

GATEWAY TO EXPORT (PIPE INITIATION PROGRAM)

IMPACT EVALUATION

GATEWAY TO EXPORT (PIPE INITIATION PROGRAM)

RESPONSIBLE OF THE EVALUATION

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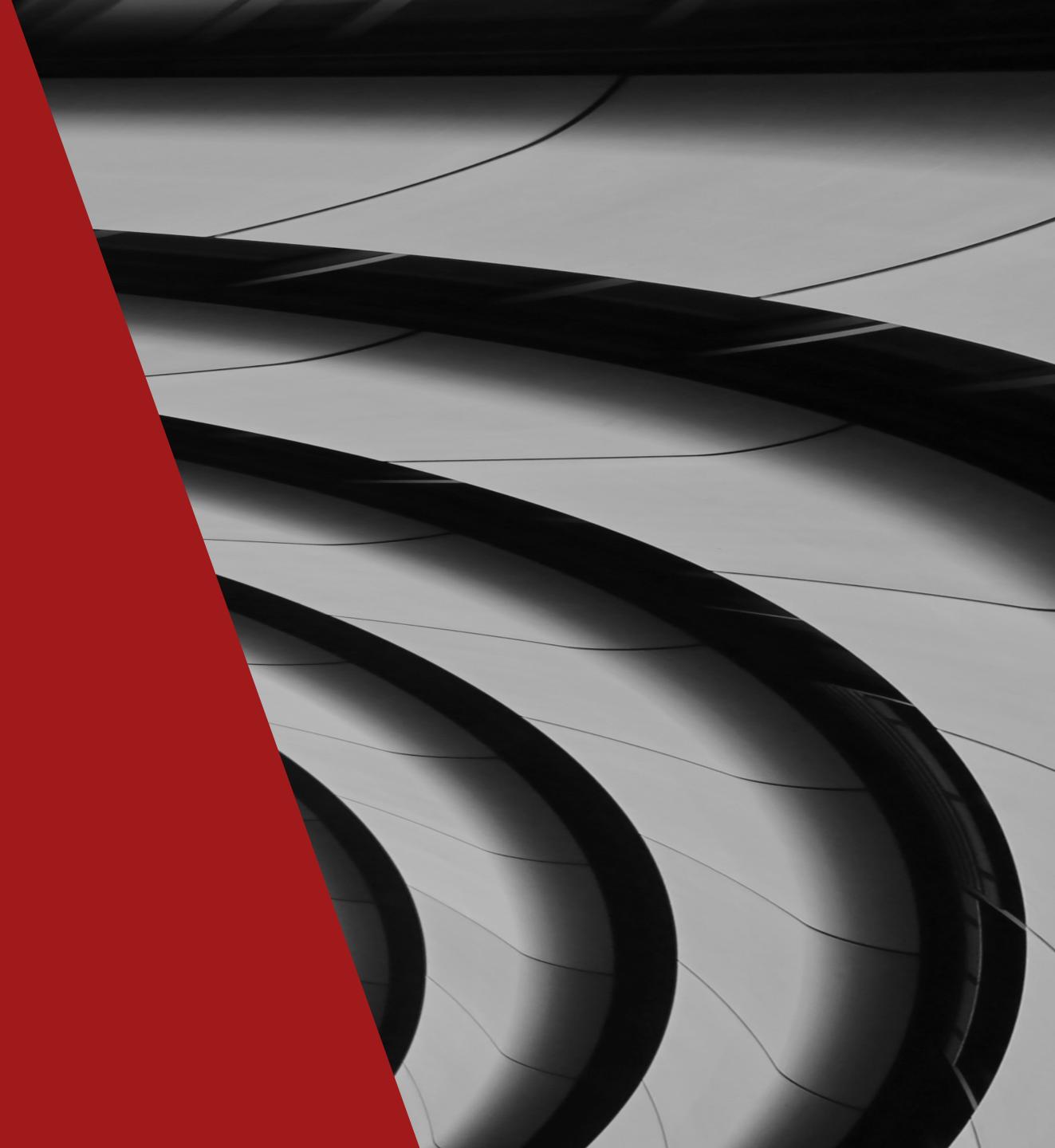
2012

