



COMPETITIVE INTELLIGENCE IN TRADE AND EXPORT

Final Report

Public Part

Project information

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Executive Summary

As coordinator of the Project, ICEX understands that this report is a crucial part of the project management process and serves a dual purpose.

As a final report, it describes all the work carried out since the beginning of the CITEX (Competitive Intelligence in Trade and Export) project. The report itself is based on the recommendations and findings extracted from the Progress Report; as such, it serves as a practical vehicle for providing information and documentation to the final users of the Project. If the Progress Report was useful to see how far the project had progressed at a given moment in time, this Final Report enables us to have a global vision of the work we have carried out through the project as a whole, what we have done to fulfil the project's objectives, the main findings that have come out of the initiative and where we might go with the CITEX products we have created in the future. At the same time, we understand that this report is a mandatory document intended to provide the European Audiovisual and Culture Executive Agency (EACEA) with a clear picture of how the project has evolved in relation to the original plans and budgets prepared for its execution.

In preparing this final report, we have fully complied with the recommendations offered in the Project Handbook and have used the report templates it contains (including the financial reporting table). Nevertheless, we have also taken into account all the recommendations offered by EACEA in the Approval of Progress Report and Notification of Payment. The public part of the Progress Report has been uploaded to the Adam Portal: <http://www.adam-europe.eu>.

The CITEX Project has now achieved all the objectives set out for it two years ago: to design, produce, and make available to business support centres (BSCs), the academic and educational materials they need to support small and medium-sized enterprises (SMEs) in their export activities and internationalisation processes through the application of competitive intelligence (CI).

Working as a team, all the members of the consortium have developed a complete list of deliverables (13) as proposed on page 13 of the application form. These deliverables ably address the scope of needs identified through the project, ensure the short-, medium- and long-term continuity of the positive impact generated by CITEX and make a considerable contribution toward the fulfilment of related European Commission (EC) policies.

CITEX has nurtured the creation of a new professional profile that has been lacking in Europe until now, but that nevertheless is critical to the future of its business communities. It has filled this critical vocational training gap by generating (1) Competitive Intelligence (CI) training methods, (2) CI training materials and (3) ICT-based e-learning tools for BSC technicians in Trade and Export at: <http://www.citexproject.eu/training>. Furthermore, CITEX harmonizes and standardizes existent training practices across Europe.

The project has produced the best possible tools on competitive intelligence for European SMEs based on a clear and accurate picture of the state of art. The training itinerary created under the aegis of CITEX includes a training manual, a trainer's guide and an online platform, which are the three main products of this project. The design and contents of all these resources have been based on three premises:

- All proposed tools have been designed bearing in mind the specific requirements of SMEs and their actual skills and capabilities. We have created a comprehensive toolbox of instruments designed to help BSCs provide a customized response to any kind of request for intelligence training that takes into account the differing circumstances of individual BSCs and the varied nature and structures of markets and sectors in countries throughout the European Union.

- The development of training resources has had a dual focus: one component was geared toward the enhancement of companies' own internal CI capabilities, and the other sought ways to strengthen business support centres' capabilities to provide CI services that currently fall outside the competence range of SMEs.

- We have tried to avoid placing an excessive emphasis on descriptions of sources, extraction methods and data-treatment, keeping in mind that it was our mission to fill an identified market gap for content and methods that addressed the specific intelligence needs of SMEs. From the very beginning, we have been fully aware 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 the financial costs and waste of resources involved in detecting and correcting such mistakes at a later stage are directly attributable to errors made in initial needs evaluations. We have therefore made an extra effort to avoid such errors.

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1. Project Objectives

The CITEX project (Competitive Intelligence in Trade and Export; number 2189 – 2009 / 504146) has been carried out through the European Commission's Leonardo da Vinci Programme under the auspices of the EC's Lifelong Learning Programme. ICEX has served as the project coordinator and the sole interlocutor for all consortium partners with the European Education, Audiovisual and Cultural Executive Agency, which acts under powers delegated by the Commission of the European Communities.

CITEX was conceived to design, produce, and make available to business support centres the educational materials they need to support SMEs in their export activities and internationalisation processes.

CITEX's mission has been to help SMEs throughout the EU become more competitive through the application of intelligence as a tool. Although businesses throughout Europe may differ in terms of their objectives and their means of achieving them, 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. CITEX offers SMEs the intelligence training they need to survive and prosper in an increasing competitive and globalised world market.

