse and rapidly evolving technical requirements in export markets.<sup>4</sup> As a result, affording these compliance costs can be particularly challenging for MSMEs looking to grow through international trade.<sup>5</sup> Given their limited resources compared to larger enterprises, the high costs associated with entry requirements can discourage MSMEs from entering export markets.

These measures and their associated regulatory burden are fixed, regardless of a firm's size, revenue or export value,<sup>6</sup> which means these costs disproportionately affect MSMEs.<sup>7</sup> Larger firms can better absorb these regulatory burdens and, in fact, it is often in their interests to use these regulatory hurdles against their smaller competitors.<sup>8</sup> In contrast, fixed compliance costs represent a larger portion of MSMEs' export sales, making them more burdensome and potentially reducing or negating

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<sup>1</sup> Secretariat, World Trade Organization (WTO). (2016). *World Trade Report 2016: Leveling the trading field for SMEs*. WTO.

<sup>2</sup> United States Trade Representative (USTR). (2010). *2010 Report on Technical Barriers to Trade*. Office of the USTR.

<sup>3</sup> Lesser, C. (2007). Do bilateral and regional approaches for reducing technical barriers to trade converge towards the multilateral trading system? *OECD Trade Policy Papers*, 58. Organisation for Economic Co-operation and Development (OECD) Publishing. <https://doi.org/10.1787/051058723767>

<sup>4</sup> USTR. (2013). *2013 Report on Technical Barriers to Trade*. Office of the USTR.

<sup>5</sup> Cusmano, L., & Koreen, M. (2017). Fostering greater SME participation in a globally integrated economy. *Journal of Management*, 22(2), 22-45.

<sup>6</sup> United States International Trade Commission (USITC). (2014). *Trade Barriers That U.S. Small and Medium-sized Enterprises Perceive as Affecting Exports to the European Union*. USITC.

<sup>7</sup> Cernat, L., Ana, N. L., & Ana, D. T. (2014). [SMEs are more important than you think! Challenges and opportunities for EU exporting SMEs](#). Directorate General for Trade, European Commission.

<sup>8</sup> USITC. (2019). *U.S. SME Exports: Trade-related Barriers Affecting Exports of U.S. Small and Medium-sized Enterprises to the United Kingdom*. USITC.

altogether the firms' export profits.<sup>9</sup> Most MSMEs also lack in-house experts with the technical knowledge needed for conformity assessment or the ability to efficiently manage trade-related costs.<sup>10</sup> This means MSMEs are more likely to lose export potential or withdraw from foreign markets due to costs related to technical barriers to trade.<sup>11</sup> This issue affects not only MSME exporters but also MSMEs involved in global value chains through subcontracting or supplying products to exporters.<sup>12</sup>

To reduce these barriers and facilitate trade for MSMEs, international standards must adequately reflect MSMEs' needs and interests. One important way to accomplish this goal is through MSME participation in international standards development. By joining a group of experts and stakeholders working to develop the technical content of a specific standard, MSMEs can provide direct input into the development of a standard. This is especially impactful when this participation begins at an early stage of standards development, enabling faster and easier adoption of the international standard in the marketplace. It also helps avoid fragmentation in export markets down the road when the international standard is used as a basis for technical regulations.

Research indicates that participation in international standards development is positively associated with MSMEs' likelihood of exporting. A study based on Canadian MSMEs shows that participating in one additional technical committee where international standards are developed could lead to more MSMEs entering the export market, with an estimated trade value of CAD516 million.<sup>13</sup> Strategically engaging in international standards development can facilitate reductions in trade barriers, which will ultimately bring more MSMEs into the global value chains.

## 2. Project overview and objectives

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This project (SCSC\_02\_2024S) under the Sub-Committee on Standards and Conformance (SCSC) aims to raise awareness of the importance of MSMEs' participation in international standards development and to help Asia-Pacific Economic Cooperation (APEC) member economies build capacity to support and promote such participation.

Participating in international standards development is one way for MSMEs to engage more broadly in international trade. However, MSMEs can face unique challenges that hinder that participation. For example, they may lack funding to attend standardization meetings, have limited time and personnel to dedicate to standards development processes, be less familiar with the standardization system and its

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<sup>9</sup> Jansen M. (2016). SME competitiveness: Standards and regulations matter. WTO Public Forum. [https://www.wto.org/english/forums\\_e/public\\_forum16\\_e/wrksses\\_e/jose\\_antonia\\_buencaminos84.pdf](https://www.wto.org/english/forums_e/public_forum16_e/wrksses_e/jose_antonia_buencaminos84.pdf)

<sup>10</sup> Fliess, B., & Busquets, C. (2006). *The Role of Trade Barriers in SME Internationalisation*. OECD Trade Policy Working Papers. OECD, Trade Directorate.

<sup>11</sup> USITC. (2019). *U.S. SME Exports: Trade-related Barriers Affecting Exports of U.S. Small and Medium-sized Enterprises to the United Kingdom*. USITC.

<sup>12</sup> Ferro, E., Wilson, J. S., & Otsuki, T. (2013). Policy note: The effect of product standards on agricultural exports from developing countries. *World Bank Policy Research Working Paper*, (6518).

<sup>13</sup> Liao, D. X., & Parkouda, M. (2023). Paving the road to global markets: How increasing participation in international standards development can boost exports from small and medium enterprises. *International Journal of Standardization Research*, 20(1), 1-19.

relevance, and face uncertainty about how to engage with other stakeholders like government officials and large enterprises.

Exploring the participation of MSMEs in international standards development, including by identifying current challenges, exchanging ideas and best practices to facilitate and support MSME participation, and capturing case studies on the outcomes of this participation, is meant to provide important information to all APEC economies. This information may be used to ensure high-quality and inclusive growth for APEC and to bring palpable benefits to MSMEs. This includes expanding opportunities for MSMEs owned or led by individuals with untapped economic potential, such as women, Indigenous Peoples, persons with disabilities, and those from remote and rural communities.

This project supports the Putrajaya Vision 2040 economic driver of “Strong, Balanced, Secure, Sustainable and Inclusive Growth,” fostering quality growth that brings palpable benefits and greater health and wellbeing to all, including MSMEs, women and others with untapped economic potential.<sup>14</sup> This project also supports the related actions under the Aotearoa Plan of Action to advance MSMEs’ access to global markets and global value chains as well as assisting in building their capacity to effectively participate in the wider economy.<sup>15</sup>

This project was co-sponsored by Australia; the People’s Republic of China; the Republic of Korea; Malaysia; New Zealand; Peru; and the United States. It included two surveys: the first directed at representatives of MSMEs and the second targeted at government agencies and standardization bodies across APEC economies. These surveys were complemented by a policy dialogue, held on 1 March 2025, where participants shared experiences and discussed the challenges and opportunities MSMEs face in participating in the development of international standards.

This project contributes to the inclusion of MSMEs in international standards development, which will support the development of more effective and inclusive standardization and conformance systems. By gaining a deeper understanding of the experiences and challenges faced by MSMEs, APEC economies can identify opportunities and implement best practices to increase their participation. MSMEs’ direct engagement and participation are essential to ensure their perspectives are reflected in international standards development.

This work builds on Peru’s project CTI 12 2015A, “Supporting the Trade Facilitation of MSMEs through Standardization.” This project sought to add to Peru’s findings and inform APEC economies’ understanding of MSMEs’ current experiences and participation in international standards development processes, given the impacts of the COVID-19 pandemic and the speed of digitalization since the completion of Peru’s project in 2017.

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<sup>14</sup> APEC. (2020). *APEC Putrajaya Vision 2040*. [https://www.apec.org/Meeting-Papers/Leaders-Declarations/2020/2020\\_aelm/Annex-A](https://www.apec.org/Meeting-Papers/Leaders-Declarations/2020/2020_aelm/Annex-A)

<sup>15</sup> APEC. (2021). *Aotearoa Plan of Action: A plan to implement the Putrajaya Vision 2040*. <https://aotearoaplanofaction.apec.org/index.html>

### 3. Select APEC work on MSMEs

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APEC has consistently prioritized MSMEs as key drivers of inclusive and sustainable economic growth. For example, APEC Ministerial Meetings have highlighted the fundamental role of MSMEs in the region's economic development, emphasizing the need to strengthen their capacities, access to finance and integration into global value chains.

