



COMPETITIVE INTELLIGENCE IN TRADE AND EXPORT

Progress Report

Public Part

Project information

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Executive Summary

In Icx, as coordinators of the Project, we understand that this report is a crucial part of the Project Management process, serving a dual purpose:

This progress report is a beneficial mean of communication between the partners in the Consortium and, in a future, the base for the Final Report. With this report we will be able to see where are we and where would we go. At the same time we understand that this report is necessary because it provides the Agency with a mid-term update on how the project is advancing against original plans and budgets.

In this Progress Report we strictly follow the recommendations of the Project Handbook and the report templates (including the financial reporting table).

The project CITEX (Competitive Intelligence in Trade and Export) has been conceived to design, produce, and make available to Business Support Centres (BSCs), the academic and educational materials they need to support Small and Medium Enterprises (SMEs) in their export activities and internationalisation processes, using Competitive Intelligence (CI). When considering SMEs, it is very important to keep in mind that they are not just “smaller” corporations but rather differentiated ones in a strong need of differentiating themselves and that thrive by fulfilling demands which can only be detected by capturing and interpreting weak signals that are not always expressed in the market. SMEs’ decision making processes are often little formalised. SMEs interact with the environment in a hardly standardised way. SMEs competences are mobilised tacitly and they tend to hit the ground running. SMEs rarely have anyone in charge of intelligence monitoring. Small is not just beautiful but also different and all these are issues to be considered when developing solutions for SMES or for SMEs’ support centres.

The project is in the correct path to produce the best tools on Competitive Intelligence to the european SMEs, from a clear and correct picture of the state of art on intelligence all around the world, in which based the formative itinerary that this Project is developing: contents in which are based, the Training Manual and the Trainer’s Guide (the two main products of this project). All these materials are based in 3 premises:

- All proposed tools are designed bearing the specific requirements of the latter in mind and considering their actual skills and capabilities. Therefore the result of our shared effort comes with a comprehensive toolbox full of instruments with which to address any potential request from a customised perspective.

- Part of the work will be based on enhancing the companies’ own CI capabilities and at some other times we shall be working on enhancing the capabilities of different Business Support Centres to provide CI services which fall beyond the capacities of SMEs.

- We are trying to avoid excessive focus on description of sources or exhausting attention paid to extraction methods and data-treatment. When dealing with SMEs, intelligence is heavily exposed to lack of adequacy to the actual final needs. We are taking into account from the very beginning that many mistakes in intelligence (and intelligence systems) can be traced back to the stage at which the customer/end user needs were analysed. It goes without saying that financial costs and waste of resources are directly related to the time latter required detecting and, eventually, correcting these mistakes. So we are making an extra effort to avoid these mistakes and should there be mistakes to make these easy to detect and correct.

This formative itinerary will be used, firstly, by the Business Support Centres in the Consortium, ICEX, RRA Celje and NEST Association, which are the main beneficiaries of the output. At a later stage, outside the scope of the project, other organizations may use them. Although the training will be addressed to professionals in the trade and export industry, it will be designed in a way that could be adapted to other industries.

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1. Project Objectives

Different studies in the last years conclude that proactive internationalisation reinforces growth, enhances competitiveness and supports the long term sustainability of companies. Yet, for many Small and Medium-sized Enterprises (SMEs), national frontiers still represent a significant barrier to expanding their businesses.

One of the main export obstacles identified is the lack of knowledge of foreign markets. CITEX objective is to tackle this issue by developing Competitive Intelligence (CI) training methods that will improve skills such as: assessing the competition of other companies in the same sector; finding new potential suppliers; understanding the relevant regulations in new markets or simply detecting new business opportunities.

At the end of the day there is a legitimate concern about the true worth –if not the sheer relevance of CI for SMEs-. Even if we assume that good intelligence is necessary for strategy, what if SMEs don't strategise? It doesn't change anything. All SMEs -at least all of those worth the support of our business support centres- regardless of their interest in strategy share an interest in their own survival. That's what intelligence–competitive intelligence- is about. Sustained and sustainable survival depends on being capable of evaluating a given development, playing forward and exploring the potential of different choices and deciding among the latter considering goals and potential reactions of other agents to our actions. This is all what intelligence is about and it boils down to activities such as researching competitors and their competitiveness; finding back-up or new potential suppliers; assessing customers' financial soundness; understanding the relevant regulation in new markets or simply detecting new business opportunities. Sometimes some SMEs with appropriate training will manage to carry out these tasks by themselves some other times they will require Business Support Centres (BSCs) to assist them but in any case their success and survival depend on coming up with sensible answers to these questions. To be or not to be -that is the CI- question.

