

iCEX

NON-SECTOR-BASED PROMOTION PLAN PROGRAM

IMPACT EVALUATION

NON-SECTOR- BASED PROMOTION PLAN PROGRAM

RESPONSIBLE OF THE EVALUATION

**Evaluation Department
Executive Office
ICEX Spain Trade & Investment**

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OBJECTIVE OF THE EVALUATION



Ex post impact evaluation of the ICEX Non-Sector-Based Promotion Plan Program to gather evidence on its medium- and long-term effectiveness for participating companies.

WHAT IS THE ACTIVITY BEING EVALUATED?

The ICEX Non-Sector-Based Promotion Plan Program promotes Spanish offerings and brand image abroad for cross-cutting sectors that don't have well-organized, influential exporters' associations. These plans include 25 different support instruments. This evaluation focuses on the five most significant in terms of number of activities and clients:

- Fairs with official pavilions (FPO)
- Promotional campaigns (CPROM)
- Trade missions (MDIR)
- Reverse missions (MINV)
- Fairs with collective participation (FPA)

These 5 initiatives have been evaluated independently.

WHAT IS THE PURPOSE OF ICEX'S SUPPORT?



Immediate objective: (short-term) to generate sales opportunities and facilitate direct contact with international customers.



Mediate objective: (medium-term) to increase sales contracts and improve customer loyalty and (long-term) to enhance the competitiveness of Spanish companies.

EVALUATION QUESTIONS

- What types of companies participate in the ICEX Non-Sector-Based Promotion Plan Program?
- What effect do the collective promotion efforts have?
- What impact does participation in the Non-Sector-Based Promotion Plans have?
- Are there differences in effectiveness between the activities included in the Non-Sector-Based Promotion Plan Program and those included in the Sector-Based Promotion Plan Program?

EVALUATION FACT SHEET



TARGET POPULATION

Spanish companies with exportable products or services.

UNIVERSE

2,637 unique companies that participated in any activity under the ICEX Non-Sector-Based Promotion Plan Program.

TIME FRAME

2010-2012.

SAMPLE

1,152 unique clients.

SAMPLING METHOD

Simple random sample.

RESPONSE RATE

43.69%

FIELDWORK

Between April and May 2013.

IMPACT ESTIMATION TECHNIQUE

Implicit question (counterfeit counterfactual). Two additional questions, called “benefits” (interpretable as value for money) and “additionality”, have been added to the implicit questions in the questionnaire, which make up the value-added section.

A logistic regression model was constructed to check which impact and outcome variables designed to capture effects on the company after receiving support affect the recognition of additionality and benefits of public intervention.

The analysis was carried out by client type. This analysis consisted of: client impact analysis and analysis of the suitability of the program for surmounting specific barriers faced by the company.

CLIENT SEGMENTATION

SEGMENTATION TECHNIQUE: Hierarchical clustering based on the characterization variables included in the survey and variables collected from INFORMA D&B.

There are **5 well-defined client types**.

TYPE 1 Growing companies that have an export share above 60%, generally spread across more than 20 countries, and which dedicate resources to R&D&I.

TYPE 2 Growing companies, mostly in the agri-food sector, dedicating between 1% and 5% of their employees to R&D&I activities, with an export share above 60% and generally spread across more than 20 countries.

TYPE 3 Companies with no R&D&I personnel or quality certifications, with an export share above 40%, moderate international diversification, and turnover below €6 million. About half of these companies belong to the agri-food sector.

CLIENT SEGMENTATION

SEGMENTATION TECHNIQUE: Hierarchical clustering based on the characterization variables included in the survey and variables collected from INFORMA D&B.

There are **5 well-defined client types**.

TYPE 4

Declining companies that generally dedicate 1% to 5% of their employees to R&D&I activities, with turnover typically below €6 million. The agri-food sector is underrepresented and the consumer sector is overrepresented.

TYPE 5

Companies reporting stable turnover, generally with more than six years of international experience, and that dedicate part of their personnel to R&D&I activities.

