

University - Enterprise cooperation in Europe and Vietnam

Introducing Emilia-Romagna economy and the forecasts for companies' job demand

22nd of May, 2017

**Unioncamere Emilia-Romagna,
Bologna**



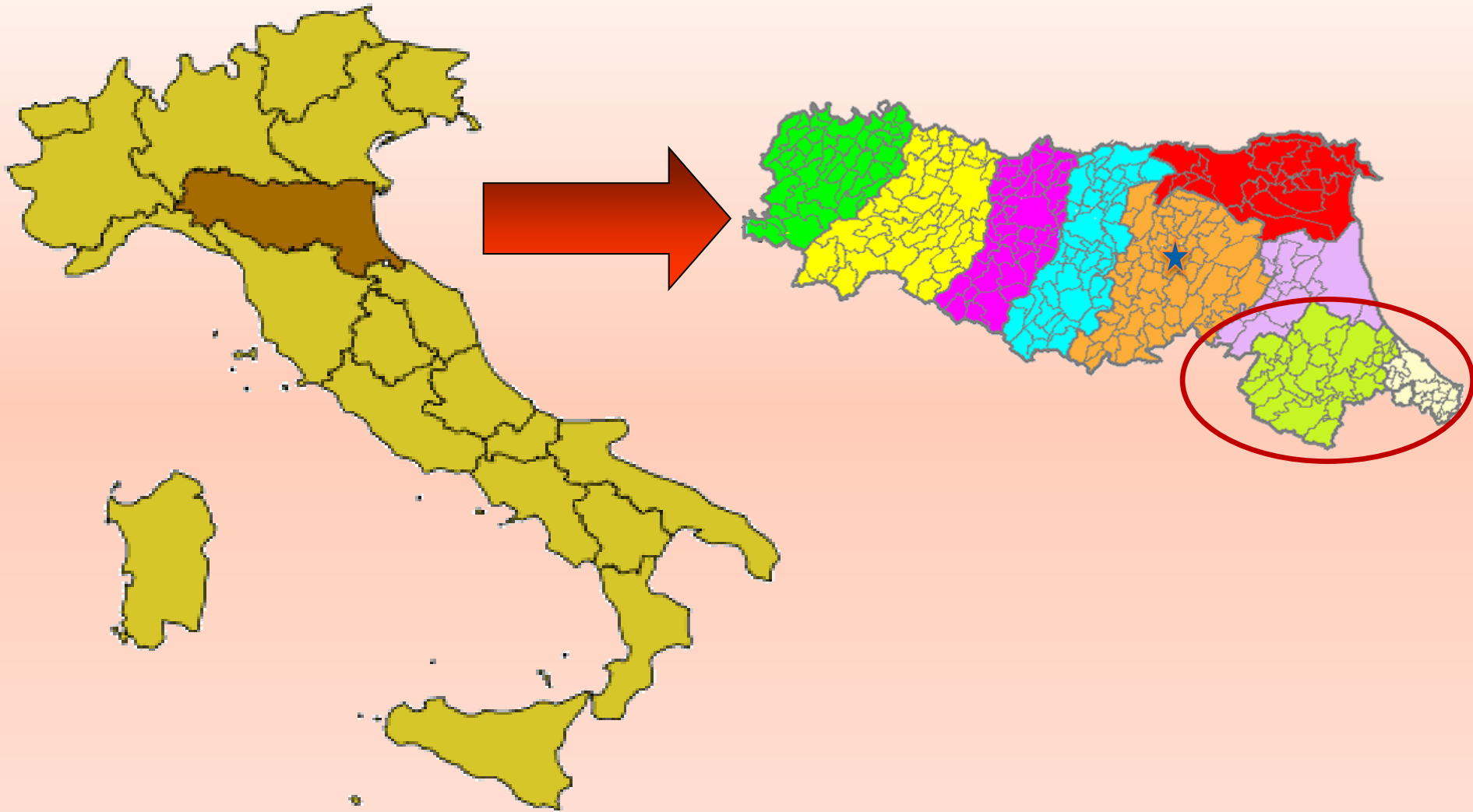
Today's agenda

- **Introducing the regional scenario;**
- **Introducing the regional economy;**
- **The Chambers and the vocational guidance → Excelsior project to forecast entrepreneurs' hirings**