A company's sustained and sustainable survival depends on its capability to evaluate a given development, play forward, explore the potential of a range of choices and decide amongst the latter, taking into consideration the goals and potential reactions of other agents to its own actions. This is what intelligence is all 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. With appropriate training, many SMEs can manage to carry out these tasks by themselves. Whenever they need help, they can turn to business support centres, which are there to assist them. In any case, their success and survival depend on coming up with sensible answers to their questions. To be or not to be – that is the CI question.

Over the last three decades, opinions about competitive intelligence have changed in Europe: whereas it was once seen as a discipline narrowly dealing with processes and instruments, it is now considered to be an integral part of a company's knowledge management activities. We can therefore agree with *G. Colletis's* statement that a company's

economic intelligence – or competitive intelligence, in our case – is its ‘capacity to efficiently combine know-how and resources – internal and external – when facing a new productive challenge’.¹ CITEX has developed a **new approach towards CI** that stresses the link between a company’s application of a solid understanding of its environment to its internal decision-making methods and better decision-making. It is essentially a matter of achieving superior decision-making through superior information.

Building on the argument above, the starting premises of the CITEX project have been:

- Intelligence, in any organization, primarily concerns arriving at an accurate understanding of the concepts of this relatively new discipline and developing analysts’ analytical abilities.
- The CITEX approach rests on the notion that to be effective, training must be affordable and accessible and should not be based on any form of expensive software that would be out of the reach of the majority of SMEs.

Guided by these precepts, CITEX has effectively contributed to the standardisation and promotion of competences that are needed to tackle many of the complex challenges facing today’s organisations. CITEX products were consciously designed for professionals with diverse needs who worked in a wide spectrum of organizations. The standardization of competences also helps to create a field of equal opportunities for all companies, regardless of their size or sector. The materials used in the CITEX training programme were designed to cover the needs of two phases. The first was oriented towards helping people develop a clear and common understanding of CI, and the second was centred on the acquisition of a range of advanced analytical skills. The programme has sought to give participants a solid foundation in critical thinking, rather than prescribing expensive software solutions. In this way, CITEX has helped individuals to be better thinkers and better decision-makers who can make their companies more competitive.

The project is already showing positive results at various BSCs within the consortium and in SMEs across Europe. Just as these organisations and companies have, many others will now benefit from the training programme developed by CITEX, which offers them the opportunity to improve their ability to assess the competition presented by other companies in the same sector, find new potential suppliers, understand the relevant regulations in new markets or simply detect new business opportunities.

¹ Colletis G., ‘Intelligence Économique: vers un nouveau concept en analyse économique ?’, *Revue d’Intelligence Économique* 1, (1997), pp. 25-34.

CITEX's main objective has been to enhance BSCs' assets by providing competitive intelligence training to their agents and technicians. Our goal was to nurture the development of a new professional profile that has been lacking in Europe until the present, but that nevertheless is critical to the future of its business communities. CITEX has filled this critical vocational training gap by generating (1) competitive intelligence training methods, (2) CI training materials and (3) ICT-based e-learning tools for BSC technicians in trade and export and has contributed to the harmonisation and standardisation of existing training experiences dispersed across Europe by making its methods available to any interested BSC in Europe.

The CITEX project (Competitive Intelligence in Trade and Export) was 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 processes through the application of competitive intelligence.

2. Project Approach

It is very important to keep in mind that SMEs are not just smaller versions of corporations. These businesses have a strong need to differentiate themselves from the competition and thrive by fulfilling demands that can only be detected by capturing and interpreting weak signals that are not always expressed in the market. SMEs rarely have a designated person in charge of intelligence monitoring or IT operations. All these are issues should be taken into consideration in developing solutions for SMEs or for business support centres.

Because this project addressed the needs of small and medium-sized enterprises, all the tools we have chosen have been designed to match their specific requirements, skills and capabilities. However, we also realised that not all the tools covered in the training programme designed by CITEX would be useful to every company that signed on to the course. To address the diversity of needs in the SME community, CITEX has designed a comprehensive toolbox of instruments that can be used to create customised responses to virtually any request.

The CITEX project has had a dual focus: enhancing companies' own internal CI capabilities, and strengthening business support centres' capabilities to provide CI services that currently fall outside the competence range of SMEs.

The project team has carefully avoided putting an excessive focus on descriptions of sources, extraction methods and data treatment. Good intelligence grows out of a solid understanding of user/consumer needs. When designing intelligence training resources for SMEs, it is essential to tailor both content and methods to their specific needs. Special efforts have been made to overcome a well-established tradition of applying supply-side logic to the design, development and introduction of information and intelligence systems.

From the very beginning, we have been aware that many mistakes in intelligence (and intelligence systems) can be traced back to the stage at which customer/end user needs were analysed. It goes without saying that the financial costs and waste of resources involved in detecting and correcting such mistakes at a later stage are directly attributable to errors made in initial needs evaluations. We have therefore made an extra effort to avoid such errors.

