# TEN CHANGES SHAPING THE FUTURE OF PROJECT MARKETING

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**Abstract**

The ongoing change in firms' orientations from products towards solutions, among other trends, calls for a re-examination of the existing project marketing concepts. Based on empirical qualitative data from two longitudinal research programmes, we identify ten changes shaping the international project business, and discuss how these changes challenge the existing concepts of project marketing. By reporting several case examples from our cross-national qualitative data, we illustrate these changes and analyze how they affect the behaviour of project business companies. Finally we discuss these changes in the light of the existing project marketing concepts and suggest how the project marketing theory should be developed in order to keep up with these changes.

**Keywords**: Project marketing, Project business, Solutions

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## Introduction

Firms in such industries as aerospace, construction, shipyards, engineering, etc. are firms were the value creation process includes the search, preparation, bidding, negotiation, implementation and transition of a project. These firms thus operate in the project business (Artto and Wikström, 2005; Tikkanen, Kujala and Artto, 2007), whose specificities call for a unique marketing process, which is project marketing (Cova, Ghauri and Salle, 2002; Skaates and Tikkanen, 2003). Over the last decade there has been a growing interest in the field of project marketing, as researches have identified a need to depict the unique features of project marketing in relation to other types of industrial marketing. As a result, the project marketing research has evolved towards a relatively stable view of the relevant marketing actions required at the level of an individual project and at the level of multiple projects (Cova and Salle, 2007). However, the new decade shows signs of discrepancy between this established vision of project marketing and the actual context and actions of project-related companies (Alajoutsijärvi et al., 2007).

In the global business environment, there are several general trends shaping the context in which companies operate, such as globalization, outsourcing, and a trend towards integrated solutions. Specializing in a narrowing set of core competences due to competitive pressures while simultaneously answering to more demanding customer needs is an inherent paradox in the global business environment (Möller, 2006). This paradox is apparent in the context of project business as well, as some project suppliers are outsourcing more and more activities or entire subprojects to external partners (Tikkanen, Kujala and Artto, 2007), and at the same time combining several competences to answer to the customers' requests for more extensive offerings (Ulaga and Eggert, 2006; Davies, Brady and Hobday, 2007). Due to this contradiction, project business companies need to identify complementary and substitutive resources, capabilities and competencies possessed by different actors in the business network (Tikkanen, Kujala and Artto, 2007). The ability to cope in the network of actors and integrate external resources in order to co-create value with customer network actors (Cova and Salle, 2008) is therefore becoming an essential success factor of project-based firms. Thus, the inherent paradox of the evolving business environment forces project business companies to adapt their behaviour in several ways.

In this paper, we examine the changes occurring in the project business and assess how these changes might (re)shape project marketing. Our objective is to shed light on the project marketing dynamics by exploring how the project business is changing and what these changes mean for the development of the project marketing theory. In doing this, we rely on two research programmes in Finland and France examining several project related companies in various industries operating world-wide. We have gathered many weak signals identified in the case companies in these two research programmes, and, in an inductive fashion, we interpret them as possible changes that are shaping the future project business arena, and consequently the project marketing practice and theory. We end with ten changes and describe their essential features. To illustrate these changes we use several case examples from our cross-national data. We contend that these ten major changes occurring in the project business context represent a challenge for the existing body of knowledge on project marketing. We discuss them and highlight their major impacts for the rethinking of the project marketing theory. Our findings show that project business companies are moving from a logic of influence towards a logic of cooperation, and this development forces project suppliers to acquire new marketing competencies and capabilities.

## Evolution of Project Marketing Research

As projects have become a dominant mode of business in several industries, and companies have increasingly adopted project-oriented working methods, the terms project, project business and project marketing have received increased attention in management and marketing research. A project has been defined as "a complex transaction covering a package of products, services and work, specifically designed to create capital assets that produce benefits for a buyer over an extended period of time (Cova et al., 2002, p. 3), and project business has been defined as "the part of business that relates directly or indirectly to projects, with a purpose to achieve objectives of a firm or several firms" (Artto and Wikström, 2005, p. 351). Drawing on the work of Cova and Holstius (1993), we define project marketing as *a multifunctional process of managing networks and buyer-seller interaction within and between projects in businesses where the value creation process includes the search, preparation, bidding, negotiation, implementation, and transition of a project.* We thus adopt a broad view to project marketing by acknowledging that projects have become a substantial part of the value creations processes in several industries. As many firms in different industries use external delivery projects for their business purposes (Artto and Wikström, 2005), a large part of projects include some modularity and are not purely unique (Hellström and Wikström, 2005). The pursuit for integrated solutions (e.g. Davies et al., 2003), in which the anticipation and construction of customer needs forms the basis for building modular project offerings (Cova and Salle, 2008) has further increased the spectrum of project-type business.

Project marketing has been studied by e.g. the research group called INPM, the International Network for Project Marketing and Systems Selling (e.g. Gunter and Bonaccorsi, 1996; Mandjak and Veres, 1998; Skaates and Tikkanen, 2003). Researchers in the field of project marketing have identified a need to depict the unique features of project marketing in relation to other types of industrial marketing and identified discontinuity, uniqueness, and the complexity of projects as the distinguishing features of project marketing (e.g. Mandjak and Veres, 1998). It has been particularly the feature of discontinuity of project activities (Hadjikhani, 1996), which has been considered central in the reflection of project marketing (Cova and Salle, 2007).