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Where we are



Unioncamere Emilia-Romagna

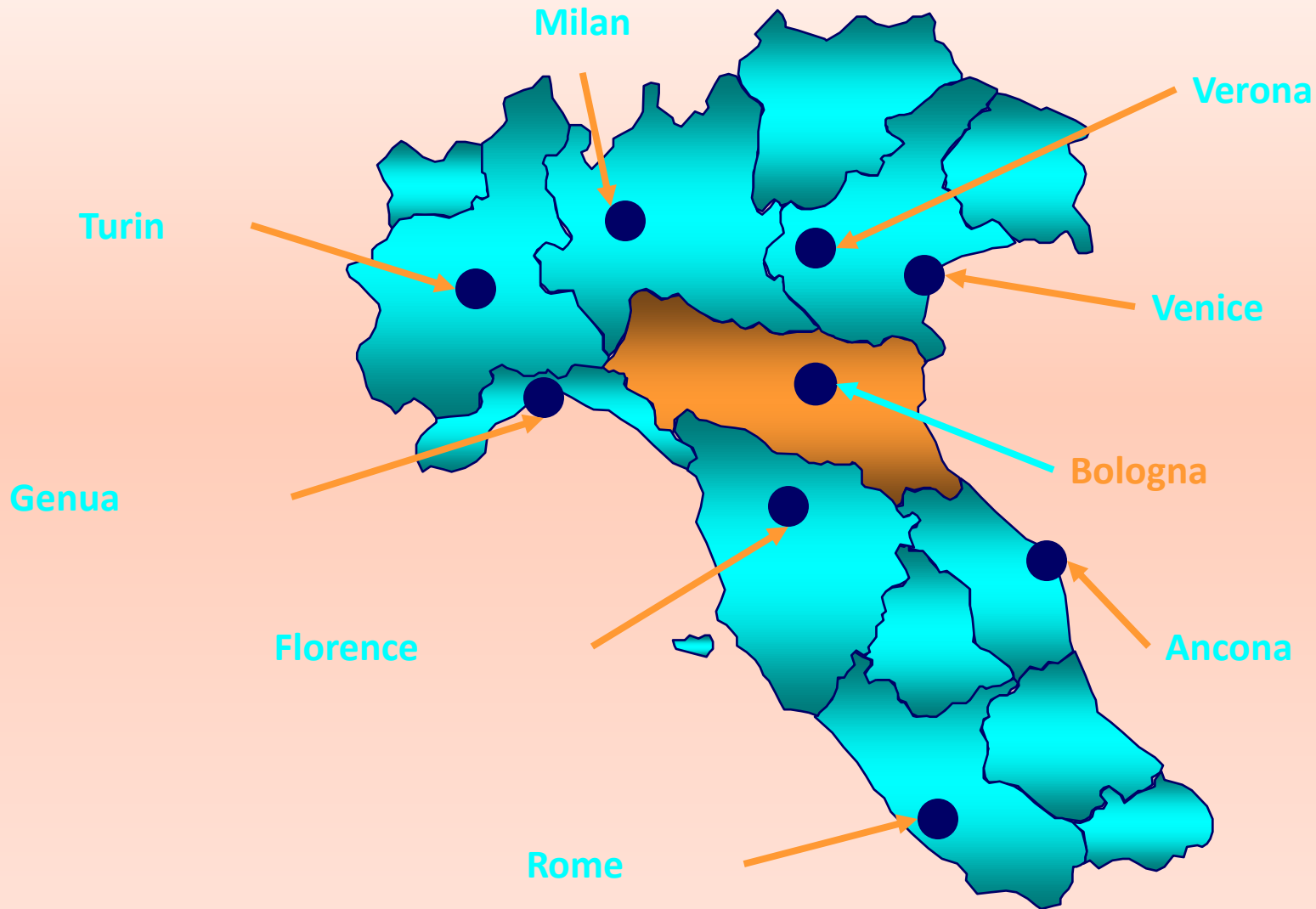
Unioncamere Emilia-Romagna is the Regional Association of the Chambers of Commerce of Emilia-Romagna: we bring together all the Chambers of our region (Bologna, Ferrara, Modena, Parma, Piacenza, Ravenna, Reggio Emilia and Romagna).

Our main aim is to support the regional economy development, in cooperation with all local policy-makers.

We:

- **act on behalf of the Chambers of commerce and represent their interest;**
- **coordinate the activities of the Chambers;**
- **analyze and monitor the regional economy.**

The logistic position I



The logistic position - II

3 INTERNATIONAL AIRPORTS

Bologna (the main regional hub for flight transport), Parma and Rimini.

FREIGHT TRANSPORT

17 freight villages and intermodal terminals spread throughout the region. The main freight villages are in Bologna, Parma and Piacenza.

RAILWAY NETWORK

The regional railway network consists of 1,400 km of track (covering 48.8 Km per 1,000 km²).

REGIONAL HIGHWAYS

Regional highways cover 25.7 Km per 1,000 km²,

PORTS

Ravenna port is the most important in the region and is the leader nationwide for raw materials movement in the ceramics, cereals, fertilizers and flour-based products sectors.

Emilia-Romagna

A region for the future

- FDI Intelligence, the Financial Times foreign investment specialist division, has published the "European Cities & Regions of the Future 2016/17" report on the attractiveness of cities and regions in Europe. Emilia-Romagna ranks 7TH for business attractiveness among THE TOP 10 Southern European regions. The region also stands 6th among the Top 10 Large European regions for FDI (Foreign Direct Investment) strategy..



Strong university tradition

7 UNIVERSITIES

BOLOGNA (since 1088), PARMA, MODENA-REGGIO EMILIA AND FERRARA, Cattolica University (PIACENZA), Politecnico di Milano (Piacenza campus), Johns Hopkins University (JHU).

6 UNIVERSITY SEATS

DECENTRALISED IN OTHER REGION'S TOWNS

ABOUT 142,000 ENROLLED STUDENTS

(42% from other regions) in the 2012/13 academic year, employing 6,400 lecturers and researchers. 76% of researchers operate in technical-scientific areas.

A REGIONAL POLYTECHNIC NETWORK

organized into three training paths: Higher Technical Institutes (HTI); Higher Technical Education and Training paths (HTET); Higher Education

Strong university tradition



THE THEMATIC PLATFORMS OF THE EMILIA-ROMAGNA HIGH TECHNOLOGY NETWORK

- > Since 2005 Emilia-Romagna Region , through the Regional Programme for Innovation, Industrial Research and Technology Transfer, established the **High Technology Network - research laboratories and innovation centres -** with the aim of creating a qualified industrial research offer throughout the territory by increasing the synergies between regional universities and research centres;
- > In the framework of High technology network, the Emilia-Romagna Technopole Network are distributed in **6 Platforms: Agri-food, Constructions, Energy-Environment, ICT and Design, Mechanics-Materials, Life Science**

The network of the research and innovation centers in Emilia-Romagna (the "techno-poles")



- Food and beverage
- Mechanics
- Construction

- ICT and design
- Energy and environment
- Biotech

INTERNATIONAL TRADE FAIRs IN EMILIA-ROMAGNA

- > The trade shows and exhibitions system in Emilia-Romagna is one of the most important in Europe.
- > Bologna leads the regional trade fair system, which also includes Modena and Ferrara. These centres are followed by Parma (linked with the trade fairs of Reggio Emilia and Piacenza) and Rimini, which includes the trade fairs of Forlì and Ravenna.
- > Fair calendar is available at:
- > <http://wwwservizi.regione.emilia-romagna.it/impres/fiere/>

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Regional Economy

	Italy	Emilia-Romagna	E.R./ Italy
Population	60.665.551	4.448.146	7,3%
Active Businesses	5.145.995	407.514	8,0%
GDP (€ mn)	1.643.443	149.313	9,1%
p.c. GDP (€)	27.090	33.567	123,9%
Active population (15-64)	64,9%	73,6%	113,4%
Unemployment rate	11,7%	6,9%	59,0%
Export Value (€ mn)	417.076	56.138	13,5%

