



Unioncamere
Veneto

Economic structure of North Italy and chances for cooperation in the Scandinavian-Adriatic-Corridor

**Association Chambers of Commerce of Veneto
Region**

Erica Holland

Rostock, 11 August 2011

VENETO REGION IN ITALY AND IN EUROPE

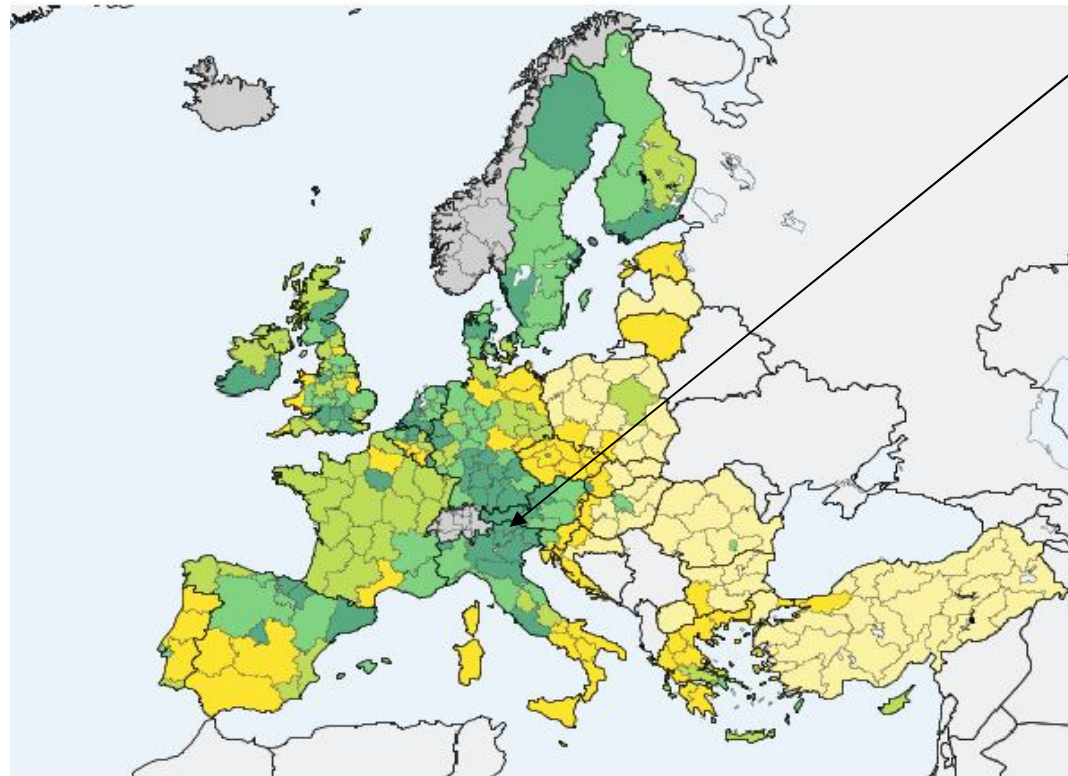
The Veneto Region with Lombardy and Emilia Romagna is one of the most important and dynamic locations of industry and commerce.

In the European Union it is one of the most developed regions.