In fact, during the last three decades Competitive Intelligence (CI) in Europe has evolved from being seen as a discipline dealing mainly with processes and instruments to being regarded as part of a company's knowledge management activities. We can therefore say together with *G. Colletis* that a company's Economic Intelligence –and for this purpose Competitive Intelligence- is its “capacity to combine efficiently know-how and resources – internal and external- when facing a new productive challenge”.¹ This **new approach towards CI** underlines the need to combine adequate understanding of both, the company's environment as well as its own internal decision making methods.

CITEX pursues to endow BSCs with new assets by training their agents and technicians in Competitive Intelligence. Our goal is to nurture a new professional profile that is presently lacking but critically needed at the EU level.

¹ **Colletis G.**, « Intelligence Économique: vers un nouveau concept en analyse économique? », Revue d'Intelligence Économique, 1, 1997, pp. 25-34.

The project CITEX (Competitive Intelligence in Trade and Export) has been conceived to design, produce and make available to Business Support Centres, the academic and educational materials they need to support SMEs in their export activities and internationalisation process.

When considering SMEs, it is very important to keep in mind that they are not just “smaller” corporations but rather differentiated ones in a strong need of differentiating themselves and that thrive by fulfilling demands which can only be detected by capturing and interpreting weak signals that are not always expressed in the market. SMEs often don't have directly contact with the end-consumer. SMEs' decision making processes are often little formalised. SMEs often have little specialized personnel. SMEs interact with the environment in a hardly standardised way. SMEs competences are mobilised tacitly and they tend to hit the ground running. SMEs rarely have anyone in charge of intelligence monitoring or informatics. Small is not just beautiful but also different and all these are issues to be considered when developing solutions for SMEs or for SMEs' support centres.

2. Project Approach

Because we are dealing with Small and Medium Enterprises (SMEs) all proposed tools are designed bearing the specific requirements of the latter in mind and considering their actual skills and capabilities. However, it is also important to understand that not all tools are necessarily meant to be applied by each single company directly. Economic and Competitive Intelligence are complex matters useful to all companies but not always easy for every company to inverse itself in. Therefore the result of our shared effort comes with a comprehensive toolbox full of instruments with which to address any potential request from a customised perspective.

Part of the work will be based on enhancing the companies' own CI capabilities and at some other times we shall be working on enhancing the capabilities of different business support centres to provide CI services which fall beyond the capacities of SMEs.

In this sense, we are trying to avoid excessive focus on description of sources or exhausting attention paid to extraction methods and data-treatment. Good intelligence grows based on a good understanding of the user/consumer needs. When dealing with SMEs, intelligence is heavily exposed to lack of adequacy to the actual final needs. Special attention is being paid to overcoming a well-established tradition of applying supply-side logic when designing, developing and introducing information and intelligence systems.

We are taking into account from the very beginning that many mistakes in intelligence (and intelligence systems) can be traced back to the stage at which the customer/end user needs were analysed. It goes without saying that financial costs and waste of resources are directly related to the time latter required detecting and, eventually, correcting these mistakes. So we are making an extra effort to avoid these mistakes and should there be mistakes to make these easy to detect and correct.

Among the major obstacles to be overcome when trying to build user-centred CI solutions for SMEs it is worth mentioning lack of awareness of own needs, difficulties explaining their own decision-making process as well as misconceptions on how to translate their requirements into specific informational requests. Our efforts will be further complicated by the fact that we are to prepare programs and learning tools to be used not by the SMEs themselves but by specialists in ICI working from institutions that are entrusted with enhancing the competitive capacity of European SMEs in international markets. Therefore the aspirations, constraints and experiences of these "specialists" need to be considered when designing the program.

Once the needs have been established, these are to be prioritized and classified as well as completed by adding on some non-expressed and tacit needs. In this particular case, needs should also be classified according to their likelihood of being properly addressed by a swift training activity aimed at those specialists from which SMEs can expect assistance in CI matters. Needs are therefore to be ranked according to the effectiveness of their fulfilment through the training of CI specialists. In a nutshell: due attention must be paid to the fact that this project is about coming up with learning tools, methodologies and materials which must all share as their most salient feature their potential to enhance SMEs competitiveness in non-EU markets through the advocacy and introduction of CI services and practices. It should also be part of this project to introduce some validation procedures and guidelines for

CI activities currently carried out by BSCs –and affiliated SMEs- so as to decide on what to keep, what to reject and what to reinforce. In all its different aspects these needs assessment process will be best served if it is carried out in its first stage without considering whether the means are available or not, cost and resources constraints are better analysed once there has been a comprehensive consideration of what would be desirable.

The way to hell is paved with good intentions. The way forward is blocked by lack of attention to basic details even once the “big picture” is clear and shared. In this sense, regarding the company we must take into consideration its size, objectives and activity areas. Then its actual production, its links to the market, its finances and its innovation activities are to be monitored together with its basic strategic choices and development axis. Outside the company, the foreign environment is mainly defined by demand, technological opportunities or constrains, competitors, general financial situation, regulatory issues and political and geopolitical developments.