Most recently, a Joint Statement on the 31st APEC Small and Medium Enterprises Ministerial Meeting outlined 3 regional priorities to advance these efforts:

- fostering innovative growth through emerging technologies such as artificial intelligence and digital transformation
- driving sustainable growth with policies that help MSMEs adapt to climate change and demographic shifts
- promoting inclusive growth by enhancing connectivity and expanding access to regional and global markets<sup>16</sup>

In alignment with the Putrajaya Vision 2040, APEC has implemented numerous targeted initiatives to support the development and internationalization of MSMEs. These include the Daegu Initiative, the 2015 Iloilo Initiative and the Boracay Agenda to Globalize MSMEs,<sup>17</sup> which focused on removing barriers to trade and improving MSMEs' access to global markets. In addition, various fora across APEC have developed projects and advanced work to strengthen MSMEs' digital capabilities, promote innovation and deliver capacity-building programs to foster more competitive, resilient enterprises.

The Jeju Initiative on APEC Startup Alliance: Connecting APEC Startup Ecosystem, announced on 5 September 2025, seeks "to improve the economic and policy environments in APEC economies to make them more conducive to innovation by facilitating the exchange of information on policies, experiences and best practices in the startup ecosystem, so that each economy can reap the benefits of innovation and startup-driven economic growth, including for MSMEs facing structural barriers in achieving their full economic potential."<sup>18</sup> Priority activities include creating networking opportunities, sharing information and creating a collaborative network of startup stakeholders.

It is important to note that there is currently no single definition of "MSME" across APEC economies. Instead, multiple definitions of MSME are used. These definitions typically consider one or more characteristics of an MSME, such as number of employees, sales and revenue figures, and assets and capital.

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<sup>16</sup> APEC. (2025). *APEC ministers commit to boosting SMEs resilience amid global uncertainty*.

<https://www.apec.org/press/news-releases/2025/apec-ministers-commit-to-boosting-smes-resilience-amid-global-uncertainty>

<sup>17</sup> APEC. (2015). *Boracay Action Agenda to Globalize MSMEs*. [https://www.apec.org/meeting-papers/sectoral-ministerial-meetings/trade/2015\\_trade/2015\\_mrt\\_standalone](https://www.apec.org/meeting-papers/sectoral-ministerial-meetings/trade/2015_trade/2015_mrt_standalone)

<sup>18</sup> APEC. (2025). *Jeju Initiative on APEC Startup Alliance: Connecting APEC Startup Ecosystem*.

<https://www.apec.org/meeting-papers/sectoral-ministerial-meetings/smallandmediumenterprise/2025-apec-small-and-medium-enterprises-ministerial-meeting/jeju-initiative-on-apec-startup-alliance--connecting-apec-startup-ecosystem>

## 3.1 Project: Supporting the Trade Facilitation of MSMEs through Standardization

In 2017, Peru completed a project entitled “Supporting the Trade Facilitation of MSMEs through Standardization” (CTI 13 2015A), which explored, documented and exchanged information about initiatives launched by domestic standards bodies that have helped MSMEs better understand the benefits of standards, conformance and metrology, with the aim of increasing MSME competitiveness and their integration in international trade. The project included a comprehensive survey, a two-day workshop and a document review. These activities provided valuable insights and led to key conclusions about efforts and challenges faced by APEC economies in supporting MSMEs through standards and conformance initiatives.

The results, published in the “*Guide to Support Quality Infrastructure Incorporation into MSMEs*”,<sup>19</sup> highlights that the strategies most used by APEC member economies were to help MSMEs implement standards, work with relevant associations, develop materials (including web-based information) that is readily available to MSMEs and promote awareness using IT tools. It was noted that these strategies face common challenges, including limited access to information on quality infrastructure and the services it delivers, limited awareness of the importance of quality infrastructure, and lack of resources and qualified experts.

A key finding of this work was the importance of objectives and indicators to measure the impacts of any strategies used. While not all initiatives may require such objectives or indicators, they can be helpful in illustrating impacts, for example in terms of improvement in MSMEs’ competitiveness.

## 3.2 APEC Small and Medium Enterprises Working Group

In line with the Putrajaya Vision’s emphasis on strong, inclusive and sustainable growth, the APEC Small and Medium Enterprises Working Group (SMEWG) plays a central role in promoting the development of an enabling environment, fostering capacity building and enhancing interconnectedness of MSMEs within the APEC region. SMEWG accomplishes these goals by sharing best practices among APEC economies and building on synergies with other APEC fora, the private sector and other stakeholders to promote the development and growth of MSMEs in the Asia-Pacific region.

To inform the SMEWG, the APEC Policy Support Unit published a paper, entitled "Enhancing MSME Data Interoperability in the APEC Region,"<sup>20</sup> to identify challenges, find opportunities, and propose recommendations to improve MSMEs' data compatibility and interoperability in the APEC region. The paper explores the challenges posed by the lack of interoperable data, considers its implications for evidence-based regional policymaking, and suggests approaches to enhance data interoperability using means that are considered to have minimal impacts and are feasible. This work is critical for

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<sup>19</sup> APEC. (2017). *Guide to support quality infrastructure incorporation into MSMEs*. National Institute of Quality (INACAL, Peru). <https://www.apec.org/publications/2017/04/guide-to-support-quality-infrastructure-incorporation-into-msmes>

<sup>20</sup> APEC Policy Support Unit. (2024). *Enhancing MSME Data Interoperability in the APEC Region*. APEC. <https://www.apec.org/publications/2024/09/enhancing-msme-data-interoperability-in-the-apec-region>

enabling evidence-based policymaking, providing targeted support to MSMEs, and monitoring trends and impacts over time.

A total of twenty economies in the region conducted firm-level surveys to gather information on MSMEs, such as number of employees, sales or revenue figures, and merchandise trading activity. The paper outlines three phases that could be used to advance MSME data interoperability:

1. preparation, where unified data semantics, formats and reporting mechanisms are developed
2. implementation, which involves executing the processes and mechanisms determined in the preparation stage
3. utilization, which ensures the data is high quality, can be used for monitoring progress on MSME issues, and is shared with relevant policymakers and stakeholders

The paper outlines several opportunities to enhance data interoperability, highlighting that interoperable data can improve the effectiveness of regional cooperation, including by identifying and coordinating on common issues as well as by facilitating cross-border learning and collaboration.

Together, these initiatives reflect APEC's comprehensive, cross-fora approach to empowering MSMEs. By addressing systemic challenges, sharing best practices and promoting policy coherence, APEC member economies are working to ensure MSMEs are not only included but equipped to thrive in a rapidly evolving global economy.

### 3.3 Case studies

As part of this project, APEC member economies shared case studies of current and past initiatives that showcase their efforts at engaging with MSMEs as well as the outcomes of the resulting MSME participation. These case studies provide examples that may be used to inform APEC member economies of new approaches.

#### 3.3.1 Canada: Innovation Initiative

Led by the Standards Council of Canada (SCC), the Innovation Initiative<sup>21</sup> was launched in 2017 to support commercialization and market access for Canadian businesses through standardization. It provided tailored, end-to-end support and guidance to help innovative companies navigate standards development and conformity assessment processes. The program offered Canadian innovators the opportunity to access knowledge and technical experts from international standardization networks and provided them with opportunities to participate in the development of international standards.

SCC supported the delivery of custom standardization solutions to support these innovators, tailored to their unique needs. Activities included:

- developing a new domestic or international standard
- amending, revising or adding a new part to an existing standard
- supporting compliance with existing standards and conformity assessment programs or schemes
- creating a consortium, committee or working group to advance standardization activity

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<sup>21</sup> SCC. (2023). *SCC's Innovation Initiative: Propelling Canada to lead the innovation race*. SCC. [https://scc-ccn.ca/system/files/2024-05/scc\\_2022\\_innovation\\_report\\_en\\_final.pdf](https://scc-ccn.ca/system/files/2024-05/scc_2022_innovation_report_en_final.pdf)

These activities accelerated the adoption of international standards and thus innovative companies' access to export markets. In 2023, six years after the program launched, 68% of innovative companies reported an increase in revenue, exports or employment as a result of participating in standardization.<sup>22</sup> Half of the companies indicated that the standardization solutions helped them resolve challenges in commercialization. This was particularly impactful for those offering innovative products that could not access markets because no standards existed to test their products. Of the companies involved in this program, 80% said participating in standards development allowed them to access expert knowledge and stay informed of future standardization trends. These knowledge-based benefits help MSMEs stay in the forefront of industry best practices and emerging trends, which allows them to anticipate market shifts and adapt early. Exposure to cutting-edge developments can also inspire new ideas and opportunities for business development.

