

**1<sup>st</sup> DRAFT**

**REPORT**

**Implementation of the  
STRATINC project in the  
Region of Murcia**

**STRATINC**

**INFO - Instituto de Fomento de la  
Región de Murcia**

**Murcia January 2005**

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## 1. Short Description of the initial situation

### a. Institution

INFO<sup>1</sup> is the partner of the STRATINC project in the Region of Murcia (Spain). It is the Regional Development Agency. Regarding its legal statutes, INFO is a public owned company established by the Regional Government through the Ministry of Industry and Environment to foster competitiveness in the regional industrial companies. INFO has an annual budget for the year 2006 of XXX million of euros and 110 employees. These resources come from funds of the regional government and mainly from the Structural Funds (FEDER) of the European Union. With them, INFO is able to implement the following policies:

- *Innovation department*: It is *directly involved* in the STRATINC project. Its main task in INFO is to implement the Regional Science and Technology policy of the region into the companies. In this sense the Innovation Department follows all the plans and strategies done within the Ministry of Industry and is the Agency which put them into practice<sup>2</sup>. There are 10 persons working in the following aspects:
  - o Providing assistance to financing innovation in companies
  - o Coordination the network of ten technology centers
  - o Helping to establish technology transfer agreements through the IRC network
  - o Promoting of the Biotechnology and ICT clusters
  - o Assistance on Intellectual Property Rights.
- Promotion of *internationalization* of companies: it is mainly focused to provide instruments to promote the export of manufactured goods from the Region to Europe and the rest of the world. The main instruments are:
  - o A network of 20 business promoters distributed in the main economic regions of the world (USA, China, Japan, Germany, UK, Saudi Arabia, etc.).
  - o Trade missions to the most potential markets
  - o Training
  - o Information through the web site [www.impulsoexterior.com](http://www.impulsoexterior.com)
  - o Grants and subsidies
- Attraction of *foreign investments*: this department helps investors from other countries to find ideal locations (industrial land), other inputs (as energy, labour recruitment, semi-finished products providers, etc.) and grants.
- *Industrial infrastructures*: this department coordinates the regional efforts in the promotion of industrial parks, logistic centres, business incubators, etc. The department could act as the main builder of these infrastructure or just helping others (with technical advice or funds) to promote it by the private initiative.
- Promotion of the *industrial competitiveness*: this department mainly provides funds to companies through different programmes.

### b. Economic context of the area at the beginning of the project

Agrofood industry is an important economic driver force in the Region of Murcia. Within this industry there are two main traditional existing clusters, one related to intensive agricultural production and the other is related to the canned fruit and vegetable processing. The second one is more related to the common activities currently done by INFO<sup>3</sup>, the companies' size and its

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<sup>1</sup> INFO is the acronym of "INstituto de FOmento de la Región de Murcia".

<sup>2</sup> The role of the Innovation Department of INFO the region of Murcia is similar to the one carried out by ANVAR in France.

<sup>3</sup> INFO belongs to the Ministry of Industry and not to the Ministry of Agriculture, where there intensive agriculture is supported.

development would fit better with activities related to Strategic Intelligence, thus the canned food processing of vegetable and fruits was selected as the most suitable cluster for the Stratinc Project. Once the project was initiated, we decided to focus in the juice manufacturing industry accordingly with its worldwide competitiveness and technology development.

The cluster of canned food companies exists since the beginning of the 20<sup>th</sup> century; however there is not a cluster of the juice industry. The juice processing companies are close competitors, there are few relevant in number and avoid any technical contact among them. So it is not a cluster, despite 68.71% of the Spanish production with a total value of 458.49 millions of euros is done in area lesser than a circle of 40 km. of diameter. Furthermore the vast majorities are SME, but there is a strong presence of big companies which are the leaders of the industry<sup>4</sup>. Thus the average size is 356 employees and close to 70 million of euros of turnover.

Economic context has a good perspective for the juice industry. The local consumption of juices has almost doubled<sup>5</sup> in the last ten years due the increasing of purchasing capacity caused by the overall good wealth, but also it has been mainly driven by the capacity of innovate in new products by the juice producers, thus mixing them with milk, adding new flavours, new healthy components as vitamins, fibers, etc... From the other side, the main difficulty comes from the commercialization as white trademarks<sup>6</sup> of the 50% of the total juice consumption in Spain, which implies two consequences:

- Firstly a loss of image to the final customer;
- And secondly a loss of money because the product is sold cheaper.

This tendency of white brands is getting increasing importance with the big supermarket chains: Carrefour, Eroski, Mercadona, etc and its effects are increased by the fact that the international commercializations of juice with the Spanish trademarks are still very weak; without any perspective that this situation would favourably change in the near future.