Data source: Unioncamere Emilia-Romagna , Centre for Economic Research on Istat 's and Company Register 's data

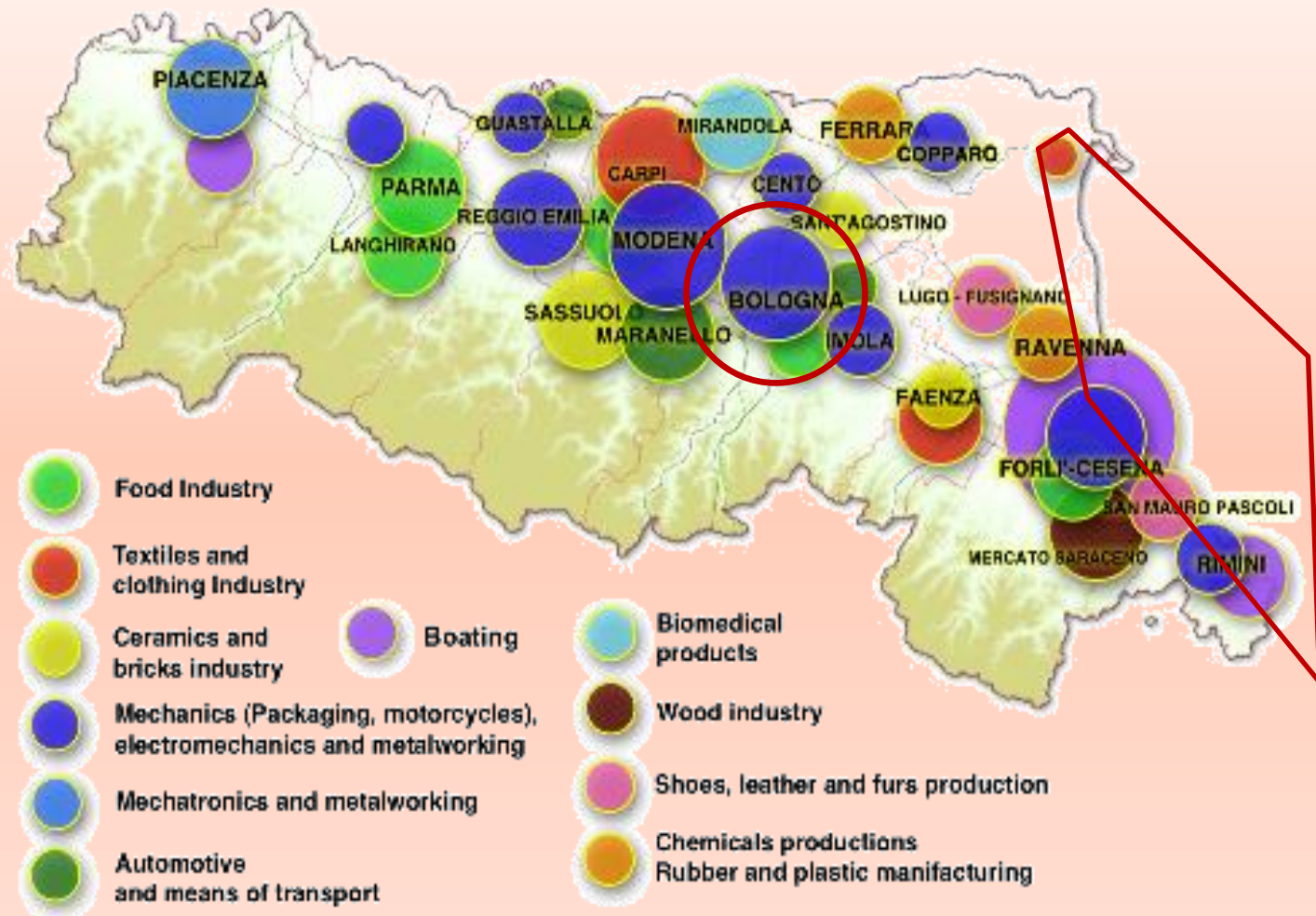
Regional Economy

The structure of our economy: the weight of the macro-sectors (added value)