### **3.3.2 Indonesia: The National Standardization Agency's Coaching Program**

The National Standardization Agency of Indonesia (BSN) has played a pivotal role in strengthening the engagement of MSMEs in the development and implementation of Indonesian National Standards (SNI). Acknowledging the barriers MSMEs face, particularly their limited awareness and technical understanding of international standards, BSN initiated an inclusive coaching program. This initiative aimed to bridge the knowledge gap and equip MSMEs with the tools needed to comply with and contribute to standardization, enhancing their competitiveness in domestic and international markets.

Central to this initiative were the various stakeholders who collaborated in its execution. BSN led the effort, working closely with MSMEs across multiple food processing, agriculture, logistics, and manufacturing sectors. Industry associations, like the Indonesian Cold Chain Association (ARPI), and academic institutions, such as Diponegoro University, also played supporting roles. Together, they fostered a network that encouraged knowledge exchange, capacity building, and direct involvement in standard-setting processes.

To put this into action, BSN organized a domestic coaching program that included outreach, training sessions, workshops, and hands-on support. These efforts culminated in the successful assistance of over 2,000 MSMEs, with 457 obtaining certification, 106 under SNI ISO and 102 under Hazard Analysis Critical Control Point (HACCP). Funding support for certification costs further lowered barriers to participation. Importantly, MSMEs were not just recipients of knowledge but also contributors to standards development. They actively participated in technical meetings and consensus-building discussions, influencing the creation and revision of standards relevant to their industries.

The impact of this program has been substantial. MSMEs gained improved access to markets through certification and alignment with international standards. Specific cases highlight this success—for instance, PT Superkul contributed to SNI 9300:2024 for cold chain logistics, and PD Sahang Mas helped update the domestic coffee standards. These contributions underscore a growing culture of collaboration and co-creation in Indonesia's standardization landscape.

Despite these achievements, challenges remain. The initial lack of awareness and limited resources among MSMEs were significant obstacles. However, the coaching program's success in overcoming these barriers demonstrates a viable model for inclusive standards development. It has empowered

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<sup>22</sup> SCC. (n.d.) *Innovation*. <https://scc-ccn.ca/areas-work/innovation>

MSMEs not only to meet regulatory requirements but also to become active stakeholders in shaping the standards that affect their industries.

### **3.3.3 Peru: Strengthening the Quality of Coffee and Cocoa for Export**

The project “Strengthening the quality of coffee and cocoa for exports from Peru” is being implemented the Global Quality and Standards Program (GQSP), developed by the United Nations Industrial Development Organization (UNIDO) and Swiss Cooperation-SECO, in co-management with the National Institute of Quality (INACAL). Its purpose is to improve the technical competence and sustainability of the Peruvian Quality Infrastructure System for the value chains of these products.

Among the lines of this project is the development of Peruvian Technical Standards (NTPs) and Guides for the implementation of Peruvian Technical Standards related to coffee, cocoa, chocolate, as well as other derivatives. To date, four NTPs and 17 important Peruvian Guides for the implementation have been approved under this project in these sectors.

The Guides for the implementation have been developed to enhance the quality of coffee, cocoa, chocolate, and derivatives, considering the potential and needs of the Peruvian industry. They have been reviewed and contributed to by the respective members of the INACAL’s Technical Committees on Standardization (CTN) for Cocoa and Chocolate and Coffee, to support the application of NTPs in the quality evaluation of products from these sectors, based on current norms and protocols that enable standardization of final products.

The guides are intended for producers' cooperatives, manufacturers, laboratories and other organizations involved in the value chain of coffee, cocoa, chocolate, and related products.

With the support of the project, significant progress was achieved in strengthening Peru’s Standardization System, particularly through the development and approval of new business plans for the CTNs for coffee, cocoa, and chocolate. A new methodology for drafting these plans was developed with the International Organization for Standardization (ISO) and piloted successfully, allowing the CTNs to perform strategic analyses of their respective sectors and propose updated or new NTPs. The support also enabled INACAL staff and CTN members to be trained in the methodology, ensuring its sustainability and replication.

Additionally, with technical assistance from the Associação Brasileira de Normas Técnicas (ABNT) and UNIDO, a tailored digital platform was implemented to streamline the Peruvian Technical Standards development process. The platform—now in use at INACAL—has improved efficiency and transparency by tracking over 500 Draft Peruvian Technical Standards and facilitating user participation and committee management.

### **3.3.4 ISO and the International Electrotechnical Commission**

Recognizing the potential benefits and challenges MSMEs faced in standards development, ISO and the International Electrotechnical Commission (IEC) have taken several steps to support MSMEs in using standards and participating in standards development.<sup>23</sup> In 2016, they published the joint ISO/IEC Guide 17 to provide guidance and recommendations for writing standards that take into

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<sup>23</sup> ISO. (n.d.). *ISO and small & medium enterprises*. <https://www.iso.org/iso-and-smes.html>

account the needs of MSMEs.<sup>24</sup> In addition to developing guidelines and handbooks to help MSMEs implement various standards, ISO also collaborates with its member bodies to provide localized support for MSMEs. Activities include training, funding and technical assistance to help MSMEs engage in standardization. IEC also established the Global Impact Fund to support MSMEs in targeted economies that use IEC standards to address global challenges. The initiative ensures MSMEs have access to funding and technical expertise and can work alongside IEC stakeholders to ensure a broad range of support among domestic stakeholders.<sup>25</sup>

## 4. Project deliverables

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This project was intended to examine the participation of MSMEs in the development of international standards, identify the current challenges they face, and exchange ideas and best practices to enhance their involvement. To achieve these goals, the project focused on two main deliverables: a survey and a policy dialogue.

### 4.1 Deliverable 1: Survey

#### 4.1.1 Survey design and distribution

To better understand MSMEs' experiences in the APEC region and support their engagement in international standards development, two surveys were launched in 2024 among APEC economies with the objective to study the current challenges MSMEs face and best practices to support them.

- The first survey targeted APEC member economies as well as international and domestic standardization bodies. It gathered information on the various programs and policies members currently offer to support their MSMEs (referred to as "Member Economy Survey").
- The second survey targeted MSMEs and aimed to study their experiences, including their knowledge in standardization, challenges they face, and benefits they wish to receive when participating in international standards development (referred to as "MSME Survey").

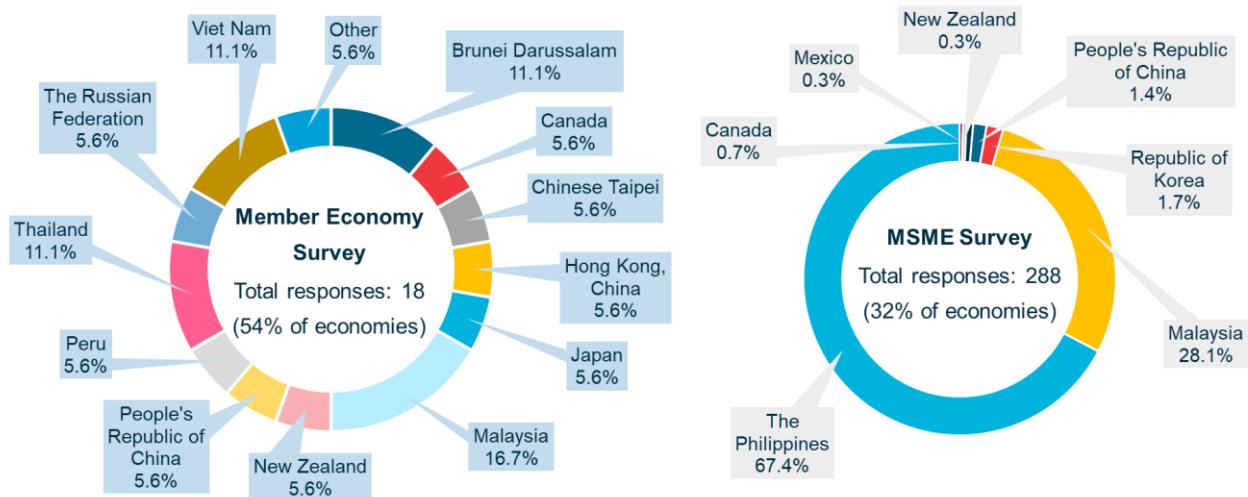
Both surveys were distributed to APEC member economies through their representatives on SCSC. The Member Economy Survey received 18 responses from 12 economies, accounting for 55% of the member economies. The MSME Survey received 288 responses from 7 economies, representing 32% of the member economies. It is important to note that 90% of the MSME survey responses came from Malaysia and the Philippines. As a result, the data is more representative of these economies and the results of the MSME survey should be interpreted with that in mind.