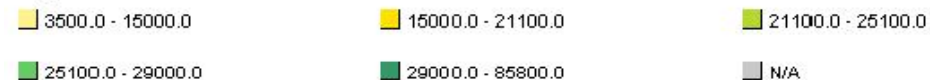
VENETO REGION IN ITALY AND IN EUROPE

PER-CAPITE GDP (in euro). Year 2008

Regional gross domestic product (PPS per inhabitant), by NUTS 2 regions



Legend



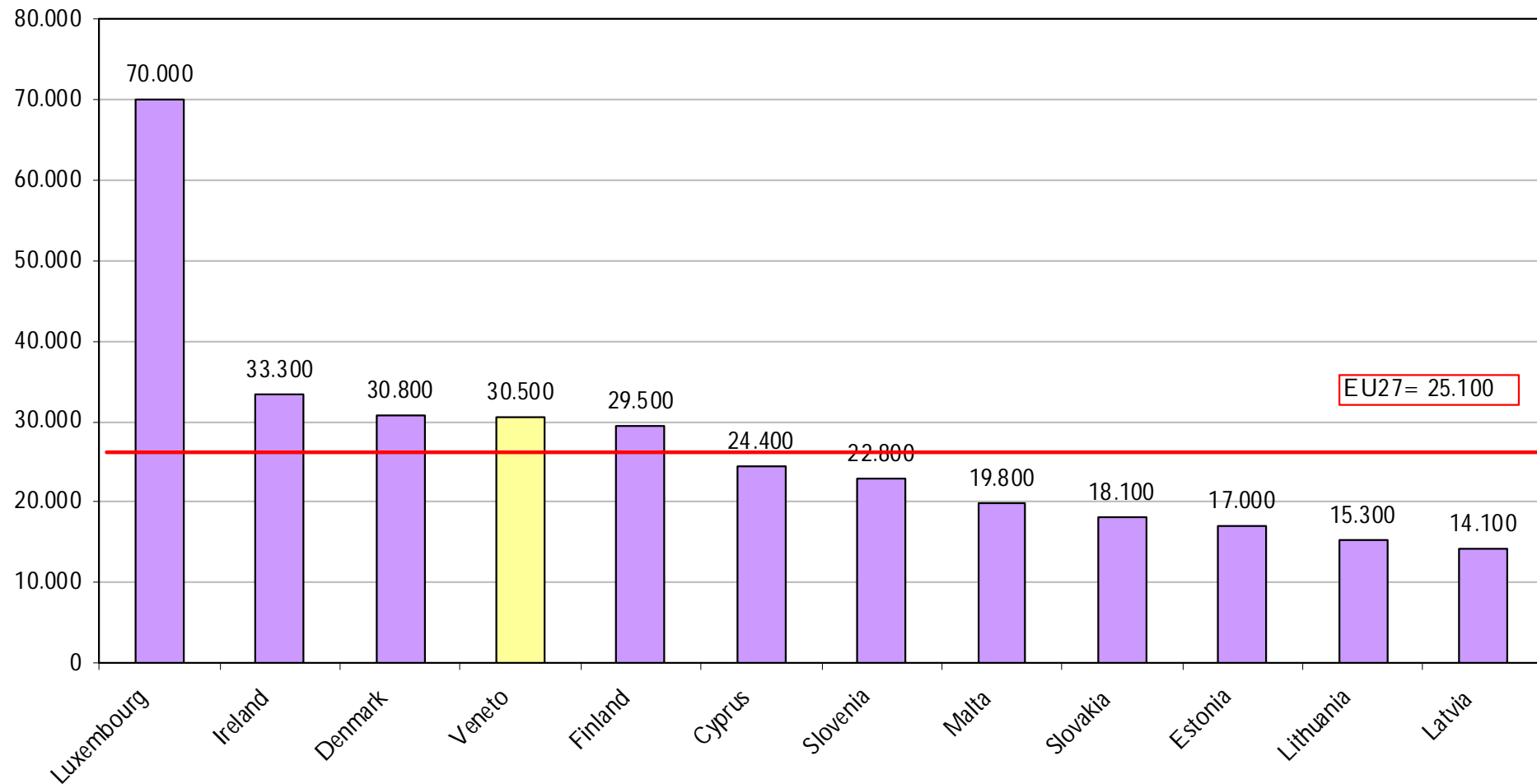
Veneto	30.500
Italy	26.000
EU-27	25.100

Compared with EU-27

Veneto	122,0
Italy	104,0
EU-27	100,0

VENETO REGION IN ITALY and IN EUROPE

Pil procapite (valori in euro in PPS). Anno 2008



Fonte: elab. Unioncamere del Veneto su dati Eurostat

Veneto Region's main features

The Veneto Region is characterized by two particular aspects:

1. polycentric production
2. central role of geography and economy in the international trade (1)

A polycentric production

In the Veneto Region there are not big industrial concentrations, but a **high number of small and medium sized companies**, distributed in thousands of sites in the central plains, valleys of the foothills of the Alps and foothills of the lowland. RS5

This generates a interconnected-network productive system to which the infrastructural structure is no longer able to answer effectively.

