Presidency of the Regional Council
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REGIONE DEL VENETO

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RAPPORTO STATISTICO

Il Veneto si racconta, il Veneto si confronta

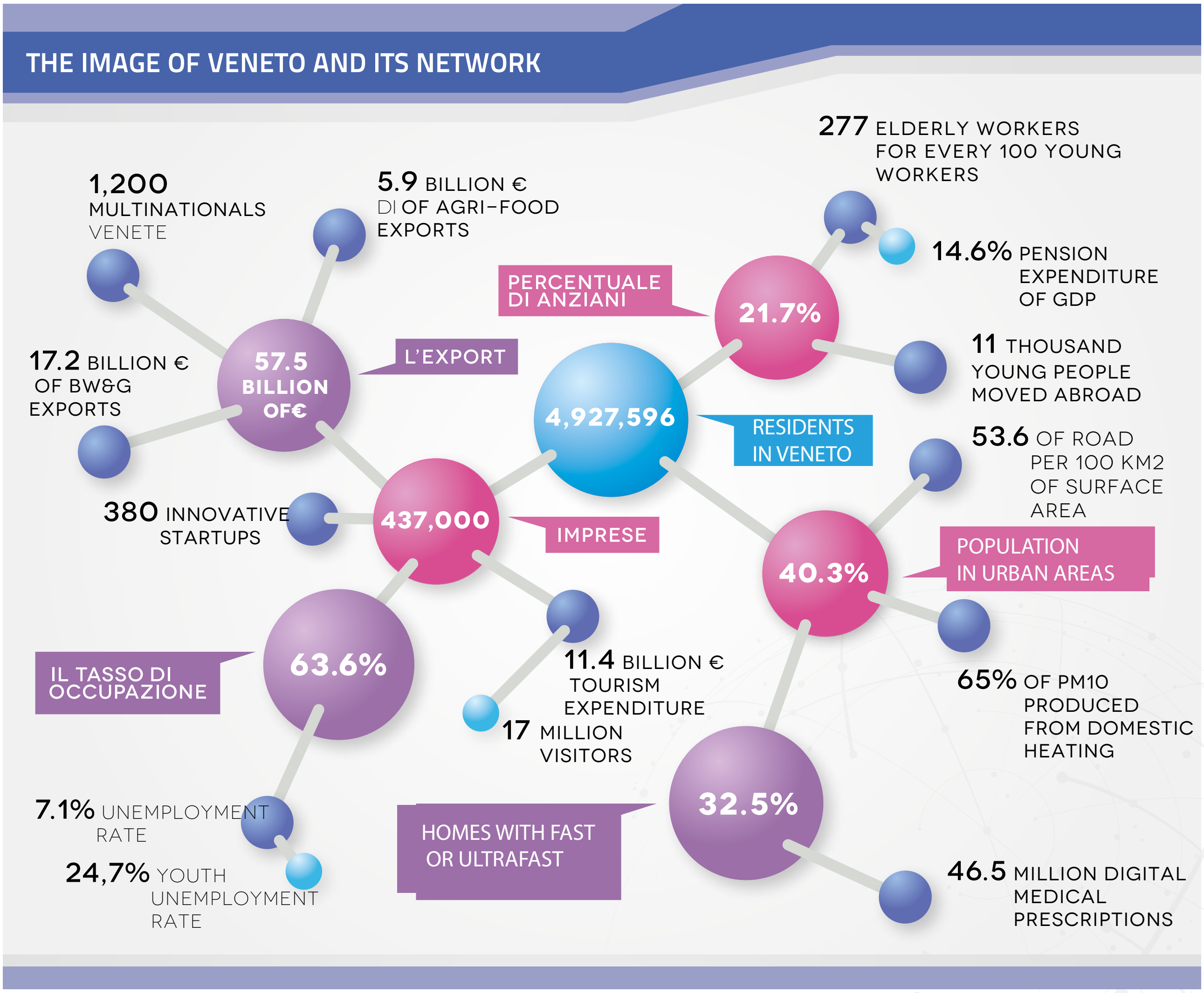
SINTESI

INTERCONNESSIONI

2016 STATISTICAL REPORT

The Interconnections of the Veneto Region

"Born with social networks, the young generations no longer connect themselves: they live connected"
(Jean-Emmanuel Ray, professor of law at the Sorbonne)



Connections are part of our daily life: we are connected to digital networks, we work in a world with less well-defined boundaries, we work online and we make purchases in digital markets. As the Polish sociologist and philosopher to whom we owe the definition of liquid modernity, Zygmunt Bauman, writes, "actions in the connected world are significantly faster and more advantageous than those that life imposes in the disconnected world. In clear contrast with the way in which a person moves offline, the challenges of the life of someone who navigates in the online world are incomparably more simple (without the need for particularly complex skills nor prolonged effort), faster (the results truly are immediate and you get the feeling of being able to obtain anything without having to wait), safer."

But connection is not just digital; you don't have to dig very deep to realise that our lives are far from being composed of airtight compartments, but instead are made up of interwoven experiences, situations, environments that are different but, at the same time, connected. In fact, today, it is impossible to talk about economics without thinking about the repercussions on society, nor to extricate the subject of employment from demographic and generational issues, nor to study the demands of development without considering the needs of environmental protection.

In this scenario, this year's Statistical Report aims to cover the theme of Interconnections and to provide an image of the multifaceted reality of Veneto, using a multidisciplinary approach and from a perspective of ever-increasing integration of different types of knowledge and expertise. The objective is to account for, in a concrete and well-argued fashion, not only the individual phenomena, but also for the relationships between them, evolving from a fragmented and often stagnant vision to a dynamic view of existing relationships, promoting interdisciplinarity as a means of pushing the boundaries of sector-based know- how. However, you cannot begin to talk about Veneto without first considering the global scenario to which it is connected.

Interaction between International Events and the Economic System

In the 00s, the development in volume and variety of international trade in goods and services, the increase in flows of capital and employment, the rapid and generalised diffusion of technology, the integration of financial markets hurdled geopolitical, dimensional and sectorial boundaries. This interdependence, as well as having positive effects on wellbeing and on overall consumer opportunities, has also brought great insecurity.

There are many interconnected elements that characterise the international economic scenario of 2015: from ongoing conflict to terrorist attacks, continuing migration flows, the insecurity of emerging countries, the opening up of opportunities in new countries, such as Iran and Cuba.

Certain factors stimulate global demand for 2015, such as the fall in price of petroleum, the monetary expansion measures of the Central European Bank, the drop in interest rates, the depreciation of the Euro. Alongside these factors, elements emerge that are negative for the economy, such as the financial markets' failure in the capacity for self-regulation, manifested last August with the bursting of the bubble that had formed in the Chinese stock market. The price signal of the stock market crash demonstrates the fragility of emerging economies and the difficulties of the Chinese economic policy in managing this delicate crisis situation.

China influences markets

2016 reaps that sown in the previous two year period; that is to say, a global economy that sticks to a path of recovery at a moderate rhythm and with great instability of financial markets. After a long period of growth, the stock markets have suspended earnings for over a year, recording a significant market correction in the early weeks of 2016.

Whereas, in the second half of 2015, the epicentre of the financial crisis was located in the Chinese stock market, during the most recent stages, all the main markets have suffered losses.