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<sup>24</sup> IEC. (2016). *ISO/IEC Guide 17:2016*. <https://webstore.iec.ch/en/publication/24306>

<sup>25</sup> IEC. (2022). *IEC Global Impact Fund*. [https://www.prd.iec.ch/system/files/2022-06/IEC\\_2022\\_How-we-contribute\\_Sustainable\\_future.pdf](https://www.prd.iec.ch/system/files/2022-06/IEC_2022_How-we-contribute_Sustainable_future.pdf)

Figure 1. Geographic distribution of survey responses

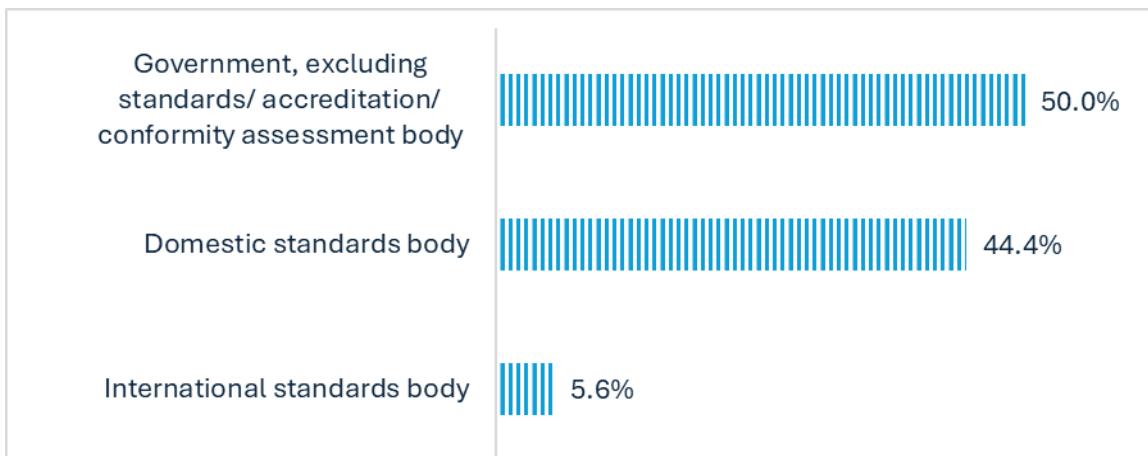


## 4.1.2 Survey results and findings

### Member Economy Survey

- **Sectoral breakdown:** Half of the responses to the Member Economy Survey came from standardization bodies and the other half from government bodies.

Figure 2. Sectoral breakdown (Member Economy Survey)



- **Current practices:**
  - *Support for MSME participation in standards development:* All survey respondents believe MSME participation in international standards development is important. Among them, about 83% are currently working with MSMEs to encourage or facilitate their participation in

international standards development, and 72% have plans to engage in this type of work. However, only 33% have set specific targets or goals to increase MSMEs' participation.

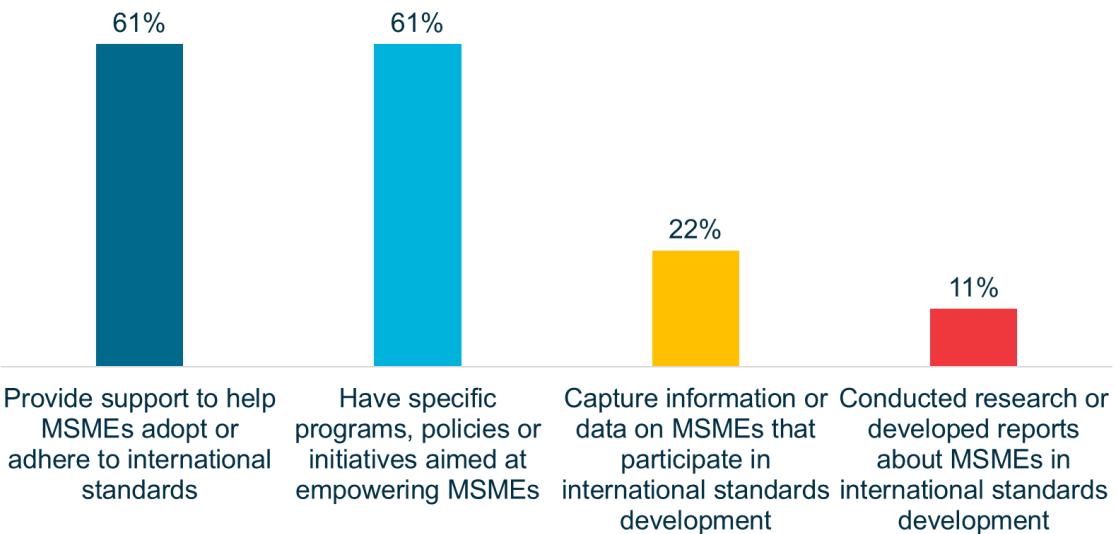
Figure 3. Support for MSME participation in standards development (Member Economy Survey)



- **Support for the use of standards:** 61% of respondents provide support to help MSMEs adopt or adhere to international standards.
- **Support to specific groups:** 61% of respondents have specific programs, policies or initiatives to empower MSMEs owned by women, youth, Indigenous Peoples, persons with disabilities, and individuals from remote or rural communities. Among these groups, women and youth are the two groups that received the most support, with more than half of respondents offering specific policies or programs to support them.<sup>26</sup>
- **Research and data support:** Only 22% of respondents capture information or data on MSME's participation, and only 11% have developed research or reports on this subject area.

<sup>26</sup> Note that this refers to support beyond standards development.