RS5

E' ancora da tradurre. Non sapevo come...

Roswitha Schipfer; 26.07.2011

Veneto Region's production system

The Veneto Region is characterized by

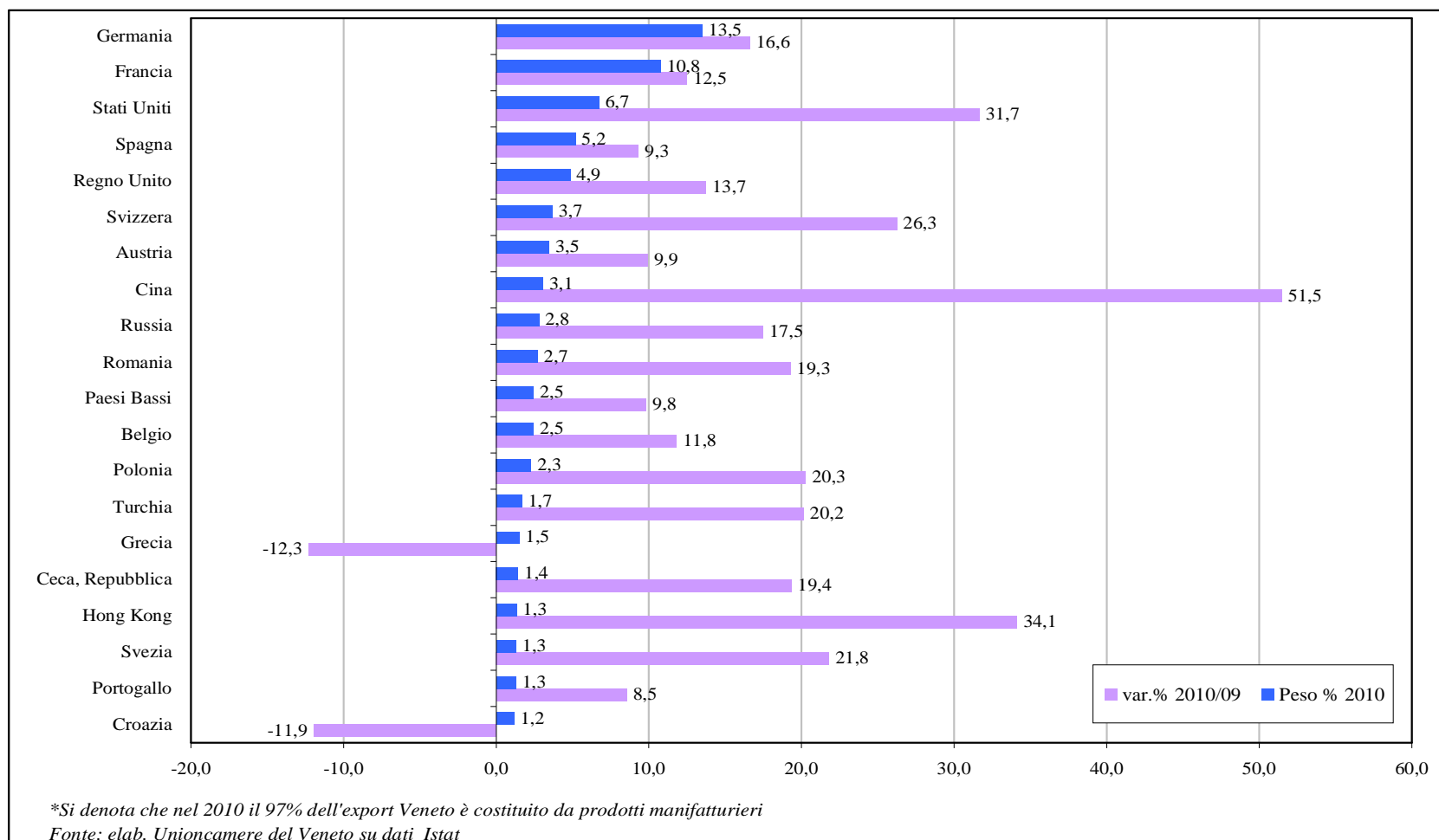
- over 510,000 companies
- an unemployment rate well below the national average (5.2%) and
- a high value of exports (more than 33,000 million Euro in the first trimester of 2010).