The decreasing pace of global trading

The cornerstone of economic interconnection, or international goods trade, is certainly influenced by all the factors described above and its growth rate, which is usually double that of the growth of GDP, in the past four years has followed that of produced global wealth; the growth prospects remain unclear, with the emerging economies[1] losing momentum in recent years.
This is a worrying situation, according to global trade experts, who have always seen commercial trade as a unique opportunity for economic growth and seen the protectionism that may manifest itself in the form of real wars of currency as a danger that risks obliterating economic recovery1. "In a time of great uncertainty, especially in Europe, where austerity measures have contributed to depressing domestic demand, global trade holds a crucial role in resurrecting prospects of development and reducing poverty," states the OECD press release.
Professor Dani Rodrik[2] sustains that we have entered an era of hyper-globalisation: a market where the benefits of the free flow of goods and capital across national borders have, for the most part, already been produced. Basically, the advantages are by now counterbalanced by enormous costs due to unemployment, wage reduction, lost pensions and depopulating urban communities. "The free market, and the generalised internationalisation of the economy, failed to ensure the expected prosperity, confirming its lack of ability to manage efficiently and effectively the risks tied to the cyclic nature of the evolution of economic activity."
Alongside Rodrik's affirmations must be included the thoughts of Joseph Stiglitz, one of the world's leading economists, 2001 Nobel Prize winner for his research on the asymmetry of informational asymmetries that obstruct the free market, who has long predicted a revision of the entire international economic system.
Within this context, the global economy grew by 3.1% in 2015, a relatively moderate pace, created by a modest recovery of advanced economies (+1.9%) and by growth of +4% of emerging markets, which, despite representing over 70% of global growth, decrease in rate for the fifth year in a row.
GDP of the Europe-28 was up +1.8% at the close of 2015, highlighting a recovery, albeit a fragile one. There was similar growth in the Euro Zone: +1.5% in 2015.

We are out of stagnation but not yet back to pre-crisis figures

In Italy, recovery is gradual; in 2015, GDP is recorded at 1,636,372 million euro at current value, with an increase in real terms of 0.8%, after three consecutive years of decline. In 2016, growth is predicted to be 1%, supported by investments and consumption.
The Veneto GDP grew by 1% in 2015, a slightly higher rate than the national average, and an increase of 1.2% is predicted for 2016.
In the 2017 predictions, positive development of the main economic variables is expected but, despite the recovery predicted for the three-year period 2014-2017, at the end of 2017, Veneto's economy will still be tending to the scars left by the period of stagnation, especially in terms of GDP, investments and consumption. In contrast, on the foreign sales front, our region continues to grow.

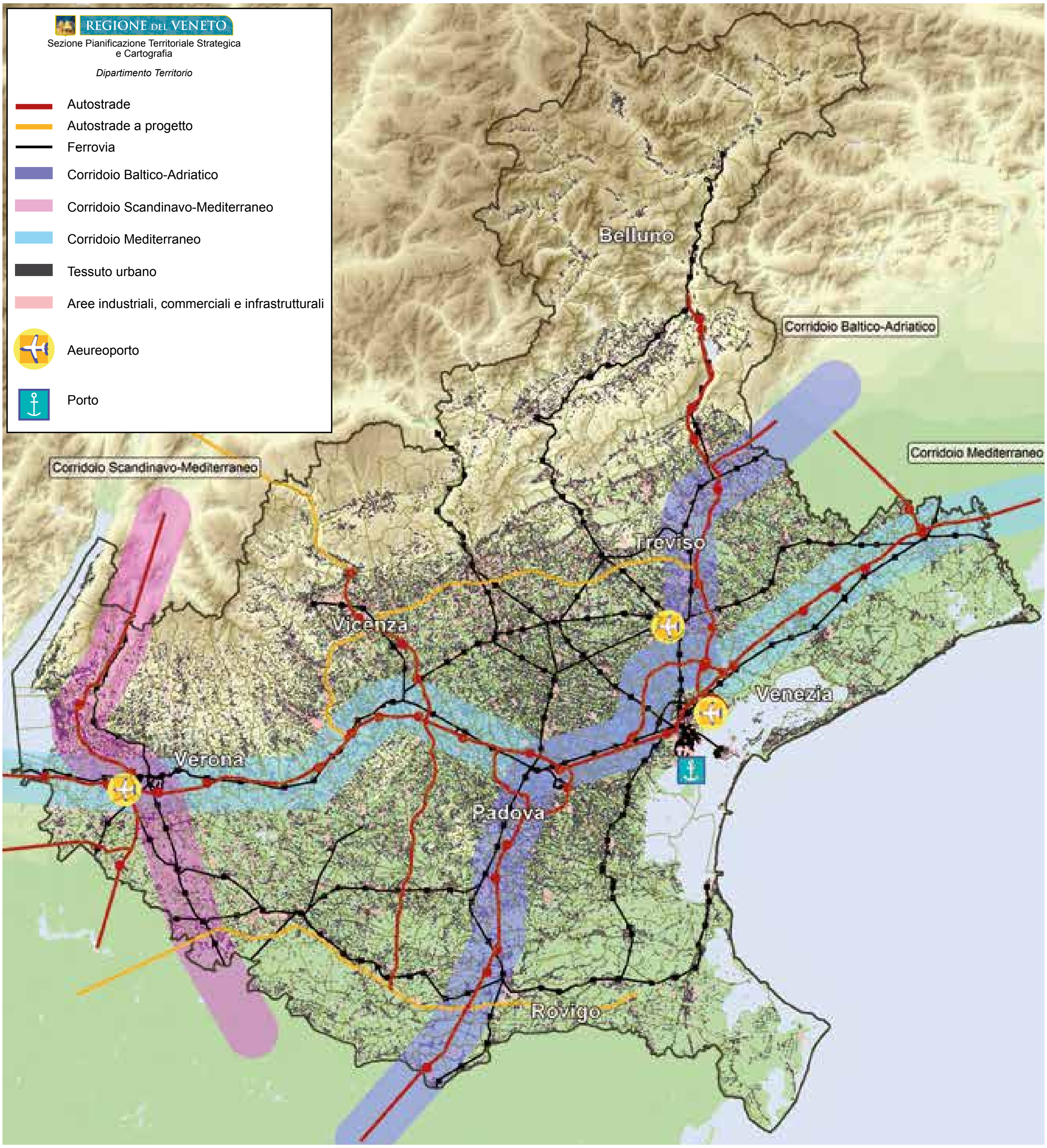
1.1 Veneto: a region interconnected to the world

In this macro scenario, we can only start by observing Veneto from a territorial point of view and from its strategic position of spatial interconnection. Indeed, it is crossed by three fundamental axes, namely the Scandinavian-Mediterranean Corridor (from Malta to Scandinavia), the Mediterranean Corridor (from Barcelona to Kiev) and the Baltic-Adriatic Corridor (from Ravenna to Poland).
However, talking about existing interconnections in the Veneto region means facing issues such as the consequences of the geographical and economical position of the region, the level of road services, logistics, the mobility of goods and people and relative cost, the negative externalities of traffic, as well as the particular settlement plan that characterises the region and gives rise to the so-called "urban sprawl", typical of the central and eastern areas of our region, which winds along the main highway and railway: you live in locality A, the children go to school in B, you work in C, you shop in D, and so on.

[1] "Commercio mondiale, un crollo che fa riflettere" by Monica Straniero, 5 October 2015

[2] Professor formerly at Harvard, now at the Princeton Institute for Advanced Studies

Fig. 1 – Veneto: Infrastructure and Urban Fabric



Source: Veneto Region – Strategic Territorial Planning and Cartography Section – Technical Regional Map (L.R. 28/78)

Veneto: "urban sprawl"

Whereas the urban areas of central Europe feature, in general, a concentrated core and a very stretched-out hinterland, for Veneto, the settlements appear, instead, more widespread and don't help to created compact centres with a limited urban proliferation. This polycentric nature of Veneto, with the consequent creation of urbanised continuum, has long been a strong point towards regional development, especially economic; today, however, there is also recognition of its limitations in terms of land consumption, to the extent that, currently, 12.9% of regional territory is urbanised.