SMEs' low level of **awareness regarding their own needs**, their lack of experience in explaining their own decision-making processes and their misconceptions regarding how to translate their requirements into specific informational requests were some of the major obstacles we faced in designing effective user-centred CI solutions for SMEs. Our efforts were further complicated by the fact that we had to prepare programmes and learning tools that would not be used not by the SMEs themselves, but rather by CI specialists working out of institutions that had been entrusted with the job of **enhancing the competitive capacity of European SMEs in international markets**. Therefore, the aspirations, constraints and experiences of these specialists needed to be considered when designing the programme.

Once the basic needs of SMEs were established, they were prioritized, classified and complemented with others we perceived as tacit or unexpressed. Care was also taken to classify needs according to the likelihood of their being properly addressed during the brief training activities planned for specialists designated to provide CI support to SMEs and the probability of their being effectively conveyed by the CI specialists. Due attention was always paid to the fact that **this project was about coming up with learning tools, methodologies and materials that first and foremost would serve to enhance SMEs' competitiveness in non-EU markets through the advocacy and introduction of CI services and practices**. The project also introduced a number of validation procedures and guidelines for CI activities currently carried out by BSCs and affiliated SMEs so as to decide what to keep, what to reject and what to reinforce. Although it was not clear if resources would be available to address all the needs identified, this process was carried out during the initial stage of the project in order to have a bigger picture of what SMEs needed before making specific allocations of time and resources.

It is often said that the way to hell is paved with good intentions. One could also add that the way forward is often blocked by a lack of attention to basic details even once the 'big picture' of an endeavour has been made clear and has been shared with all the players involved. In order to avoid roadblocks in the rollout of the CITEX project, it was decided that the size, objectives and activity areas of the companies involved should all be carefully considered and that the actual production of these companies, their links to the market, their financial situations and their innovation activities were to be monitored together with their basic strategic choices and the axes of their development. For the purposes of our project, a company's external environment was defined mainly in terms of market demand, technological opportunities or constrains, competitors, general economic situation, regulatory issues and political and geopolitical developments.

2.1. - Methodology.

The first task undertaken in the project was the determination of a terminological definition of the subject to be addressed and its codification in a document titled '**User-centred Competitive Intelligence**'. This document set out generally accepted conceptions of what is meant by the term competitive intelligence and how CI is presently applied by European enterprises. As such, it established a common understanding of the discipline that all stakeholders could use as a point of departure. As a complement to this document, an entire chapter devoted to terminology and definitions and a glossary of terms were included in the Trainers Guide. Before any the term was approved for inclusion in the glossary, various definitions were tested in pilot sessions.

In order to define the scope of research that we would need to carry out, the CITEX consortium partners researched '**the State of the Art**' in competitive intelligence in the countries involved in the project. Through this study, we were able to see what had been done previously in this discipline and how existing training itineraries might be useful to SMEs in their internationalization efforts. An example of a particularly useful reference was 'The Development of Intelligence Studies in Spain', an article that recently appeared in the prestigious journal *International Journal of Intelligence and Counterintelligence*. This study was undertaken to find out what training opportunities existed in this discipline in the various countries involved in the project, the main topics these courses covered and how CITEX could offer something new and up to date, with the ultimate objective of producing the best and most suitable package of training methods possible for SMEs. As helping European SMEs internationalize their businesses was the key objective of this project, all CITEX training methods have been tested through pilot sessions carried out in different countries to ensure that theoretical perspectives presented were adequately adapted to square with the real situations and needs of these enterprises in this area.

In order to tailor training methods to their needs, a **questionnaire** was designed and **interviews** were carried out to determine European enterprises' present levels of knowledge (both formal and informal) and use (both structured or casual) of competitive intelligence. Each project partner was requested to collect data from at least forty SMEs in its zone of operations.

We also developed a **Guide of Best Practices** in competitive intelligence in order to help the BSCs to unify their approaches in this discipline.

2.1.1. - Assessment Methodology

ICEX has had authority over, and responsibility for, the evaluation of the entire CITEX project. This signifies that ICEX was responsible for the final determination of terms of reference and 'rules of engagement'; the clarification of the boundaries and scope of the evaluation; the planning and organisation of the evaluation process (at times in conjunction with other designated partners); the design of, and consensus on, the indicators and criteria to be adopted and oversight activities to ensure that the evaluation was conducted ethically and was governed by a code of conduct.