OVERALL EFFECTIVENESS

- The delivery of the ICEX Non-Sector-Based Promotion Plan Program is consistent across geographic destinations in achieving its objectives.
- Despite budgetary constraints beginning in 2010, the number of clients served has not decreased proportionally. Instead, they primarily resulted in more moderate spending per participant, which mitigated the impact of the budget cut on the overall number of clients reached.
- The activities of the ICEX Non-Sector-Based Promotion Plan Program primarily focus on Fairs with Official Pavilions. The program's effectiveness matches this particular instrument.
- **Nearly 80% of companies recognized the added value** of participating in the ICEX Non-Sector-Based Promotion Plan Program.
- **Companies across the board acknowledged additionality in market entry,** the strengthening and enhancement of the sector's image, **increased confidence to operate in international markets, and gaining new ideas** for products, services or technologies that define their competitive environment in foreign markets.

EFFECTIVENESS BY COMPANY TYPE

- **Type 1** companies attribute improvements in their marketing strategy and a positive effect on company turnover to public support.
- **Type 2** companies attribute greater awareness of intangibles and the ability to maintain or expand their customer portfolio to public support.
- **Type 3** companies attribute improvements in their products, services, processes, and management methods, as well as entry into new markets to public support.
- **Type 4** companies attribute entry into new markets to public support.
- **Type 5** companies attribute increased confidence to operate in international markets, as well as a positive effect on hiring personnel or retaining qualified personnel in Spain to public support.

CONTRAST BETWEEN SECTOR- AND NON-SECTOR-BASED PROMOTION PLAN PROGRAMS

- The types of companies that participate in Non-Sector-Based Promotion Plans are usually different from those that participate in Sector-Based Promotion Plans, though some companies participate in activities under both programs.
- There is evidence that **the probability of companies participating in Sector-Based Promotion Plans benefiting from activities increases the longer they remain involved**, whereas this effect is not seen for companies that only participate in the Non-Sector-Based Promotion Plans. For companies in Sector-Based Promotion Plans, this probability increases significantly up to the seventh year.
- **Overall, companies participating in Sector-Based Promotion Plans tend to remain engaged in activities longer than those participating in the Non-Sector-Based Promotion Plans.**

RECOMMENDATIONS

We recommend a company characteristics information system should be developed in ICEX's new CRM. This system should have the ability to classify these companies, thereby improving client knowledge and relationship management. This system would also facilitate data-driven management and more efficient data mining.

Systemic, non-anonymised monitoring of activity usage and effectiveness is recommended, extending beyond the current quality evaluation system.

An ex-ante needs assessment of the Fairs with Official Pavilions (FPO) instrument is recommended to enhance its impact and results, particularly from the perspective of customer value. Given that the value appears to be linked to the length of participation in either the Sector- or Non-Sector-Based Promotion Plans, this evaluation may suggest the potential benefit of offering additional services, either simultaneously or in later stages, following a strategic progression aimed at improving company performance in international markets.

Due to the substantial net loss incurred by ICEX through the Fairs with Official Pavilions, **conducting cost-effectiveness evaluations for the activities of both the Sector- and Non-Sector-Based Promotion Plans is recommended.** This will enable a comparative evaluation of efficiency.

RECOMMENDATIONS

Patterns are evident in preferences for public support to help companies overcome barriers to entering foreign markets. In particular, financial support tends to be viewed as opposed to credibility reinforcement and, to some extent, image campaigns. Access to customers and access to relevant information are closely linked and tend to be somewhat opposed to face-to-face promotion activities. For all company types, the top priorities are access to customers and relevant information. Therefore, **we recommend that the public pricing for participation in the Fairs with Official Pavilions be reconsidered, and that the potential elimination of the subsidy component for these activities be considered.**

COMPLIANCE WITH RECOMMENDATIONS

The recommendations set out in this evaluation have been accepted as necessary and feasible by both the organization and those responsible for providing the various ICEX services. The implementation of these recommendations will enable improvements to be made in the provision of services, bearing in mind that the improvement process is ongoing, thanks to other evaluations that are either already underway or will be launched if necessary.

PROCURING INFORMATION

The fieldwork and descriptive analysis were carried out by means of a below-threshold contract awarded to the company **WEBTOOLS, S.L.**



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