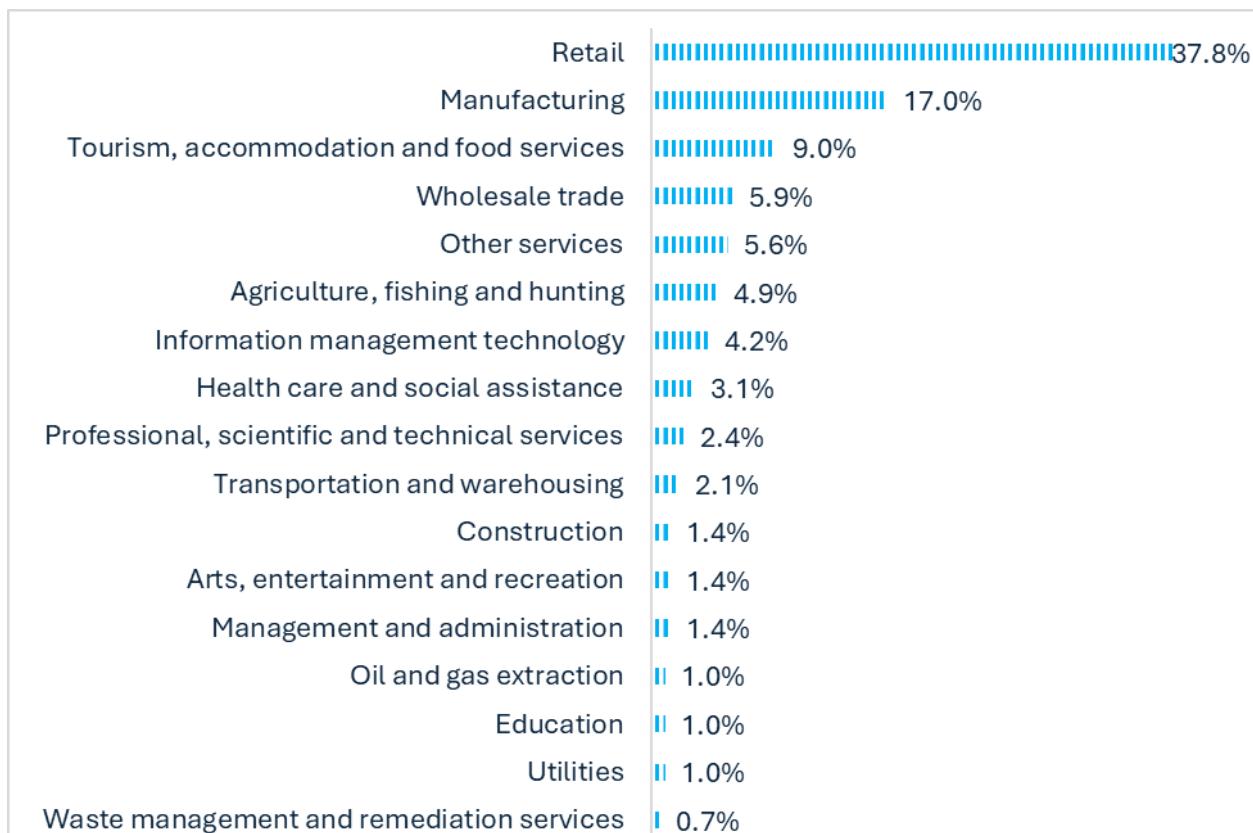
Figure 4. Other supports for MSMEs (Member Economy Survey)



#### MSME Survey

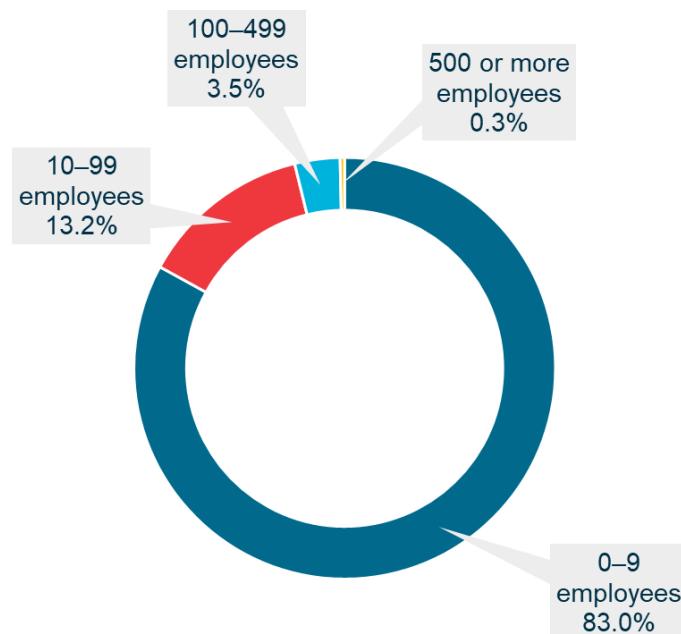
- **Sectoral breakdown:** The top three sectors represented by respondents to the MSME Survey are:
  - retail (37.8%),
  - manufacturing (17.0%),
  - tourism, accommodation and food services (9.0%).

Figure 5. Sectoral breakdown by respondent (MSME Survey)



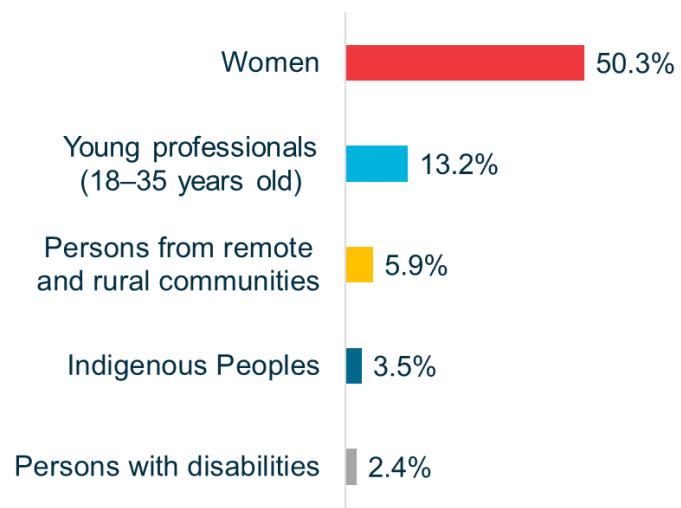
- **Size of business:** 99.7% of responses came from enterprises with fewer than 500 employees, including 83.0% from enterprises with fewer than 10 employees.

Figure 6. Size of business (MSME Survey)



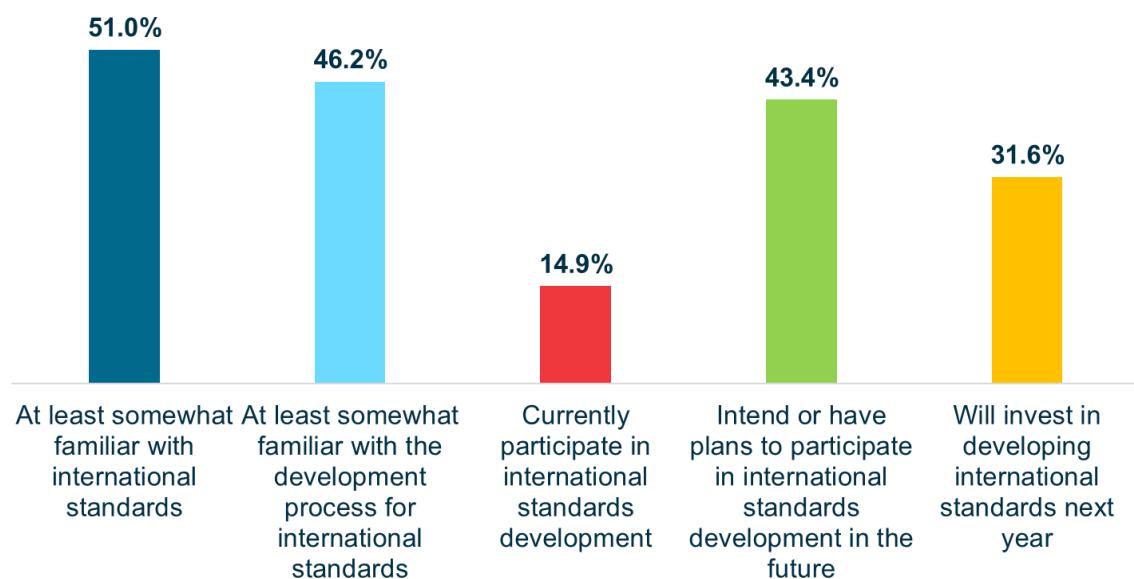
- **Characteristics of business owners:** About half of the MSMEs that responded to the survey are owned by women. This could be associated with the sectoral distribution of MSMEs. Many of the businesses are located in the retail and services sectors, where women are more likely to be owners compared with other sectors.

