

iCEX

SUPPORT FOR SUBSIDIARIES

NEEDS ASSESSMENT

SUPPORT FOR SUBSIDIARIES

RESPONSIBLE OF THE EVALUATION
Evaluation Department
Executive Office
ICEX Spain Trade & Investment

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Needs

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Ex ante

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EVALUATION STARTED IN YEAR
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EVALUATION COMPLETED IN YEAR
2022

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



The increasing number of internationalised Spanish companies with a stable presence in destination markets, together with findings from previous needs assessment studies, points to a clear demand from companies for the provision of in-market services.

The purpose of this evaluation is to identify the needs of Spanish companies established abroad and to assess ICEX's position to meet those needs, thereby endowing both the Spanish Economic and Commercial Offices abroad (Ofecomes) and ICEX Central Services with new instruments in order to strengthen the portfolio of support services available for companies throughout their international expansion.

WHAT IS SUPPORT FOR SUBSIDIARIES?

These are services that ICEX provides directly to the subsidiaries of Spanish companies abroad to address an objective barrier to their internationalisation process.

EVALUATION QUESTIONS

- What are the needs of Spanish companies established abroad?
- 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 to subsidiaries, and how do they wish to contract them?
- How should ICEX engage with companies?
- Which market niches are we not addressing?

PHASES OF THE EVALUATION

- **Preliminary phase.** Qualitative study. In September 2021, a working group of 12 Ofecomes was set up to gain a better understanding of the range of services offered by comparable competitor countries, as well as the expressed demand for those services on the part of some Spanish companies established in their destination markets. Completion: December 2021.
- **Phase 1.** Qualitative (focus groups and in-depth interviews). Commissioned in July 2021, building on the results of the preliminary phase, the results have provided a deeper understanding of the in-market support needs of Spanish company subsidiaries. Completion: July 2022.

EVALUATION FACT SHEET

PHASE 1



TARGET POPULATION

Commercial and manufacturing subsidiaries of Spanish companies abroad.

UNIVERSE

596 unique companies that responded to the EPAI-ICEX 2021 survey and that have subsidiaries abroad.

TIME FRAME

2012-2020.

SAMPLE

56 unique clients.

SAMPLING METHOD

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

FIELDWORK

Between February and June 2022.

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.

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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 that of 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.

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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.

PERCEPTION OF ICEX AS A SERVICE PROVIDER

- Companies rate ICEX support very positively in early setting-up stages. However, they sometimes feel “unsupported” once these have ended, when the business is up and running and the demands become more sporadic and specific.
- Where it exists, the relationship between subsidiaries in the destination country and Ofecomes is, in most cases, positive. **The truly distinguishing factor is closeness and reliability.**
- Even so, if the company operates fully as a local company, its relationship with the Ofecomes may be minimal or even non-existent.
- There is evidence that **neither the subsidiaries nor the parent companies are sufficiently familiar with ICEX’s current portfolio of services.**

CONCLUSIONS

- More precise information is required on the relevant services and who provides them, as well as **information on reliable in-market service providers**, especially in the early stages of establishing a presence in a country. Companies require precise, sector-specific and up-to-date regulatory and commercial information in the destination country.
- Companies require funding to support their establishment in the destination market, being able to use the Ofecomes facilities in the country for their commercial activity, and support in recruiting suitable and stable workers.
- There is a demand for an **advisor in the destination country**, as well as for **personalised guidance**, so that their needs can be addressed not only in the initial phases of establishment but also once the company is established. Services should be tailored to their actual needs.
- In countries characterised by lower institutional stability, companies find institutional backing and ongoing specific advisory support particularly useful in mitigating the uncertainty they face.

RECOMMENDATIONS

- We recommend **communicating in advance and proactively those services that might be useful** for a parent company or a subsidiary through the most appropriate channel.
- We recommend **maintaining an updated structured directory of trusted local service providers.**
- We recommend **reviewing and expanding the portfolio of customised services** in order to better address the needs identified in this evaluation. Examples would include making space rental services more flexible, identifying logistics and warehousing companies, customised services to facilitate access to financial services or financing alternatives appropriate to the customer, customised services to support establishment, consolidation or business diversification in destination markets.

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 following public tender was issued for phase 1 of the evaluation:

File: 150/2021

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



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