The expectation for 2011 is an increase of about 1% of GDP, marking a slow but significant recovery of the regional economy.

VENETO – MAIN DESTINATION MARKETS FOR GOODS

Main markets for the destination of manufacturing goods

Veneto. Primi 20 Paesi per destinazione delle esportazioni regionali di prodotti manifatturieri* (var.% e comp.%). Anno 2010



Veneto Region's production system

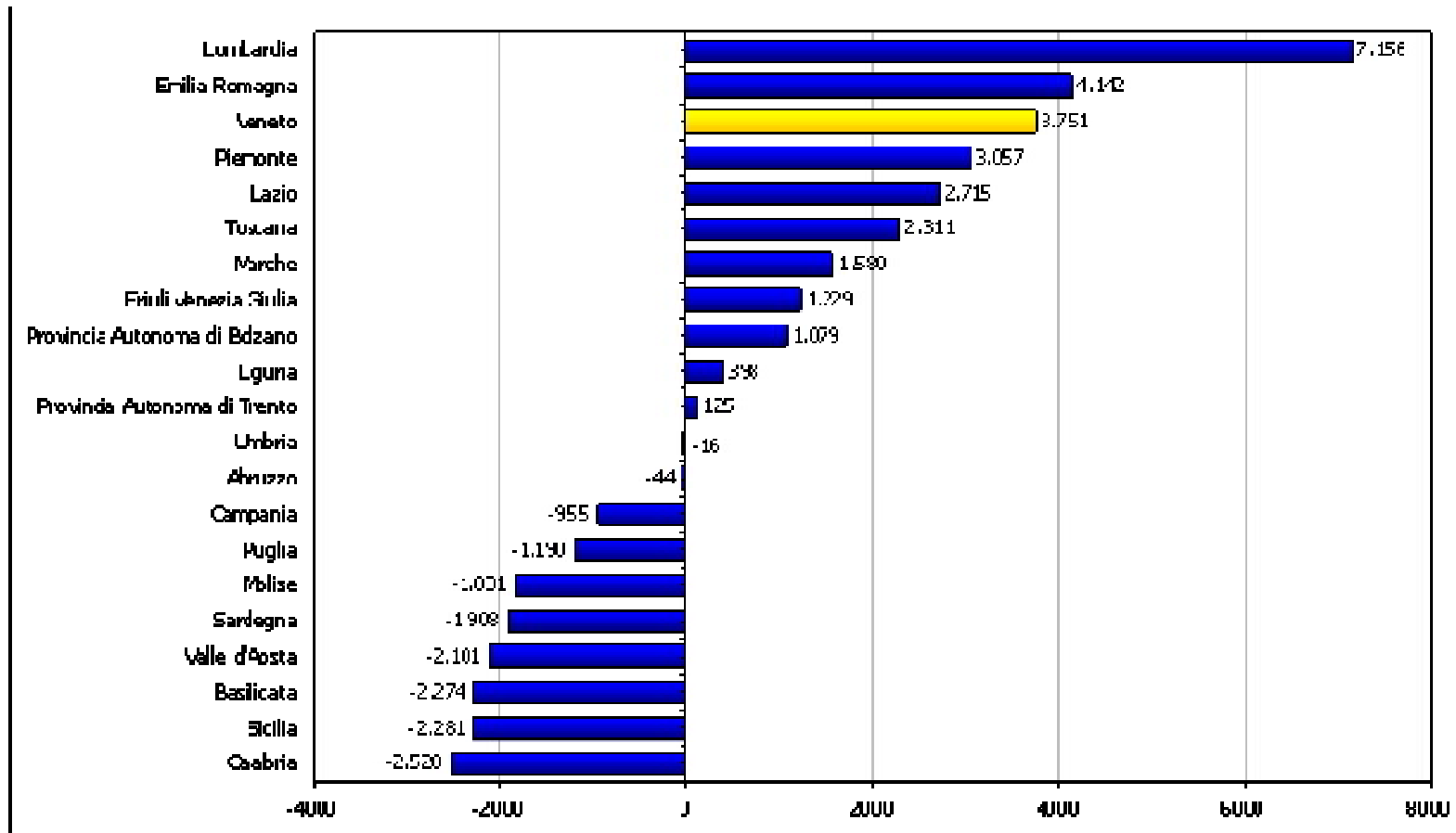
A **key feature** of the Veneto Region is the presence of **industrial clusters or areas** populated by firms that produce mainly the same product.