Through identification of the special features of project marketing (Hadjikhani, 1996; Mandjak and Veres, 1998), highlighting the major role of non-business actors (Skaates, Tikkanen and Lindblom, 2003), and developing a processual model of project marketing (Cova, Mazet and Salle, 1994; Cova, Ghauri and Salle; 2002), project marketing research has evolved towards a common understanding of the essential features of project business, which are usually taken as granted in project marketing studies. However, the traditional view of project marketing characteristics may be questioned due to the changing and varying patterns of actions through which project business companies actually operate (Alajoutsijarvi, Mainela, Salminen and Ulkuniemi, 2007). Moreover, an emerging call from the research literature suggests that the project marketing approach should be merged into the project management view (Cova and Salle, 2005; Blomqvist and Wilson, 2007; Tikkanen, Kujala and Artto, 2007). In order to do that, we need more understanding of the complex and constantly changing context of project business. We contend that the current state of project marketing research is quite static and simplistic, compared to the dynamic and changing context in which project business companies actually operate. In this paper, our objective is to shed light to the complex dynamics of project business and identify important areas for theory development by exploring the ongoing changes in the international project business.

## Research Design

The objective of the present study is to stress the aspects of theory development and improvement (Dubois and Gadde, 2002), based on empirical findings from project business companies. In order to identify the changes occurring in international project business, we adopt the multiple case study methodology (Eisenhardt, 1989; Woodside and Wilson, 2003; Eisenhardt and Graebner, 2007) by combining data from two on-going European research programmes focusing on project business characteristics. In doing so we have made a move in a different direction in the use of case study research from the traditional IMP approach based on a single, unique in-depth case (Håkansson et al., 1979) to one employing various instances.

The selection of qualitative and discovery-oriented methods is appropriate especially when studying complex change processes (Eisenhardt, 1989). Thus, the multiple case study approach combining data from two different countries gives a rich picture of the dynamics and changes occurring in the international project business. Semi-structured on-site interviews with key informants, focus groups, and reviews of internal information have provided the data for the Finnish research programme, which focuses on examining the business characteristics in four companies operating in a complex project-oriented process technology industry. Action research is the basis for the long-term programme that the French authors undertake with major companies operating within B2B markets in aerospace and construction industry. Interviews with managers taking part in the marketing process have been the main source of the data collection. The researchers stayed in the companies for several days, including training; this helped in understanding the overall context in which the marketing actions take place.

The gathered qualitative data has been interpreted through an inductive approach by using traditional techniques for qualitative data analysis. The findings have been derived by identifying patterns of action in several case companies and interpreting these weak signals as general patterns occurring in the project business environment. The illustrative cases have been selected among other possible cases in order to depict each identified change through revelatory case descriptions. In order to address the challenge of "better stories vs. better theories" (Dyer and Wilkins, 1991; Eisenhardt and Graebner, 2007) in case study research, we develop the theory in the sections in such a way that each is supported by empirical evidence. Thus, the overarching organizing frame of the paper is the inductive development of theory, and each part of this theoretical development is 'demonstrated' by evidence from at least one of the cases.

## Proposed On-going Changes in Project Business

In the following we describe identified changes occurring in project business, together with illustrative case examples from our cross-national data. These changes are multifaceted; they are related to the supplier side, to the buyer side, and to the context of project business. We do not argue that all these changes exist in all project business companies. Instead, these trends can be seen as going across several industries.

### *Changing role of customer network actors in the definition of projects (1)*

The role of third parties around the customer, such as engineering offices, arbitrators or consultants in the early phases of project construction has changed. These types of actors are now mobilized directly by the supplier and they are integrated into the solution team. Instead of being active co-constructors (a process which is increasingly being led by the supplier and the customer in co-operation), third parties are now being mobilized by project suppliers, who have adopted some of the integrating tasks traditionally owned by the third parties. As a result, third parties, being business or non-business actors of the customer network, seem 'less active' in the design and construction of projects, but they are still important. Even though third parties are involved very early and all along the project cycle, they do not have the same kind of role as before. Instead of trying to influence and create credibility among actors of the customer network, project suppliers have increasingly adopted the role of an active integrator, whose main task is to mobilize these actors in order to deliver value for the customer.

*Case BOC Defence*

*BOC Defence is one of the major players in the defence industry. It is a financially sound private international group of medium size, present in more than seventy countries on five continents. Its marketing objective is to anticipate the future market for defence equipmen,t given worldwide geopolitical movements. BOC Defence has decided on a 'go' for the Australian market, to be confirmed by a call for tender for a set of defence equipment 6 or 7 years hence. It is important to point out that the Australian market, like a large part of South-Eastern Asia and Oceania markets, has been relatively inaccessible to BOC Defence up to this point in time. BOC Defence sets up actions known as pre-investment, which, in addition to the search for political support, are identified as small development agreements for taking up positions and creating intermediary links in the network of the customer, the Australian Armed Forces. It is therefore more of a strategy of industrial presence than one of counter-trade. A good example of this is the research agreement signed with a Sydney university laboratory to develop a technology program together. As a result of its relationship with BOC, the laboratory has co-created new software applications that are beneficial both to the laboratory and to BOC, developing its position in the customer network. In addition, the applications developed this way are going to be used in the proposition to be made to the customer, thereby facilitating BOC's sales approach.*

### *Rapid changing of actors in the customer base of a project supplier (2)*

During the past decades many companies operating in project business have witnessed a clear trend of consolidation in their customer base. Project business suppliers are facing rapid changes in their customer base in terms of mergers and acquisitions, for example. As a result, project business companies are operating with more complex customer organizations than before. The customer bases of project business companies are constantly changing and more dynamic, and thus more difficult to cope with. This change is not specific to project business, it is occurring in many industries, but it has a specific impact on project business due to the long time frames of project activities.