### ***c. The context in terms of existing or potential networks, partners stakeholder***

The regional canned food companies are grouped on the following associations:

- Agrupación de Conserveros: it is the association of companies: it is important not only for the information and lobby, but in many cases its close links to the regional administration provides advantageous credits to its associates; it also negotiates every year the reference prices for acquiring the fruits and vegetables.
- CTNC: National Technology Center on Canned Food: private ruled by the companies themselves, today its president is the same as the one of the Agrupación. It provides good information on norms and law to its associated companies. But its main activity is to supply them advanced technology services and innovation through R&D projects.

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<sup>4</sup> Just five of the companies involved in the Stratinc Project are not SMEs: Ant<sup>o</sup> Muñoz y Cía (1.065 employees), Halcon (716 employees), Juver (452 employees), Hero (682 employees) and García Carrión (318 employees).

<sup>5</sup> These trends of increasing demand do not occur exclusively in Spain. For example in France, accordingly with data from UNIJUS - Union interprofessionnelle des jus de fruits (<http://www.unijus.org>), the average consumption per capita was 22,5 litres in the year 2002, while it was just 10,1 litres of juices and nectars on the year 1991. In ten years the global consumption has doubled. Considering that the food products are continuously losing weight on the consumer purchasing capacity, juices and their healthy derivatives had became a special commodity. This extraordinary growth in just ten years does not happen in almost none of the products done by the food industry

<sup>6</sup> "White trademark" or "white brand" is the name done to those products commercialized with the name of the supermarket.

- AILIMPO: Spanish interprofessional association of lemon and grapefruit. It has associated not only agricultural producers but also thirteen citrus fruits extraction companies.
- Asozumos: The Spanish association of juice producers
- AIJN: the same organisation as Asozumos in the European level

## 2. The intra-regional activities during STRATINC

### a. The working groups constitution and meeting

#### DIFFICULTY

It was decided to held a meeting with the working groups only when we would be able to provide a good agenda of things to consider. We have not been able to have such agenda until today.

#### SOLUTION:

Decisions have been taken with bilateral meetings. Just for the selection of software we had several meetings with the 10 technology centers. And lately the agrofood companies has been asked to be in a meeting just once, when we had to decide the content of a technology watch report and the detailed design of the PSIP

#### DETAILED DESCRIPTION:

Until today we haven't done a proper constitution of working groups and/or steering committee. The main reason has been a lack of contents in the Stratinc project for making up an agenda for such a meeting. It was senseless to constitute those working groups without an explicit commitment, decisions to take and tasks to be done.

However the decisions, in all the stages of the project had been collaborative, through the following ways:

- *For the overall designing of the participation in the project:* all the decisions was taken between the two lead regional partners: INFO (Esteban Pelayo) and CTC (Marian Pedrero), with the commitment of the two respective responsible: Juan A. Aroca (Head of the Innovation Department of INFO) and Luis Dussac (General Secretary of CTC).
- *General design and contents of the PSIP:* it was done by INFO and CTC with the information collected from:
  - o Companies interviewed on face to face meetings<sup>7</sup>
  - o Meetings with other stakeholders: AILIMPO, Agrupación de Conserveros
- *Selection of software tools:* considering that the STRATINC project is a model that would be extended to the rest of ten technology centres existing in Murcia, the selection of the software tools was done after four presentations of the main pre-selected software providers<sup>8</sup> to the information responsables of the ten technology centres followed by the elaboration of a report. With the selected software provider there had been three later meetings where it had been explained to those stakeholders in a detailed way the possibilities, constraints and requirements to be implemented.
- *Detailed design of the PSIP and Technology Watch report:* on October 2005, CTC and INFO organised a meeting with the juices processing industry. In this occasion they have things to decide:
  - o The topic of the technology watch report we were planning to do in the framework of the Stratinc project. The companies selected "Active packaging"

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<sup>7</sup> Despite what was pointed out by TECHNOPOLIS in its interim report we followed the model proposed by the lead partner of the consortia (Lorraine) in the meetings, despite we already know that it was useless because was too general.

<sup>8</sup> The presentations were done by TRIZ XXI (its software was Knowledgeist), Xerca, Denodo and 3000 Informática (Hummingbird & InfoCrawler) which was finally selected.

- The detailed design of the PSIP: what information to place, how, where, etc.

For the future it is planned another meeting with the juice companies with the following agenda:

- *Technology Watch report*: to present it to the companies and to identify suggestions as a feedback for future reports.
- *PSIP launch*: to redesign its contents and ways to present information to its subscribers.

Summarizing there had been continuous meetings (almost every week) for the daily steering of the project, between the two main partners of the project in the Region of Murcia, thus CTC and INFO. The rest of the workings groups were not formalised established because there was a lack of contents for their meetings; however there were meetings when it was needed for the selection of software tools and for the Strategic Intelligence tools (PSIP and Technology Watch report with the companies).