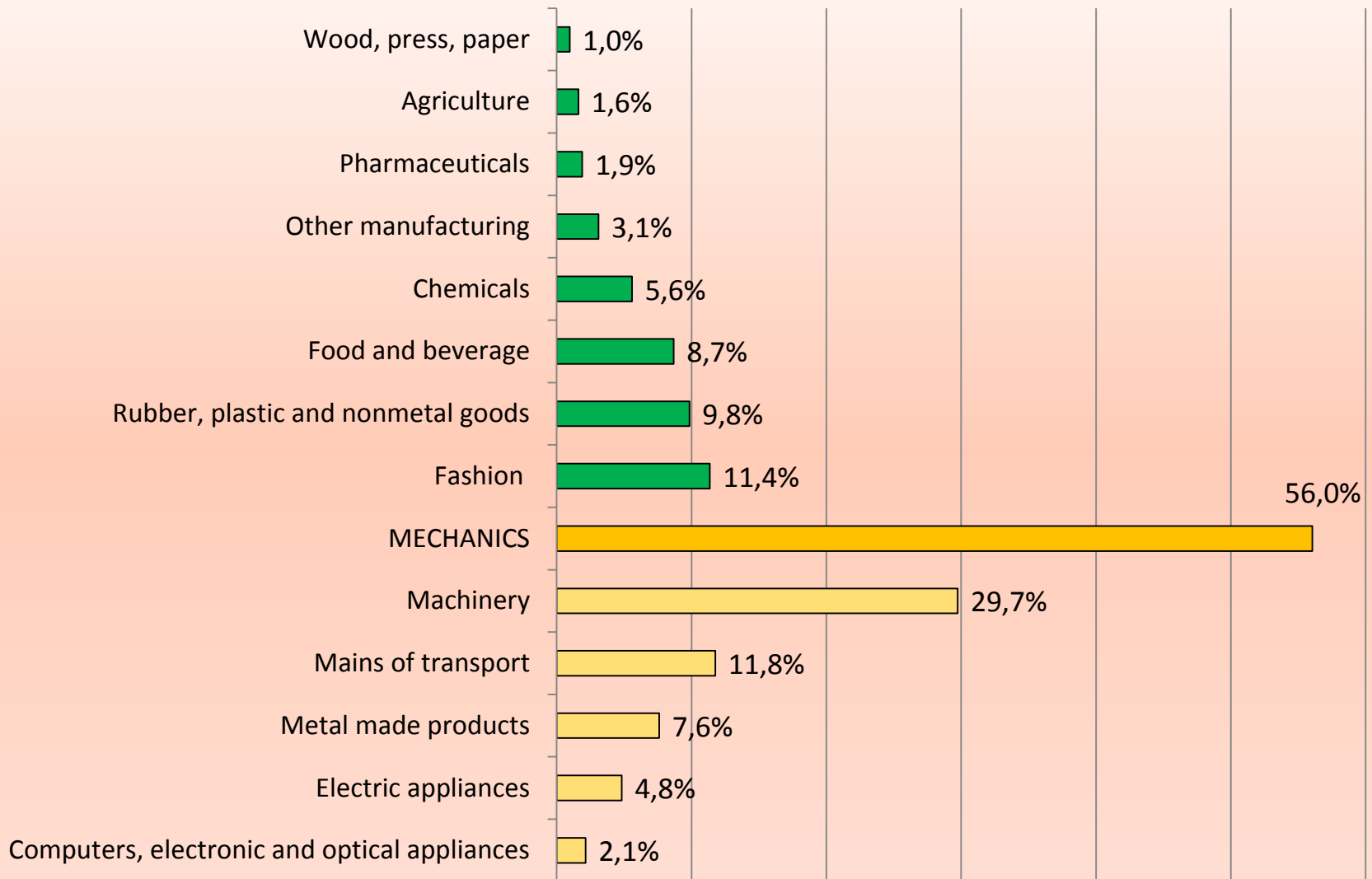
	Italy		Emilia-Romagna		E.R. / Italy
	€ millions	relative weight	€ millions	relative weight	
Agriculture	31.551	2,2%	3.425	2,6%	10,8%
Industry	340.276	23,5%	38.079	29,5%	11,2%
Services	1.077.409	74,3%	87.933	67,9%	8,2%
Total Added Value	1.449.236	100,0%	129.437	100,0%	9,0%

Data source: Unioncamere Emilia-Romagna , Centre for Economic Research on Istat's data