The urban areas of Veneto are situated in the central area (Padua, Treviso, Venice, Verona and Vicenza) and are made up of a densely inhabited urban nucleus (core) and a connected hinterland, as is proven by the commuter flows for reasons of work and study.

40% of the Veneto population lives in an urban area

The urban areas cover 16% of the surface area of Veneto and contain 40.3% or the population. Whilst in provincial capitals the population numbers have remained stable, on average, with the exception of Venice itself, which has lost inhabitants, the hinterland municipalities have recorded an average increase in residents of over 9%. These towns represent the hubs for the provision of essential and superior services for vast and significant areas, to the extent that, typically, the population that gravitates towards them daily is larger than the resident population, including those who study or work there and stay for shorter or longer periods (+26% daily increase in population, on average).

Social vulnerability and housing deprivation is higher in provincial capitals

The concentration of thousands of people in urban areas can exacerbate the risk of social marginality or critical issues of an environmental nature. More problems of social vulnerability and housing deprivation are found in provincial capitals[3] than in the hinterland, including due to the increased presence of elderly households, among those most at risk in financial terms and in terms of need of assistance.

However, from an environmental point of view, you find, on the one hand, the now long-term problems of population centres relating to pollution and traffic congestion and, on the other hand, strong dynamism towards actions aimed at environmental protection, such as the presence of green areas, natural absorbers of pollutants and greenhouse gases, the development of waste sorting, with over 65% of collection consisting of sorted waste, and careful water management, from source to feeding into the network and from user supply to waste water treatment.

Traffic and heating: urban pollution

Urban pollution is due particularly to the heating of buildings, vehicle traffic and industrial and power plants. In fact, cities are the places with the highest concentrations of sources of energy imbalances, with direct consequences, including on the health of citizens. Amongst existing pollutants, there are greenhouse gases – carbon dioxide (CO_2), methane (CH_4) and nitrous oxide (N_2O) – and suspended particulate matter (SPM). Road transport is the principal cause of CO_2 emissions: of the 30 million tonnes of emissions in Veneto in 2010, around 30% is produced by this sector, in particular by cars, followed by heavy vehicles and light vehicles.

Decrease in particulate matter

With regard to particulate matter, however, the macro sector with the highest environmental impact is that of non-industrial combustion, which includes the domestic sector and therefore domestic heating systems: in 2010, this sector produced 65.4% of PM10 and 69.8% of PM2.5 3. Contrary to popular belief, therefore, more particulate matter is produced by domestic heating than by road transport, which is, in any case, in second place.

Despite the fact that the current situation often presents critical issues, particularly within urban centres, from 2005 to 2010 there was an evident, progressive drop in overall emissions, by 24.2% and 23.7% for PM10

[3] PM10 are especially fine particulate matter with a diameter of less than 10 µm (micrometres), capable of penetrating the respiratory system. In addition to PM10 particulate, there is a particular subgroup with a diameter of less than 2.5 µm, called PM2.5, which, as well as penetrating the respiratory system, also manage to infiltrate its lower tract, making them even more dangerous than PM10.

and PM2.5 respectively.

The Urban Agenda has the City of the Future in Mind

It is clear that towns and cities have an increasingly strategic role in the European scenario: they are the site of concentration of the principal environmental, social and economic challenges, in terms of both potential innovative solutions and risk of problems of sustainability. Currently, 72% of the European population lives in towns and cities and this will probably rise to over 80% by 2050 and 67% of European GDP is produced in metropolitan areas.

The European Commission promotes the definition of a European Urban Agenda, as an integral part of the Europe 2020 strategy, for the establishment of a network of development between cities aimed at sustainable and socially inclusive growth and, at the same time, it invites Member States to equip themselves with a national Urban Agenda. The European urban development model envisages a "city of the future", beyond administrative boundaries and viewed as a "functional" city at the service of its territory of reference, favouring a compact structure of settlements with limited urban proliferation.

Provinces Downscaled, Metropolitan Cities on the Rise

Whereas the provinces are seeing their functions being downscaled, metropolitan cities are acquiring an increasingly active role, through a national law (so-called "Delrio Law" No. 56 of 2014). The law has made metropolitan city boundaries coincide with those of the pre-existing provinces, re-examining their organisation, and this was followed by the Veneto Regional Law No. 19 of 2015. Thus, we are faced with a comprehensive overhaul of the organisation[4] of local autonomy, which has yet to be concluded. As far as Veneto is concerned, the definition of Metropolitan City relates to Venice, which now has the task of filling the planning acts with content, starting with the 3-year Strategic Metropolitan Plan, and of ensuring the necessary resources for the implementation of urban renewal interventions. In parallel, the number of other entities which carry out public functions, such as Chambers of Commerce and land reclamation authorities, is being reduced and the dimensions of reference regional associations is being increased. For the 7-year period 2014/2020, € 892 million has been made available for interventions devoted to the 14 metropolitan areas in Italy, through the National Operational Programme for Metropolitan Cities (PON Metro)4, adopted in 2014 as a national planning instrument, co-funded with EU resources.

€ 77 Million for Veneto's Medium Cities with the POR-FESR

For medium-sized cities and regional urban hubs, however, there is the POR-FESR (ERDF) 2014-20205.

Within the POR-FESR, there is an axis dedicated to Sustainable Urban Development, with funding of € 77 million destined for sustainable urban mobility, social inclusion, small and medium enterprise competitiveness and the development of e-Government services. The funding concerns urban areas and asecond type of area made up of smaller municipalities that possess significant urban functions and are positioned[5] along transportation routes.

Consequently, confirmation of Veneto as an "urban sprawl" and the European lines of development have led to an increased demand for transport, especially private transport required by resident citizens.

Veneto's Infrastructural Network

Along the railway and road network

The physical road infrastructure (provincial, regional, national roads) provided in Veneto – understood as km of road per 100 km2 of surface area – over the past ten years is below the national average: 53.6 km as compared to 58, in 20136. However, the highway network contains more road than the average: 3 km as compared to 2.2 km.

In 2014, 3,903,220 vehicles travelled on the Veneto road network (74% of which were cars), to which is added all the through traffic. In the same year, 998,317 actual vehicles7 per day travelled on the highway network (770,709 for passenger transport and 227,608 for goods transport), a slight increase (+1.3%) as compared to the previous year, but still down from the period 2009-2011 (approx. -3-4%).

[4] Department for Development and Economic Cohesion. Programma Operativo Nazionale Città Metropolitane 2014- 2020, 22 July 2014.

[5] Veneto Region, Operational Programme within the field of the objective "Investments to promote growth and employment", Veneto Regional Operational Programme – European Regional Development Fund; 2015.

This increase, although small, in Veneto road traffic leads to a focus on the still-open challenge of road safety. During 2014, almost 14 thousand accidents were recorded on the Veneto road network, with over 19,500 injured and causing 325 deaths. Compared to the previous year, the percentages indicate +1.2% accidents, +2.8% injuries and +8.7% deaths. This increase, combined with the fact that 71.2% of accidents can be attributed to behaviour, increases anticipation of the digital revolution in the automotive industry, which will occur within the wireless digital network environment. The fact that mortality rates dropped by over 53% from 2001 to 2014 will not allow us to be completely satisfied until we achieve the total elimination of deaths and scale down the number of injuries, which in 2014, for Veneto only, led to estimated social costs of around € 1.5 billion relating to road accidents.
The railway statistics are fully in line with national data: 6.8 km per 100 km2, 63% of which electrified and 48% twin-track.
The Veneto infrastructure also includes, of course, the Port of Venice and the Venice-Treviso-Verona Airport System.