2.1. - Methodology.

Please find attached the documents:

Annex 1: User-centred Competitive Intelligence; Annex 2: The questionnaire; Annex 3: The interviews; Annex 4: The project Methodology.

The first thing we have done in this regard is to establish a terminological definition of our study with the developing of a document title "User-centred Competitive Intelligence". This document contents what is understood by Competitive Intelligence (CI) and how this CI is applied in the European Enterprises today. This document provides us a point of departure form a common understanding of the discipline. This will be completed with a whole chapter of terminology and definitions in the contents and a glossary of terms. All of them will be tested in the implementation of the pilots further in the project.

In order to define the scope of research, in CITEX we have researched “the State of the Art” in Competitive Intelligence in the European Union. In this sense, we will be able to see that is done already in this discipline and how the different formative itineraries are able to help the SMEs in their efforts of internalization. The example taken from where we are going to start is the articles recently published in the prestigious journal International Journal of Intelligence and Counterintelligence “The Development of Intelligence Studies in Spain”. The objective is to be aware of “what is out there” in this discipline, what are the main topics of those courses and how can offer something new and actual, in order to offer the best contents to the SMEs. The idea of this project is to help the European SMEs in their efforts of internalization and, in this regard, the CITEX contents are going to adapt the theoretical view with the reality of the enterprises.

At the same time we have created a research methodology in order to define the target group for study. The project established a research methodology and objectives, which are going to guide us in our work. As a result of all these activities it has been created a questionnaire and interviews in order to see both, the actual knowledge and uses (formal or informal, structured or not) of Competitive intelligence in the European enterprises and the real needs in this discipline with the aim of best adequate the contents to their needs. Partners were asked to collect data from at least 40 SMEs.

Our methodology of work is completed with a developing of a guide of best practices in Competitive Intelligence in order to help the BSCs to unify their approach in this discipline.

2.1.1. - Assessment Methodology

Find Attached Annex 5: Evaluation Guide.

ICEX has authority and responsibility for the evaluation. This means that ICEX is responsible for agreeing the terms of reference and 'rules of engagement'; clarify the boundaries and scope of the evaluation; be responsible for planning and organising the evaluation, sometimes in conjunction with designated others; be responsible for designing or agreeing what indicators and criteria are to be adopted and ensure that the evaluation is conducted ethically and that it is governed by a code of conduct.

In this evaluation we will compare what has been accomplished with what should have been accomplished. In the different Working Packages (WP) are presented the **participant outcome objectives** where it is described what is expected to be achieved as a result of the Project. The expectations about how your project will change participants' knowledge, skills, attitudes or awareness are the participant outcome objectives.

We will focus this evaluation in feedback, linking learning outcomes to objectives and providing a form of quality control. The control itself, making links from training to organizational activities and to consider cost effectiveness and in determining the relationships between learning, training, and the transfer of training to the job, and how the results of the evaluation influence the context in which are occurring.

Among the questions to be answered in the evaluation are: What is the project trying to do and how?; What were the aims, objectives and deliverables?; What were the problems the project was trying to solve?; What were the issues the project was trying to address?; What was the gap in the market?; Has the project succeeded in its intentions?; Why were you doing this project?,,,

The quality assessments of the deliverables will follow the criteria of clarity, rigor and simplicity of the explanations, starting on the premises contained in the attached document and always bearing in mind the ultimate goal of this project. In this sense, ICEX is responsible for assessing the quality of content delivered to the resulting product is useful, in line with actual needs of SMEs.

Every partner has developed a **working plan**, in which it will include WHAT is going to do, HOW is going to do it, WHEN is going to do it, WHO is going to do it and the RESULTS it wants to achieve by doing it. You can find a list of tasks by partner in the Project Working Plan.

ICEX recommends the partners that the structure of the progress reports of each WP suits the **template progress reports proposed by the Agency in the Project** handbook (Annex II - Assessment progress report sheet) with the aim to facilitate the task of writing the progress report in October 2010.

Hence, in order to do an overall evaluation correctly, ICEX recommend the partners to include a report of all the tasks that the partner had to achieve in the different Working Packages and scored them from 1 up to 10.

Please find attached in the annexes an example of a **Partner progress report** based in the ICEX tasks in the different Working Packages within the Evaluation Guide.

2.2. – Dissemination and Exploitation Strategy

Find Attached Annex 6: Dissemination Plan of CITEX Project.