Figure 7. Characteristics of business owners (MSME Survey)



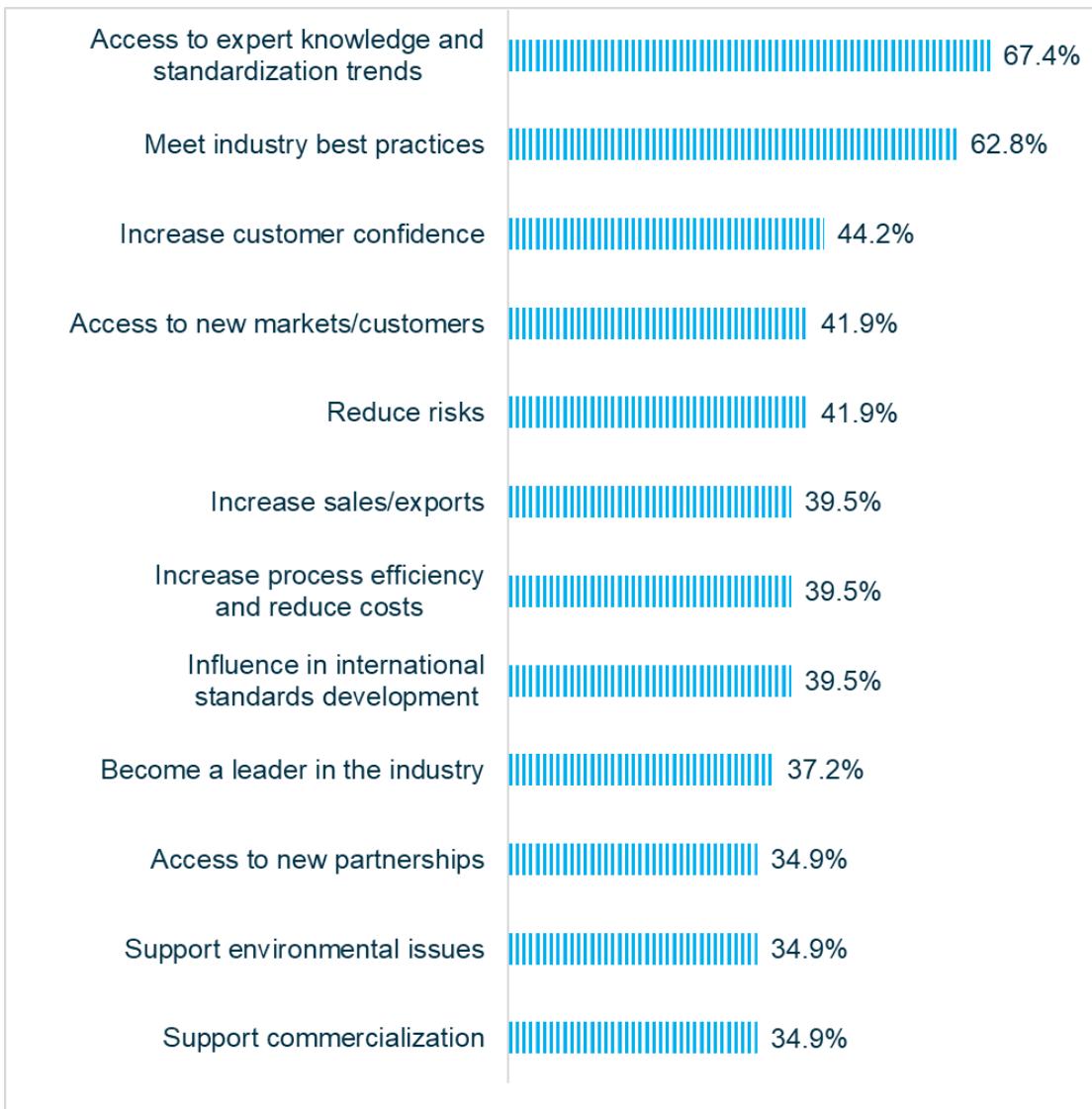
- **Standards activities:** About half of the MSMEs are at least somewhat familiar with international standards and the development process of standards. However, only about 14.9% currently participate in international standards development. That said, 43.4% of the respondents have an intention to participate in standards development in the future and 31.6% said they will invest in standards development. Among those who intend to invest financially, most (70%) will invest USD1,000 to 10,000, which is to be expected given that most of them are smaller businesses.

Figure 8. Standards activities (MSME Survey)



- **Use of standards:** 24% of MSMEs use or comply with international standards. The top reason for using standards is regulatory requirements (as cited by 59.4% of the MSMEs currently using standards).
- **Benefits of participating in international standards development:** The top two benefits cited by respondents are access to expert knowledge and standardization, and meeting industry best practices, followed by increased customer confidence, access to new markets/customers, and reduced risks. Overall, MSMEs reported more knowledge-based benefits than financial benefits.

Figure 9. Benefits of participating in international standards development (MSME Survey)



### Comparison across both surveys

By comparing the results of the two surveys, we were able to identify common themes and gaps perceived by member economies, standardization bodies and MSMEs.

### Challenges MSMEs face in participating in standards development

Figure 10 shows the ranking of the same group of challenges in different questions and surveys. The first 2 columns are from the MSME survey and are about the challenges MSMEs face when participating in international standards development and the reasons why the remaining MSMEs do not participate in standards development. The third column is from the Member Economy Survey and captures the challenges member economies and international and domestic standardization bodies believe MSMEs face when participating in international standards development. The comparison reveals the following:

- Lack of funding is considered the top challenge MSMEs face across all three groups.

- Lack of awareness of the international standards system and its benefits and the lack of information about relevant activities are the second and third reasons why MSMEs do not participate (second column). However, these reasons were ranked lower in terms of the challenges MSMEs actually encountered while participating in standards development and those assumed by member economies.
- In contrast, the complexity of the international standards system is among the top three challenges reported by MSMEs participating in international standards development and also by member economies, but it is not perceived as a significant barrier by those who do not participate in the development of international standards. This is likely because non-participants have not considered the possible complexities in the system.

Figure 10. Challenges MSMEs face when participating in standards development (MSME Survey vs. Member Economy Survey)



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## Ways to support MSMEs

Similarly, the ranking of different ways to support MSMEs can also be compared across different groups (see Figure 11). The first two columns are from the Member Economy Survey, presenting what has been done by member economies to support MSMEs and what has been perceived as the more effective ways to increase MSME participation in international standards development. The third column is from the MSME Survey and shows what MSMEs believe member economies could do to support their participation in international standards development. The comparison shows the following:

- Building expertise through workshops and training ranks consistently across all three groups as an effective way of supporting MSMEs.
- Providing funding for participation is not a very common way that member economies currently support MSMEs. However, it is considered the most effective way and is also the top-cited form of support MSMEs wish to receive to enable their participation in standards development.
- Similarly, mentoring programs to support new participants is the least used way member economies currently support MSMEs, but one of the top three supports MSMEs wish to receive.
- Member economies most commonly provide assistance on how to participate in international standards development, but this approach only has a medium ranking in terms of perceived

effectiveness and as a support MSMEs would like to receive. A potential explanation for this is that this type of assistance is more general and may not be as effective as training or mentoring programs, which have a more specific focus and may provide more customized support.

- Similarly, sharing targeted information about key activities and events seems to be less effective than expected in supporting MSMEs.

Figure 11. Ways to support MSMEs (MSME Survey vs. Member Economy Survey)



#### 4.1.3 Summary and implications

The survey results show that all member economies agree it is important and beneficial for MSMEs to engage in international standards development. Many of them offer support to encourage participation. However, only a small portion of member economies have set specific targets or collect data to monitor the level of participation. More data collection may be useful among APEC economies to establish benchmarks, evaluate the status quo, support evidence-based decision making, and provide means to monitor and track progress.

Lack of financial capital remains a major challenge that MSMEs encountered in their standardization journey. This is consistent with findings from previous literature. To empower MSMEs and improve their engagement in standards development, member economies could consider various funding opportunities to encourage participation, such as tax incentives, reimbursement for travel expenses and interest-free loans.

In addition to financial challenges, lack of awareness and lack of information on standards development activities are also among the top reasons why MSMEs do not participate. Member economies may consider developing targeted communication strategies to educate MSMEs on the importance and advantages of standards. Sharing sector-specific benefits and success stories on what other MSMEs have achieved from engaging in international standards development could help increase interest and incentivize participation by making it more relevant.

For MSMEs participating in standards development or trying to navigate the standardization system, targeted support such as mentoring programs, training to build expertise and customized advice are considered more effective compared to general information support. It is also recommended to use

online portals to build virtual standardization communities where MSMEs can access centralized resources, attend e-learning modules, have interactive conversations and network with other participants.

#### **4.1.4 Limitations and recommendation for future research**

Due to the limited control on survey distribution (APEC member economies had full control over the distribution of both surveys), convenience sampling was used. This led to an unbalanced representation of survey respondents. With 90% of the MSME Survey responses coming from only two economies, the results of this research are considered more a reflection of the experiences of MSMEs in these economies. In addition, because the MSME surveys were distributed through member economies' representatives on SCSC, respondents likely had a closer connection with standardization than the general MSME population. As such, the conclusions drawn from the MSME Survey might not be applicable to the overall MSME population, but rather a reflection of MSMEs that are more likely to be involved in the standardization process.