As part of our responsibility to evaluate the project as a whole, we have compared what has been actually accomplished to the objectives originally set out for this project. **Participant outcome objectives** prepared by project partners were documented in 'Working Packages' that described what they expected to achieve during the project period. This documentation recorded partners' expectations of how the project would change participants' knowledge, skills, attitudes or awareness.

The evaluation team was responsible for analysing feedback, linking trainer and end client learning outcomes to objectives and performing quality control functions. The latter included providing a continuous link between training and organisational activities, performing cost effectiveness studies, and tracking the dynamics between learning, training, and the eventual implementation of trainees' new knowledge in the workplace.

In the course of our evaluation, we posed a number of questions such as: What activities have been carried out and how have they been executed? What were the aims, objectives and deliverables of these activities? What problems is the project trying to solve? What issues is the project trying to address? What gap exists in the current market that needs to be filled? Has the project succeeded in its intentions?

Quality assessment of deliverables included evaluations of the clarity, rigour and simplicity of explanations provided in the materials that were prepared, how these materials were received in pilot sessions, the adherence of materials and methods to the starting premises of the project and the relevance of materials and methods to the ultimate goals of the project. The entire evaluation process carried out by ICEX was geared towards ensuring that the end product was useful and in line with actual needs of SMEs.

Every partner organisation developed its own **working plan** (WP) that stated WHAT it was going to do, HOW it was going to do it, WHEN it was going to carry out planned activities, WHO was designated to perform each given task, and WHAT RESULTS it hoped to achieve. A list of tasks carried out by partner organisations can be found in the Project Working Plan.

To expedite the process of preparing the final report to be issued in February 2012, ICEX requested that all partners submit their WPs using the **final report template recommended by EACEA and provided in the Project Handbook** (Annex II - Assessment progress report sheet).

To facilitate the ongoing task of project evaluation, in October 2010, ICEX requested that partners send a report documenting all the tasks that they had pledged to carry out as stated in their Working Packages. All partners agreed to this oversight mechanism and their compliance with each task defined in this initial report was subsequently scored using a scale of 1 to 10.

Partners were required to clearly acknowledge the European Commission's contribution in all publications and products they produced related to the project using the following statement:

'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'.

Translations of this statement into all EU languages are available on the following webpage: http://eacea.ec.europa.eu/about/logos_en.htm

The programme and project logos have been included on all materials and products related to the project. For the period 2007-2013, beneficiaries are required to use the official logo available on the following webpage: http://eacea.ec.europa.eu/about/logos_en.htm The CITEX logo is found below and in the project e-based communication tool.



2.2. – Dissemination and Exploitation Strategy

The document **Dissemination Plan for the CITEX Project** was created to assist all project partners in disseminating and exploiting the results of this project. Its purpose was to ensure that project results were appropriately publicised, taught and implemented on a broad scale. The plan outlined the different activities that were to be carried out during the project lifetime, and gave 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, print media, events) was devised and a range of tools was developed and delivered in the framework of each strategy. Detailed information concerning deadlines, partner responsibilities for the dissemination of results and information on target groups was also included.

It was our intention that the plan be a flexible document open to review and adjustment throughout and beyond the lifetime of the project. We realised that as dialogues developed between project partners and potential end users and new target groups were added, changes in the approach and strategy might be called for in order to increase the project's impact. Nevertheless, dissemination within the project consortium was based on three principles:

- *CITEX consortium partners would carry out dissemination and exploitation activities throughout the project.* It is important for all partners to immediately pursue every opportunity that arises to spread information about the project's achievements and its potential benefits for target groups.
- *All partners would be equally responsible for disseminating and exploiting the results.* Each partner's individual experiences, networks and contacts are invaluable resources that should be used to involve target groups, extend the project's impact and make the project sustainable.
- *The dissemination and exploitation processes of the CITEX project had to be transparent and allow for follow-up activities and adjustments.* For that reason, ALL partners were instructed to keep track of any dissemination and exploitation activities they carried out and be sensitive to input from local and regional user groups.

The following is a basic outline of the dissemination and exploitation plan executed by members of the CITEX consortium. *Figure 1* gives an overview of the plan.