In order to describe the dissemination and exploitation strategy for the CITEX project we create the **dissemination plan of the project CITEX** as an instrument to guide all the project partners in the processes of disseminating and exploiting the project results. The objective is to ensure that the results of the project are appropriately recognized, demonstrated and implemented on a wide scale. The plan outlines the different activities that will be carried out during the project lifetime, giving detailed information about the CITEX project dissemination tools and target groups. In order to guarantee an effective promotion and exploitation of the project, a multiple dissemination strategy (Internet, Paper, Events) have been identified and different tools will be developed and delivered in the framework of each strategy. Detailed information on deadlines and partners responsibilities for the dissemination of results and information on target groups have also been included.

The intention is that the plan shall be *a flexible document* which is open for adjustments along the project lifetime and beyond. As the dialogue between project partners and potential end users are being developed and new target groups will possibly add, there might be a need for changes in the approach and strategy in order to maximize the impacts of the project. Nevertheless, dissemination within the project CITEX will be based on three principles:

- *Dissemination and exploitation within CITEX are processes which shall follow through all stages of the project.* From the first day of the project it is important for project partners to take all opportunities to spread information about what have been achieved, and how potential target groups will be able to benefit from project results.
- *All partners are equally responsible for disseminating and exploiting the results.* Each partner has got invaluable resources in their individual experiences, networks and contacts. These resources have to be used to involve the target groups, spread the results and make the project sustainable.
- *The dissemination and exploitation process of the CITEX project has to be transparent, able to follow up and to adjust.* For that reason ALL partners have to keep track of all their dissemination and exploitation activities and to be sensitive to input from local and regional user groups.

The following text will explain the basic of dissemination and exploitation within of results produced within the project CITEX. *Figure1* gives an overview of the dissemination approach.

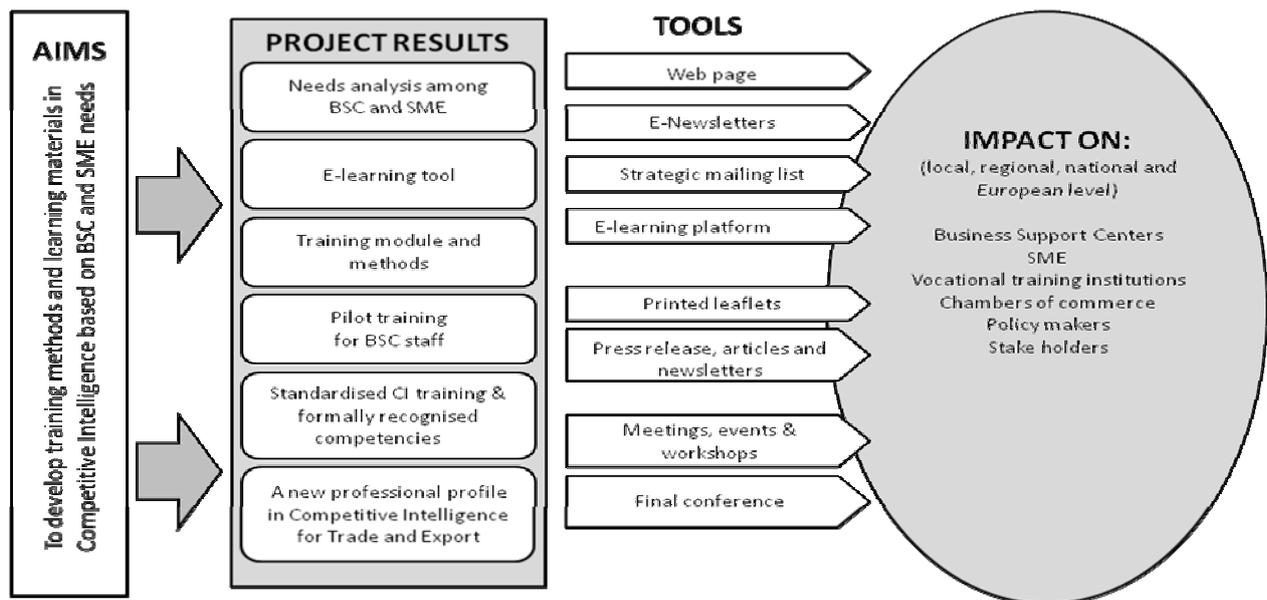


Figure 1. Dissemination & exploitation approach of CITEX

Dissemination within the project CITEX is about making sure that the results are *widely known* - to raise awareness amongst key actors of the quality, relevance and effectiveness of the project and the results. **Exploitation** will be the job to ensure that the project results are *widely used* and lasting after the project ends:

- 1) To make target groups understand how the CITEX training methods meet their specific needs.
- 2) To convince individual end users how they can benefit from, and apply, the training material.
- 3) But it also concerns the issue to integrate the results into a broader context. To influence relevant decision makers at local, national and European level in order to establish a standardized professional profile that will recognize Analysts on Competitive Intelligence.