EVALUATION COMPLETED IN YEAR

2013

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OBJECTIVE OF THE EVALUATION



In 2012, the Gateway to Export Program (PIPE) became unfeasible due to the rationalization of spending driven by the financial crisis. PIPE is a program jointly implemented by ICEX and the Consejo Superior de Cámaras (CSC), with the collaboration of all Autonomous Communities and the Chambers of Commerce of Spain. It is supported by European Regional Development Funds (ERDF) from the European Union. ICEX Management considered continuing the program independently under the name ICEX NEXT and tasked the Evaluation Department with conducting an ex-post impact evaluation of the program to assess its medium- and long-term effectiveness and to inform the design of the new program.

ICEX's Gateway to Export Program (PIPE) provides individualized support to SMEs with their own products or services and a clear internationalization orientation, helping them define the most effective international strategy for export-driven business development. The program is divided into the following phases:

- > **First phase:** Diagnosis of the company's competitive position and internationalization potential. This phase lasts three to four weeks and includes three meetings between the company and the PIPE promoter.
- → **Second phase:** Internationalization plan design with the PIPE promoter based on the company's profile. This phase lasts three to four months.
- Third phase: Plan implementation with the support of the PIPE collaborator, a young professional trained in foreign trade and languages. The collaborator can optionally join the company to provide assistance, always while operating under the external supervision of the PIPE promoter. This phase lasts 20–21 months (until the 24 months of the program have been completed). During this phase, the program provides financial backing for all expenses related to implementing the internationalization plan.
- → Some companies are invited to continue in the **PIPE follow-up program** based on the results they have achieved. This program aims to strengthen these SMEs' position as exporters and provides them with a broad range of services for an additional two years.

WHAT IS THE ACTIVITY BEING EVALUATED?

In summary, the support provided includes:

- \rightarrow Diagnosis of the company's competitive position and internationalization potential.
- → Consulting on foreign trade processes.
- → Financial support for hiring a PIPE collaborator (bringing specialized human resources into the company's International or Export Department).
- → Financial support for promotional expenses.
- → Optional additional services through membership of the PIPE Club, covering activities such as promotion, communications, translation services, as well as funding lines and other financial services.

WHAT IS THE PURPOSE OF ICEX'S SUPPORT?



Immediate objective: (short-term) to help companies to acquire new skills for operating in international markets and to translate these skills into changes in behaviour.



Mediate objective: (medium-term) to foster a company-wide cultural shift that leads to sustainable improvements in commercial operations.

Objective Activity Questions Fact sheet Segmentation Results Recommendations Procurement

EVALUATION QUESTIONS

- → What types of companies apply to the PIPE program?
- → What expectations do companies have when applying to the PIPE program? To what extent are these expectations met?
- → What impact does participation in the PIPE program have?
- → Are the effects of the program sustained after completion?



TARGET POPULATION

Spanish companies that have exportable products or services and a clear international orientation.

UNIVERSE

1,265 unique companies that have participated in the PIPE program.

TIME FRAME

2007-2011 (companies that began the program on or after 1/1/2007 and finished it on or before 12/31/2011).

SAMPLE

747 unique clients.

SAMPLING METHOD

Simple random sample.

RESPONSE RATE

59.05%

FIELDWORK

December 2012.

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. It consisted of: analysis of the impact on the client, examining expectations when applying to the PIPE program, and determining the program's suitability for successfully initiating and consolidating an SME in the international market.

EVALUATION FACT SHEET



ADDITIONAL IMPACT ESTIMATION TECHNIQUE

A pretest-posttest design (counterfeit counterfactual), which was applied to the export share of participating companies using panel data regression. This analysis was expanded further to estimate the contribution of each support component (support for promotional actions, support for the collaborator, and support for the promoter) to the increase in exports. The export evolution was tracked over a five-year period, recoded according to the following table, regardless of the company's year of entry.

Year Recoded v	
Year prior to program entry	-1
Year of program entry	0
First year of program	1
Second year of program	2
Year after program completion	3

CLIENT SEGMENTATION

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

There are 5 well-defined client types.