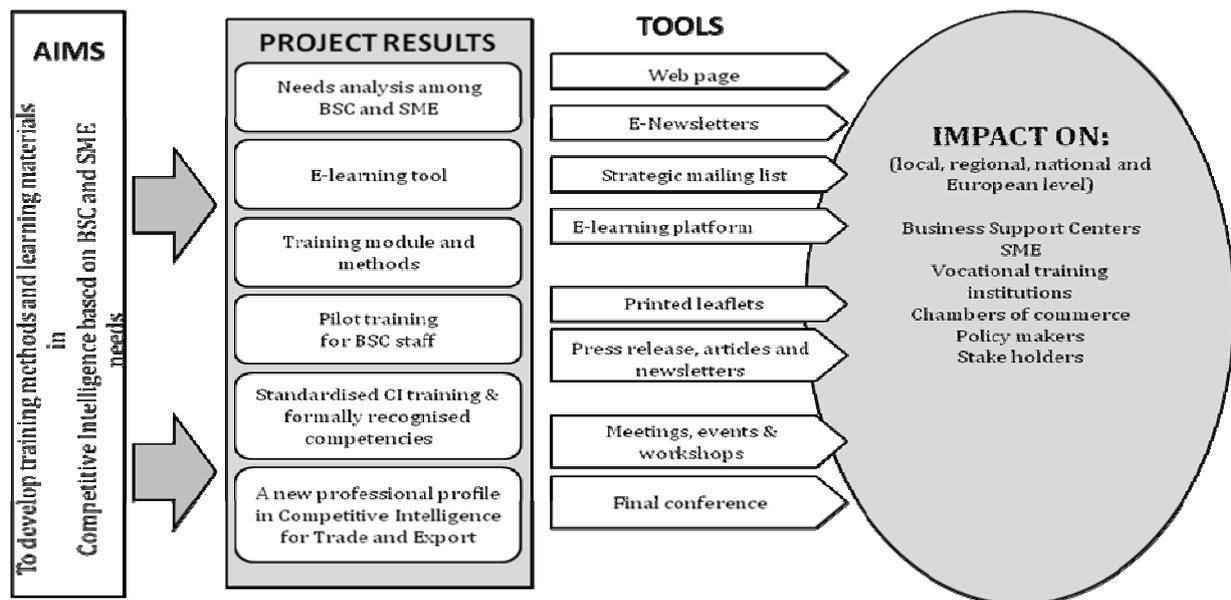


Figure 1. CITEX Dissemination and Exploitation Plan

Dissemination activities carried out by members of the CITEX project consortium were duly focused on promoting the project and making key target groups aware of the quality, relevance and effectiveness of the project's deliverables. For the purposes of this project, we understood **exploitation** as the sum of efforts carried out to ensure that project results were widely used and continued to have an impact after the project ends. Efforts focused on:

- 1) Making target groups understand how CITEX training methods meet their specific needs.
- 2) Demonstrating to individual end users how they could benefit from, and apply, CITEX training materials.
- 3) Integrating the results into a broader context. To establish a standardized professional profile that would give competitive intelligence analysts recognition, every effort was made to influence relevant decision-makers at local, national and European levels.

Last but not least, dissemination efforts stressed the project's link to the EC's *Leonardo da Vinci* and Lifelong Learning Programme. Holding up CITEX as a successful example of a programme carried out under the Commission's LLP initiative was seen as being a good tactic for spreading the word about the programme's objectives and the possibilities it provided for furthering companies' international aspirations.

As mentioned earlier, CITEX consortium partners actively engaged in dissemination and exploitation activities throughout all phases of the project. However, the balance between the two types of activities differed slightly from one phase of the project to another.

The initial phase of the project focused on ensuring that the project addressed the needs of BSCs and SMEs and familiarising target groups with the concept of CI and informing them of up-coming project activities.

The mid-phase of the project was devoted to identifying lessons learned (for example, carrying out reviews of the findings of the SME needs analysis and feedback provided during pilot training sessions) and passing them on to interested parties.

The final phase of the project was devoted to disseminating the project's results and introducing training elements such as the e-learning tool and learning methods created by CITEX to a more general audience. During this phase, information about lessons learned and project achievements was disseminated, activities designed to make CITEX-designed e-tools and methods attractive to potential users/customers and policy makers and prepare for a larger scale implementation of the CITEX training programme were carried out.

ICEX and members of the CITEX project consortium fully understood that all partners were equally responsible for disseminating and exploiting the results of this project. Partners' experiences, networks and contacts constituted invaluable resources that were mobilised to involve target groups, disseminate project results and make the project sustainable. The following section provides a brief overview of the tools used and each partner's role and responsibilities.

2.2.1. Tools for dissemination and exploitation

Internet strategy

Website

The CITEX website was central to the dissemination goals for the project. It was also an important vehicle for establishing links with other similar or relevant projects. The website supported both front office and back office activities. It was designed to be both an information source for all interested parties who had not been a part of the project consortium as well as a source of internal information and support for the members involved in its development. The CITEX website provided information about the project's main objectives, activities and partnerships and was updated at regular intervals throughout the project.