Last but not least one focus of dissemination will be the Lifelong Learning Program Leonardo da Vinci. Using CITEX as an example, dissemination activity will show the program objectives and what possibilities it gives for financing international projects.

As mentioned in the introduction, dissemination and exploitation within CITEX are processes which shall follow through all stages of the project. However, the balance between the two types of activities will slightly differ between different phases of the project.

Early in the project, the focus will be to ensure that the project is addressing the needs of BSCs and SMEs, and to create awareness among all target groups of the concept of CI and about the up-coming project activities.

During the mid-phase of the project, the work is about identifying lessons from what has been learned - for example: results from the needs analysis of SME's and experiences from the pilot training - and passing them on to interested parties.

At the end of the project, the intention is to publicize more generally the project's results, the e-learning tool and the applied methods of learning, etc. The task will be to spread what lessons have been learned and benefits gained, to make e-tools and methods attractive to

potential users/customers and policy makers and prepare for larger scale implementation of CITEX training.

All partners are equally responsible for disseminating and exploiting the results. Each partner has got invaluable resources in their individual experiences, networks and contacts. These resources have to be used to involve the target groups, spread the results and make the project sustainable. The following section is an attempt to clarify what tools will be used and what are the roles and responsibilities for each partner.

3. Project Outcomes & Results

ICEX is the Contractor and the Project Coordinator for CITEX. As such, its main responsibility is to ensure that the project produces the required products, to the required standard of quality. In order to get this and to be sure that we give the best tools on Competitive intelligence to the European SMEs, it is paramount to have a clear and correct picture of the state of art on intelligence all around the world in which based the formative itinerary that this Project will develop; contents in which are based the Training Manual and the Trainer's Guide (the two main products of this project).

CITEX project will equip organizations with the necessary tools to take full advantage of the potential in Competitive Intelligence for trade and export. The project runs for 2 years and proposes to generate:

- High quality learning materials and teaching methods in the field of CI.
- Pilot training for the Business Support Centers (BSCs) in the project consortium.
- A study on the information needs of SMEs and quality of service of BSC supporting them.
- A comprehensive toolbox full of instruments with which to address any potential request from a customised perspective.
- The State of the art concerning Teaching Competitive Intelligence in Europe.
- Methodology for CITEX Project.
- Questionnaire about CI in the SMEs.
- List of beneficiaries, list of European Enterprises for the implementation of the Questionnaire.
- Evaluation Guide.
- First approach to the writing of the Contents.
- Dissemination Plan.

There are different tools for dissemination and exploitation where all the results can be found. In this sense the following text describes the different tools to be used, and what the responsibilities are for each partner, in order to disseminate and exploit the project results. *Table 1.1 and 1.2* below gives an overview.

2010												
	1	2	3	4	5	6	7	8	9	10	11	12
Webpage			Create			Uppdate			Uppdate		Uppdate	
E-Newsletter			31st			14nd			29rd			14th
Strategic mailinglist			Create		29th							
Printed leaflets				30th								
Pressreleases & articles	Each partner at important project milestones											
Meeting & events	Each partner using all availabel opportunities											
Final conference												

Table 1.1 deadlines for dissemination 2010

2011												
	1	2	3	4	5	6	7	8	9	10	11	12
Webpage			Uppdate			Uppdate			Uppdate		Uppdate	
E-Newsletter			31th			29th			29th			10th
Strategic mailing list	Uppdate									Uppdate		
Printed leaflets											30th	
Press releases & articles	Each partner at important project milestones											
Meeting & events	Each partner using all availabel opportunities											
Final conference												

Table 1.1 deadlines for dissemination 2011

The **website** for CITEX is central to the dissemination objectives for the project. It is also important to establish links with similar projects or other projects of relevance. The aim of the website is twofold: to function as a source of information for all interested parties outside the project and as a source of information and support for those within it. CITEX website presents the project's main objectives, activities and partnership and it will be regularly updated during the project lifetime.

The webpage will be available at the following web address: www.citexprojezt.eu

CITEX *Project area* includes a brief presentation of the project, the objectives, the target group and an overview of the innovative methodology and technology used in the project. *Course section* of the website offers a brief presentation of the methodology to be developed, the pilot courses. The section *Products and Results* will contain the mid-term results and tools and all public projects' deliverables. A presentation of the CITEX *Partnership* will be shown providing the link to the partners' institutional websites and presenting contact details to all partner representatives. *Communication* area allows downloading the brochures and entering the newsletter. The CITEX website also offers a specific section for *News* to highlight relevant events and meaningful international conferences and national events with target groups organized by partners to disseminate and exploit the project. The section *Contacts* informs about the project partners assigned and provides e-mail contacts, telephone numbers and addresses. The *Private Area* – Via a link to the project tool "Colabora" project partners will have access to a restricted area accessible only by partners to upload and download project's documents and sharing opinions about the workflow and the project's progress.