*Case Systel*

*Systel is a Finnish company that is one of the leading global providers of process technology solutions for global mining and metal industry. The nature of the company's projects varies from technology packages to large turnkey project deliveries, which often comprise a large share of the company's revenues. Consolidations and mergers shape the business environment in which Systel operates recurrently. This is* *illustrated by the fact that the company itself has a relatively brief history as an independently operating entity, as it was previously a part of a larger group. In recent years, the company has faced high consolidation in its customer base as well, which has created major challenges in terms of customer relationship management. The customers have become larger, more powerful players with engineering offices as intermediaries between them and project suppliers. The effects of this process are further strengthened due to the highly cyclical nature of the business, as the demand for the company's projects is mainly driven by the overall activity in the mining and metal industries, which is in turn affected by the global supply and consumption of metal industries. As a result, besides the actual customers (mining and metal providers), there are many major actors, such as end consumers, merchants and raw material producers that shape the demand for projects.*

*Case Airbus*
*When Airbus launched its A380 project in the late 1990's, Boeing held a monopoly position in the specific HCLA (high capacity long range aircraft) segment, which allowed them to 'milk' the segment, i.e. to charge a substantial premium and use the proceeds to cross subsidise sales on other market segments (thereby creating high price pressure on Airbus sales in these segments), and to be the only company able to offer a full range of aircraft to major commercial airlines (denying Airbus recognition as a full supplier by those majors). Even though Boeing and Airbus market forecasts generally agree on the overall size of the market, Boeing professes a somewhat different view on the HCLA segment. They believe that new medium-size aircraft can offer long-range services economically, and that passengers will prefer these to larger size aircraft to bypass hubs and fly 'point-to-point'. Airbus, on the other hand, believes that this fragmentation may occur, but that large city routes will continue to carry increasing passenger loads, in connecting flights and 'origin and destination' flights. According to Philippe Jarry, Airbus Senior Vice-President for Product Policy, a certain number of trends which are expected to shape the market for HCLA in the future could explain these differences, but he states that this is also explainable by the fuzziness of the consumer base of the two companies. A new aircraft conception cycle lasts from 5 to 10 years, and airlines expect to use the same aircraft for a further 25 years. For the A380 project, the kick-off CFG (Customer Focus Groups) meeting took place in Carcassonne in June 1996; 16 commercial airlines were involved and the objective was to review all possible questions of interest to customers about the specific features of A380 (high gross weight, large dimensions, three decks, 'short' fuselage, long wing root chord). Of the 16 airlines involved in this first CFG meeting, 6 have disappeared during the last decade because of failures and mergers. In the meantime, 5 new Asian airlines have become major clients of A380. They did not participate in the kick-off meeting and the definition of the project.*

***The changing buying process and increased risk factor (3)***

Mergers and consolidation among project companies' customer bases have led to larger buying entities allowing customers to use their most skilled and experienced buyers. Additionally, project buyers have increasingly invested in the purchasing function, as the monetary value of the purchased components or subsystems is high, and thus includes high risks. As a result, the professionalism of the buyers has increased and their strategic role within the customer company has strengthened. At the same time this has had an impact on the suppliers. Purchasing managers are more equipped to negotiate with suppliers, who are in turn obliged to share the risk and take a risk with their customers. This means that more and more financial risk-taking by the supplier is involved in the project marketing process. Sharing risks can be seen as a result of changing balance in power between the supplier and the customer. In conclusion, the change in the supplier approach results from the power balance. Another explanation may be that customers have radically changed their supply strategy. This is typically the case with PFI (Private Finance Initiative) or PPP (Public Private Partnerships). PFI or PPP is one way for governments to increase private sector involvement in the provision of public services. In the following case, the customer had to pay a kind of 'annual rent' to a consortium which designs, builds, maintains, operates and finances a building specifically designed to this customer. The consortium assumes the risks.

*Case City of Lille*
*Recently, the City of Lille (in the North of France) turned to a PPP procedure for the procurement process of a 50 000-seat soccer stadium.Three private consortia (architect + contractor + financers) were selected and submitted a proposal. The winning consortium proposed the following bid, which is close to a BOOT (build, own, operate, transfer) agreement: it will invest 700 million euros and get a return on investment through the*

*annual fees paid by the City of Lille (14.3 million euros), the soccer club called LOSC (7.5 million euros), and by diverse earnings from advertising, the organizing of events, and the running of a shopping mall. The consortium also controls the naming of the stadium, i.e. the fee paid by a company to couple its name to the one of the stadium (for example the Emirate Stadium of Arsenal or the Allianz stadium of Bayern München). In 31 years the stadium will become the property of the City of Lille.*

***From project orientation towards customer orientation (4)***

Increasing the frequency of transactions with customers is an important objective for many project business companies. As a result, project suppliers seem to have become more customer-oriented than before. In order to coordinate their activities with increasingly complex customer organizations, project companies are adopting key account management programs, and the organizational mode has been developed to operate more around customers than projects. As a result, more and more project business companies are key account-organized instead of project-organized. Thus, it can be stated that many project business companies have shifted from a single project oriented perspective towards a more customer oriented one. Maximizing the profits of a single project is no more the primary target; instead project business companies aim at bringing superior value to the customer throughout the whole customer relationship.