## **b. Political changes**

There weren't any significant changes on the political framework that could affect the project.

## **c. The Survey**

### DIFFICULTY

The model proposed for all the partners of the consortia did not fit with our local requirements.

### SOLUTION:

Make the proposed through interviews in order to collect more information during the face to face meetings.

### DETAILED DESCRIPTION:

One of the most interesting outputs of the STRATINC project for the Region of Murcia was the conclusions of the survey. We were planning to use that survey to improve our already existing PSIP, which consists basically on a common knowledge management platform for the ten technology centres. This existing platform was developed with a top-down approach, just by INFO, some experts and the ten technology centres with their own perceptions. The survey for the STRATINC project was a really good opportunity for having a formalised way to get the suggestions of the companies as the main users of the PSIP. In this sense, the months of January and February of 2004 was dedicated by INFO and CTC to design and validate in a meeting with two companies (AMC and Agrotransformados) the design of the survey.

In this aspect the difficulties came from the STRATINC project itself. In order to have comparable results among the partners of the consortia we were forced to use the model proposed by Lorraine. Knowing the companies, the model proposed was quite long with difficult questions, so we decided to make the survey visiting the companies one by one. The visits had the added value of having face to face conversations and we were able to obtain data for the inquiry<sup>9</sup> and at the same time, an overall idea about the Strategic Intelligence on the visited companies, which were not asked on the questionnaire.

## **d. The interviews**

### DIFFICULTY

They were too long, more than one hour. The people selected for the interview were the technical directors of factories, which are busy persons.

### SOLUTION:

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<sup>9</sup> But the model of the questionnaire proposed by Lorraine was followed, contrary to what is expressed on the interim report done by Technopolis.

Smile, speak faster, be serious and avoid questions which are public data (employees, turnover, exports, etc.).

#### DETAILED DESCRIPTION:

Making the appointments for the interviews was easy. CTC and INFO have a good reputation of seriousness and commitment with the development of the companies and we were able to make the interviews with the persons desired. They were mainly the technical directors of the factories. This was the selected responsibility of the interlocutors because we wanted to establish a PSIP focused on technology and competitors; considering that markets, regulations, standards, recruitment or financing are already well covered by other existing platforms<sup>10</sup>.

The difficulties came on the realisation of the interviews. The shortest interview took more than one hour. It was a complete waste of time because they were answering questions which were useless for the future of the project. The interviewed persons (normally the technical director of the factory) are really busy persons, but they answered as well as they could considering the future benefit for its company in the proposed platform to provide information to their company.

However interviews are the most useful tool to collect information from the companies. Until now, we have only made just one meeting with all of them. The companies are so jealous of providing information to competitors, that they do not express their opinions freely with the competitor sited in front of them. So it is necessary to make bilateral meetings to obtain relevant information. From the other side, we could not make a phone call of more than half an hour; and finally any written inquiry sent by post would never be answered.

### **e. Selection of software tools**

#### DIFFICULTY

Evaluation was a complex task due to the diversity of software which could be applied to solve broadly different situations.

#### SOLUTION:

- E-mail contact with CEIS to get a confirmation about some doubts
- Make a deep analysis of the software needs. It was identified that we need to collect information, and the analysis of it would be done manually.
- At the same time convince the software providers to make a presentation/demonstration in Murcia
- Take a decision which wasn't obvious

#### DETAILED DESCRIPTION:

It was a complex task. Evaluation of the software was not easy because the following reasons:

- There are not many installations of software for Technology Watch that could serve us as a model
- The information supplied by the providers of software has a deep commercial background
- There was not an easy way of testing the software before purchasing it.
- Our objective was to acquire software that would be also used in the future by all the technology centers. So the decision process was more complex because it was necessary to establish the needs of ten technology centers instead of just one stakeholder.

The process took from May 2005 to September 2005. Just at the beginning of October it was decided to select Hummingbird and Infocrawler that would be installed by the local company 3000 Informática. For the selection of software tools it was done the following things:

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<sup>10</sup> The service of international trade of INFO has a good platform for international trade, despite not specialized in juices, in [www.impulsoexterior.com](http://www.impulsoexterior.com). Ailimpo, Asozumos and Agrupación de Conserveros provide also good information about training, financing, etc. CTC in its existing platform is really good on standards, laws and regulations.