The website is available at the following URL: ***www.citexproject.eu***

The website includes a brief introduction to the project, its objectives, its target groups and an overview of the innovative methodology and technology it employs. The *Course section* of the website offers a brief presentation on the methodology under development and the pilot courses conducted. The site also contains the mid-term results and the deliverables.

The CITEX Project Partner page provides links to partners' institutional websites and contact details for partner representatives. Visitors can download brochures and read the newsletters on the Communication page. The CITEX website also offers a specific news section that highlights relevant events and international conferences as well as national events with target groups organised by partners to disseminate and exploit the project. The Contacts section offers information about project partners and provides email addresses, telephone numbers and postal addresses. Via a link to the project tool 'Colabora', project partners had access to a restricted area designed for their exclusive use that provided a space to upload and download project documents and exchange opinions about the work flow and progress throughout the project.

Deadlines and responsibilities

All partners provided visible links between their websites and the project website. All partners were also responsible for continuously feeding the website with relevant information. West Sweden was responsible for gathering and structuring information received from partners. IDEC was responsible for building the website and uploading all information. The first version of the website was published in April 2010. The CITEX website is currently available in English, Spanish, Bulgarian and Slovenian.

E-newsletter

An online newsletter proved to be a good way to keep interested parties informed about the project progress, newly achieved results and relevant events at local and international level. Newsletters were made available for public viewing on the CITEX website and sent out via email.

CITEX partners contributed to e-newsletters by sending material to West Sweden three weeks prior to publication deadlines. The e-newsletter was published in English.

Strategic mailing list to target groups

All partners were asked to identify specific and strategic target groups on the basis of a general, brief description of the project's target group profile and use their own channels to disseminate project results.

Paper strategy

Printed leaflet

Printed materials are essential to any promotional campaign. CITEX partners produced a brochure at the beginning of the project that introduces the project's objectives, activities, target groups, results and partnerships. This brochure was available in English.

Press releases, articles and newsletters

Part of the dissemination work entailed carrying out research to identify suitable publications and discussing ways to interest them in running articles about the project. For example, articles about the CITEX project's methodological approach could be of interest to sector-specific journals. However, publications not limited to special interest groups were also considered, since it was important to promote a general awareness of the project. It was also considered essential to pursue opportunities to generate publicity via channels that were easier to penetrate than large newspapers. Possibilities included partners' own organizational newsletters and publications that focused on developments within local and regional business communities.

Event strategy

Meetings, events and workshops

Participation in conferences and workshops was one way in which the CITEX project was promoted. Active interventions by CITEX partners on behalf of the programme ranged from poster sessions geared towards brochure distribution and one-to-one conversations to more formal presentations about the CITEX project. Consortium partners were encouraged to keep their eye out for events that could provide interesting venues for promoting CITEX.

The conclusions and results of the CITEX project will be presented at the 2012 ISA Conference in San Diego on April 4, 2012.

http://www.isanet.org/annual_convention/

Final conference

A plenary session was convened during the final project meeting in Brussels to make a formal presentation of the project's final results and products. The heads of partner organizations were invited to encourage their continued commitment to the project after it officially wraps up.

3. Project Outcomes and Results

As noted in the Assessment Methodology section of this report, ICEX was the project contractor and coordinator for CITEX. As such, its main responsibility was to ensure that the project produced the required products to the required standards of quality. We understood from the beginning that in order to achieve our goal of providing European SMEs with the best competitive intelligence tools possible, we would first need to establish a clear and accurate picture of the state of the art in intelligence around the world. This information would help us design the training itinerary envisioned for this project, which was to include a CITEX Training Manual, CITEX Trainer's Guide and a CITEX online platform (the three main deliverables planned for this project).

As noted in the Project Objectives section of this report, the CITEX project was committed to equipping organizations with the tools they need to take full advantage of the potential of competitive intelligence in trade and export. In its two years of operations, the project generated the following deliverables:

Deliverables	ICEX	BRU NEL	RRA	NEST	ICEX II	ICP	Euradia	IDEC	West Sweden
CITEX work plan (draft)	✓								
WP plan	✓	✓			✓	✓			✓
Templates for WP plans	✓								
Progress report	✓	✓			✓	✓			✓
Templates for progress reports	✓								
Evaluation report	✓	✓			✓	✓			✓
Report + Catalogue + Evaluation plan	✓					✓			
Training Manual					✓				
Trainers' Guide							✓		
E-learning platform								✓	
Training Manual in 3 languages					✓				
Trainers' Guide in 3 languages					✓				
Guide for pilot implementation		✓							
Report on pilots		✓							
Dissemination strategy									✓
Project website								✓	
Dissemination events	✓	✓	✓	✓	✓	✓	✓	✓	✓
Promotionalaterials									✓
Communication content	✓	✓	✓	✓	✓	✓	✓	✓	✓
Final report to EACEA									

4. Partnerships

This training itinerary is initially being used by the BSC members of the consortium: ICEX, RRA Celje, NEST Association and, at some point in the future, Brunel University, which are the main initial beneficiaries of the project. At a later stage, the itinerary will be made available to other organizations outside the scope of the initial project. Although training materials were initially directed towards professionals in the trade and export industry, they were designed to be adapted for use by other sectors.

