

iCEX

**COMPREHENSIVE
NEEDS
ASSESSMENT**

NEEDS ASSESSMENT

COMPREHENSIVE NEEDS ASSESSMENT

RESPONSIBLE OF THE EVALUATION

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

DATE OF PUBLICATION

June 2026

TYPE OF EVALUATION

Needs

TIME OF THE EVALUATION

Ex ante

CODE

GENE_2020

EVALUATION STARTED IN YEAR

2020

EVALUATION COMPLETED IN YEAR

2021

CONTENTS

Objective of the evaluation	↗
What is the activity being evaluated	↗
Evaluation questions	↗
Evaluation fact sheet	↗
Segmentation of clients	↗
Results	↗
Recommendations	↗
Procurement information	↗

OBJECTIVE OF THE EVALUATION



In line with the recommendation made by the International Trade Center (ITC) in 2015 and with the aim of supporting the strategic orientation of ICEX and its service portfolio, the Evaluation Department proposed in 2018 conducting a comprehensive assessment of the needs of Spanish companies in relation to internationalisation.

The sharp increase in the number of exporting companies in recent years and the changes currently being experienced in international markets, as a result of structural trends, compounded recently by the temporary crisis brought about by Covid-19, make it necessary to improve understanding of the current internationalisation needs of Spanish companies, with a view to adapting, if necessary, the internationalisation support instruments offered by ICEX.

The aim of the evaluation is to identify the internationalisation needs of Spanish companies in order to design new interventions and adapt ICEX's existing instruments.

WHAT IS ICEX SUPPORT?

These are services provided by ICEX to a company to address an objective barrier to its internationalisation process.

EVALUATION QUESTIONS

- What are companies' needs in terms of support for internationalisation?
- Have these needs changed in any way in the current context?
- To what extent are they aware of ICEX and its portfolio of support services for the internationalisation of Spanish companies? How do they value it?
- What support services should we offer and how would companies like to engage them?
- Which market niches are we not addressing?

PHASES OF THE EVALUATION

- **Preliminary phase.** Quantitative (analysis of survey data). In January 2020, the first edition of the EPAI-ICEX study was carried out, commissioned by the Secretariat of State for Trade (SEC) and included in the 2017-2018 Action Plan for the Internationalisation of the Spanish Economy, with the aim of exploring awareness, use and effectiveness of the services provided by ICEX, as well as business perceptions of barriers to internationalisation and internationalisation strategies. Completion: July 2020.
- **Phase 1.** Qualitative (focus groups and in-depth interviews). Commissioned in September 2020, drawing on the results of the EPAI-ICEX study, this phase has further deepened our understanding of the current needs of Spanish companies in relation to internationalisation, with the aim of adapting the support instruments offered by ICEX. Completion: May 2021.

EVALUATION FACT SHEET

PRELIMINARY PHASE



TARGET POPULATION

Spanish companies with exportable products or services.

BASE POPULATION

52,223 unique companies that have used some ICEX support or information service.

UNIVERSE

26,110 unique companies, randomly selected from the base population.

TIME FRAME

2002-2018.

SAMPLE

1,305 unique companies.

SAMPLING METHOD

Simple random sample.

RESPONSE RATE

4.99%

SAMPLE WEIGHTING

To ensure that the distribution of companies in the sample is statistically comparable with that of the universe, the sample has been weighted in accordance with the following (combined) variables: Treatment group, number of employees, company age and productivity.

FIELDWORK

Between January and February 2020.

METHODOLOGY

Descriptive statistics based on data collected through an online survey.

EVALUATION FACT SHEET

PHASE 1



TARGET POPULATION

Spanish companies with exportable products or services.

UNIVERSE

58,419 unique companies that have used an ICEX support or information service.

TIME FRAME

2012-2019.

SAMPLE

84 unique clients.

SAMPLING METHOD

Stratified sample by size, macro-sector, autonomous community and degree of internationalisation.

FIELDWORK

Between October 2020 and February 2021.

METHODOLOGY

Qualitative method. Focus groups and in-depth interviews, following a cascading design.

CLIENT SEGMENTATION

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

The same types of company identified in the 2020 EPAI-ICEX study are used.

There are **8 well-defined client types**.

TYPE 1

Small companies with a moderate international presence. This group is predominantly made up of small, well-established companies with a well-established presence in international markets. Although there are exceptions, they generally export to few markets and the share of exports in their turnover is moderate or low. In general terms, these are stable or growing companies, with medium-to-high productivity, an intermediate level of implementation of quality standards, that do not stand out in brand development or in the allocation of resources to R&D&I.

TYPE 2

Small companies with a strong international presence. Small companies, already well established, predominate in this group, with an equally well-established presence in international markets, often in many markets, and with a significant proportion of companies for which the contribution of exports to turnover is high. In general terms, these are growing companies, with high productivity, a greater level of implementation of quality standards, as well as greater brand development than other small companies, although they do not stand out in terms of allocating resources to R&D&I.

CLIENT SEGMENTATION

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

The same types of company identified in the 2020 EPAI-ICEX study are used.