The dynamism of ports and airports in 2015

The global financial crisis has also affected port traffic, in particular the number of incoming ships, which decreased continuously from 2008 to 2014, with an inversion in trend only in the final[6] year. Thus 2015 is the second consecutive year of recovery in goods movement (just over 25 million tonnes) and, above all, is a record year for container movement (560 thousand TEUs8).
The Venice-Treviso Airport System ended 2015 with very positive traffic results: +3.8% passengers, +5% aircraft movement. Venice Airport recorded 8,751,028 passengers, an increase of 3.3% as compared to the previous year. Treviso Airport saw a total of 2,383,307 passengers, +6% on 2014. Verona[7] Airport instead saw an increase in goods traffic but a decrease in passengers, with +8% and -6.7% respectively in 2015.

Veneto: a Dream Tourist Destination
For the rest, Veneto proves to be one of the most desired tourist destinations in the world. The region offers an unrivalled range of tourist attractions, favoured by the natural structure of the territory, which is promoted by the entrepreneurial capacity of tourist operators, always ready to make the changes necessary to best meet the demands of the customer.
The year 2015 held yet another record for Veneto, with over 17 million arrivals, one million more than the previous year (+6.1%). There was also a corresponding, though lesser, increase in overnight stays (+2.3%), which are again over 63 million. These excellent results reflect a good year for international tourism (+5.8% arrivals and +2.2% overnight stays), but also increased interest among Italian tourists (+6.7% and 2.4% respectively).

Record tourist arrivals in Veneto in 2015

Positive variations are recorded by both the hotel industry (+6.1% arrivals and +3.9% overnight stays) and complementary hospitality (guest houses, hostels, B&B etc.) sector (+6.3% and +0.8%). All these results relate to those who have spent at least one night in a hospitality establishment. ISTAT (Italian National Statistics Institute) estimates that there were around 13 million day trips taken by Italians in Veneto in 2014, including in this figure movement outside of the usual environment and excluding movement for routine activities tied more to commuting for work and school than to tourism.
Overall, in 2015, tourist spending in Veneto was around € 11.4 billion, recovering from the decreases suffered in recent years and returning to values seen in 2011-2012. Foreign tourists spent around € 5.2 billion, a sharp increase on last year (+8.2%). Italian tourist spending was around estimated at around € 6.2 billion, a figure that also takes into consideration movement in relation to unregistered buildings, such as second homes, a phenomenon especially common in seaside or mountain destinations.

€ 11.4 billion in tourist spending in Veneto

Italians come to Veneto mainly to visit our cities of art (45.7%), whilst the seaside localities record the greatest number of overnight stays (39.4%).

6 Most recent year available.

7 Actual vehicles is understood to mean all vehicles that entered the highway, irrespective of the distance travelled. 8 TEU: twenty-foot equivalent unit, the standard unit of measurement for ISO container transport volume, corresponding to around 40 cubic metres.

The people of Veneto prefer to holiday in

The people of Veneto prefer to spend their holidays in Italy, with around 80%, and, in more detail, within Italy, the tourist localities of our own region saw 30% of arrivals in 2014; the second-most preferred destination for Veneto tourists is Trentino Alto Adige, with 16.3%. There was an increase in Veneto interest in the most popular regions, such as Lombardy, Tuscany and Emilia Romagna, but Umbria also makes an appearance among the most desired destinations, whilst Campania and Sardinia have only just recently begun to recover the losses in Venetian tourist numbers of previous years.
In 2015, over 1.6 million Veneto tourists stayed overnight in the Veneto Region, demonstrating a sharp increase as compared to 2014.

The Veneto IS Chosen by foreigners and Italians to the art cities, Dai Venetian for the sea

Foreign and Italian tourists choose Veneto for its cities of art, but the people of Veneto prefer the beach Generally, the people of Veneto choose to stay within their home region to holiday by the sea, making up 46.3% of tourist resort guests. The second-most preferred destination in which to pay to stay overnight are cities of art, which, since 2011, have surpassed, though only just, mountain destinations. Veneto people staying within their region follow the trend of substituting long paid holidays with shorter holidays throughout the year and/or weekends out of the city. In addition, the summer season still sees more movement but the alternative of holidays in other periods of the year is becoming increasingly popular, an inclination that certainly strengthens in a period of financial crisis. Indeed, there is a notable lengthening of the beach season and slightly more evenly distributed tourist flows throughout the year in mountain, lake and thermal spa locations.

Transnational Veneto: Dynamic Commercial Trade

Veneto is also connected to the rest of the world, including through dynamic commercial trade: in 2015, Veneto exports exceeded € 57.5 billion, which corresponds to over one third of regional GDP. Foreign tourists make up over two thirds of visitors to Veneto and, in 2015, there were 34,302 entrepreneurs with foreign citizenship who have set up their businesses in Veneto, 13.5% of the total.

Veneto has a strong inclination towards commercial trade

Veneto exports continue to support the regional economy. Last year ended with a gratifying increase of 5.3% in export value, as compared to 2014, the biggest variation since 2011.
Among the principal markets, there are double-figure increases in sales of Veneto products in the United States (+16.6%), thanks to the depreciation of the euro against the dollar, in the United Kingdom, where the greatest increases in terms of value were related to agri-food products (+€ 117 million) and mechanical manufacturing (+€ 68 million), in Poland, Croatia and in Mexico (+22.9%, an increase of € 120 million as compared to the previous year).

Exports fly to the US and UK; crisis on the Russian front

Exports in Veneto products to China grew by +4.9%: the reduction in turnover for mechanical manufacturing, the leading sector in Veneto exports to the country, is more than compensated by the increase in exports in optical and chemical products and the wood industry.
On the contrary, turnover in sales to Russia, after the fall of around € 180 million euro recorded in 2014, fell again in 2015 by 30.6%, that is to say that Russia has dropped from eighth to thirteenth place in the rankings of the principal markets of regional exports.
The main Veneto export sector, in 2015, remains that of mechanical engineering, with € 11.4 billion in foreign sales; fashion takes second place with € 10 billion. The product sectors that have made the biggest contribution to growth in Veneto exports in 2015 are those of optical products.

Mechanical engineering and fashion lead Veneto

Almost € 6 billion in agri-food exports
Most likely due to the impact of the Expo, the Veneto agri-food exports market9 ended 2015 at a value of almost € 6 billion, 16% of the national total and figure never achieved before. The dynamics of Veneto exports of these products are changing and developing, becoming for the first time the most exported in Italy.
With over 30% of total Veneto agri-food exports, wine is yet again confirmed as the leading earner, bringing

L'export dell'agroalimentare sfiora i 6 miliardi

in more than € 1.8 billion, an increase of almost 10 percentage points compared to the previous year, crowning Veneto once again king of Italian wine production. There is no surprise even at the amazing double-figure growth in exports of fizzy wines, which increased by 32.4% between 2014 and 2015, representing today almost one third of the total value of exported wine.
Within the complex international framework, Veneto successfully improved its placement, demonstrating more intense growth in exports not only in terms of global demand, but also in relation to other European regions. With an average annual increase of 4% between 2012 and 2015, Veneto holds the record for growth in exports, alongside Baden-Württemberg and Bayern, in Germany, Île-de-France, Midi-Pyrénées and Rhône-Alpes, in France and Cataluña, in Spain. Baden- Württemberg is in second place (3.6%), Cataluña in third place (3.3%). Italy is placed lower in the rankings, though growth was superior to global demand (2% as compared to 1.8%), as is Rhône-Alpes, which fails to exceed 0.4%.