TYPE 1	Growing companies with previous international market experience, a high export share with moderate to high diversification, and a commitment to R&D&I but no quality certification. There is a higher proportion of beverage sector companies than expected.
TYPE 2	Declining micro-companies with no prior international experience but with a willingness to invest in R&-D&I.
TYPE 3	Stable or declining micro-companies with a willingness to invest in RδDδI, limited prior international experience, and an export share below 50% with low market diversification.
TYPE 4	Stable companies with a willingness to invest in R&D&I and quality certification, generating turnover between €2 and €6 million, with prior international experience, and an export market share below 60% that's generally diversified in fewer than 10 countries. There is a lower proportion of service companies than expected
TYPE 5	Stable or growing companies with a willingness to invest in R&D&I and that are aware of quality certification, with turnover under €5 million, prior international experience, and an export share below 20% concentrated in few countries.

EFFECTIVENESS

- The implementation of the Gateway to Export Program consistently achieved its objectives across productive sectors, autonomous communities, and entry years.
- In general, companies reported noticing the program's effects during the support period, or within one to two years after it ended.
- The observed chain of effects is highly consistent with the program's stated objectives: companies gain new skills, change their behaviour, and improve commercial operations. This chain aligns with the program's training-oriented approach, which prepares the ground for a cultural change that ultimately leads to improved commercial outcomes.
- The diagnosis phase plays the most significant role in producing the observed effects, followed by consultancy and financial support for necessary promotional actions. Using PIPE Club services properly further amplifies these effects.
- **85% of participating companies recognized the program's added value,** although attribution of effects varies by company type.
- In general, companies recognize additionality in improvements in their marketing strategy one year after completing the program. Two years later, they attribute broader cultural changes within the company. Three years later, the impact could be attributed in decisions to increase R&D spending.

EFFECTIVENESS

- In terms of profits relative to resources invested, one year later, companies attributed increased confidence in operating in international markets, though this came at the expense of a decline in their income statement (reflecting the cost of investment). Two years later, they attributed improvements in products, services, processes and management methods. By the third year, there is attribution in the creation of an international department and in a positive impact on the income statement.
- The increase in export share observed both in the year the program ended and in the following year can be attributed to the program, but only for company types 1, 4, and 5. For these company types, the program's support components—whether for promotional activities or for the PIPE promoter—prove to be relevant. For type 3 companies, support for promotional activities and for the promoter also appears to have contributed positively to the evolution of their export share.

EFFECTIVENESS BY COMPANY TYPE

- TYPE 1. These companies experienced rapid and sustained growth in their export share after completing the program and credit the public support with fostering a change in their corporate culture aligned with their strengths. This was reflected in their ability to successfully target niche markets with products or services well suited to them.
- TYPE 2. These companies began exporting thanks to ICEX support but were unable to continue independently due to management's limited efforts to meet the demands of the international market.
- TYPE 3. These companies increased their international activity during the initial phases of the program but stagnated once the program ended. They only achieved meaningful commercial results with continued public assistance, though they failed to bring about a broader cultural change within the company.
- **TYPE 4.** These companies credit the public support with improving their marketing strategy, improving their products, services, processes, and management methods, and stronger ties with institutions.
- TYPE 5. These companies tended to reach a break-even export share, which they subsequently maintained. They credit public support with a change in their overall corporate culture, entry into new markets, and the expansion of their client portfolio.

AREAS FOR IMPROVEMENT

- Overall, companies are satisfied with their participation in the program, though certain improvements could enhance its effectiveness.
- Some type 1 companies requested more personalized attention and ongoing support from ICEX after completing the program, while some type 5 companies seek more sector-specific expertise.

RECOMMENDATIONS

We recommend that the program's core structure be maintained without major changes, with an emphasis on the diagnosis phase as its main value.

To enhance the program's effectiveness, **we recommend that the PIPE Club services be maintained** and improved communication be established with participating companies to encourage their use.

Given that the increase in export share after program completion primarily occurred for companies with prior export experience, the entry criteria for ICEX NEXT, PIPE's successor, should be reconsidered. This program should focus on consolidating companies that have already taken their initial steps in foreign markets.

We recommend that companies be encouraged to continue using ICEX services after program completion.

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.**