*Case Systel*

*Systel, a European technology provider for the mining industry has recently adopted a customer life cycle model, according to which it strives to be a long-term partner for its customers, helping them to maintain the efficiency of their production plants throughout their life cycle. The main reason for adopting the life cycle model is that the company is striving for growth mainly among its existing customer base, due to the saturation of markets. As the time span between actual projects with the same customer is often very long, even more than 20 years, the life cycle model includes several service components designed to bring extra revenues and maintain the customer relationship between projects. Such services include auditing and expert services, through which the condition of the customer's processes and maintenance practices are evaluated and guidance is provided to their operations personnel. On the basis of the auditing results, Systel can offer its customers improvement and upgrade solutions in the form of plant automation, process and equipment upgrades, and operator training.*

***Customer-oriented project delivery and implementation (5)***

Project business companies have acknowledged that good experiences and customer satisfaction during the project process can result in increased customer loyalty and good customer references. Therefore, project companies take increasing case of the quality of the project delivery process and the satisfaction of the customer during the project implementation phase. Instead of focusing only on sales efforts and winning new projects, the marketing function in project business companies has become more important also during the project delivery and execution phases. Project companies have found that the implementation of the project must be managed by marketers, not just the project team. As a result, in many project business organizations, project sales and marketing functions are now more integrated to the execution and implementation of projects instead of forming a separate function. The same change can be found in the construction industry when comparing the traditional approach based on a call for tender to select the contractor with the approach of integrating upstream or downstream phases. In traditional approaches the task of the project sales function ended when the company won the contract. The project sales function was not involved in the building phase. In the emerging design and build (D&B) approaches, the same individuals are involved throughout the project.

*Case Logtel*

*Logtel, a Scandinavian manufacturer of heavy material handling equipment for logistics operators has faced an increasing need to focus on customer satisfaction during the project delivery and implementation phases. The company operates globally through a complex matrix-based organization and provides large material handling equipment for ports, harbors, shipyards and the offshore industry. The company has faced situations where customer satisfaction was lacking because of inconsistencies in interaction with the customer between the sales and project management. As a result, the marketing and selling functions have recently become very interested also in the project delivery phase. In order to improve customer satisfaction, the company has taken actions and implemented development projects to enhance the consistency of customer relationship management and internal communication of customer information. Now the company has changed its* *operations so that the marketing and selling personnel is more involved in project management throughout the whole customer relationship from the delivery phase to hand-over and training.*

***Dual upstream-downstream movement of project suppliers (6)***

In addition to the core project itself, companies involved in project-type business often offer to design and plan the project together with the customer and provide services to operate, maintain, and even finance the project during its life cycle. Thus, many project suppliers are involved in the pre-requirements and in the customer requirements definition of the project, and at the same time they are involved in the post-deployment customer support, through maintenance, upgrading, training, or even marketing. For example company may be selling projects to customers abroad and at the same time help these customers to find end customers and markets for their products. Thus, it can be seen that project business companies are trying to go more and more upstream and to participate in the definition of customer requirements. At the same time they are also going downstream by providing services and other elements after the project. This marriage between upstream and downstream logics has resulted in a widened scale of operations that require new skills from project business companies.

*Case B Construction*

*B is a French group operating in the construction industry. B is ranked in the top ten companies in this industry in the world. Since the 1990s B has faced a huge change on the customer side, which has impacted the supply side. In construction industry the traditional approach for buying projects is based on a process which separates the design phase and the realization phase of a project. In the design phase, the customer generally turns to an engineering company, which defines the project specifications. The engineering company is often selected by using a call-for-tender procedure. Then the engineering company helps the customer to choose the contractor who will realize the customer's project. This choice can be based on the call-for-tender procedure as well. This sequential approach leads to an adversarial relationship between the different actors involved in the process. They tend to refer to the contract, thus trying to limit their risks. As a consequence, many conflicts concerning for example quality, costs, and delays may occur. Due to the high risk of conflicts involved in this type of buying procedure, the buyers in the construction industry have adopted new alternative approaches, based on a greater integration of the different phases in the value chain of the project. This integration can be upstream (design phase + realization phase), and/or downstream (maintenance phase + exploitation phase). It can also include the financing of the project. These kinds of integrated approaches (upstream, downstream and financing) can be found in cases of PFI (Private Finance Initiative) or PPP (Public Private Partnerships). These high value approaches are mainly developed by big companies, such as B.*

***Enlargement of the offering (7)***

This trend includes three intertwined dimensions: 1) enlargement of the contents of the offering and diversity of the elements of the offering; 2) enlargement of the target of the offering with stakeholders inside and outside the customer, and 3) enlargement of the economic partners on the supply side.

The increasing demand for complete solutions and global offers has made project marketing companies to expand their offerings to services and other additional elements. The offerings of project business companies now include elements previously produced internally by their customers, such as training, system operation, financial arrangements, and even legal services. Especially, the role of services has become an important element in many project business companies’ offerings. As a result, elements of the offering are more diverse than before, including products, services, financial services, and legal services. The second dimension, the enlargement of the target of the offering with stakeholders inside and outside the customer, is illustrated by the fact that offerings are increasingly dedicated to satisfy many different actors in and around the customer. The client surface is no longer just made of the client, but of the network surrounding the client.