All partners will link their webpages with the project website in a visible way. All partners are responsible for continuously feeding the website with relevant information. West Sweden is responsible for gathering and structuring information from partners. IDEC is responsible for building the web page and upload the information. A first version of the webpage has been published in **April 2010**. The CITEX website will be available in English.

An online newsletter is a good way to keep interested parties informed about the project progress, the current achieved results and about relevant events at local and international level. Periodical newsletters will be available on the CITEX website and sent out via e-mail (every 3 months). Each newsletter will include:

- A short editorial introduction.
- Focus on the partners and how they will use the results.
- Information from the partners about the progress of the project activities.
- Information from the partners about relevant local, regional, national and european events (conferences, workshops, etc.,,,).
- Information about the issue of articles and publications meaningful for the project.

The CITEX partners will contribute with drafting the quarterly e-newsletters by sending West Sweden material three weeks ahead of deadline for publication. The e-Newsletter will be available in English.

Deadlines for publication of e-newsletters are shown in the *Table 2.* below.

Deadline	A <u>Preliminary</u> suggestions of main focus
31 st – March 2010	Project presentation (partners, aims, activities)
14 th - June 2010	The results from IPT's study on initiatives and business support centers
29 th - September 2010	How will the project be evaluated? About methods and approaches
10 th - January 2011	Interligare - about the developed training manual, trainers guide and the e-learning platform. + Expectations on the upcoming pilot tests. NECC, RRA Celje, NEST, ICEX
31 st – March 2011	A report from the ongoing pilot tests.
14 th – June 2011	Overall experiences form the pilots + Announcing the final conference
29 th – September 2011	Presentation of the final results, training manual, training guide and e-learning platform
10 th - December 2011	How will the results be available to others? How can interested target group access the developed methods?

Table 2. CITEX e-Newsletter - Deadlines and suggestions of main focus

Based on the general and brief description of project target groups on page 6, all partners are asked to identify and establish a mailing list with country specific strategic target groups. The list will be used to secure that the e-newsletter and other information from the project reach out to the largest possible audience. The list could also be used to follow up on the project in general and the dissemination activities in particular.

Printed materials are essential for any promotional purposes. CITEX partners will build two different brochures. One, produced at the beginning of the project, introduces the project's objectives, activities, target groups, results and partnership; the other, one published at the

end of the project, will present the results of the project with information on how interested organizations will be able to experience the methods and e-learning courses which has been created. Brochures will be available in English.

Deadline for the two brochures are 5/29/2010 and 01/12/2011.

Each partner contributes with inputs. West Sweden defines the draft version and circulates the text among the partners. As soon as the partners confirm the text and the graphic design, West Sweden proceeds with the realization and printing of the brochure.

Part of the dissemination work will be analyzing suitable publications and discussing the possibilities to issue some articles. **Publications and articles about the CITEX Project's** methodological approach can be submitted sector-specific journals. Publications that are not limited to special-interest groups must also be considered, since it is important to promote a general awareness about the project. It is also essential to capture opportunities to get publicity via channels which are less hard to reach compared to large news papers. For example, partners own organizations newsletters, local publications on the developments within the local and regional business society, etc.,,

Each partner should issue a press release in occasion of the most important milestones of the project. Examples of themes to publish press releases for:

- Presenting the CITEX aims and partnership mentioning the project website address.
- The results or the needs analysis.
- The start of the pilot studies.
- The partner meetings.
- Launching the final event in Brussels.

Partners should collect and send a scanned version of all the published articles about CITEX to West Sweden. This in order to actively contribute to the creation of a project Press Kit, containing all issued project press releases and published articles. Moreover, these articles will be of great importance for the writing of the final report.

The press releases shall be sent to West Sweden and labeled with:

- Name of the papers it has been sent to
- Headline translated into English
- Date it was sent

The scanned articles shall be labeled with:

- Name of the newsletter/ paper it is published in
- The headline translated into English
- Date of publication

The participation in **conferences and workshops** represents an opportunity to promote the CITEX project. The active participation of CITEX members may vary from a poster-session, where brochures can be distributed and small discussions held, to a pre-planned presentation of the CITEX project. Project members will be encouraged to look for events that would be interesting for CITEX.

As the CITEX project's budget is very limited when it comes to conference participation, it is important that each partner take all opportunities to spread the message, in other words, to use daily meetings, networks and workshops in the local and regional environment.