Additionally, the lack of consistent definitions of "MSME" among APEC economies also imposes potential discrepancies in the interpretation of the survey questions and results. If conditions permitted, future surveys should consider ways to improve geographic representation of the survey sample and try to have a better defined MSME population to produce more balanced and meaningful results.

More sector-specific analysis is also encouraged in the future to help APEC economies better understand sector-specific challenges and prioritize areas where MSMEs can benefit more from standards participation. This will help member economies direct limited resources to where support is needed the most and maximize its impact and benefits on MSMEs.

### **4.2 Deliverable 2: Policy dialogue**

#### **4.2.1 Overview**

On 1 March 2025, during the APEC First Senior Officials' Meeting in Gyeongju, Republic of Korea, SCSC held a policy dialogue as part of this project focused on engaging MSMEs in international standards development.

The policy dialogue consisted of five sessions that leveraged the information gathered from the surveys conducted in the project's initial stage and featured speakers, panellists and participants from APEC economies, international standardizing organizations and MSMEs. (See Annex I for the policy dialogue's agenda.)

At the end of the dialogue, a dedicated session was held for small group discussions, where participants delved deeper into key issues. These breakout groups focused on a series of guiding questions, including questions addressing the main barriers faced by MSMEs in participating in standards development, strategies to enhance the involvement of MSMEs, and the role of different stakeholders such as governments, standardizing bodies and MSMEs. The groups also explored ways to make the process more inclusive, particularly for underrepresented groups, and discussed potential next steps in the APEC context to advance work in this space.

## 4.2.2 What we heard: Key points

Concurring with the survey results from APEC member economies, participants in the policy dialogue widely agreed that the participation of MSMEs in international standards development is important. Speakers and panellists emphasized the multifaceted nature of MSME engagement and the need for dedicated strategies to foster their inclusion in international standards development, as well as the importance of:

- developing practical tools and institutional approaches to strengthen the capacity of MSMEs
- involving MSMEs early in standards development processes, including for standards that may be used in conformity assessment procedures
- ensuring that international standards development frameworks are inclusive and enable meaningful participation by MSMEs
- fostering collaboration between domestic regulators and MSMEs to build more inclusive, supportive, and responsive standards ecosystems

Throughout the policy dialogue, it was noted that despite their critical economic role in the region, MSMEs face structural challenges that prevent them from fully participating in international standards development processes, affecting their ability to compete and thrive in global markets.

### **Awareness and readiness**

Participants raised important questions about the levels of awareness and understanding among member economies and standardizing bodies of MSMEs' challenges. The varying readiness levels of MSMEs to participate in the development of international standards was also raised, with participants noting that increasing this readiness may also help incentivize MSMEs' participation.

### **Funding**

The top challenge MSMEs face when participating in international standards development, reported by both MSMEs and member economies in this project's surveys, is a lack of funding to participate. Participants in the policy dialogue echoed this, noting the positive impacts of having financial resources available to support the participation of MSMEs in the development of international standards. For example, participants emphasized that without adequate funding, it is difficult for small businesses to engage meaningfully in these processes, especially given the time and expertise required to navigate technical processes. Funding was considered very effective and is the number one support that MSMEs wish to receive to support their participation in standards development.

### **Types of participation**

There are many pathways to participating in international standards development, such as by commenting on draft international standards, being involved as a member of a mirror committee or participating as an expert in a working group. It is critical to make use of all these pathways, as each MSME is unique and may benefit from different types of participation or make better use of their resources by participating in certain ways over others. Furthermore, not all MSMEs may need to be directly involved in every stage of standards development. For some, engagement through public comment periods or representation through associations may be more appropriate and manageable. Similarly, MSMEs operating in sectors that use international standards extensively or those developing innovative products or new technologies may find participation particularly impactful. As such, effective

participation requires both institutional support and flexible, inclusive mechanisms tailored to different MSMEs and contexts.

### **Support mechanisms**

MSMEs may be unfamiliar with the process of developing and implementing international standards and may lack the capacity to engage effectively. It is useful to provide support mechanisms, such as training programs and mentoring opportunities, to build expertise and knowledge. Providing support mechanisms can empower MSMEs to leverage international systems and enhance their competitiveness, helping them become entities that regularly contribute to the development and application of international standards. It is important that these mechanisms be adapted to the realities of MSMEs.

### **Use of technology**

The COVID-19 pandemic was identified as a global turning point that disrupted traditional ways of working while accelerating the adoption of new digital tools and technologies. Making use of the latest technological advancements has the potential to lower participation barriers for MSMEs by enabling virtual engagement and reducing travel costs. This may be especially impactful in reaching MSMEs that are typically underrepresented, such as those from remote and rural communities. These tools can significantly enhance inclusivity and accessibility, opening new opportunities for MSMEs to actively contribute to the development of international standards.

### **Early participation**

MSMEs need to be aware and brought into the standards development process early. This allows their needs, perspectives and any potential barriers to standard application to be considered from the beginning of the development process, rather than in the later stages, which may help them use and apply those standards once they are published.

### **Transparency**

Transparency is an essential element to support MSMEs' participation in international standards development. Clear and open participation and development processes help build trust and increase understanding, which may encourage broader involvement from MSMEs and additional participants, such as women, Indigenous Peoples, persons with disabilities, and those from remote and rural communities.

As a general finding, some of the challenges identified in Peru's project, "Supporting the Trade Facilitation of MSMEs through Standardization" (CTI 13 2015A), continue to persist. These include limited access to information for MSMEs on quality infrastructure and its importance and a lack of funding to support participation.

# 5. Recommendations

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This project explored the participation of MSMEs in international standards development, including current challenges and best practices to facilitate and support MSMEs' participation. It also sought to further APEC member economies' understanding of the challenges and important role MSMEs play in international standards development. Facilitating MSMEs' participation in these activities will help ensure matters unique to MSMEs are considered and addressed during the development of international standards, making it easier for MSMEs to use, apply and conform to international standards. This will also help engage more MSMEs in international trade and increase their potential market access.

Based on the findings from the surveys and policy dialogue, the following recommendations are outlined for APEC member economies' consideration.

## Recommendation 1: Consider medium- and long-term initiatives

MSMEs experience additional challenges when the programs and initiatives put in place to support them are designed to end after a short period of time. While these types of programs and initiatives may offer temporary support or engagement opportunities for MSMEs, they often do not result in lasting benefits, overcome systemic barriers or embed incentives to participation.

Some short-term initiatives, such as training, provide real and tangible benefits. However, they can still be undermined by a lack of sustained support. For example, developing an international standard can take up to 36 months. During this time, a member economy might provide financial support to an MSME so they can participate in working group meetings so they can contribute their unique perspective. Ideally, funding would be sustained for the entire development process (i.e., up to 36 months) to ensure consistent engagement. However, if that support is reduced or withdrawn prematurely, the MSME may struggle to stay involved, which could limit their ability to shape the standard and ultimately, to adopt or benefit from it once it is published. This illustrates the importance of considering longer-term initiatives and activities that are tailored to the specific context, MSME and desired outcome.

## Recommendation 2: Consider setting domestic goals and targets and collecting related data

The Member Economy Survey results showed that 83% of respondents are currently working with MSMEs to encourage or facilitate their participation in international standards development but only 33% of respondents have specific targets or goals in place to increase the participation of MSMEs.

Setting specific targets to increase participation and then collecting data to monitor the level of participation can be effective ways to determine changes over time and the impacts of any initiatives and activities undertaken. This can help establish benchmarks, support evidence-based decision-

making, strengthen efforts to examine the current landscape, track progress against goals, and evaluate success.

Collecting and analyzing data on MSMEs' participation in international standards development, as well as the related challenges and outcomes, can also inform adjustments over time to improve existing programs and initiatives. This approach encourages transparency, accountability and targeted solutions that address specific gaps, leading to more robust and widely adopted international standards.

It is important to note that the definition of "MSME" varies across APEC member economies due to different economic contexts such as development stage, industry structure and policy priorities. This adds complexity to understanding and comparing the experiences and activities of MSMEs across the Indo-Pacific region. Establishing a common framework (for example, an international workshop agreement) for collecting and reporting MSME data concerning international standards development and related outcomes would enable data aggregation possibilities. This could support the ability of policymakers to measure impact more accurately and to leverage best practices from other economies more easily.