Our region has **36 clusters**, bringing together nearly **8,300 companies** and employing **more than 260,000 employees**.

Veneto Region's production system (3)

Veneto is an area that thrives on **employment and production**, which depends little on the public sector and is strongly oriented towards the international markets.

ITALY. Fiscal residue of the public administration - Italian regions EURO PER-CAPITE. Years 2006-2008 average (Euro per inhabitant)



Source: Elaborazione Unioncamere del Veneto su dati DPS Ministero dello Sviluppo Economico (CPT)



Economic and structural aspects of the Venetian production system in relation to the European transport axes

Responding to polycentric production

In the recent years the territory has started to provide answers to the companies by creating a Logistic Cluster.

The aim is to bring together in one cluster transport services, logistics and brokerage services, with the aim of overcoming the current dispersion of resources and offering more integrated and high quality services.

This process is a great opportunity for the Veneto Region and indicates a strong willingness to consider Logistics as an issue of primary importance.

Exploiting geographical centrality

Veneto's strong orientation towards the international markets is facilitated by the fact that the territory is a true hinge point for the traffic from Italy to Northern Europe (**Corridor I**) and a crossroad of the flow of goods that cross the continent latitudinally (**Corridor V**).

Intermodality

The development of intermodality is subordinated to the construction / finalization of the works made for the completion of major roads/ infrastructure for the trans-European networks, allowing to attract traffic from the Balkans, Asia and North Africa.

More over it becomes strategically important to invest in port facilities that promote integration between different areas of trade and development, in this sense the **motorways of the sea** can contribute to a growth in the region.

As part of the **Euro-Mediterranean transport system**, in particular the maritime mode will play a vital role in the mobility of goods.

The new National Plan of logistics for 2011-2020 and its effects on Veneto Region

There are great expectations regarding the effects that the new national Plan of logistics will have on Veneto, especially regarding the abatement of logistic inefficiencies and the creation of a systemic vision for the transport sector.

Proposals and strategies (1)

The Chamber of Commerce system can play the role, in Italy and elsewhere, of **calibrating national action plans with regional action**, and of fostering the driving economic forces in the regions aside to social needs when addressing public administration decision makers (e.g. the important “Trial” initiative of Uniontrasporti)

Proposals and strategies (2)

Another role that the Chamber of Commerce system can play, in Italy and elsewhere, is promoting the **general planning of public works** through project financing, as well as **assessing consensus** among professionals in this sector and involved stakeholders.

Proposals and strategies (3)

Important is the enhancement of the **human capital**, involving more and more universities and research centers in order to increase the participation in community planning, which takes into account the needs of entrepreneurs and allows the creation of networks with other regions of European countries affected by the strategic development of the infrastructure main routes.

Proposals and strategies (4)

Unioncamere del Veneto- Eurosportello is heavily focusing on relevant projects in the field of transport and logistics (BATCO and **SoNorA**), on developing important partnerships which may allow to define strategies that have a shared vision with other European regions.

Strategies from a European perspective (1)

Concerning the **rail transport** it is necessary to create competitive international services to reduce travel times between major cities and suburbs.

The development of logistics infrastructure and logistics services requires a firm position by **Regional Development Agencies** and Rural logistics competence centres as **intermediaries** for transport and for the development of innovative solutions.

Strategies from a European perspective (2)

The development of a "green corridor" along the Baltic-Adriatic Sea, among other things proposed in the Action Plan on logistics by the European Union, is important for the development of eco-friendly and high energy efficient **inter-modal systems**.

The goal is to develop innovative products, services and methodologies in close cooperation with partners and promote the cross-border market.