1. Review of the documents proposed by CEIS
2. Identification with the local stakeholders, the responsables of documentation of the ten technology centers, other tools suitable to be applied. By this way it was selected the software Xerca and Denodo
3. Elaboration of a complete diagnosis of the current situation, the needs and how they should be satisfied. In a few words the controversy was to purchase software tools to collect information or software tools to analyze it. The majority of the technology centers wanted tools for information analysis, thus the second option. However almost all the tools for analyzing texts work only in English or French, which wasn't today a language commonly used by the technology centres information departments. In addition the semantic software approaches need a complex parameterizations thus making difficult to perform new searches. And finally, the information sources used by the technology centers are still quite weak, so we (INFO & CTC) decided to select a simple tool for collecting information (Humminbird) and later, when the volume of information would become a problem, to solve it by acquiring analytical tools in future projects.
4. Selection and presentations of the four software tools to be evaluated: Xerca, Denodo, Hummingbird and Knowledgegist. These presentations took place during June and July 2005
5. Further considerations, with exchanges of information with the potential providers and users during September 2005. And finally was decide to install Hummingbird distributed in Murcia by the company 3000 Informática
6. Negotiations with the local provider on how to make the installation, where, what to be install during the month of November. This was because we decided not to purchase the selected software but to test it before in order to be sure of its suitability. The resources of the Stratinc project would then be used just for the testing phase, in order to have the full assistance of the company on the implementation of the desired searches in internet.
7. In December it was done the final installation of the software and the local provider of Hummingbird (3000 Informática) started to establish the first searches.

## ***f. Diffusion of information***

We did not identify this as a strong problem. There was not any diffusion activity in the Region of Murcia because until today there was not much information to transmit generated by the STRATINC project. So we had only transmitted in our web site the general profile of the project, its objectives, activities, partners and financing programme.

However there had been some promotion of the project, just when it has been needed for an specific purpose:

- To the juice processing companies, when it was done the survey. At the same we had also introduce the project to several stakeholders (Ailimpo, Asozumos, Universities, etc.) in order to get some ideas about the design of the PSIP
- One year later, we promoted it to the juice processing companies; just before the meeting we have had with them.
- During the project meeting in Murcia (13<sup>th</sup> & 14<sup>th</sup> of October) the project was also promoted in the newspapers and other mass-media.

For the near future, we are writing a two pages article in the regional magazine of innovation "Nova" to explain the results achieved in the project. And finally the launch of the PSIP would also be publicised.

## ***e. Other difficulties***

Regarding the intra-regional activities in Murcia, we are facing other difficulties that may be specific of our particular situation:

### **i. Difficulties with CTC regarding the platform to share the knowledge**

The planned juices PSIP was going to be a specific particularization, just for the juice industry, of the pre-existing knowledge management platform of all the technology centres. With this scheme, the PSIP which was going to be developed under Stratinc project would just take automatically from the common repository of information the information relevant to the juice industry. But since mid 2005, there are some difficulties with CTC. The common platform does not fit their expectations, they haven't integrated in it yet and there are serious doubts about if finally they would be integrated on it.

Despite it is a serious problem which affect the future viability of the PSIP on juices, we haven't be able to find a solution yet. One of them could come from establish routines for the migration of data from the current repository of CTC to the juices PSIP. The other one could be to make the juice PSIP completely independent from the Technology Centres platform and give it to the companies.

### **ii. Difficulties on the Technology Watch report**

The realisation by the CTC of a Technology Watch report was another tool of Strategic Intelligence to foster clustering in the juice industry. However the topic selected by the juice companies was difficult<sup>11</sup> and the unique person who was able to do it in CTC have a long illness. The solution would come from the finding of another person to replace the expert who was going to write the technology watch report. The alternative is to abandon the realisation of this report considering that it is not a key deliverable for the Stratinc project.

### **iii. Budget: It is very expensive to develop the PSIP**

It is really expensive to develop a web platform with our current provider<sup>12</sup>. But we have kept this company as developer of the juices PSIP because it was the company who developed the common platform of Knowledge Management for the network of 10 Technology Centres.

Our subcontracting budget for this software company was near to 24.000 euros, divided by its half in two steps: one for a first launch and the rest of 12.000 euros for the implementation of the modifications proposed by the juice companies. However we have already spent the first 12.000 euros and we are not able to show a first release of the PSIP as it was scheduled. We still have serious doubts about the ability of the software company to be able to make the proposed two steps development. The solutions we have adopted are to make the detailed analysis of the PSIP by ourselves and secondly to monitor daily the work done by the software programmers.

## **3. Selection of Solutions or Products and their consequences**

### **a. Software tool**

An important question for the software selection is the consideration of Stratinc as a *pilot project*, which would extend its tools and methodologies developed for the agrofood industry to other industries covered by the rest of nine technology centres. So in our selection procedure there was an active involvement of CTC and also the other nine technology centres.

The selection of the software tool was Hummingbird Search Server & InfoCrawler, both tools represented by the company 3000 Informática. This selection was done following the advice of CEIS and using DECILOR as model; the idea was *to provide internet automatic searches done by*

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<sup>11</sup> The topic selected was "Active packaging". The problem comes because this technology is still being developed, with a low level of standardisation, so it is difficult to find relevant information. But the most important constraint comes from the weak experience of CTC in both, the packaging technology itself, and the writing of technology watch reports.