Veneto holds the record for growth among its competitors

BW&G: the Flagship of Veneto Exports

In order to strengthen the regions's position on international markets, Veneto relies on its Beautiful, Well- made and Good (BW&G) products, which hold even more weight that[8] on national soil: BW&G exports are worth € 17.2 billion and form 30% of regional manufacturing exports, as compared to the national average of 18%. These products include medium-high range goods in the agri-food, clothing, footwear, furnishings, eyewear and goldsmith-jewellery sectors and combine the ancient tradition of Veneto know-how with innovation of design, materials and production techniques and represent one of the pillars of the local manufacturing system, a heritage worthy of support and promotion.
Direct BW&G exports in mature markets pick up pace and exports in new markets are on the increase Within a more complex and heterogeneous international framework, further effort is required on behalf of Veneto businesses in their choice of winning strategies and target markets. Thus far, Veneto has responded successfully to this challenge. Firstly, Veneto BW&G has managed to exploit the recovery of demand in mature economies, towards which growth in regional exports accelerated between 2014 and 2015.
Secondly, in 2015, notwithstanding the volatility of the international situation, notwithstanding, above all, the fall in demand from Russia, regional BW&G exports in new markets did increase by a small amount. This is an important indication of the resilience of the local economic system, which managed to react quickly to falls in demand in areas in difficulty, directing its exports elsewhere, providing proof of its versatility and determination. Thus, in 2015, losses in exports to Russia, Brazil and other less important countries were covered by an increase in BW&G exports to China, Mexico, Poland, South Africa, Saudi Arabia and Turkey, to name but the most important destinations.

Accelerate the export of B & B Direct in mature markets and also grows towards the new

Maintaining its position constant over the next few years, in 2021, regional exports to the United Arab Emirates, leading importer of BW&G among the new markets, could reach around € 674 billion, 240 billion more that the current € 434 billion. By strengthening its role as a hub of trade and tourism, the country will continue to be an ideal showroom for the promotion of Veneto BW&G around the world. China will maintain its attraction to Veneto products, thanks to the social transformation it is undergoing and also based on public policies of expansive nature. Russia, despite current difficulties, will remain, in 2021, the second biggest importer of BW&G products among the new markets. Closer and more accessible markets, such as Turkey and Poland, will maintain their appeal, though in the former, in addition to the uncertainties of political risk, certain difficulties in approaching consumers who live outside of the larger urban centres; in the latter, there is increasing pressure from other international competitors, such as China and Germany in fashion or from local producers in furnishings. There are also certain more promising markets featuring broad growth prospects in the demand for BW&G goods: first and foremost, India, for which growth is predicted to rise by 94% in six years. The expansion of Veneto product imports to this

But which will be the markets of leading interest for BW&G?

[8] Understood to mean the combined export of two economic associations: "agriculture, forestry and fishing" and "food industry".

country is negatively affected by poor accessibility and very high non-tariff barriers.

Not Just Exports…Foreign Investments

The tendency of local enterprises towards internationalisation is decidedly higher than the national average. In fact, 13.8% of national exports and 13.8% of Italian-based multinational businesses (enterprises active abroad through own branches and/or joint ventures) are of Veneto origin.
Post-crisis model of internationalisation
Since 2012 in particular, certain positive signs have been seen, in terms of both exports, which have grown at a higher rate than the national average, and foreign investments, which have shown progressive increases, even during the crisis, in investor base, or number or enterprises, though often of only small or very small amounts, capable of establishing a direct presence abroad. Though "weak", this sign is nonetheless an indicator of renewed vitality of the region's system of small and medium enterprises: during 2014 too, as with during the whole period of financial crisis, there was a certain number of small and medium enterprises of Veneto that invested abroad for the first time, mostly to consolidate their presence on leading end markets (most of these are enterprises who opened new commercial headquarters abroad) and less commonly to set up new production sites in neighbouring markets or to delocalise production to countries with lower costs of labour. The hope is that this sign is a prelude to recovery of the region's phase of "multinational pursuit", launched in the 1980s by the (few) large and medium-large leading enterprises, continuing into the 1990s and early 2000s with the impetuous arrival on the international scene of small and medium enterprises. The ability of local enterprises to invest abroad in production, trade and services is an essential indicator of their capacity to make their corporate structures more efficient and reactive to changes in the economic situation and to the social and political conditions of the international scenario. A positive response should also be reserved for the growing presence of multinational enterprises (MNEs) in the region, which, in addition to being proof of the attractiveness and competitiveness of Veneto, can
also contribute to enhancing said qualities in a circular manner, as a result of both the cumulative effects of bringing added technological and managerial expertise and the spill-over created by MNE interaction with the local economic fabric, as many studies have shown.

The internationalization model in the post-crisis

1.2 Intergenerational Connections and Social Repercussions

However, the region is not just a physical space connected by settlement and infrastructural networks; it is above all the site of a complex network of social and economic connections, favoured by shared culture, history and human skills and experience.

From Generations in Transit…

The economic development of a territory cannot disregard the most important element on which it stands, i.e. the people. In particular, the ageing of a population and the developments predicted in the coming decades will have a certain impact on national accounts: the part of public spending most closely tied to ageing (pensions, health and care) will record an increase, mitigated only in part by the predicted reduction in spending on education and unemployment.
From a demographic point of view, we can say that the European continent of old is also the old continent. Indeed, Europe is characterised by a more intense population ageing process, to the extent that it is the oldest continent, not just today, but for coming decades. Italy, together with Germany, is the oldest country in Europe. The average age has increased, as well as the proportion of elderly people, to the detriment of the younger segment of the population and that of working age. The Italian population has an average age of 45 years (as compared to the 42 years of the EU-28 and 36 years in Ireland, the youngest country), whilst in 1994, it was 38 years. Furthermore, of the almost 61 million residents, 21.7% is at least 65 years old (the European average is around 19%), with peaks of up to 28% in Liguria, which takes the title of oldest region in Europe. Over the next 25 years, the proportion of elderly people is estimated to reach 29% and increase as far as 30% by 2060.

The Veneto population consists of 21.7% of elderly people, in line with the national average. Whereas a moderate increase in population is predicted for coming decades – around 14% between now and 2060 – the number of elderly people is set to increase more sharply (+50%) and even more so for the very elderly, that is to say people of at least 80 years of age, who will double in number by 2060 (+133%).
The process of demographic transformation, which sees an increase in size of the oldest segments of the population, is caused by several factors, mainly the combined effect of a decrease in birth rate and an increase in longevity, which, though not uniformly, are characteristic of the whole of Europe.
In 2014, there were almost 13% fewer births in Italy as compared to 2014 and predictions for 2015 only serve to confirm this trend, with numbers that mark a record low since the Unification of Italy.