*Case Larox*

*Larox is a Finnish company which supplies solid/liquid separation equipment and related services to the mining and metals industry and the chemical process industry. The company has widened its service portfolio in order to satisfy a wider range of customers' filtration needs. The company offers its customers full-service cooperation agreements, including preventive maintenance and spare part logistics planning, the actual service procedures, optimized spare part services, and emergency services. The company’s primary strategic* *goal is to increase the share of after sales service of the total business. As a result the company has widened its service offerings to include various technical and modernization services, such as inspection and maintenance, training and consultation, equipment relocation services, and documentation services. The service function also includes buying and selling second-hand filters for customers. The company has even required the needed knowledge and expertise to maintain and modernize competitors' equipment.*

*Case Batir*

*Batir is a small building-contracting firm in the South of France. For a project of new housings that will be built on the old stadium field of La Roche, a small village in the South of France, Batir has developed a proposal which aims to serve many actors around the core customer, the town council. The announcement of the sale of the football stadium for housing plots generated much discussion in the village. The villagers soon started to complain about the construction that they would have to endure. They discussed the matter with the mayor and the municipal councilors. Batir asked the residents of Les Risées, the housing estate bordering the stadium to the North, whether they wanted to buy plots. No one was interested. After that, Batir went to see them individually and ask them whether they would be interested in extending their land by buying a strip of stadium land at the purchase price. Six of the eight residents of Les Risées were indeed interested in this proposal. Consequently, the six owners became supporters of the project and regularly visited the town council to lobby for the project on behalf of Batir. This company was the only one to offer a proposal that was acceptable to the town council and it won the..*

***Branding in projects (8)***

Branding had received little attention in industrial markets before 2000 (Mudambi, 2000), and especially in project marketing branding has been a neglected area. Now we can see branding emerging in project business at two different levels, the decision making level (immaterial level) and the user level (material level). The more companies are selling complete solutions, the more is the brand needed to build trust to assure the major decision makers in the buying company. However, there is always materiality inside the solutions. Customer organizations pay attention to the brand also because of the users' requirements. The users in the target customer companies and their brand perceptions of the supplier's material solution are play an increasingly important role in winning new projects.

*Case Logtel 2*

*Logtel is a Scandinavian company that provides complex heavy cranes and other material handling equipment for ports, harbors, shipyards and the offshore industry. The deliveries of large cranes are long projects that may take from seven months up to two years. Logtel competes on a relatively higher price premium than its competitors, which requires justifying the higher price of projects for potential customers. In many project sales negotiations Logtel has learned that the crane users in the customer company have demanded specifically Logtel, and expressed their reluctance to use any other cranes. Managers of customer companies have reported that their workers are not willing to use any other cranes, due to the reliable and distinguished reputation of Logtel. Thus, users' perceptions of the Logtel brand in target customer companies have played an important role in winning new projects for Logtel.*

***Shift from references to super-references (9)***

While having positive references has become more and more important, also the effect of bad references has increased. Because of the quick information flow between companies, also bad news spread fast in the market. The impact of positive and negative customer references on the acquisition of new projects has therefore strengthened. A positive super-reference can be regarded as an extremely influential customer relationship that has a substantial influence on winning new customers. This kind of relationship can be based on a pioneering customer's successful adoption of disruptive technology combined with the supplier's very good service. A super-reference in the field of a new innovative technology may even alter the whole business logic of the industry because of its impact. Alternatively, a super-reference can be born when winning a very important global customer and establishing a strategic partnership-type customer relationship with it. In both cases a very well managed customer relationship that can be freely shown to markets and can be utilized effectively is the key for creating a super-reference. In the case of an ideal super-reference, both disruptive technology and important global customer are involved simultaneously, strengthening the network effect of the customer reference. At its extreme, a new (super) reference customer works as an extremely credible and reputable advocate or testimonial not only for the project supplier, but for the project suppliers' partners and subcontractors as well. Generally, first reference projects in areas of new technology or application are crucial for project business companies and thus most likely turn into super-references.

*Case Eiffage*

*A huge viaduct designed by Norman Forster and Partners (a very famous engineering company specialized in bridge building) was built in the center of France (Millau city). This viaduct was meant to facilitate the traffic by joining two hills. The first specifications (layout, technical characteristics, feasibility) were defined in 1987 and the viaduct was delivered in 2004. This viaduct is exceptional because of its dimensions and its architecture. One of the pillars is 245 meters high, the highest in the world. The deck and beams culminate at 270 meters. The most recent technologies were used. The consequence is that Eiffage, which was relatively unknown, compared to the two other big groups in France (Bouygues Construction and Vinci), is now well known. Its name is associated to the Millau viaduct. Its fame has helped Eiffage to win exceptional projects in the construction industry, such as a recent stadium in Lille (North of France) which contains a lot of innovations (700 millions €).*