Strategies from a European perspective (3)


Development of actions of "**capacity building**" to mobilize key players and create public-private partnerships for new services, through joint action plans at an inter-regional level.

The joint action plans also allow to **harmonize the technical parameters** and to establish priorities for its implementation at the international level.

Strategies from a European perspective (4)

The participation in EU projects can add value to the intellectual capital, for example through the development of a transnational network of universities with specific expertise in the areas of logistics and transport.

It also encourages the growth of clusters of innovation, mobilizing regional economic actors (Chambers of Commerce, trade associations, civic associations) and market participants, to ensure a full implementation and the sharing of identified strategies.



Developing the North-South Axis: The SoNorA Project

NORTH-SOUTH AXIS

SoNorA Project



- Central Europe programme - EU Territorial Cooperation
- Duration: 40 months (Nov. 2008 – Feb. 2012)
- Total budget:
€ 7.098.964,99
- ERDF contribution:
€ 5.551.180,84 25
- 25 Partners from 6 EU countries
- 35 Associated Institutions from 9 EU countries

NORTH-SOUTH AXIS

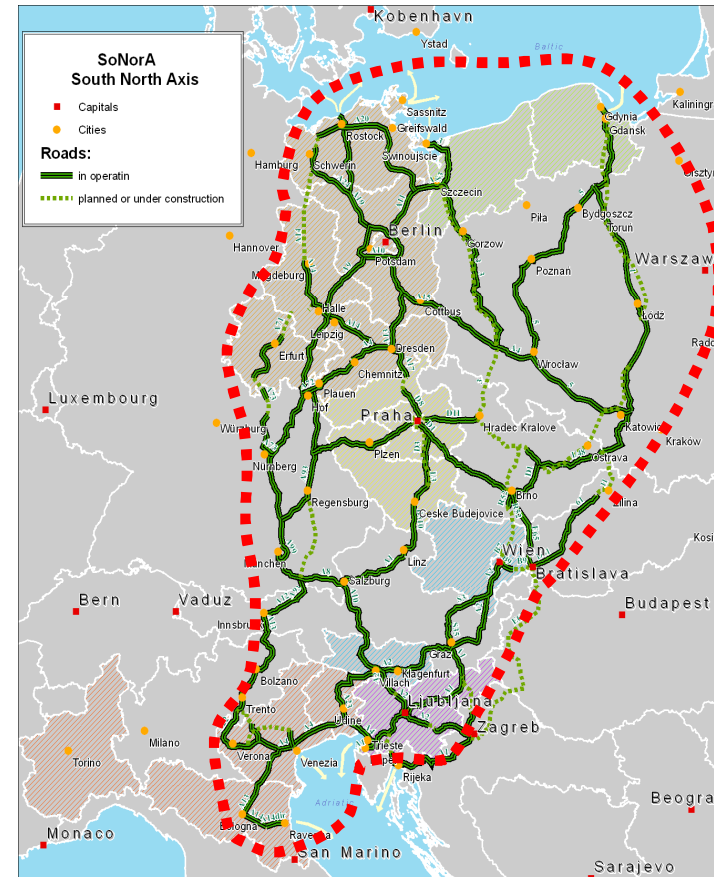
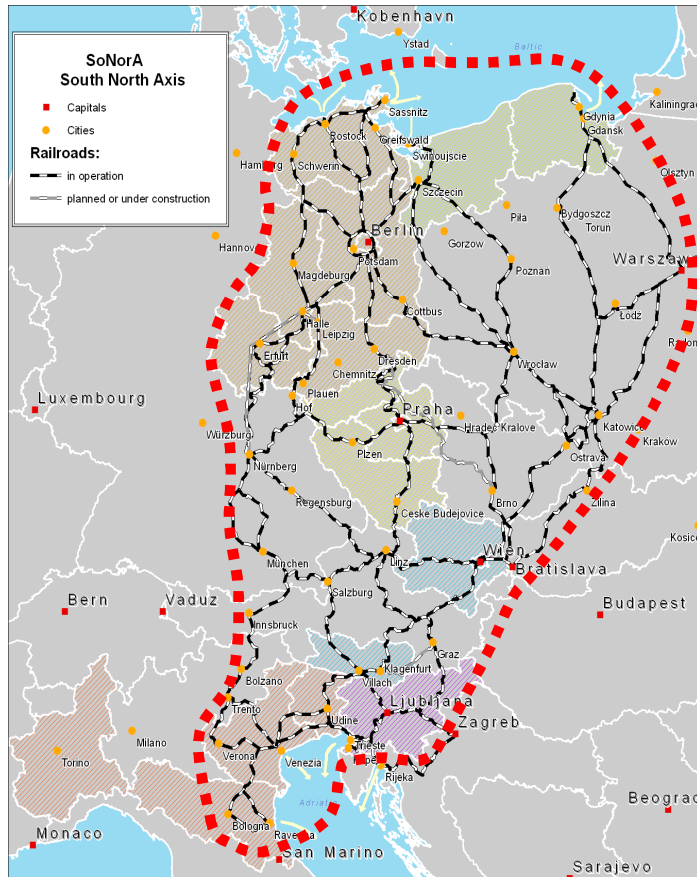
SoNorA Project Goals