There are **8 well-defined client types**.

TYPE 3

Small companies with low international presence. Small businesses, already well established, predominate in this group. Almost all have experience in international markets, although less extensive than other small companies. In general, they are limited to a few markets and the share of exports in turnover is low. In general terms, these are stable or growing companies, with medium-low or low productivity, a lower level than other small companies in the implementation of quality standards, as well as in brand development. Nor do they stand out in their allocation of resources to R&D&I.

TYPE 4

Medium-sized companies with a moderate international presence. A group dominated by already well-established medium-sized companies. Experience in international markets is usually extensive. Compared with other medium-sized or large companies, there is a higher frequency of companies that serve few markets and for which the share of exports in turnover is low, although a wide diversity of situations is represented within the group. These are companies that are growing or stable, with an average level of productivity. In organisational terms, the introduction of quality standards, the development of multiple brands and the integration of investee companies into the group are common. The allocation of human resources to R&D&I activities is generally moderate.

CLIENT SEGMENTATION

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

The same types of company identified in the 2020 EPAI-ICEX study are used.

There are **8 well-defined client types**.

TYPE 5

Medium and large companies with a strong international presence. A group in which medium-sized and some large, already established companies coexist. Their presence in international markets is extensive and, compared with other groups, what stands out is the frequency with which companies serve many markets and the importance of exports in their turnover. Growing companies predominate, with very few companies in decline. Their productivity tends to be high. The introduction of quality standards is also common; the percentage of companies that commit to developing numerous brands is the highest of all groups, and there is a somewhat higher proportion of companies that allocate more human resources to R&D&I.

TYPE 6

Micro-companies with international experience. The group includes micro-companies, both those that are relatively recently established and those that are already consolidated. The vast majority export to a limited number of countries and, although companies for which exports account for a small share of turnover predominate, there are significant proportions of companies for which that share is medium or high. These are companies that are growing or stable, with a proportion of them also in recession. Their productivity is diverse, with a certain balance between those with high or medium-high productivity and those with low or medium-low productivity. They do not usually adopt quality standards, nor is it observed that they are committed to brand development. Although most companies devote few human resources to R&D&I, the group quite frequently includes companies in which the workforce's commitment to these activities is substantial.

CLIENT SEGMENTATION

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

The same types of company identified in the 2020 EPAI-ICEX study are used.

There are **8 well-defined client types**.

TYPE 7

Micro-companies without international experience. A group made up of micro-companies essentially dedicated to the domestic market. There is a lower proportion of young companies compared with the group with experience. Stable companies with medium-low or low productivity predominate. They do not usually adopt quality policies and they do not develop brands. Investment in R&D&I is limited.

TYPE 8

Mystery micro-companies (other micro-companies). An essentially micro-company group, highly heterogeneous. They are younger companies than those in other groups. Companies with no or limited international experience and outward orientation coexist with others that have extensive experience, some oriented towards multiple markets and for which exports can become a very significant part of turnover. They are stable or growing companies, and their level of productivity is not known. They do not usually adopt quality standards, nor is there any clear policy for brand development. Although many companies do not carry out R&D&I activities or allocate few human resources to this activity, there is a small group that allocates a high proportion of resources. Although, as in the other groups, companies that do not make online sales or for which these are of limited importance predominate, it is the group where there is a higher percentage of companies for which this is the main sales channel.

CURRENT CONTEXT. IMPLICATIONS OF THE COVID-19 CRISIS.

Companies have decided to **boost digitisation**.

Businesses are experiencing high levels of uncertainty and volatility and are bracing themselves for a **slowdown in the pace of globalisation**.

An asymmetric impact is observed, depending on the characteristics of the companies:

- Companies with a **high degree of internationalisation** are taking advantage of the slowdown in activity to rethink their strategy and move forward with digitalisation and their sustainability policy.
- Companies with a **low degree of internationalisation** see that the situation is jeopardising what they have achieved so far.

PERCEPTION OF ICEX AS A SERVICE PROVIDER

- ICEX has a **central role** in the system for supporting internationalisation, and its work is widely recognised.
- However, there are factors that distance companies from using ICEX services.
- Some medium-sized and large companies with high levels of internationalisation consider their relationship with the institution to be almost always in the past. On some occasions, using its services at present is regarded as a very limited option, or no option at all.
- Many companies that have used us in the past do not currently regard ICEX as a relevant player in addressing their needs, either because responding to those needs first requires establishing certain technical capabilities that they do not associate with the institution, or because they have had negative experiences in the past.
- It is noted that ICEX's **excessive bureaucracy** constitutes an obstacle. Many state that they have given up requesting services and support from ICEX simply because of the excessive bureaucracy and the lengthy processing time. They also mention the **lack of information about ICEX's full portfolio of services**.
- **ICEX services are used to a greater extent in the early stages of the internationalisation process**, when the company still has no prior experience in the chosen market.
- **Companies that are more internationalised and have greater resources tend to distance themselves from public support services**. At present, they make very limited use of them, although it seems that they did so in the past.