*Case Systel 2*

*Systel, a Finnish provider of process technology solutions, operates in the mining and metal industry. The entry into the market is fairly difficult, since proven technologies and references are prerequisites for success in the industry. Even though Systel has an established market position and long traditions working as a technology provider, the significance of customer references remains high, as the company is constantly investing in developing new innovative technologies. Due to mergers and acquisitions, the mining industry has developed into a relatively close network, where the actors know each other well, and both good and bad news spread fast. Thus, due to the increased networking and information flows between customer organizations, references have become even more decisive than before in the industry. At present, Systel is targeting new customers for a new innovative hydrometallurgical process for producing high-quality copper directly from sulfidic copper concentrate. The new technology allows skipping several phases in the traditional value chain, and most likely alters the business logic of the industry. Currently, Systel is in a final phase of negotiating a contract for delivering the first process solution, and thus is about to get the first reference customer for this new innovative technology. According to company representatives, the first customer for this new technology gives an access to a several new customers, because it proves the functionality of the new technology and thus reduces the risk of potential customers. Systel has a network of subcontractors whose deliveries may account for as much as half of all the deliveries in the project. The new customer relationship can be regarded as a "super-reference" because it opens markets not only for Systel, but for other companies of the process technology cluster as well.*

***Plurality of marketing situations faced by companies (10)***

Despite of the increasing importance of project-type business, companies operating in the field are less and less purely project business companies. The number of traditional project business companies delivering solely complex project transactions is actually diminishing. Instead of delivering only large complex projects, companies involved in international project business are nowadays at the same time project marketers, solution providers, equipment providers, service providers, and sometimes even product marketers.

*Case Safran*

*Safran is a high-technology group, organized in four branches: aerospace propulsion, aicraft equipment, defence security, and communications. It has 57,000 employees in over 30 countries, and annual revenues exceeding 12 billion euros. Safran's Aerospace Propulsion branch groups all design, production, marketing, testing and MRO activities concerning propulsion systems for airplanes, helicopters, missiles and launch vehicles in the civil, military and space markets. Safran's Aircraft Equipment branch groups all design, production, marketing and MRO activities for systems and equipment used in civil and military airplanes and helicopters. In these two branches, dedicated to serve the aerospace consumers, Safran has several constituent companies, such as Snecma, Messier-Bugatti, Turboméca, etc., that could serve the same customer but with totally different marketing approaches and offering strategies. Safran has developed a matrix to position the diverse market situations its constituent companies are facing (see figure 1). On the vertical axis, Safran differentiates market-driven demand situations (low importance of non-business actors in the decision process) to government-driven demand situations (high importance of non-business actors in the decision process). On the horizontal axis, Safran differentiates standardized offering situations (products) from specific offering situations (projects). The coupling of the two axes determines several major situations which call for different marketing approaches. Figure 1 depicts examples of marketing situations faced by the Safran Group.*

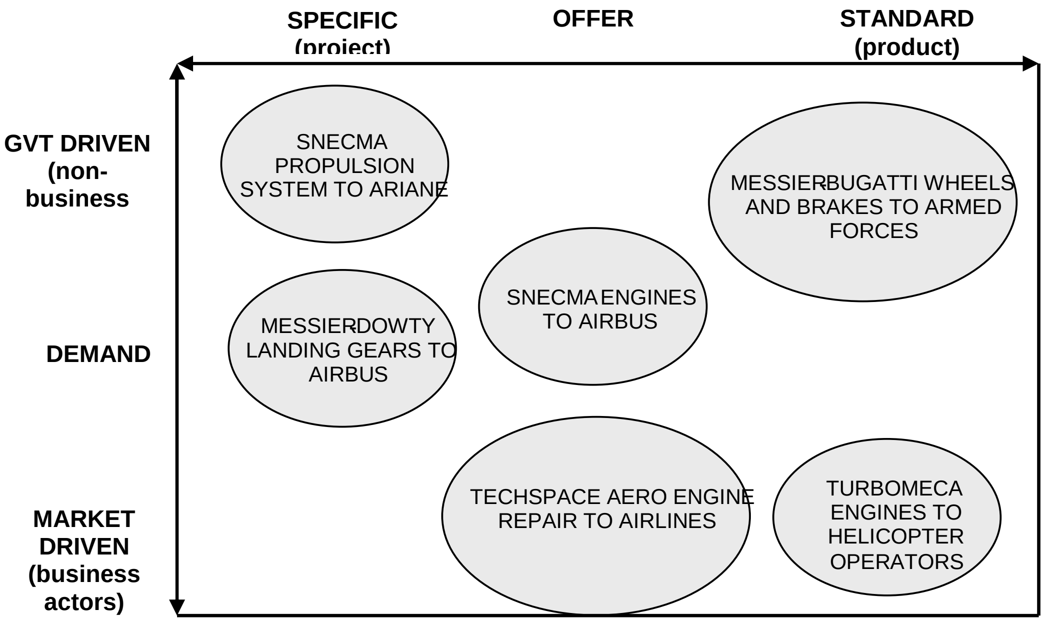

Figure 1: Examples of marketing situations faced by the Safran Group

**Discussion**

The objective of this paper was to examine the changes in international project business through cross-national data from two longitudinal research programmes. As a result we identified ten changes shaping the project business environment. In the following, we discuss these changes in the light of the existing project marketing research. Table 1 summarizes these ten changes and their suggested implications for the project marketing theory.