- Helping Regions to develop south-north accessibility, between the Adriatic and Baltic seas, in terms of:
- **Making the SoNorA network real**, through support for the completion of transport infrastructure
- **Activating and improving multimodal freight logistics services**
- **Developing transnational action plans** for future realisations
- **Supporting new regional development opportunities** due to transport network improvements



NORTH-SOUTH AXIS

SoNorA: Reference Area and Infrastructure Network



NORTH-SOUTH AXIS

SoNorA TEN-T Recommendations

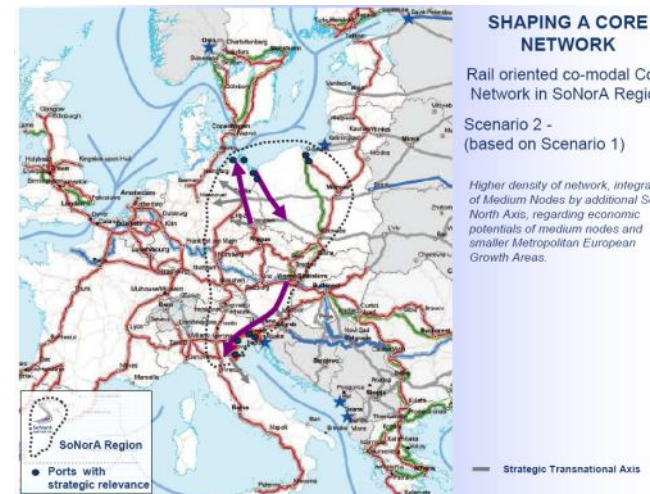


Principles for designing the core network

- Dual layer approach
- **MODES** Selection criteria
 - Maturity
 - Operation
 - Directing
 - Effect
 - Sustainability

Policy recommendations on updating TEN-T Network a SoNorA position paper was developed and submitted to authorities:

- TEN-T Days (2009, 2010): Submitted SoNorA position
- Consultation Process 15/09/10
Presentation 06/10/10 - Brussels