<sup>12</sup> The company is Steria, This is a French company with branches in many European countries.

*Hummingbird*, avoiding this routinely time consuming job to the personnel of the Technology Centres.

There was a detailed evaluation of other tools<sup>13</sup>, all of them more advanced than the one finally selected. Those software tools were able to provide better semantic analysis or an automatic capture of data in dynamic databases or an innovative way to present the result in a rose of information formed by topics in each axis. But accordingly with the diagnosis done in 2004, we have identified that development of Strategic Intelligence tools in the technology centres in Murcia is still quite weak. Despite the technology centres wanted to have analyzing tools, we decided to go step by step, and to start using simple software tools. So our plan is to install first a strong internet search, in the framework of the Stratinc project. This internet searcher, if it would work properly in the test that have started for CTC, it would eliminate tasks done every day as the consultation of the Official Bulletins to see new regulations, the daily press, or project databases to search for novelties as CORDIS or EUREKA. In the future this software tool would be extended to other technology centres. And later, when searching information would not be a problem, and the most time consuming task would be the analysis of the information, we will implement new automatic software tools for the study/ examination of information.

### ***b. Partner or Subcontractor implementing the PSIP***

The selection of the National Technology Centre on Canned and Food Industry (CTC) was done at the beginning of the project. The selection was influenced by the fact that the agrofood cluster is the biggest one in the Region of Murcia. CTC is a provider of technology based services to that cluster and was strongly connected to the innovation department of INFO.

However, the decision of selecting the agrofood industry and CTC has been *one of the biggest mistakes* done in the planning of the Stratinc project. Below there is a non-exhaustive list of constraints imposed to the project by CTC:

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<sup>13</sup> There was a final evaluation of four software tools: Denodo, GoldFire Innovator, Xerca and Hummingbird Search Server. There were some presentations from its providers not only to INFO, but also to the Technology Centers which are going to use it.

The first software presented was developed by the Spanish company DENODO. It is an advance searching software, with a similar application in Strategic Intelligence in the Spanish Region of Galicia. This application is called VIXÍA and was carried out with the CIS-Galicia. The solution offered by DENODO was a internet searcher adapted to dynamic and structured web sites, with an automatic capture to any database, that could be selectively published also with this software. The cost of this software (about 90.000 euros) was well over what was in the budget of the Stratinc project, but we negotiated a price for testing that would fit in the budget of the project.

The second software presented is GoldFire Innovator (or KNOWLEDGIST). It was developed by a Canadian company and it is represented by the Spanish company TRIZ XXI. This software is very strong on the semantic analysis and is able to formulate a problem-solution algorithm. It is specially indicated for searching patents databases and exploits very well that information. But it is not limited to that patent's databases, being able to be used in more than 1.000 technical and scientific databases. It is a relatively cheap programme and the Spanish provider would be able to give the most advanced training in Spain on how to implement technology watch services. The unique problem for us was that it only works in English and French, while the staff of the technology centres and its associated companies does not use documentation on those languages in a important number. TRIZ XXI made us a good offer, with a strong reduction of its current costs, being able to obtain a license 15.000 euros.

The third solution presented was a Spanish development called XERCA. It is a powerful semantic analyzer, in English, French, Spanish and Euskera, where the user is able to combine the pre-selected semantic searches by making more weight, or less weight, in a rose of topics (each of them is called axis). This tool is a good combination of searches and semantic analysis. But its concept was far too advanced for solving the current situation of the Technology Centres. In this case the cost of this software tool was more expensive that the available budget, but we negotiated to have it for 20.000 euros, inside of the budget proposed to Stratinc.

- Too much time spent in coordination INFO-CTC, which has been highly time-consuming.
- The involvement of CTC with its own resources is weak, having employed for the project just the resources actually paid by the subcontracting of the Stratinc project.
- Limitations in the number of companies involved in the project to those associated to the CTC.
- Difficulties in the involvement of other organisms and institution to the PSIP, as Ailimpo, Asozumos, etc, due the lack of leadership of CTC in the technologies related to the juice industry. This weak position makes CTC to accentuate its isolation approaches to any initiative that could involve its associated companies and could generate any benefit.
- And finally, what is more important, the future of the PSIP is not clear because probably CTC would close the juices PSIP just after the end of the Stratinc project. This is the unique Technology Centre of the Region of Murcia which still is not integrated on the common platform for knowledge management. There is not any perspective of its future integration and this affects particularly to the PSIP because it has been designed as a particularization for the juice industry of the common platform for all the technology centers<sup>14</sup>.