DEMANDS AND PROPOSALS FOR IMPROVEMENT

- ↗ **Companies' needs have barely changed, except for a demand for support in digitalisation**, consisting of training and advice on digital marketing or the implementation of digital tools.
- ↗ Larger companies with international experience focus their needs almost exclusively on high value-added advisory services and on specific, high-level networking, while smaller companies focus on requesting support targeted at SMEs and more initial advice.
- ↗ We have developed a **taxonomy** that links business models, needs and the use of support services.
 - **Companies that are highly internationalised and make limited use of ICEX.** They request intermediation services and matching from ICEX, the search for suppliers and partners, an account manager, more information on the services offered by the institution, and institutional support.
 - **Highly internationalised companies that make frequent use of ICEX.** They request information on markets, searching for partners and customers, specialised advisory services and grants. They request more detailed and accessible listings, better communication about ICEX services, wider support in destination markets, more information and training.
 - **Companies with moderate levels of internationalisation and use of ICEX services.** They call for training, improved communication from ICEX, support in marketing and digitalisation, country image building, and personalised advice.

DEMANDS AND PROPOSALS FOR IMPROVEMENT

- **Companies with niche business models and low or moderate internationalisation that do not believe that ICEX's services can be of any use to them.** ICEX's services are not tailored to the specific nature of their niche, they require greater customisation, and they are sceptical about the support that ICEX can provide.
- **Companies with a low and recent internationalisation process and frequent recourse to ICEX.** They call for more support tailored to their size, advice, support for digitalisation and closer contact with ICEX.

CONCLUSIONS

- Companies call for **a more practical, specialised and personalised support for internationalisation, tailored to their sector and their target markets.** A comprehensive approach to internationalisation is called for, one that considers not only export activity, but the full set of factors that affect international competitiveness, including relationships with foreign suppliers.
- The **digitalisation of support services** is a priority and a potential source of competitive advantage. Concepts such as digital platforms, artificial-intelligence-based matching services, specialised directories, virtual trade fairs or advanced B2B solutions can contribute significantly to addressing emerging needs.
- The most internationalised and largest companies require **advanced, forward-looking advisory services, geared towards anticipating opportunities and risks,** with strategic information on markets, trade policies and international trends. In this regard, it is considered essential to have stable channels for transmitting information to support decision-making.
- For their part, smaller companies call for **intensive support in the initial stages of entering new markets.** Highly specialised, niche-oriented support closely aligned with the specific characteristics of companies is considered appropriate, and has at times been referred to as incubator and mentoring services.
- There is a high level of appreciation for **high-quality networking which is specific and geared towards sharing experiences** with both Spanish and local companies in the destination markets. Likewise, subsidies and access to finance are particularly relevant in the early stages of the internationalisation process.

CONCLUSIONS

- A large majority of companies consider that **Spain's country brand does not currently constitute a significant competitive advantage** in international markets.
- Clear areas for improvement are identified in the customer orientation of ICEX services, including **a portal design better tailored to business needs**, more effective segmentation, greater monitoring and evaluation of the services provided, and a higher degree of personalisation.
- Several **lines of action** are identified with a view to better adapting ICEX services to companies' current support needs:
 - **Strengthen sectoral and technical specialisation**, both internally and through partnerships with expert organisations.
 - **Increase the added value of support services.**
 - **Improve communication** by structuring services according to phases of internationalisation or needs and extending their reach to companies that do not use these services.
 - **Promote sustainability as a strategic axis**, taking into account the differing degree of business maturity in relation to the importance of this concept.
 - **Develop specific actions for sectors of activity currently unconnected with internationalisation** that have very significant competitive advantages underpinned by the exclusivity of their techniques and products.

RECOMMENDATIONS

- **We recommend that ICEX change its relationship model towards a customer-oriented approach.**
- **We recommend a greater personalisation of services**, starting with active listening to companies in order to offer them services proactively, rather than adopting an approach of “here is the menu, find your service”.
- We recommend a more focused web design which is better adapted to customers’ needs.
- We recommend considering the creation of **customer relationship managers** who can provide ongoing support to companies (mentoring).
- We recommend the specialisation of internal teams and providing them with a minimum level of technical knowledge, establishing collaboration agreements with institutions that have expert knowledge, and promoting spaces that facilitate meetings between specialised stakeholders.
- We recommend carrying out actions to **strengthen Spain’s country brand** so that it becomes associated with high value-added products.
- We recommend the **use of artificial intelligence systems that provide competitive (commercial) intelligence** to companies in an ethical manner and ensuring explicability.
- We recommend the **systematic measurement of the return on investment** for each type of support in each individual company.

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 of the preliminary phase were carried out by means of a below-threshold contract awarded to the company **WEBTOOLS, S.L.**

The following public tender was issued for the first phase of this evaluation:

File: 132/2020

Company awarded the contract: **ABAY ANALISTAS ECONÓMICOS, S.L.**



GOBIERNO
DE ESPAÑA

VICEPRESIDENCIA
PRIMERA DEL GOBIERNO

MINISTERIO
DE ECONOMÍA, COMERCIO
Y EMPRESA

ICEX