Partners should collect the agendas from all meetings where they have been presented CITEX. The copy shall be sent to West Sweden labeled with:

- The title of the meeting/conference in English
- The date of the meeting

Final conference

A plenary conference will be arranged during the final project meeting in Brussels. It aims at disseminating and exploiting the final results and products. Decision makers will be invited in order to promote their active involvement in the project sustainability after the project end. Slides and supporting materials will be delivered in paper modality and will be accessible through the web site. It is foreseen the participation of approximately 100 key actors, though the budget will limit the maximum number of participants (5250 euros are supposed to cover both the conference and printing of brochures). Duration: 1 day. Language: English.
Formal requirements for project products

Partners must clearly acknowledge the European Union's contribution in all publications and products they realize. The following sentence must be enclosed:

"This project has been funded with support from the European Commission. This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein."

The translated version is available at the following webpage:

http://eacea.ec.europa.eu/about/logos_en.htm

Remember to put the program and project logo for each project product. For 2007-2013 beneficiaries are required to use the official logo available at the following webpage: http://eacea.ec.europa.eu/about/logos_en.htm. CITEX's logo is found below and in the project e-based communication tool.



4. Partnerships

This formative itinerary will be used, firstly, by the BSCs in the consortium: ICEX, RRA Celje and NEST Association, which are the main beneficiaries of the output. At a later stage, outside the scope of the project, other organizations may use them. Although the training will be addressed to professionals in the trade and export industry, it will be designed in a way that could be adapted to other industries.

As extending business activities beyond their own country often is a big additional investment for SMEs with scarce resources, the primary target groups of CITEX are BSCs and other organizations supporting SMEs in their internationalization process.

The end users are the persons and organizations which might be interested to make practical use of the training materials and methods developed by the project. Staff, trainers and managers in organizations such as:

- SMEs that are waiting to do business outside the EU borders.
- Training institutions providing education in trade and export.
- Business support centers (BSCs) – or other bodies that support trade and export companies.
- Chambers of Commerce.
- Other professionals from any sector that wishes to develop their knowledge and improve their skills in the field of competitive intelligence.

The Policy Makers are the target group whose recognition is necessary for implementing the project result at a larger scale and to recognize Competitive Intelligence as a new professional profile. The target groups may vary depending on national context. But a couple of examples are:

- Managers of SMEs.
- Politicians and managers of public authorities responsible for regional development and business support.
- Policy makers and Universities responsible for accreditation of vocational training.
- Organizations responsible for funding vocational training.

The Stake Holders are the groups which will not be using the e-learning tool and methodologies directly themselves but their approval is important, as their view is valued by decision makers and end users. Country specific variations may be shown here as well. A couple of examples are:

- Networks of vocational education centers.
- Networks and cluster initiatives for the export industry.
- Networks of BSCs.

Each partner has got invaluable resources in their individual experiences, networks and contacts. These resources have to be used to involve the target groups, spread the results and make the project sustainable. A list over country specific target groups will be gathered and updated during the project.

PROJECT PARTNERS

The project partners are located all over Europe and consist of both, research organizations and regional BSCs.

The Spanish Institute for Trade and Export (ICEX) is the coordinator.

Organisation	Country	Website
Spanish Institute for Trade and Export (ICEX)	Spain	www.icex.es
Regionalna Razvojna Agencija Celje d.o.o. (RRA Celje)	Slovenia	www.rra-celje.si
Association NEST	Bulgaria	www.nest-association.org
Institute of Creative Proceedings (IPT)	Poland	www.ipt.pl
EURADIA International	Spain	www.euradia.es
IDEC	Greece	www.idec.gr
West Sweden	Sweden	www.westsweden.se

5. Plans for the Future

The long term goal of the project is to establish a new professional profile responsible for the development of CI in trade and export. This profile is currently lacking and is critically needed at the EU level. The expectation is that improved skills in Competitive Intelligence will foster business growth in Europe.

In this sense this Project will create a formative Itinerary in Europe in order to familiarize the SMEs with Competitive Intelligence (CI) as a very useful tool for the Internalization. This project will unify Concepts and meanings of this discipline across participant countries and in a future all around Europe becoming pioneers in this unification of the uses of Competitive Intelligence being able to disseminate good practices in Competitive Intelligence and at the end giving all the SMEs in Europe the possibility of incorporate CI to their practices making them more competitive.

The objective is to disseminate the results of this Project among all Europe starting with the Partners and making them able to teach in their countries this useful discipline under a common understanding and contents but adapted to their realities. This will make that during the next years the contents will mature and adapted with every course in order to be in constant evolution but due to this Project based to common and basic principles.