Increasingly fewer babies and more elderly

In Veneto, the difference is even more pronounced: the number of children born in 2014 was 16.4% lower than that of 2008. The drop in birth rate in our region concerns to a greater extent the provinces of Belluno and Rovigo; the latter has the lowest fertility rate in the region (1.16 children per woman).
The reduction in number of births depends on various factors, one of which is structural. In fact, in recent years, the productive life of women born during the baby boom of the mid 1960s (who reached around 45 in 2010) is coming to an end and reproduction is entrusted to the women of successive female generations, who are much less numerous: in Veneto, between 2010 and 2014, the number of women of reproductive age fell by 60 thousand. Another factor is the existing fertility model, or average number of children born to each woman. This indicator, which has decreased over recent years, tells us that, as well as the structural effect of a situation with fewer women, there is also a specific factor tied to the fact that, on average, each woman has fewer children than in the past. Currently, with an average of 1.54 children per woman, there is a situation of diversity within Europe: France, Ireland, Sweden and the United Kingdom are the most prolific countries (more than 1.8 children per woman), whilst Italy, together with Southern Europe, Germany and certain Eastern European countries, is among the least fertile (1.35). In Veneto, the situation is slightly better (1.39); however the trend is clearly downward (it was 1.5 in 2010). Up until now, the diminishing number of Italian women of reproductive age and their poor birth rate had been compensated, in part, by foreign women, who are now, however, also revising their reproductive behaviour. Whereas, in 2002, foreign women in Veneto had, on average, 3.09 children, in 2014, this figure drops to 2.08. For the same year, the fertility rate of Veneto women is just 1.26.

Fewer women and lower fertility rate

Delaying motherhood until a later age also contributes to lowering the birth rate. Today, in Italy, women give birth at 31.6 years of age and in Veneto at 32. By reducing the available fertility period, the effect can be failure to fulfil the desire to become a mother; the reported desired number of children is above 2, with an OECD average of 2.27 and, in Italy, of 2.01. What has most impact, therefore, is not so much the low desire for children as the discrepancy between the desired number of children and the number actually possible. The most significant factor that may affect this aspect is the organisation of time in the world of work. In our country, having children at a young age is a hindrance to the career progress of women, to the extent that the term child penalty is referred to in literature. In Italy, in 2014, for every 100 childless women in employment, there were only 77 working mothers with small children (in Veneto, the figure was 88). Furthermore, the rate of employment of women with children is, for all productive ages, systematically lower than that of women without children, clearly demonstrating the very poor consideration of the reconciliation of family and working life by the labour market.

Unmet desire for motherhood

... to Generational Imbalance in the Labour Market

The ageing of the population leads, however, to the ageing of the workforce, with inevitable repercussions on the labour market and economic implications on the sustainability of the pension system. The progressive unbalancing of the structure of the population towards the categories of advanced ages renders the sustainability of the pension system a critical issue, based on the burden of contributions of an active population that will be increasingly insufficient in relation to the increasing number of those benefiting from pensions.
An ageing active population

In less than ten years, the employment turnover – which expresses the percentage ratio between the segment of the working population that is potentially about to retire (55-64 years of age) and that which has just entered the world of work (15-24 years) – in Veneto rose from 97, recorded in 2005, highlighting a situation in which the young employed outnumbered those of 55-64 years, to 127 in 2008 and 277 in 2014. The two components of the turnover have changed radically in the past ten years, following divergent dynamics: the elderly component, the index numerator, has increased sharply, whereas the young component, the denominator, has decreased significantly.

An aging, aging population

From 2005 to 2014, the employed in Veneto of between 15 and 24 years of age have decreased in number by 37%, against, instead, an increase in the population of this age group of 4.4%. This debacle is due to the financial crisis, the scarcity of employment, in particular for young people, and the increase in education; in fact, the poor availability of employment pushes young people to continue in education.
On the other hand, the changes in legislation on pensions related to financial sustainability issues tied to the ageing population and poor fertility rate, amongst which the raising of the minimum age of retirement, European recommendations and the increase in female participation in the labour market have led to an increase in the number of 55-64 year olds in employment: indeed, in ten years, they have increased in number by 78%.
From comparisons among regions, it emerges that our region has a more sustainable pension system than others. In 2013, 100 employed people in Veneto supported 63 pensioners, as compared to the Italian average of 72, making it the third lowest regional rate.

Decent Pensions and Sustainable Pension System: a Disconnected Network?

Clearly, the important social consequences of ageing also draw attention. Whilst, on the one hand, the increase in number of elderly people, interconnected also with the difficulties caused by the crisis, places the financial sustainability of the pension system at risk, on the other hand, we must take care to ensure pensioners an adequate quality of life, in the spirit of solidarity among generations.

However, Veneto has a more sustainable pension system

A fairly favourable situation emerges for Veneto, as compared to other regions: in 2013, income of the newly-retired stood at 76% of the income of those nearing retirement; the Italian average is 73%. However, half of female pensioners live on less than € 1000 a month.
It is hard to tell, however, how far future retired generations will manage to maintain a quality of life sufficiently similar to that enjoyed during employment. With the Fornero Reform, benefit contributions accrued from 1 January 2012 will be calculated for all workers using the contributions-based system introduced by the Dini government for workers employed from January 1996 and for those who, at that time, had fewer than 18 years' contributions; the Dini reform maintained the pay scheme, however, for those who had already accrued 18 years of contributions as of 31/12/1995. The contributions system, which is based on contributions made during working life, is less advantageous than the pay scheme, which is instead calculated based on the average wages received in the final years of employment.
What will be the impact on people of delayed retirement?
What will be the social consequences of all this?
Taking into consideration the latest benefit reforms (excluding any possible regulatory amendments that could arise in coming decades) and assuming that there will be a constant increase in life expectancy at birth, it emerges that, however much demographic predictions show a progressive increase in life expectancy, there will be increasingly fewer years to live upon reaching age-base retirement. In particular, whilst, in 2010, women in Veneto had almost 27 years to enjoy once reaching retirement age and men more than 18 years to do the same, in 2021, this will have fallen to 21.6 and 17.7 respectively, decreasing further to an estimated 19 years and 16 years in 2060.

Poorer pensions and fewer years to be enjoyed in the future after a lifetime of work?

Whilst we must bear in mind the possibility of early retirement, contributions-based pensions using the "quota" system[9], as well as all the possible regulatory amendments that could occur, the situation today does not look too bright. What's more, thanks to the contributions system, there will be significantly less money to live on than during employment but there will also be fewer years to devote to ourselves and our families after a lifetime of work. And the impact goes beyond the individual, extending in different directions: for example, there will be fewer grandparents to look after grandchildren and this could affect the supply of services for children.

In the future, will we have the poorest pensions and the fewer years dedicated to ourselves after a lifetime

Young People; How to Connect to the Employment Network

In our current scenario, it is essential to support young people entering the world of work, the base of the pyramid on which today's working population that is too narrow to balance our overly top-heavy structure. In recent years, youth unemployment has increased strongly and progressively, making young people feel increasingly like extras in the labour market instead of leading actors.

Fortunately, in 2015, the rate of youth unemployment finally stalled: in Italy, after seven years, unemployment among 15-24 year olds finally dropped from 42.7% in 2014 to 40.3%, still double the European average (EU-28 20.4%). Veneto continues to hold the lowest unemployment rates in Italy, together with Trentino Alto Adige: with a rate of 24.5% in 2015, the first decrease in seven years, dropping by three percentage points as compared to the previous year, the region takes second place in the lowest unemployment rates among Italian regions. In addition, compared to other Italian regions, Veneto recorded one of the highest levels of employment and lowest NEET rates (young people Not in Education, Employment or Training), confirming once again its position among the top regions in Italy.

Youth unemployment falling after seven years...

However, this fall in youth unemployment is accompanied by a significant increase in the rate of inactivity (in Veneto, +2.7% as compared to the previous year) and an increase in numbers attending study or training courses. It follows that the lower rates of employed, NEET and also unemployed recorded in 2015 are replaced by the increase in the rate of the very young who choose to continue to study.