As extending business activities beyond the borders of their own countries is often a daunting proposition for SMEs with limited resources, the primary target groups of the CITEX project have been BSCs and other organizations that offer support to SMEs that are planning and carrying out internationalization processes.

Any individuals and organizations interested in making practical use of the training materials and methods developed by the project may be end users. These include staff members, trainers and managers of organizations such as:

- SMEs eager to do business beyond the borders of the EU.
- Training institutions that provide education in trade and export.
- Business support centres or other entities that support trade and export companies.
- Chambers of Commerce.
- Other professionals from any sector that wish to expand their knowledge and improve their skills in the field of competitive intelligence.

Policymakers have formed a main target group, as their engagement was, and continues to be, necessary to ensure a large-scale implementation of the project's products and services and the recognition of competitive intelligence analyst as a new professional profile. Although target groups have varied from country to country, policymaker profiles targeted in all countries included:

- Managers of SMEs.
- Politicians and managers of public authorities responsible for regional development and business support.
- Policymakers and universities responsible for the accreditation of vocational training.
- Organizations responsible for funding vocational training.

Groups that may never use the e-learning tool and methodologies themselves but whose approval is important in view of their influence upon decision-makers and end users have been considered stakeholders in the project as well. These have varied from one country to another, but some examples are:

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

Each partner's individual experiences, networks and contacts were invaluable resources that could be used to involve target groups, disseminate project results and make the project sustainable. A list of country-specific target groups was prepared and updated during the project.

PROJECT PARTNERS

Project partners were located all over Europe and included both research organizations and regional BSCs.

The Spanish Institute for Trade and Export (ICEX) served as project coordinator.

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5. Plans for the Future

The long-term goal of the CITEX project has been to establish a new cadre of professionals prepared to carry out CI in trade and export. Such a professional profile is currently lacking, but critically needed, throughout the European Union. This initiative was based on the indications that a larger pool of CI experts could help spur business growth in Europe.

To move forward towards this objective, CITEX has created a training Itinerary designed to introduce CI to European SMEs as a very useful tool that can enhance the effectiveness of their internationalisation efforts. This project has unified the divergent, pre-existing concepts and assumptions about this discipline in participant countries. Our hope is to make Europe a pioneer in the unification of competitive intelligence methodologies and a leader in the implementation of good practices in this field, to the end that all SMEs, wherever they are in Europe, will have the equal possibility to incorporate CI practices into their business processes and become more competitive.

The objective going forward is to continue disseminating the results of this project throughout Europe. Emphasis should first be placed on training project partners, so that they will be able to teach the mutually accepted and standardised methods developed by CITEX and adapt them as needed to local circumstances in their own countries. Although training methods are bound to mature and evolve as courses are repeated and extended, they will nevertheless continue to be rooted in the basic, common principles established by the project.

Other related projects that the CITEX project would like to carry out in a future phase include:

- Linking European SMEs' general strategies to their acquisition of information.
- Enhancing core capabilities related to the definition of intelligence requirements, intelligence analysis, and the dissemination of intelligence analysis throughout the European Union.
- Integrating all source intelligence from the intelligence community with information from state and local BSCs. (It is important to point out that although business support centres have an essential role in the development and implementation of the project, this tends to be overlooked in practice)
- Introducing new advancements that allow technology to harness intelligence with minimal human interaction. (In its pursuit of the best intelligence solutions for SMEs, CITEX never forgets that by their very nature SME's have limited human resources.)
- Improving intelligence-gathering criteria to produce higher ratios of usable results. There is an urgent need to improve intelligence-gathering processes so that they

generate a higher ratio of actionable intelligence. (SME's are flooded with information, but very little of it is useful and even less is actionable)

- Creating government-industry partnerships geared towards enhancing intelligence. Much could be gained from identifying opportunities for combined the efforts of government and industry and forging alliances between them. (CITEX itself is a good example of the potential of public-private partnerships in the field of competitive intelligence.)
- Bridging the gap between collaboration on paper and active collaboration and introducing new advances in intelligence that have emerged since the preparation of the current training materials.
- Evaluating and supporting technological innovation initiatives. Given ICEX's proven track record in designing and managing projects of this type, the organization looks forward to the possibility of contributing to the achievement of new goals established by the EU in the future.