Thinking back, there are some other smaller clusters that could be satisfied with a stronger compromise of its respective technology centre. In fact the results got from Stratinc would immediately be applied to the fire-extinguishers industry (Metal Technology Centre) and it is followed with interest by CETEC<sup>15</sup>, for its plastic cluster, CETENMA<sup>16</sup> for its energy cluster and CENTIC<sup>17</sup>. Any other selection, different from CTC, *would also make possible to establish synergies with other partners of the Stratinc consortia*. For example if we add to the Technology Centers mentioned the interest of CETEM, the one dedicated to the wood and furniture industries; probably the active involvement of CETEM would make possible a stronger cooperation with Lorraine. The same could be said about CENTIC with Central Macedonia; or the selection of CETEC, CT Metal or CETENMA with North Rhine-Westphalia.

But despite what was written before, the best approach for the Stratinc project would have been the *initiation in INFO of an active cluster promotion activity through Strategic Intelligence tools*. In 2003 it was difficult to foresight the current situation in the innovation department in INFO; but in the year 2005 it was establish an action line of emerging cluster promotion, and today there are two persons dedicated to foster the clusters of Biotechnology and ICT. The Stratinc project would have serve them as an effective tool to foster their respective cluster by providing value added services of Strategic Intelligence from INFO. In both cases we would also have established thicker links with Oslo or Central Macedonia.

So our conclusion is that we have been too fast in the selection of partners and too generous proposing the benefits of the Stratinc project to CTC. In the future the selection of partners would be more accurate. Especially if it is considered the future sustainability of the instrument developed during these years in the framework of the Stratinc project. *Any implementation done by INFO itself would have a longer life than the one provided by the Stratinc project*. In this sense the selection of the cluster and the associated partner was a mistake. The PSIP would have to be implemented for a less

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<sup>14</sup> Any lack of integration of CTC in the platform, would mean that the staff of CTC have to insert two times the same information: one for its current portal in [www.ctnc.es](http://www.ctnc.es) and the other one for the future PSIP in juices that would be established in [www.zumos.ctnc.es](http://www.zumos.ctnc.es). Considering that in the future there will not be as today specially dedicated personnel to insert information interesting for the juice industry, we are quite sure that this sub -domain just for the juice industry will quickly disappear.

<sup>15</sup> CETEC is the Technology Centre for the Shoes and Plastic Industries

<sup>16</sup> CETENMA is the Technology Centre for Energy and Environment Industries

<sup>17</sup> CENTIC is the Technology Centre for the Information and Communications Technologies (ICT) Industries

developed cluster, as the expressed Biotech or ICT; but also others not covered by technology centres: as printing industry, fine chemicals, machinery manufacturers, etc.

### **c. Cooperation within PSIP itself**

#### COMPANIES WHICH ARE IMPLEMENTING THE PSIP

In the effective realisation of the PSIP we have contracted a software company Steria and another company Grupo Manglar for the creativity of the web site. Both of them had been also involved in the big platform for knowledge management of the ten Technology Centres. We have selected them because they are able to perform the work quickly and coherently with the previously existing platform.

In the case of Grupo Manglar, which has already finished its job, the creativity is coherently done with the web portal of the CTC. But the creativity of the new PSIP had to be in line with Technology Watch contents for the Industry of juices. As it could be seen in the image, we think that they have achieved the expected results. They have designed a portal able to supply information to the companies easily, where the navigation model makes it simple because the information is classified accordingly with the main technologies used in the juice industry. The design has been done on the promised schedule, mid of December, and budget (close to 11.000 €)



The design done by Grupo Manglar is implemented by the software company Steria. This company was the main responsible of the existing platform and is able to perform accurately its particularization for the juice industry. But despite the years we have been working together, this company is not performing the job as it was supposed to be done. It is taken longer and more expensive than expected. By this time, beginning of January, we expect that the job would be finished by the end of the month, but we have serious doubts of the capacity of Steria on doing that development in so short time. In order to save time and resources CTC & INFO had been doing the detailed analysis of the PSIP. With this document, the software programmers are able to make their job faster and accurately.

#### PARTNERSHIPS ON THE CONTENTS OF THE PSIP

The contents of the PSIP in juices would be inserted by CTC. For that purpose it is contracted with funds coming from the Stratinc project. In fact, despite the PSIP is not already launched, they are inserting information right now. This insertion could be done because we could use the infrastructure of the pre-existing platform.

Unfortunately there is not any other formalised partnership for the PSIP, despite there are other organisms that could provide contents, as the Universities, Technology Centers, Ailimpo<sup>18</sup>, Asozumos, etc. However in the design of the PSIP which is currently being implemented there is a place where they would be able to insert contents to the platform. Ideally, the possibility of inserting information could be a starting point for the further cooperation. But until now CTC had been very jealous of being the unique organism involved in the platform. If we add this exclusivity to the fact that there is not good perspectives of continuity by the end of the project, the lack of interest on establishing agreements is evident.