Table 1 Summary of the identified changes and their implications for the project marketing theory

| Identified change | Implication for the project marketing theory |
|---|---|
| • Changing role of customer network actors in the definition of projects (1) | - From network management to network mobilization |
| • Rapid changing of actors in the customer base of a project supplier (2) | - From “territorialized” milieus to global constellations |
| • Changing buying process and the increased risk factor (3) | - From bidding procedures to risk-sharing approaches |
| • From project orientation towards customer orientation (4) | - From project portfolio management to key accounts management |
| • More customer-oriented project delivery and implementation (5) | - From the management of discontinuity to the management of continuity |
| • A dual upstream-downstream movement of project suppliers (6) | - From an upstream logic to an upstream/downstream logic |
| • Enlargement of the offering (7) | - From project offering to solution offering |
| • Branding in projects (8) | - From corporate reputation to branding strategies |
| • Shift from references to super- | - From references to systematic building of network |

| | |
|---|---|
| references (9) | position |
| • Plurality of marketing situations faced by companies (10) | - From project marketing to total marketing |

The *first* identified change, the changing role of customer network actors in the definition of projects, is related to the notion that project business suppliers have increasingly adopted the role of system integrators (Davies, Brady and Tang, 2003; Davies, Brady and Hobday, 2007). This change demands new capabilities from the project suppliers as, instead of only influencing and convincing the third parties, the ability to integrate and mobilize a range of these actors becomes a key activity (Davies, Brady and Tang, 2003; Davies, Brady and Hobday, 2007). The project suppliers may need to create specialized divisions, units and individual projects to mobilize the actors in the customer network and integrate their resources for projects. Thus, instead on identifying and influencing customer network actors, the *coordination* and *mobilization* of these actors becomes central. For project marketing theory this change reflects a shift in orientation from network management towards network mobilization.

The *second* identified change, rapid changing of actors in the customer base of a project supplier, is in accordance with recent findings on project buying, which highlight the dynamic nature of a buying network (Owusu and Welch 2007). In the existing project marketing research, understanding the processes and dynamic aspects of the project ´milieu´ (Cova, Mazet and Salle 1996) has been identified as being a central managerial task and a key success factor for project business companies (Skaates and Tikkanen 2003). The rapid changing of actors in the customer base of a project supplier seems to make the task of understanding and anticipating the actors of the milieu even more demanding for project suppliers. Due to the increasingly global nature of customer organizations, it can also be questioned whether project milieus in their traditional sense, as a local collective of the relevant business and non-business actors (Cova, Mazet and Salle, 1996), exist anymore. From traditional “territorialized” milieus project marketing seems to shift towards dynamic global constellations.

The *third* identified change, the changing buying process and the increased risk factor implies that project marketers need to pay more attention to the negotiation process and risk management (e.g. Hadjikhani, 1998; Murtoaro and Kujala, 2007; Fan, Lin and Sheu, 2008; Koskinen and Mäkinen, 2008). Because of the high influence of financial criteria in project business, projects have to be targeted very carefully by the suppliers (Messner, 1994). On one hand, projects have to be relevant for the investor side in terms of returns on investment, and on the other, projects have to be efficient for the customer side specifically in the case of integrated solutions. In these cases, the supplier is committed to the ‘availability of an industrial equipment’ sold to the customer. Consequently, it has to manage its own resources and the ones from its partners in order to reach the required availability. In the case of PFI or PPP, the risk is higher because profitability mainly depends on the quality of operation management by the supplier during the duration of the contract (life cycle cost). For project marketing, this change implies the shift of focus from traditional bidding procedures to risk-sharing approaches in the early phases of the project life cycle.

The *fourth* identified change, the shift from project orientation towards customer orientation, has been highlighted also in studies of project management (e.g. Hellström and Wikström, 2005). According to Hellström and Wikström (2005), customer orientation requires moving from the owner-view of project management towards a contractor-view of project management, where the customer relationship becomes a key issue in addition to time, cost and quality. Especially in the quality sense, account management approaches (such as key account management or global key account management) will became more relevant approaches in project business (Pardo, et al., 2006; Shi, Zou and Cavusgil, 2004). Thus, from the view of project marketing, this change seems to call for a transition from the project portfolio management approach to a key accounts management approach.

The *fifth* identified change, more customer oriented-project delivery and implementation adopted by project suppliers, is related to a customer-based approach of project organizations (Pinto and Rouhiainen, 2001) and to the more general notion of finding a common interface between the project marketing and project management views (Cova and Salle, 2005). In this type of customer-based approach, the core lies on managing relationships between the customers and the suppliers (Pinto and Rouhiainen, 2001). This requires a reflective and responsive approach towards the customer from the project management function during the project (Hellström and Wikström, 2005). The continuous process of maintaining the customer relationships throughout projects, as well as during and after warranty periods, seems to reflect a shift in the orientation of project marketing from the management of discontinuity to the management of continuity in projects.

The *sixth* identified change, a dual upstream-downstream movement of project suppliers, means that project marketers need to acquire a widened set of skills and capabilities. The marriage between upstream and downstream logics has resulted as a widened scale of operations, which require new skills from project business companies. According to Davies, Brady and Tang (2003), companies need system integration capabilities, operational services capabilities, business consulting capabilities, and financing capabilities when moving towards integrated solutions. Windahl and Lakemond (2006) add another capability: managing external resources in order to elaborate the offerings (the integrated solution), because one company is not able to have all the components and subsystems to build a solution alone. From the traditional upstream logic, project marketing is thus moving towards a dual upstream/downstream logic.