...also because many young people choose to continue in education

Faced with the uncertainties that guide our society, young people try to increase their chances of success through education. Last year, there was an increase in enrolled students and graduates from the Veneto region in Italian universities. Our students demonstrate a tendency to try study periods abroad, with the Erasmus Scheme, for example, and declare their willingness to move abroad for work. Often, however, the decision to seek their fortunes abroad is based on necessity due to difficulties in finding employment suited to their qualifications at home.

In the 3-year period of 2012-2014, 11 thousand young people of 25-34 years of age moved abroad from the Veneto region: in six years, the number of young people who have chosen to leave Veneto to move abroad has increased by 44%. On the other hand, of 100 young graduates employed abroad, more than half carry out highly specialised work (56%), whilst those who remain in Italy only manage to find this type of employment in 40% of cases.

11 thousand young people of Veneto live

Education and employment are, therefore, closely connected. For this reason, formative collaboration between these two fields in Italy has undergone important developments in two directions: the improvement of alternated school/work training opportunities and the promotion of apprenticeships, with the aim of facilitating the passage from the world education/training to the world of work.

School and work: two links in a chain

Work in Veneto: More Leading Actors than Extras

Clearly, it is not enough just to create more jobs. In order to stay connected to society and reduce the risk of

[9] The total sum values of registered age and accrued contributions are cross-checked.

exclusion, we also need more stable employment: a permanent contract offers increased opportunities to the individual, provides greater security and allows him to plan for the future. According to the Veneto Lavoro (Veneto Employment) data (extracted on 4 February 2016), 2015 ended leaving for 2016 an inheritance of stock more consistent of permanent contract employment, although the true testing ground will be the length of time it will take for this phenomenon to be deployed.

Unemployment falls; Veneto has the second lowest rate of people out of work...

However, the main feature of 2015 is that, after seven years, unemployment in Italy has finally fallen, and quite significantly too: the rate dropped from 12.7% in the previous year to 11.9%, thanks in particular to the decrease in the female component, although it must be pointed out that the greater decrease in female unemployment is accompanied by an increase in their rate of inactivity, which has instead decreased for men.

In our region, in the wake of a decrease in the number of those in employment, the number of people in search of work decreased by 6.2% as compared to the year before, with 156,629 unemployed.

...but the reduction is partly due to female inactivity

The rate of unemployment dropped from 7.5% in 2014 to 7.1%, again the second lowest regional rate in Italy, with Trentino Alto Adige again in first place. In particular, unemployment fell by two percentage points in Vicenza, as compared to the previous year, to 4.8% in 2015, the second lowest provincial rate in the country.

The influence behind this reduction in the numbers of unemployed comes only from the female component: unemployed women in Veneto fell in number by over 12% in just one year, against an increase in male unemployment. This data, tied to that of employment, which remained unchanged for men and fell significantly for women, is reflected in the rates of unemployment, which show a slight increase among men and a noticeable decrease among women. What emerges, therefore, is that it is actually the female workforce that is decreasing, i.e. the total number of both employed and unemployed women, in particular young women, which leads to an increase in inactivity and the relative rate of inactivity and affecting also the rate of unemployment. However, we must consider that, between 2013 and 2014, female inactivity dropped by almost 4% and that, in 2015, women in this situation are still fewer than those recorded two years ago.

1.3 Veneto: Digital and Innovative

Social, economic and territorial connections: as already mentioned in the introduction, there are many threads in our interwoven regional reality. We have left until last, but not least, the digital connection that flows between technology and innovation.

Tuning in to a Digital Network

The great digital revolution began at the moment in which the user masses began to connect their PCs to the internet: it was clear from the very beginning that the value of this network would be greater than the simple sum of the individual connected devices. In 1986, Italy was the fourth country to connect to the internet, the "network of networks", today the most-used system of communication and the most powerful tool of globalisation. The internet is a true dimension of life: accessible to anyone at any moment, it has revolutionised routines and methods of relating to others and, in the field of production, not only has it created new investment markets, but it has also changed working methods in even the most traditional professions.
Everyone and everything travels online
There is no part of daily life that isn't online: your shoes "talk" to the latest app download, telling it how many steps you've taken, the speed and distance travelled, the coffee machine starts to heat up as soon as you switch off the alarm on your bedside table and the heating starts up at home when you get in your car to go home from work, but only if there isn't too much traffic. Cars become bits that travel on a circuit, using their sensors to monitor their surroundings and serving as development tools for improving results on the whole road system. The mobility of tomorrow – interconnected, digital, smart, based on new traffic management systems – will be more complex than that of today and that of the past. But, once organised by appropriate interaction tools, it is precisely this complexity that will be its wealth, intelligence and value. One indication

of the revolution of the system is the collaboration agreement between FCA (Fiat Chrysler Automobiles) and Google, signed on 2 May 2016. This is evidence that research into self-driving cars is crossing over from the scientific to the industrial field.

31/5000 Everything and everyo-

Internet connection is now a must for hospitality facilities: Wi-Fi is among the most sought-after guest services; furthermore, a well-designed website is a great asset, capable of attracting customers from all over the world. It is estimated that, today, one trip in three made by Italians, both in Italy and abroad, is booked over the internet.

Veneto pursues the objectives of the Digital Agenda

Of the 437 thousand Veneto enterprises, 3 out of every 4 have a company website and almost half are active in e-commerce. Making use of internet potential is more intense in Veneto as compared to the average national trend, both as the opportunity for self-promotion in an international showcase and as a tool for concluding commercial transactions. The trends show how online connection can provide increased guarantees for successful growth, internationalisation, productivity and competitiveness.

The European 2010-2020 Digital Agenda is a great opportunity for social and economic development, thanks to the use of technology: it sets a series of strategic objectives to promote investment in digital infrastructures, improve people's quality of life, support competitiveness between enterprises and increase the efficiency of public services. On the theme of digital infrastructures, Veneto, as more generally in Italy, demonstrates significant delays as compared to the rest of Europe. Just 29% of real estate units are reached by services with speeds of between 30 and 100 Mbps, whilst a meagre 4% have a speed of over 100 Mbps. However, the national "Strategia italiana per la banda ultralarga" (Italian Strategy for Ultra Wideband), adopted by the government in 2015, aims to bridge this gap and develop a "future-proof" network infrastructure capable of providing, by 2020, a web connection service of at least 30 Mbps to all citizens and at least 100 Mbps to 85% of the population.

For the 2014-2020 programme, over €398 million have been allocated to Veneto: €315,810,955 or national resources and €83 million of regional funds for ultra wideband development €43 million from the EAFRD and €40 from the ERDF). With regard to the digital inclusion objectives for Italian citizens, Veneto stands above the national average, though not high enough to be in line with EU targets. In 2015, 68% of the population were regular internet users, a sharp increase on the previous year (+7 percentage points), indicating an encouraging positive trend, which, should it maintain this rhythm, would reach the objective within two years.

Citizens and Public Admin going ever more

E-Government services bring Public Administration (P.A.) closer to citizens and enterprises and favour participation, promoting open and transparent administration. They can reduce the costs of P.A. itself, on a local and central level, and, at the same time, enable the user to save both time and money.

The availability of P.A. interactive online services is on the increase, including in Veneto, with some excellent examples recognised at a national level, such as the quality of online healthcare services and online payments (1st place in 2016).