6. Contribution to EU policies

The CITEX project has addressed each of the three key growth drivers defined in the European Commission's 2020 strategy²: smart growth, sustainable growth and inclusive growth. Smart growth is closely linked to intelligence. It goes without saying that the more European businesses know about the markets in which they operate as a result of the CI training they have acquired through CITEX, the faster they will be 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, processes are streamlined and competitiveness is enhanced. Lastly, the additional skills they have acquired through the CITEX project will make businesses and the individuals that run them more competitive. The CITEX project was designed to continue boosting the number of European workers prepared for success in today's changing labour market long after its official period of activity.

The EU has outlined seven flagship initiatives³ 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. This initiative is being launched to improve the business environment, especially for SMEs, and to support the development of a strong and sustainable industrial base in Europe capable of competing in the global marketplace. CITEX has clearly contributed to the objectives of this initiative, as it has provided European companies with the tools necessary to make the informed decisions necessary for operating in international and global arenas.

'Education and Training 2020' (ET 2020)⁴, the EU's strategic framework for European cooperation in education and training, set out four strategic objectives. CITEX has made notable contributions to three of them: making lifelong learning and mobility a reality through more flexible learning and training methods, 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, multidisciplinary competences. Moreover, the involvement of business support centres will continue to encourage greater partnerships amongst enterprises and BSCs, which is a key to enhancing innovation and entrepreneurship.

² Europe 2020: A European strategy for smart, sustainable and inclusive growth http://europa.eu/press_room/pdf/complet_en_barroso_007_-_europe_2020_-_en_version.pdf

³ http://ec.europa.eu/europe2020/tools/flagship-initiatives/index_en.htm

⁴ Council conclusions issued on 12 May 2009 concerning a strategic framework for European cooperation in education and training (ET 2020) [Official Journal C 119 of 28.5.2009]. [http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52009XG0528\(01\):EN:NOT](http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52009XG0528(01):EN:NOT)

In addition to the policies and objectives stated above, CITEX objectives have been fully in line with and have actively contributed to the fulfilment of the EU's policy on trade⁵. In its communication 'Trade, Growth and World Affairs'⁶, the Commission outlined new proposals for EU trade policy. Amongst these proposals, the Commission highlighted the need for the trade sector to generate more employment, development and business opportunities, as well as a need to support measures that would help SMEs develop international activities. Currently, only one out of seven SMEs located in the EU countries carries out business activities beyond the borders of the European Union, although globalization provides many opportunities for specialist firms to succeed in international markets. The enhanced intelligence skills that CITEX has provided to European SMEs through BSCs will improve their competitiveness both within the EU Single Market and in international markets, which in turn will lead to an increase in trade, development and the creation of more jobs in the EU.

Lastly, CITEX has made an important contribution to the policy objectives defined under the European framework for Key Competences for Lifelong Learning⁷, which states that all adults should have access to educational and training opportunities that help them to develop and update key competences (KC) on a continuous basis. CITEX has actively contributed to several of the eight key competences defined in the framework. It contributed directly to the acquisition of KC3 (mathematical competence and basic competences in science and technology) by providing the specific, real-life skills that businesses and individuals need to solve a range of problems encountered in a competitive market environment. CITEX also contributed to the acquisition of KC5 (learning to learn) by engaging businesses and providing them with tools that foster ongoing learning processes and empowering them to adapt these processes to their own local needs and opportunities. Lastly, CITEX has addressed KC7 (sense of initiative and entrepreneurship) even more directly. By preparing businesses to make better-informed business decisions and to act more intelligently and competitively, competitive intelligence training helps them turn their ideas and concepts into specific actions. Although decision-making always implies risk, CI helps to minimise this risk by providing a mechanism for reaching better decisions, and better decisions pave the way to better project planning and management and a company's preparedness to seize opportunities that arise in the market.

⁵ What is Europe's Trade Policy? http://trade.ec.europa.eu/doclib/docs/2009/may/tradoc_143154.pdf

⁶ Trade, Growth and World Affairs. TRADE POLICY AS A CORE COMPONENT OF THE EU'S 2020 STRATEGY. http://trade.ec.europa.eu/doclib/docs/2010/november/tradoc_146955.pdf

⁷ Recommendation of the European Parliament and of the Council issued 18 December 2006 on key competences for lifelong learning. Published in the Official Journal of the European Union on 30 December 2006/L394. http://eurlex.europa.eu/LexUriServ/site/en/oj/2006/l_394/l_39420061230en00100018.pdf