The *seventh* identified change, the enlargement of the offering, can be seen to reflect the rapprochement between project marketing and solution business (Cova and Salle 2007), and is related to the emergence of the service dominant logic (Vargo and Lusch, 2004; Lusch and Vargo 2006). This change seems to undermine the discontinuous nature of project marketing. The project marketing research has traditionally considered discontinuity as typical to project business relationships, with the exception of “sleeping relationships”, referring to cases of continued buyer-seller dependence after the project completion (Hadjikhani, 1996). As a consequence, overcoming the demand-related discontinuity has been considered as a major strategic problem in project marketing (Skaates and Cova, 2004), and the management of discontinuity between the supplier and the customer has been the focus of interest in several project marketing studies (e.g. Hadjikhani, 1996; Cova and Salle, 2000). In the light of this change, it seems that the problem of discontinuity has been largely tackled by developing the offering to include elements that can be served to customers between projects. Even if discontinuity still remains in project-based industry, due to the inherently discontinuous nature of projects, it seems not to be the central problem as before, due to the shift in orientation from project offerings to solution offerings.

The *eight* identified change, the emergence of branding in projects, is related to the growing importance of branding in industrial marketing in general (Mudambi, Doyle and Wong, 1997; Low and Blois, 2002; Beverland Napoli and Lindgreen, 2007). The studies on branding in industrial marketing suggest that buyers’ perceptions of the service aspect (Ballantyne and Aitken, 2007) and a promise-centric approach of delivering a total solution to the customer (McQuiston, 2004) are important aspects in building a strong industrial product brand, whereas brand intangibles, such as expertise, trustworthiness and ease of doing business are important in building an industrial corporate brand (Webster and Keller, 2004). For project marketers, this change calls for a shift from focusing on corporate reputation to focusing on branding strategies.

The *ninth* identified change, a shift from references to super-references, seems to reflect the increasingly networked nature of many project business industries, which has been highlighted by Owusu and Welch (2007) in their study of buying networks in project business. In the networked project industry, reference projects are important in building a supplier’s network position (Håkansson and Johanson, 1992; Håkansson and Snehota, 1995). The essential task of a project supplier is trying to plan and build a super-reference systematically, thus building a positive image of itself (Chun, 2005). At the level of a single project, the idea is to build a critical mass of credibility in the eyes of the customer (Salminen and Moller, 2006), maximizing the reference value of the customer relationship (Jalkala, Salminen, Helm, 2007). At the level of multiple projects, the supplier has to maintain its reference portfolio by continuously monitoring and nurturing the existing reference customer relationships, also between projects. By effectively communicating references (Jalkala and Salminen, 2008) and the supplier’s competence (Zerbini, Golfetto, and Gibbert, 2007), the industry becomes rapidly aware of the supplier’s super-reference, which presumably builds the supplier’s image and reputation as a capable supplier, and thus positively affects the supplier’s network position. Of course, there are also some risks if very special projects are repeated many times (e.g. a project supplier can be considered only as special constructor with a high price). All in all, this change seems to reflect the fact that project marketing needs to shift towards systematic building of the network position.

The *tenth* identified change, the plurality of marketing situations faced by project business companies, demands a multifaceted marketing strategy from project business companies, which has been highlighted through the four-portfolios (customer relationship, network relationship, sales and delivery, and offering development -portfolio) framework (Tikkanen, Kujala and Artto, 2007). The plurality of marketing situations sets new challenges to the project supplier's abilities to design its project organisation for the specific kind of project business the supplier is involved in (Alajoutsijarvi, Mainela, Salminen and Ulkuniemi, 2007; Whitley, 2006). This change calls for a shift in the approach from traditional project marketing to total marketing.

The existing project marketing research has identified different approaches that project marketing firms can adopt in relation to approaching customers, developing the offer, and managing their relationships in the milieu (Cova and Hoskins 1997). They may either anticipate and learn to comprehend the competitive arena and the rules of the game (deterministic approach), or become actively involved in shaping the competitive arena and the rules of the game (constructivist approach). Based on the findings of this study, it seems that the deterministic approach is not an option for many project business companies any more. The project business industry seems to move from traditional view in which the objective was to go beyond the call for tender by anticipating to new approaches in which it is the interaction developed very early (in the project cycle) with different stakeholders that allows to co-define the nature of the project. In this transition, the ability to shape projects appears to be central. In the light of the identified change it seems that project business companies need to adopt a highly constructivist approach in order to succeed in the new business environment.

## Conclusions

The purpose of our paper was to examine the changes occurring in the project business context, and to assess how these changes might (re)shape the project marketing theory. Based on empirical data from two research programmes, we identified ten changes shaping the international project business.

At the managerial level, these changes seem to indicate that project suppliers have to include new competencies and capabilities in order to succeed in the dynamic project business environment. At least system integrator capabilities, customer relationship management capabilities, as well as networking capabilities seem central in the light of the identified changes.

At the theoretical level, the identified changes seem to strengthen some of the features of the traditional characteristics of project marketing, weakening some of them at the same time. Discontinuity is decreased due to the increased role of services, whereas complexity and uniqueness are increased due to changes in the customer network actors and the increased role of co-construction. However, there is a simultaneous shift towards increasing repetitiveness in projects through modularized project solutions (Hellström and Wikström, 2004; Hellström and Wikström, 2005).

All in all, these changes seem to reflect the shift in project business suppliers' orientation from influencing customers and third parties towards cooperating with them (Cova and Salle, 2007). It seems that project business is moving from the logic of influence to a logic of cooperation. In addition, all the identified changes seem to drive us towards a conclusion that actually, traditional "orthodox" project business companies, who are selling projects to order, are becoming rare. Instead, we are witnessing an emergence of companies who are adopting and combining the operational modes of system integrators, solution providers, and multi-project organizations.

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