Infrastructure network analysis

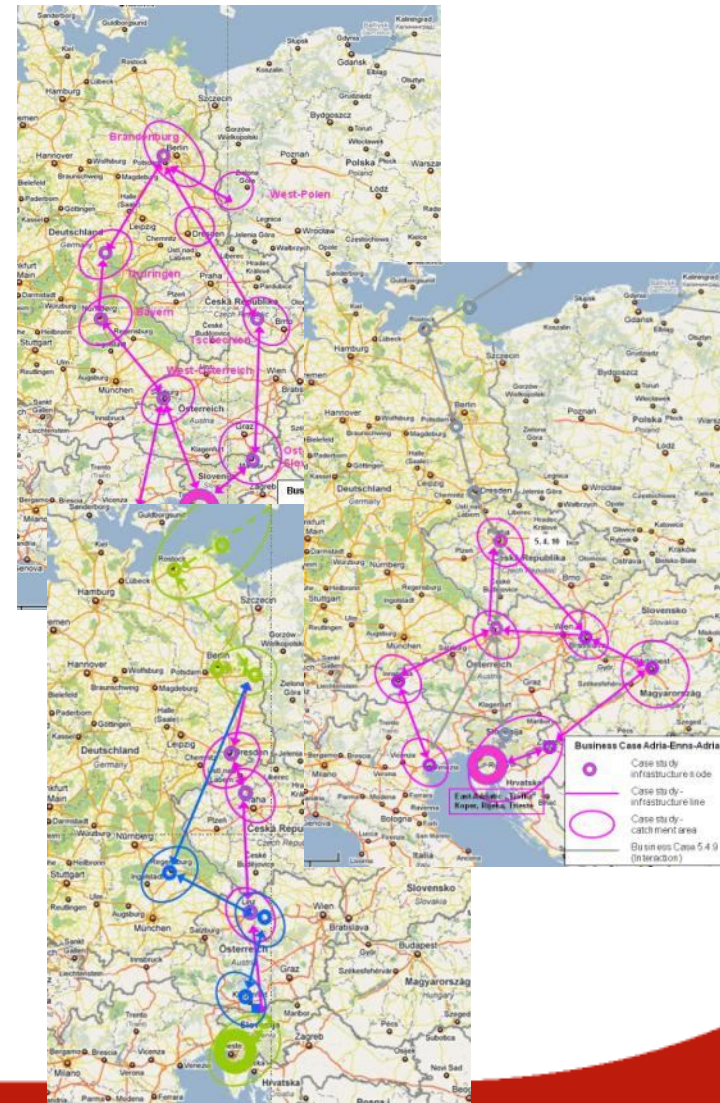
- Model of transport flow (road and rail network: base scenario and future scenario at 2020)
- Case studies on network finalisation
- Inland waterways usage pre-feasibility and feasibility
- Consensus Building analysis
- Infrastructure realisation in environment sensitive areas



NORTH-SOUTH AXIS

Multimodal freight logistic services

- Market Player Involvement
- Pre-investment case studies for logistic infrastructures
- Business case and pilot studies
 - potential port logistics
 - sector-specific logistics services
- ICT tool



NORTH-SOUTH AXIS

Regional economic development opportunities due to transport network improvement

• Regional Economic Workshops

Identification of regional stakeholders

e.g. enterprises, chambers of commerce, regional development agencies, cluster manager

STEP 1

Quantitative Analysis on regional level (NUTS 2)

Desk resesearch using EUROSTAT and ESPON data to assure comparability

STEP 2

Qualitative Analysis of regions with similar structures

Statistical analysis on local level
Cluster and networks (e.g. Centrope, Mitteldeutschland)
Interviews

STEP 3

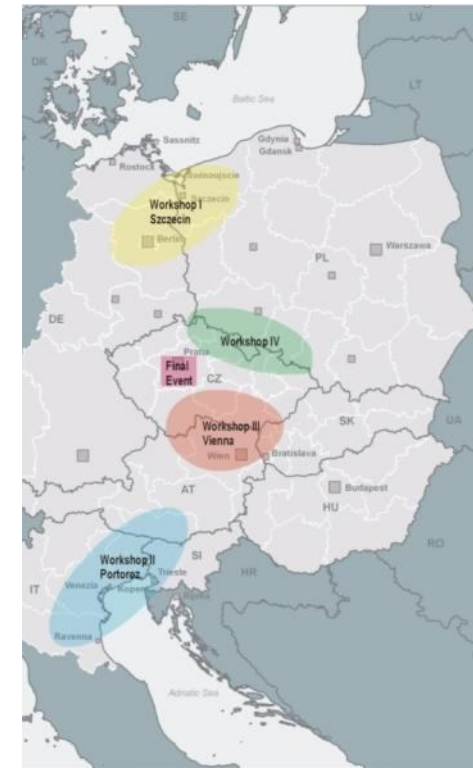
4 Regional Workshops Partners, regional stakeholders

- to identify cooperation potentials
- to specify strategic options
- time: Nov. 2009, Feb. 2010, April 2010, Oct. 2010

STEP 4

Event with Partners and Stakeholders October 2010

- (Discussion of economic chances and risks for regions)
- (Define strategic options for the SoNorA region)



Thank you for your kind attention

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