<sup>18</sup> As it has been pointed out before, Ailimpo is the interprofesional association of lemon and grapefruit producers. From the other side Asozumos is the national association of juices manufacturers.

It is better to launch it before, and later, when everything would start working, we would modify it in order to establish agreements with other possible partners of the PSIP.

#### ***d. Sustainability of the instrument***

##### EVALUATION OF MAINTENANCE COSTS OF THE PLATFORM:

Once it would be fully designed, the main cost of the PSIP is the human resources cost. Today there is a person, documentation expert, which is the responsible of feeding with contents the PSIP of juices. The monthly cost of this person is 1.300 € There are other related costs as indirect costs, costs of purchasing information, subscription to specialized databases, etc. But there are not relevant because the following two reasons:

- The majority of information comes from public sources in internet
- And secondly the software maintenance costs (of the PSIP and Humminbird) are associated to the costs of the existing common platform which is actually paid by INFO.

With the scenario shown it is possible to financing the PSIP with less than 1.500 €per month.

##### POSSIBLE ORIGINS OF FINANCIAL RESOURCES TO GUARANTEE THE SUSTAINABILITY OF THE PLATFORM

Simply there is not a reliable source of financing:

- CTC have never expressed its interest on going forward with the platform. However it is not formally established yet, because we haven't discussed this topic yet, but it is expected a lack of interest of CTC on continuously investing in this juice platform.
- For INFO has not sense to support so strongly a small set of companies which are associated to one of its Technology Centres.
- The juice companies haven't seen yet the platform, but none of them are enthusiastic with its performance. So it would be hard to charge them with the costs of its functioning.
- Finally, despite the focus of the PSIP is clearly on technology watch, other associations see the juice PSIP as a new intruder for repeating things that have been already done. They would be very happy to see its failure just a few months after its launching.

But it is important to consider that the results obtained in the project, as the PSIP software or the software tool (Hummingbird & InfoCrawler), are going to be quickly installed in other technology centres in the region.

## **4. What are the main outputs of the project having an impact in the juice cluster and in the Region of Murcia?**

### ***a. In terms of Strategic Intelligence***

At the same as the Stratinc project was running, in the Region of Murcia there was a bigger project which intended to establish a common platform for knowledge management in the network of the Technology Centres. The Stratinc project has been highly valuable as a source of new ideas to be implemented in the other project. So at the same as the Stratinc project was running, the findings of it, its conclusions or the experience sharing had been incorporated into the mainstreaming of the activities done in the Region of Murcia.

### ***b. In terms of Clusters***

The PSIP has not been launched yet, so there is not any appreciable impact in the cluster of juices. From the other side of the impacts, I want to mean the learning experience from other region clusters' policies, we haven't had implemented anything. Just as late as the beginning of 2005, in the

innovation department of INFO, we have had an explicit policy of cluster fostering. The first two clusters which are promoted are ICT and Biotechnology.

## **5. The main results of the project**

### ***a. Qualitative appreciation of the PSIP***

For INFO the PSIP is the most valuable output from the project. It has been designed with enough time and with the ideas shared by the rest of the partners of the Stratinc consortia. However we do not agree with the change on the focus of the project to other aspects, as foresight, the blueprint, cluster management, etc. From our point of view it is a lost opportunity that all of the partners hadn't developed their own PSIP with tools, the details experience exchange on this field would have been even more valuable.

### ***b. Qualitative appreciation of the Blueprint***

The Blueprint is not an appreciable output for our clusters of companies because it does not offer specific results able to be imitated. It just another guidebook, published with the support of the European Commission, that it might be interesting for a few public employees. The output for the Region of Murcia of that effort is not relevant.

### ***c. Situation within the juice cluster***

The cluster had not change at all. The unique difference is that the main companies had met once, and what is more important, that they have decided to share some of their knowledge in a common platform. But considering that the platform has not been launched yet, the situation within the cluster in terms of stronger cooperation, thicker links with stakeholders, new relationships, etc., has not change at all.

### ***d. Companies' reluctant or diffident or uninterested***

First of all for many of the companies is difficult to assimilate the concept of Strategic Intelligence. Once they have cached the idea of Strategic Intelligence, the companies do not trust blindly in the initiatives coming from INFO or CTC. Mainly because the following reasons:

- The service has to have continuity and sustainability, two aspects which are difficult when the initiative is supported with funds coming from a European project.
- Secondly is difficult with the limited resources we have to be able to provide a valuable service which will cover a significant share of the Strategic Intelligence needs of the companies.
- Finally the needs are not homogeneous, despite the selection done to juice companies from the wider agrofood ones. So the need of resources is even bigger to satisfy the specific SI needs of any of the companies.