“Main” industrial clusters in Emilia-Romagna



Export: weight of economic sectors

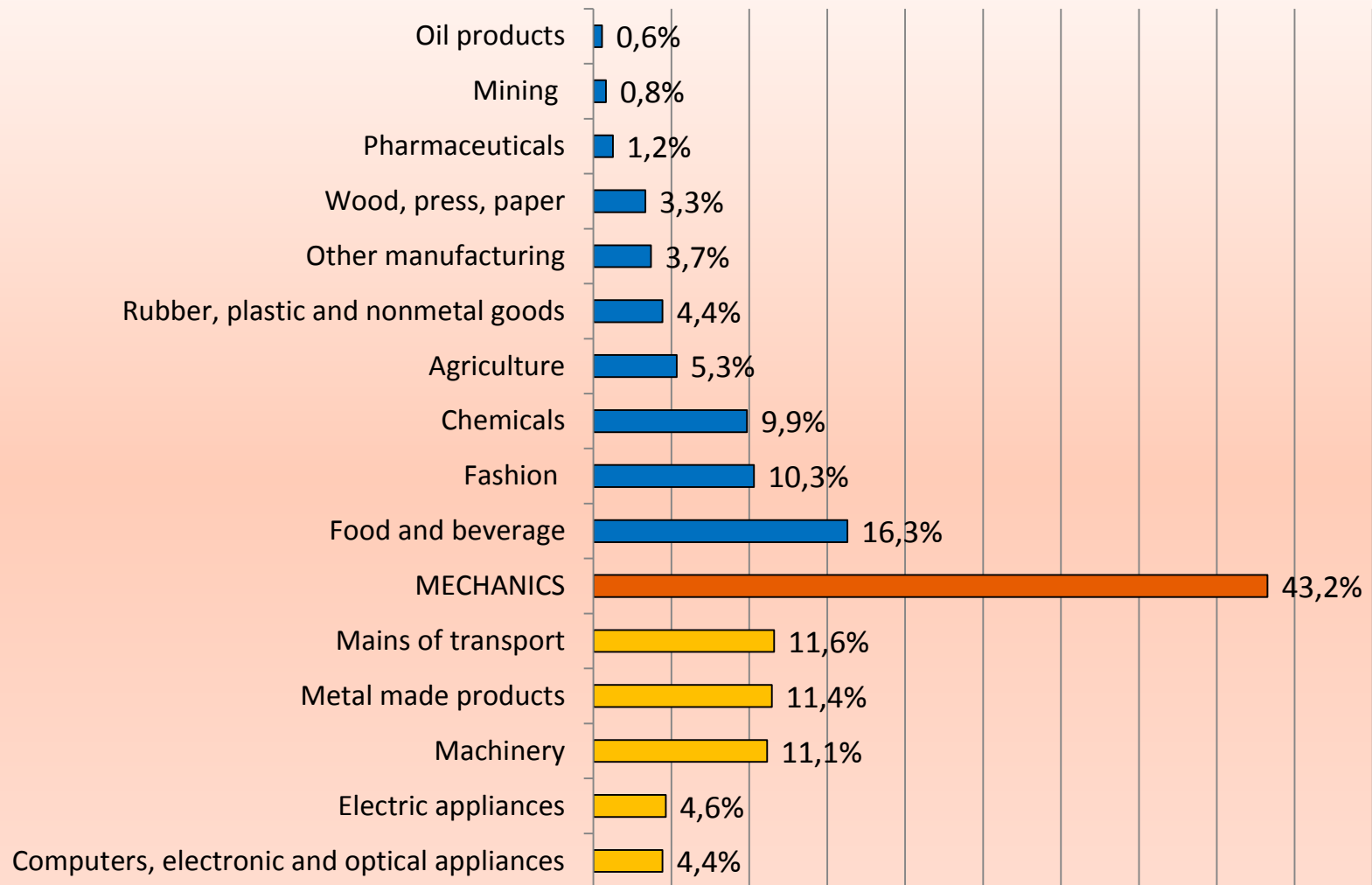


Unioncamere Emilia-Romagna, Centre for Economic Research on Istat's data

Matteo Beghelli, Centre for Economic Research, Unioncamere Emilia-Romagna

Unioncamere
Emilia-Romagna

Import: weight of economic sectors



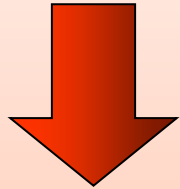
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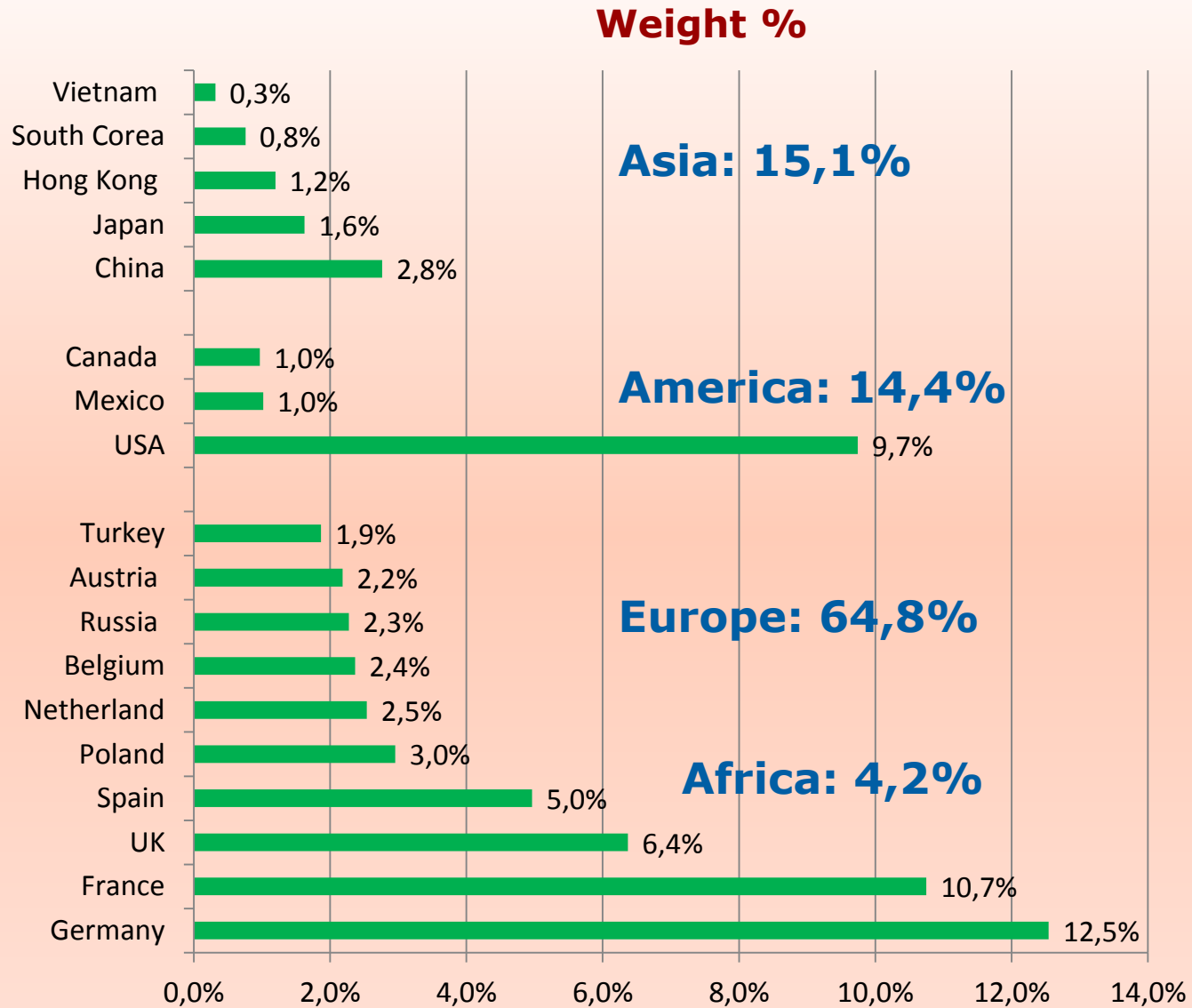
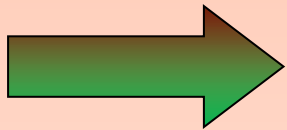
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Export: weight of economic areas