Low-impact healthcare

As part of the regional Digital Health Register, the Veneto Region is focusing its energy on realising a new vision known as "Sanità Km zero" (Low-impact Healthcare). On the one hand, it focuses on the computerisation of certain public services in order to make them available at all times and in all places; on the other, it focuses on bringing health services closer to those who require that particular attention is paid to their health situation.

Today, 60% of medical reports are downloaded from the internet, without going in person to the hospital to pick them up, whilst digital prescriptions have reached almost 46.5 million, 88.3% of pharmaceutical prescriptions and 74.4% of specialist prescriptions. Teleconsultation services are also significant, enabling consultations to take place remotely between a doctor in an outlying hospital and another in a larger facility, reducing the number of transfers, with the consequent reduction in patient stress levels and savings in terms of time and money. Finally, there are two important projects under experimentation: "ECO farmacie" (ECO Pharmacies), which enables you to go to your pharmacy with your smartphone or health card to pick up prescription drugs, and "Oltre il CUP" (Beyond the CUP; central booking service), which provides the opportu-

Sanità a Km zero

nity of booking specialist appointments directly from your GP clinic.

Connection Lies Behind the Production and Development of Innovation

Faced with the challenges of today's society, the optimal use of information and communication technologies is an important tool for social inclusion. It can act as a driving force for Veneto enterprise, if it is accompanied by a positive attitude towards new ideas and different forms of business relations and the strengthening of investments in research and innovation.

Innovative startups increase by 50%

However, the real force that can relaunch the Veneto enterprise system, which recorded an annual reduction of 0.3% in 2015, and support the positive turn that the economic cycle is taking, is innovative drive and research. One example is the 380 innovative startups found in Veneto, whose number has increased by 50% as compared to 2015. Veneto startups make up 7.5% of innovative startups in Italy and takes fourth place in the regional rankings after Lombardy, Emilia-Romagna and Lazio.

Veneto enterprises have a strong tendency towards innovation

Veneto is the second Italian region for business innovation[10] (almost 6 out of 10 enterprises are innovative) and the leading region for innovative activity for the purpose of introducing product or process innovations. The analysis undertaken highlights the fact that the inclination towards exports tends to increase with an increase in size of enterprise and that the winning strategy for taking on foreign markets includes the strong capacity to invest in research and development.

Networking improves competitiveness

Increased added value is generated by enterprises that invest in R&D, even if the effect varies based on the size category. Therefore, the size of the business, investments and technological advancement influence the way in which work and its productivity are combined in the production process. Indeed, we have noticed that the added value per employee – so-called productivity – is always higher for enterprises that conduct research and it is once again the mechanics industry that is the leading player, recording medium- high productivity, including due to its high added value production whose products are the main intended recipients of Veneto investment in R&D.

Successfully maintaining a leading role in international competitiveness certainly depends on the innovative and high-quality products/services on offer, high-level expertise, wide-scale projects, the use of superior technology and substantial investments: elements that do not fit well with the industrial "dwarfism" of the Italian and Veneto industrial horizon.

In Veneto, the average enterprise has just over 4 employees and micro enterprises make up more than 90% of all businesses. In the majority of cases, small enterprises do not have the means to take on the challenge of globalisation.

National and Veneto SMEs cannot compete on markets using operating leverage, so, in order to maintain their autonomy, they must focus on "networks", different types of association in order to achieve better performance: forming groups, districts, trade associations, consortia, partnerships with research institutes, etc.

Associations solve the issue of size whilst maintaining autonomy

The network helps competitiveness

Approximately two out of three Veneto enterprises hold permanent, contract-based or informal relationships with other enterprises or institutions, mainly production agreements, such as subcontracting. In addition, larger enterprises often benefit from formal agreements, such as consortia or joint ventures.

Network contracts, the alternative business model to the individualistic and fragmented model of our economic fabric, count for over 800 network enterprises in Veneto in 2015.

The same objective, i.e. to increase business competitiveness, is also pursued by means of organising production into groups of enterprises, the relationship form that creates business networks in which shared activities are consolidated and rationalised and, at the same time, the individual features of each unit are strengthened. Enterprise groups in Veneto make up around a quarter of joint-stock companies and count for over half of all employees.

[10] Enterprises with at least 10 employees

The Veneto district system is a leading player on foreign markets

In addition, the Veneto district system is an example of using agglomeration economies that enable the stable division of work among enterprises, with the consequent processes of integration between units that maintain their autonomy. There are 17 recognised industrial districts in Veneto, making up around 16% or local units in regional manufacturing and employing more than a fifth of employees throughout the region. Industrial districts are rewarded with increased export capacity: over 25% of regional foreign turnover is created by district enterprises.

Veneto Agriculture: Roots Connected with the Future

The capacity to create networks, become part of a network and use it to best personal advantage will also be vital for agricultural businesses. Thanks to the most recent reform of the European Union Common Agricultural Policy for the 5-year period 2015-2020, which proposes increased focus on the needs of producers, the environment and food safety, and due to the progressive opening-up of markets, agriculture has entered a phase of further change, in relation to previous programmes: the phase of market stability has ended and another has begun, in which agricultural businesses will have to interpret market demands and adopt medium and long-term development projects, using all the tools necessary to monitor and assess the economic results obtained compared to the predictions made.

The Venetian district system focuses on foreign markets

We live in an age in which computerisation has become crucially important, cross-cutting all areas of daily life. Those who are well equipped in this direction are those who manage to create greater profitability and tend towards greater multifunctionality: the most advanced companies in terms of information technology will be the avant-garde that will mould the image of the agricultural business of the near future, distinguished by a medium-large size (28.7 hectares), per capita profitability of €280 thousand and an average manager age of 49 years, tending to specialise in the cultivation of vegetable and flowers and with additional, non-agricultural activities in tourism or of a social nature.

Computerised companies are the youngest, largest and most profitable

The agricultural company of the future will successfully manage its activity with information technology, will take care of a lot of administrative and bureaucratic paperwork online, will make itself known on the internet via its website, through which it may also sell its products and services.

In addition, surrounding food, its production, distribution and consumption, true networks of bodies are created that bring together the different leading players in the production chain and among consumers in a cohesive effort towards successfully dealing with situations and problems that would be difficult to resolve individually.

This becomes of crucial importance in situations in which individual effort is insufficient, such as, for example, taking traditional local products beyond national borders, accompanied by the history, culture and work which make them so characteristic, in such a way as to ensure that the end consumer recognises the superiority of quality and is inclined to buy again. And it is not just promotion that channels the energy of the production chain, but also defending company brands, too often targeted by "Italian sounding", i.e. the use of geographical denominations, images and brands that are evocative of Italy in order to promote and market products that have nothing to do with Italy, capable of causing millions of euros of damage to our economy.

Computerized companies are younger, bigger and more profitable

Towards a Smart Land

Finally, therefore, the city of the future requires investments in innovation for the development of public and private services, in order to improve the quality of those who live in or use the city. On the theme of urban mobility, there are fewer cars per resident in circulation in Veneto compared to the national average and a greater use of eco-friendly cars, focusing also on innovative services for sustainable mobility, such as car/bike sharing or the dissemination of infomobility services. In provincial capitals, focus is placed on the innovation of digital services: broadband coverage is almost complete and work is already underway on ultra

wideband.
At the same time, many cities are also involved in Smart City projects, placing at the heart of their programmes not only new digital technologies, but also aspects concerning social inclusion, environmental sustainability and quality of life.
On average, Veneto provincial capitals demonstrate good performance, but, in terms of the future, it is essential to consider the whole region in order to analyse it from a Smart Land perspective, given that many smaller urban centres have already developed innovative best practices and that regional smartness policies concern the whole region and not just provincial capitals.

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