The idea about our organisation, or the CTC which is going to be the major provider of services, has not change. We are just at the beginning for the juice companies. The PSIP has not been launched, the Technology Watch report has not been written yet; for the companies we have still to demonstrate that we are able to produce results.

### ***e. Do you think that your organisation has gained visibility?***

No, by the contrary, we have used the strong visibility of my organisation. The good names of INFO and CTC in the companies from the Region of Murcia, have serve us well for the purposes of the Stratinc project.

### ***f. Do you think that your organisation has improved its capabilities through transfer of methodologies and experience: SI, KM, foresight, other?***

Yes, definitively. At the beginning of the project, back in mid 2003, our ideas about Strategic Intelligence was too superficial. This is the most valuable output for my organisation. The experiences shared with the rest of the partners have helped us to grow quite fast. The good criteria obtained from the rest of the partners of the consortia, makes INFO able today to start new complex projects.

If you compare with our previous situation three years ago, when the simplest project of Technology watch alerts were quite difficult for us, the situation for the Region of Murcia has change dramatically. Today, if we are able to keep the current pace, we are able to be demonstration leaders on the field for other Spanish regions.

Foresight approaches had not been treated in the project in detail yet. But after the meeting in Mülheim probably we will have many ideas to bring back and get implemented in the Region of Murcia.

## **6. Lessons learnt**

It is very important the lessons learned about the *main aspects necessary to implement Strategic Intelligence systems*. The discussions held during the Stratinc project meetings have been very fruitful in terms of exchange of experience. There are many new ideas which are currently being implemented in the Region of Murcia. As a non-exhaustive list of examples, some useful ideas got during the Stratinc project are the following ones:

- It is possible to establish cooperation agreements between competitors to supply SI information into a common system. We learned this from NRW and after a validation with our local companies, we found the potential viability of it
- It is convenient to use in the same platform used for SI other tools for self-diagnosis. Then the companies would be able to check their current situation and ways to improve its competitiveness by the continuous benchmarking. This is a lesson learned from Central Macedonia.
- It is possible to implement some decision making system, by supplying information, even to companies with a low technological content with very limited technical resources. The example of this lesson had been the wine producers SI platform developed by Tenerife
- From Lorraine we have learned how costly could be a developed Regional Strategic Intelligence platform. The difficulties of establishing a system able to provide valuable SI information to companies from the Technology Centers. And specially the software tools applicable to platforms, mainly by internet searcher software tools.
- Cluster dynamics and how to foster them are not immediately applicable to the Region of Murcia, but the experiences shared by Oslo will be useful in the future.
- From all of the partners had been quite useful the general approaches of a provider of Strategic Intelligence information.
- The differences of the countries are not so important, local conditions are quite similar and it is possible to benchmark more easily than expected.

The interviews with juice processing companies (more than 20 companies visited) has been also *very useful for knowing in detail the point of view of the companies*. The main three lessons learned are the following ones:

- Avoid always any excess of information. Any supplier of SI information has to process primary sources of information, analyse it and send only pertinent processed information that might be used later. Going to the extreme of this situation, the supplier of SI information has to send information which would lead to an immediate action by the receiver.

- The information sent has to be complete. This implies that not only a reference would be valuable. There should be clear references/links to be able to get more details about all the relevant aspects of the information supplied
- The information need to be clearly classified, not accordingly with the point of view of the department which collect information or the different sources of it, the grouping of information has to be done accordingly the use that the final user would be done to it.

## 7. Conclusions

In general, there is a *good coherence of the project with its planned objectives*. It has been highly valuable the ideas supplied by the scientific committee and the experiences shared with the rest of the partners of the consortia. It is necessary to consider that the Region of Murcia had at the beginning of the project a limited experience on Strategic Intelligence tools and Cluster fostering. Today the situation has strongly changed and we have enough knowledge to integrate the lesson learnt during the Stratinc project in the daily activities of INFO as Regional Development Agency. We are able now to be the regional leaders for developing SI platforms for cluster development and event to implement our own services, avoiding the necessity of participation of technology centers. It is very probable that we would establish our own PSIP platforms to develop clusters not covered by our current network of ten technology centres.

However there are some drawbacks that might be consider during the project:

- The experience sharing would have been stronger if there were *more coherence on the clusters selected*. The diversity of industries as biotech, new material, food, ICT, wood is too strong to make a immediate transfer to our local conditions.
- The PSIP development in each region has also be very different, making difficult to learn from *experiences of the PSIP implementation* by other partners.
- Blueprint writing is a good tool to transfer knowledge among the members of the consortia. But it is designed in *too general terms* to get specific lessons.
- Despite the number of meetings held, the permanent assistance from the lead partner, the continuous assistance of the experts from Lacave Consultancy Company and the Scientific board, we have the impression of being *too unaccompanied* on the day to day decision of the project.