56,14 bil €, 2016



**Export:
Our main trade
partners**



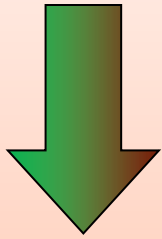
*Unioncamere Emilia-Romagna, Centre for
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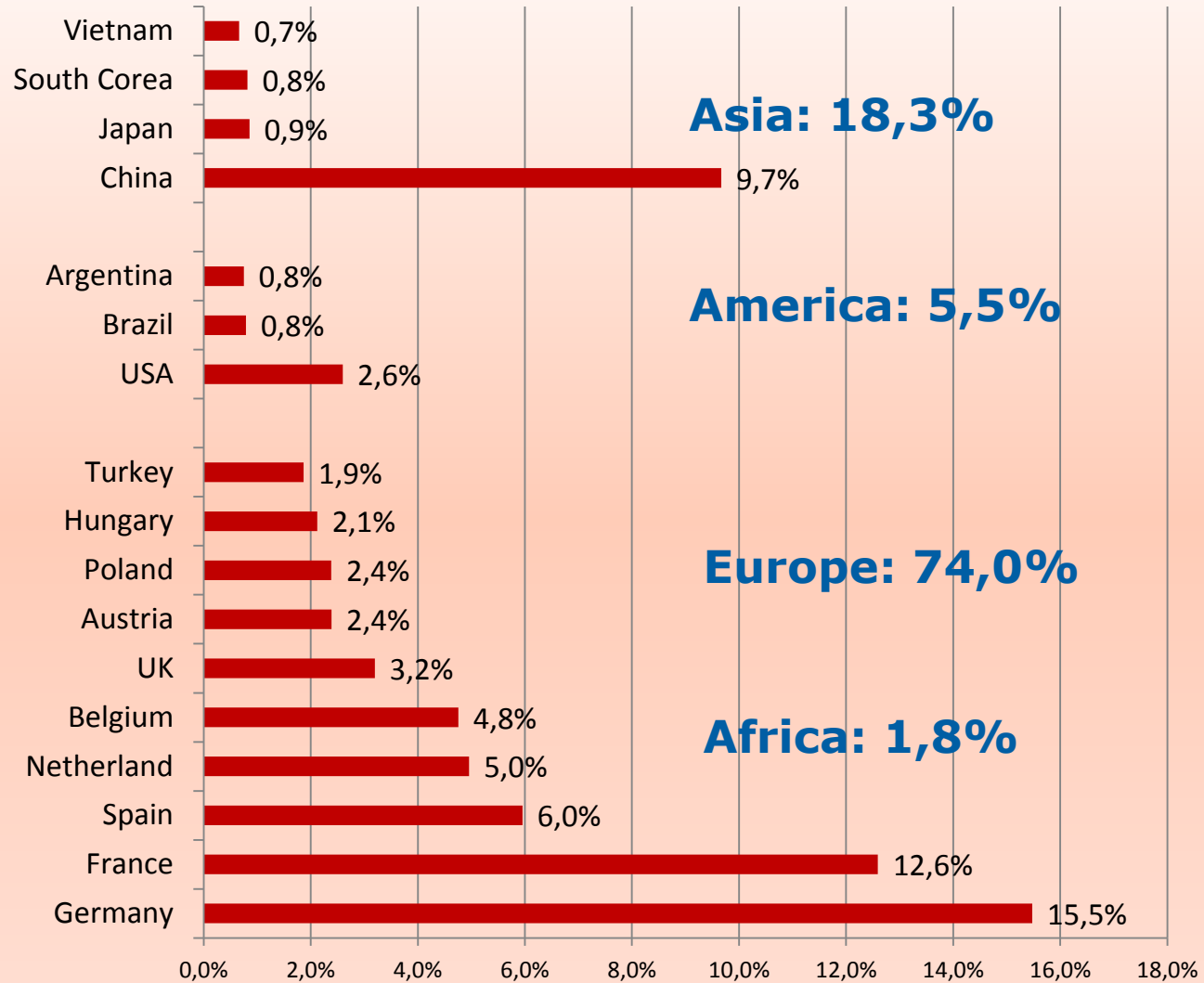
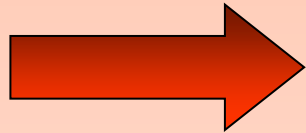
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Import: weight of economic areas

32,4 bil €, 2016



**Import:
Our main trade
partners**



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Emilia-Romagna – Vietnam

Export 2016: 179,5 mil € + **792%** 2016/2008

MAIN EXPORTS:

Machinery and equipment	+539%	45,2%
Food and beverage	+17.066%	22,5%
Textiles, clothes, leather and access.	+3.961%	5,6%
Other manufacturing	+2.008%	4,6%
Rubber, plastic, non metallic	+2.014%	4,3%
Pharmaceutical, chemical	+5.416%	3,8%



MAIN IMPORTS:

Textiles, clothes, leather and acces.	+1.598%	42,1%
Agricultural an fisheries	+949%	13,4%
Food and beverage	+194%	11,9%
Other manufacturing	+1.104%	9,3%
Electric appliances	+15.414%	9,0%
Metal products non machinery	+230%	5,6%

Import 2016: 215,3 mil € + **821%** 2016/2008

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Unione europea
Fondo sociale europeo



MINISTERO DEL LAVORO
E DELLE POLITICHE SOCIALI

Direzione Generale per le Politiche
per l'Orientamento e la Formazione

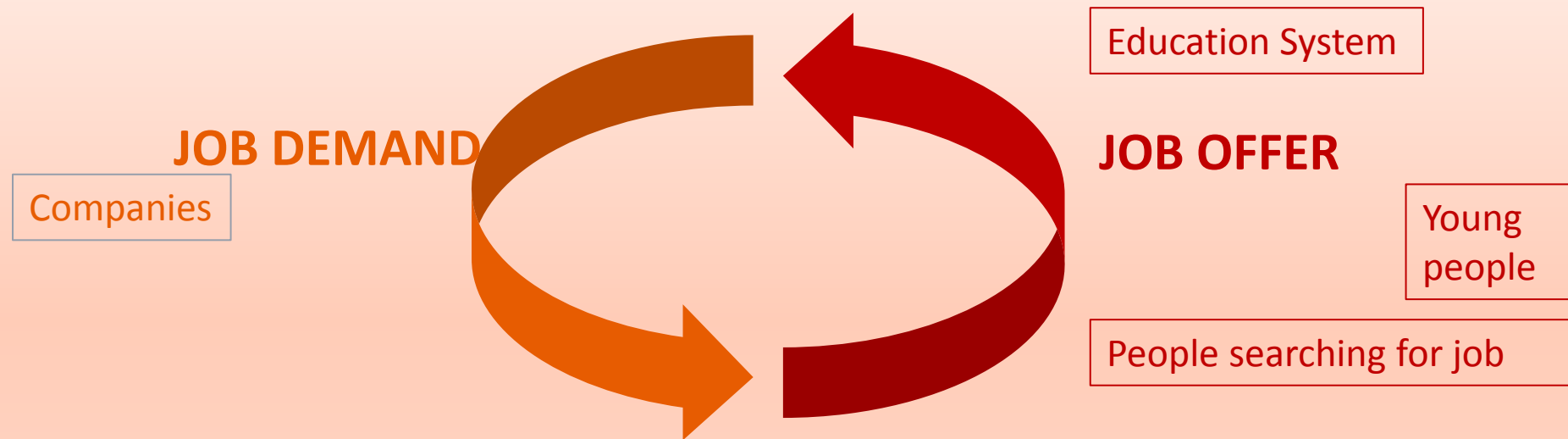


The Excelsior information system: THE FORECASTS FOR ITALIAN COMPANIES' JOB DEMAND



The Excelsior information system: Matching of job demand and supply

PROJECT DESIGNED AND MANAGED BY UNIONCAMERE NAZIONALE



Through this tool we want to create a virtuous cycle between **job demand and supply**, making the companies' needs explicit through informing both the school-system and the people looking for a job about the **potential employment opportunities of a training or professional curriculum**

Development of the project

DETAILS ABOUT INCOMING OCCUPATION

Professional roles, educational qualifications and specializations, expertise required, age, type of contract, need for further training, etc.