This recommendation echoes a key finding in Peru's project CTI 13 2015A, which noted the importance of objectives and indicators to measure the impacts of any strategies used.

## **Recommendation 3: Continue efforts at APEC SCSC relating to MSMEs**

Given the critical role MSMEs play in the Asia-Pacific region, it is recommended that SCSC continue efforts over time to explore the role, challenges and impacts of MSMEs. There are several potential actions that can be considered in future to advance these discussions:

- APEC member economies may benefit from conducting sector-specific analyses to explore the role of MSMEs operating in specific areas, such as critical and emerging technologies or services. This type of analysis may help member economies direct limited resources to areas where support is needed the most and maximize its impacts and benefits for MSMEs.
- Participants in the policy dialogue noted that MSMEs may benefit from receiving tools and communication packages on standardization. Having common APEC tools that directly communicate to MSMEs the value of their participation in international standards development may be useful to improve the rate of their participation and support MSMEs' use of international standards.
- It is important to consider opportunities to strengthen the participation of MSMEs in future SCSC projects. Strengthening these linkages and communication can help ensure MSMEs' perspectives are included and considered.
- Future efforts at SCSC should also consider the impacts on MSMEs related to technical regulations and conformity assessment procedures as well as the impacts of technical barriers to trade. For example, it would be informative to explore the use and application of standards by MSMEs.

Future efforts at SCSC would also benefit from cross-fora collaboration across APEC, such as with the Small and Medium Enterprises Work Group and the Policy Partnership on Science, Technology and

Innovation. This can support APEC as a hub for information-sharing and capacity-building relating for MSME issues and support MSMEs in their integration into international trade and value chains. Consideration should be given to if and how future SCSC work relating to MSMEs and standardization can be linked to the Jeju Initiative on APEC Startup Alliance: Connecting APEC Startup Ecosystem.

# Annex I: Agenda from the Policy Dialogue

## AGENDA

### Policy Dialogue: Engaging Micro, Small and Medium Enterprises in International Standards Development (SCSC\_02\_2024S)

1 March 2025

Gyeongju, Republic of Korea

Venue: HICO

Room 205-206

Time: 09:00 am – 05:00 pm

Time	Description
08:30 - 09:00	Arrival and Registration
09:00 - 09:15	Welcome and Overview of Objectives Emily McIntyre, Canada, Project Overseer
Session 1  09:15 - 09:45	Setting the Stage <ul style="list-style-type: none"><li>Soraya Lastra, Coordinator of the International Standardization and Stakeholder Relations Functional Unit INACAL Peru <i>Title:</i> Guide to support Quality Infrastructure incorporation into MSMEs</li></ul> <i>Questions and Answers</i>
Session 2  09:45-11:00  This session will include a summary of the project survey results, consider the importance of data interoperability, and provide an opportunity for participants to briefly discuss.	Project Survey and the Importance of Data <ul style="list-style-type: none"><li>Diane Liao, Senior Researcher, Standards Council of Canada <i>Title:</i> What we heard Overview of Survey Results</li><li>Emmanuel A. San Andres, Senior Analyst, Policy Support Unit, APEC Secretariat <i>Title:</i> <u>Enhancing MSME Data Interoperability in the APEC Region</u></li></ul>

	<p><b>Questions and Answers</b></p> <p><b>Small Group Discussions</b></p> <ol style="list-style-type: none"> <li>1. Do the survey results surprise you? If so, what surprised you and why?</li> <li>2. Is there anything missing from the survey? Do you have other observations from past experience or knowledge to share?</li> <li>3. What are your thoughts on the importance of data interoperability in the APEC region?</li> </ol> <p><b>Reporting out from Small Group Discussions</b></p>
<b>11:00 -11:20</b>	<b>Break</b>
<p>Session 3</p> <p>11:20 – 12:15</p> <p>This session will be a panel discussion highlighting the importance of MSME participation in international standards development.</p>	<p>The Importance of MSME Participation in International Standards Development</p> <p>Moderator: Kent Shigetomi, Director for Multilateral Non-Tariff Barriers, Office of the United States Trade Representative</p> <p>Panelists:</p> <ul style="list-style-type: none"> <li>• Diane Liao, Senior Researcher, Standards Council of Canada <i>Focus: How Increasing Participation in International Standards Development Can Boost Exports from Small and Medium Enterprises</i></li> <li>• Dennis Chew, Regional Director (IEC Asia-Pacific Regional Centre), International Electrotechnical Commission (IEC) <i>Focus: MSMEs in international standards development – perspectives from IEC stakeholders</i></li> <li>• Mario Fromow, CEO, Fromow Consulting Group <i>Focus: The relationship between regulators and MSMEs to promote their participation in International Standards development</i></li> </ul> <p><b>Questions and Answers</b></p>
<b>12:15 – 13:15</b>	<b>Lunch</b>
<p>Session 4</p> <p>13:15 – 15:00</p> <p>This session will feature a series of presentations</p>	<p>Facilitating MSME Participation in International Standards Development</p> <p>Presenters:</p> <ul style="list-style-type: none"> <li>• Tintin Prihatiningrum, Directorate System and</li> </ul>

<p>highlighting existing or planned objectives and initiatives to encourage and/or facilitate MSME participation in international standards development.</p>	<p>Harmonization of Standard, National Standardization Agency of Indonesia/BSN  <i>Title:</i> Engaging SMEs in standard development: challenges, strategies, and enhancing competitiveness in domestic and global markets</p> <ul style="list-style-type: none"> <li>• Mr. jumyon PARK, CEO of 'ZeroEN', Republic of Korea  <i>Title:</i> ZeroEN's Impact on MSME Participation: Achieving Success, Overcoming Challenges, and Paving the Future of IS"</li> <li>• Ms. Nuanapa Chaisuwan, Chief of Group 4, Standards Division, Thai Industrial Standards Institute (TISI)  <i>Title:</i> Empowering MSMEs: TISI and MSMEs in collaboration with ISO/IEC and announce as Thailand domestic standards.</li> <li>• Teresa J. Cendrowska, Vice-president – Global Cooperation, ASTM International  <i>Title:</i> Open and Transparent – Every Voice is Unique and Every Voice Matters</li> </ul> <p><i>Questions and Answers</i></p>
<p><b>15:00 – 15:20</b></p>	<p><b>Break</b></p>
<p>Session 5  15:20 – 16:30    In this session, participants will break out into small groups to discuss guiding questions on MSME participation in international standards development and provide key considerations and suggestions for the summary report.</p>	<p>Working Session – Challenges, Opportunities, and Recommendations on MSME Participation in International Standards Development</p> <p><i>Small Group Discussions</i></p> <ol style="list-style-type: none"> <li>1) What parts of today's session (e.g., best practices, examples, challenges) caught your attention?</li> <li>2) What are the main barriers that MSMEs face when trying to participate in international standards development? Do MSMEs in different industries face different types of barriers?</li> <li>3) How can we make it easier for MSMEs to take part in developing international standards? <ol style="list-style-type: none"> <li>a) What actions can be taken by governments, standardizing bodies, and MSMEs?</li> </ol> </li> <li>4) Can we further consider this topic at APEC? If yes, what should we concentrate on next?</li> <li>5) What strategies can be implemented to encourage more MSMEs to take part in international standards development? For example: <ol style="list-style-type: none"> <li>a) What kind of training or resources would be most helpful for MSMEs to understand and engage in the standards development process?</li> </ol> </li> </ol>

	<p>b) How can the international standards development community make the process more inclusive for MSMEs?</p> <p>c) How can policymakers create a more supportive environment for MSME involvement in standards development?</p> <p>d) What strategies can be promoted to empower women, youth, Indigenous Peoples, persons with disabilities, and those from remote and rural communities who own MSMEs to participate in the development of international standards?</p> <p>6) Do you have any other thoughts or comments on this topic you would like to share?</p> <p><i>Reporting out from Small Group Discussions</i></p>
16:30 – 17:00	Next Steps, Closing Remarks, and Evaluation Form Emily McIntyre, Project Overseer