Other aspects that are of special relevance that CITEX project would like to achieve are:

- Linking strategy to acquisition of information within the different SMEs in the EU.
- Enhancing core capabilities of requirements, analysis, and dissemination for intelligence analysis within the different countries of the European Union.
- Integrating all source intelligence from the Intelligence Community with information from state and local fusion centers. (Is important to point out that considering the role that Business Support Centers must have in the development and implementation of the project this is a very relevant issue which tends to be overlooked in practice)
- New advancements that allow technology to harness intelligence with minimal human interaction. (Although we want to come up from the CITEX with the best solutions we should not forget that SME's by definition have scarce human resources)
- Solidifying intelligence for usable results. The urgency to improve the gathering of actionable intelligence. (SME's are flooded with information but very little of it is useful and even less actionable)
- Government and Industry Partnerships for Enhanced Intelligence. Identifying opportunities for combined efforts within industry and government allies (Isn't CITEX an example of the potential of Private Public Partnership's potential in the field of competitive intelligence?)
- Bridging the Gap between Collaboration on Paper and Collaboration in Action. What the future holds in the new paradigm of intelligence more broadly shared across the enterprise.
- Evaluating and supporting technological innovation initiatives (A particularly interesting aspect considering Icx's role in the project as coordinator and responsible for ensuring the overall consistency and quality of the final result).

6. Contribution to EU policies

Summarise how this project contributes or has contributed to key EU policies, objectives and priorities (Lisbon, Bologna, Bergen, etc). This relates to section D8 of the application form.

Europe 2020

The Europe 2020 strategy identifies three key drivers for growth: smart growth, sustainable growth and inclusive growth, which are to be implemented through concrete actions at EU and national levels. The CITEX project addresses each of these three key drivers. Smart growth is closely linked to intelligence- it goes without saying that the more European businesses know about the markets in which they operate through the Competitive Intelligence (CI) acquired through CITEX, the more they are able to grow and foster innovation-. In the same way, better informed businesses use their time and resources more efficiently, as available resources are assigned where they are most needed, which leads to streamlined processes and increased competitiveness. Lastly, the additional skills acquired through the CITEX project will make businesses and the individuals that run them more competitive, at the same time providing the opportunity for a greater number of individuals to be included in today's changing labour market.

Additionally, the EU has identified 7 flagship initiatives to be undertaken within the framework of Europe 2020. Of these, the most relevant to the CITEX project is the "industrial policy for the globalisation era" initiative. The objective of this flagship initiative is to improve the business environment, notably for SMEs, and to support the development of a strong and sustainable industrial base able to compete globally. CITEX clearly supports this objective as it provides European companies with the necessary tools to make more informed decisions, which enables them to operate in a healthy business environment and compete at a more international and global level.

The EU's new "Education and Training 2020" (ET 2020) strategic framework for European cooperation in education and training sets out four strategic objectives. Of the four, CITEX contributes most notably to: making lifelong learning and mobility a reality, through more flexible learning and training methods, to improving the quality and efficiency of education and training through innovative approaches to job market-relevant training, and lastly, enhancing creativity and innovation, including entrepreneurship, at all levels of education and training, by providing citizens with key, transversal competences. Moreover, the involvement of Business Support Centres (BSCs) will encourage greater partnerships among enterprises and BSCs, key to enhancing innovation and entrepreneurship.

In addition to the policies and objectives stated above, CITEX objectives are fully in line with and actively contribute to the **EU's Trade Policy**. As part of its "Trade, Growth & World Affairs" Communication, the Commission outlines new proposals for EU trade policy. Among these proposals, the Commission highlights the need for increasing the opportunities from trade for jobs, for development and for business, as well as support measures to help SMEs that want to develop their international activities; currently one in seven of the EU's SMEs are active outside the European Union, even though globalisation provides many opportunities for specialist firms to succeed on international markets. CITEX will provide European SMEs, through the Business Support Centre (BSC) network, with the necessary skills to seek, understand and make decisions based on Competitive Intelligence (CI) from within the EU Single Market as well as internationally, which will lead to an increase in trade, development and ultimately, jobs in the EU.

Lastly, CITEX makes an important contribution to the policy objectives defined in the European Framework for **Key Competences for Lifelong Learning**, which states that adult education and training should give real opportunities to all adults to develop and update their key competences (KC) throughout life. Of the 8 key competences defined, CITEX actively contributes to several of them. Specifically, CITEX contributes to KC3, (mathematical competence and basic competences in science and technology), by providing specific, real-life skills which will enable businesses and individuals to develop and apply mathematical thinking in order to solve a range of problems encountered in a competitive market environment. In addition, CITEX contributes to acquisition of KC5, (learning to learn), by engaging businesses and providing tools that allow them to learn and adapt their learning process to their own local needs and opportunities. Lastly, KC7 (sense of initiative and entrepreneurship) is addressed in an even more direct manner: the concept of Competitive Intelligence (CI) is to allow businesses to obtain information with which to make informed business decisions, allowing them to act more intelligently and competitively, thereby turning their ideas and concepts into concrete actions. While this involves risk-taking actions resulting from informed decisions based on CI, helps to minimise risks, which allows businesses to plan and manage their projects in order to achieve objectives and seize opportunities that arise in the market.