ENTRANCE AND EXIT FLOWS IN THE LABOUR MARKET

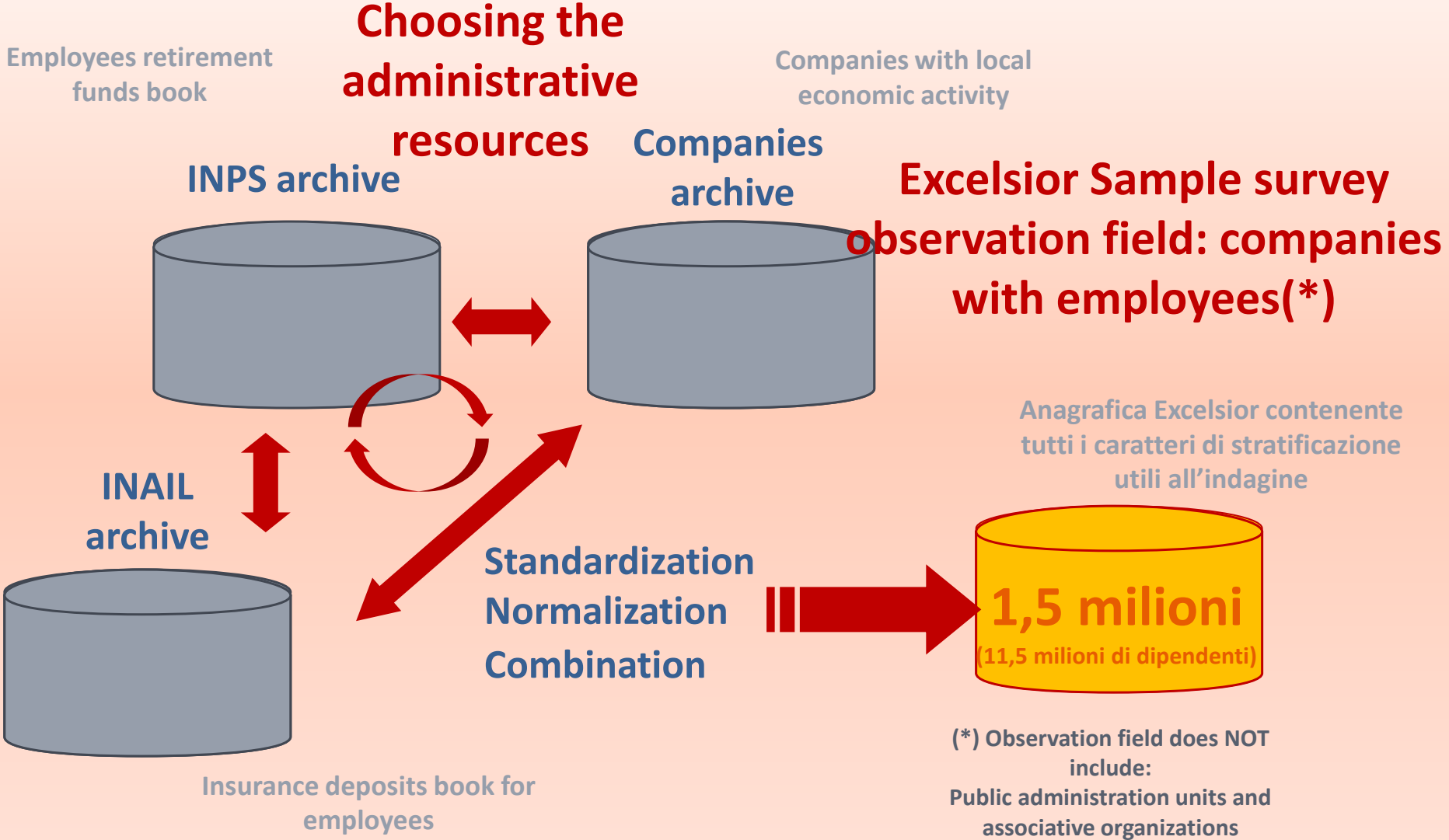
Entrances and exits from the labour market according to the placement level

DISTINCTION for SECTOR and AREA

	Project manager	Labour market experts	Statistician	Programmers	Research Assistants	Interviewers
Project management	x					
Definition of methodology and survey		x	x			
Preparatory activities			x	x	x	
Data collecting					x	x
Data processing			x	x		
Data checking and validation			x		x	
Divulgence – online database				x		
Divulgence – reports and data analysis		x				

Development of the project: Building the reference universe

Selection of sources for the population



Development of the project

The sample design Excelsior includes :

- a statistical sample for enterprises up to 50 employees;;
- a sample for firms with more than 50 employees (self-representative)

The sample plan is defined by:

- sector of economic activity (69 sectors)
- class size (3 classes: 1-9, 10-49, 50 and over)
- territory (105 provinces)

21.735 "cells" representing potential reference universes

But the Italian provinces have very different economic specializations ... so, for the sample design:

- economic sectors defined in each province give priority to specific sectors of the provincial economy that make up the cells for which it is intended to obtain significant results;
- less relevant sectors of the provincial economy are aggregated

• The sample design ensures that in any case at regional and national levels significant data are achieved for 29 standard sectors.

• Significance for the province, legal form, size and economic activity (Ateco 2007)

Development of the project

CLASSIFICATIONS USED:

Economic activities: **NACE Rev. 2 (used at European level)**.

Levels of education and fields of study: based on **ISTAT classification**.

Professions: professions in the Excelsior dictionary are classified according to categories and groups of the **ISTAT classification (official classification)**. This classification is **compatible with ISCO**.

We focus in particular on the professions, which are the most complex to detect because, while the economic activity is a well-known attribute of a company also because it is stated in various administrative offices and educational qualifications, however varied, correspond to a limited set of professional addresses, professions must find a mediation between the enterprise language and the official taxonomies.

The produced outputs:

The final results of the survey (reported to the universe) are generally available one month after the conclusion of the investigation.

They are disseminated through different types of products, addressed to different categories of users:

- **Analytical data bases** available online that, through a special tool (data warehouse), allow extractions and production of "ad hoc" tables;
- **Statistics publications** illustrating data at the national, regional (NUTS2 → 20 regions) and provincial (NUTS 3 → 105 provinces) level;
- **Thematic publications** (including statistical tables and data analysis) relating to specific topics, including: training activities carried out by enterprises, employment needs in the areas of tourism, ICT, in high-tech sectors and cooperatives; apprenticeship contracts and atypical work; employment prospects of university and school graduates;
- **Quarterly newsletters** on labor demand trends.

Both databases that publications are available at (<http://excelsior.unioncamere.net>)

http://excelsior.unioncamere.net/index.php?option=com_previsioniarp&Itemid=1611#bologna

The produced outputs: some examples

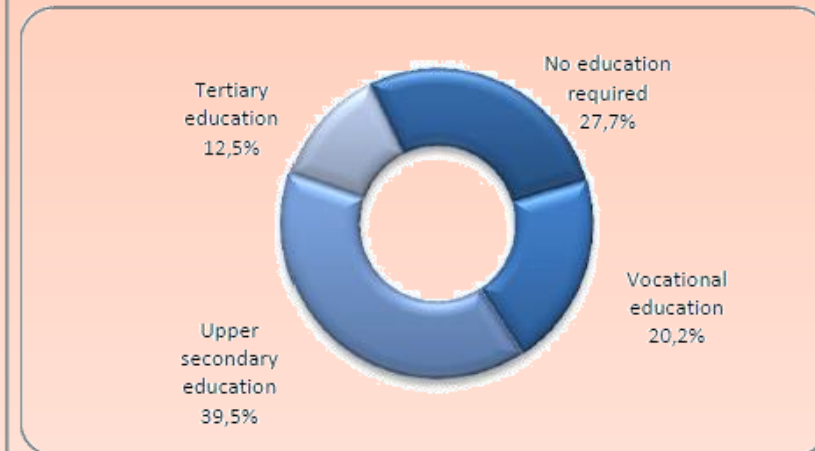
Forecasts for 2017

	Hirings	Layoffs	Net var.
Whole Italian companies (no agriculture, no public bodies, no no-profit)	960.070	890.370	69.700
Manufacturing	195.790	179.130	16.660
Utilities	15.070	14.370	700
Constructions	68.190	75.880	-7.690
Trade and retail	138.260	124.960	13.300
Other services	542.760	496.030	46.730
Whole Italian companies (no agriculture, no public bodies, no no-profit)	960.070	890.370	69.700

Recruitment forecast by major group

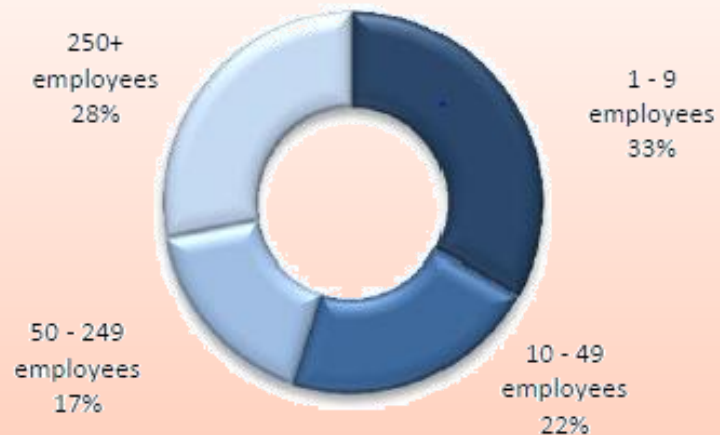


Recruitment forecast by level of educational attainment

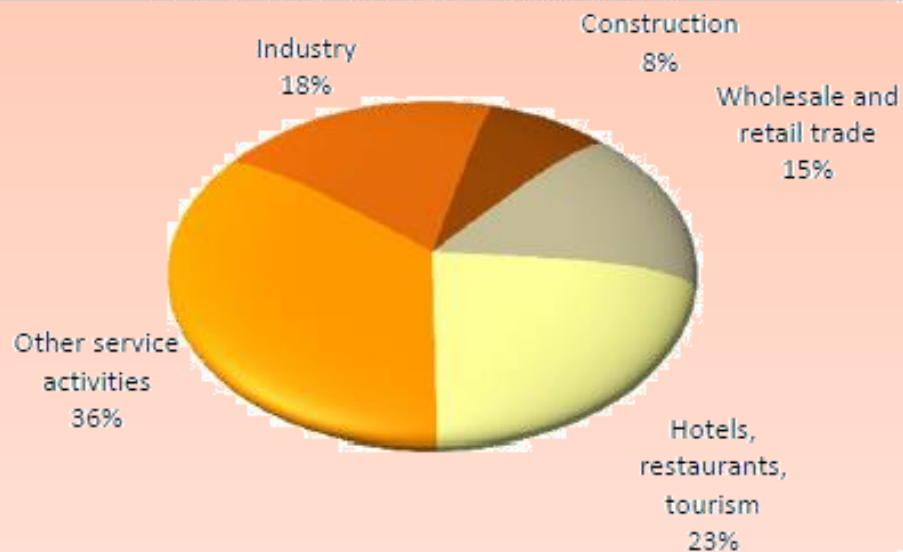


The produced outputs: some examples

Recruitment forecast by enterprise size class



Recruitment forecast by sector,

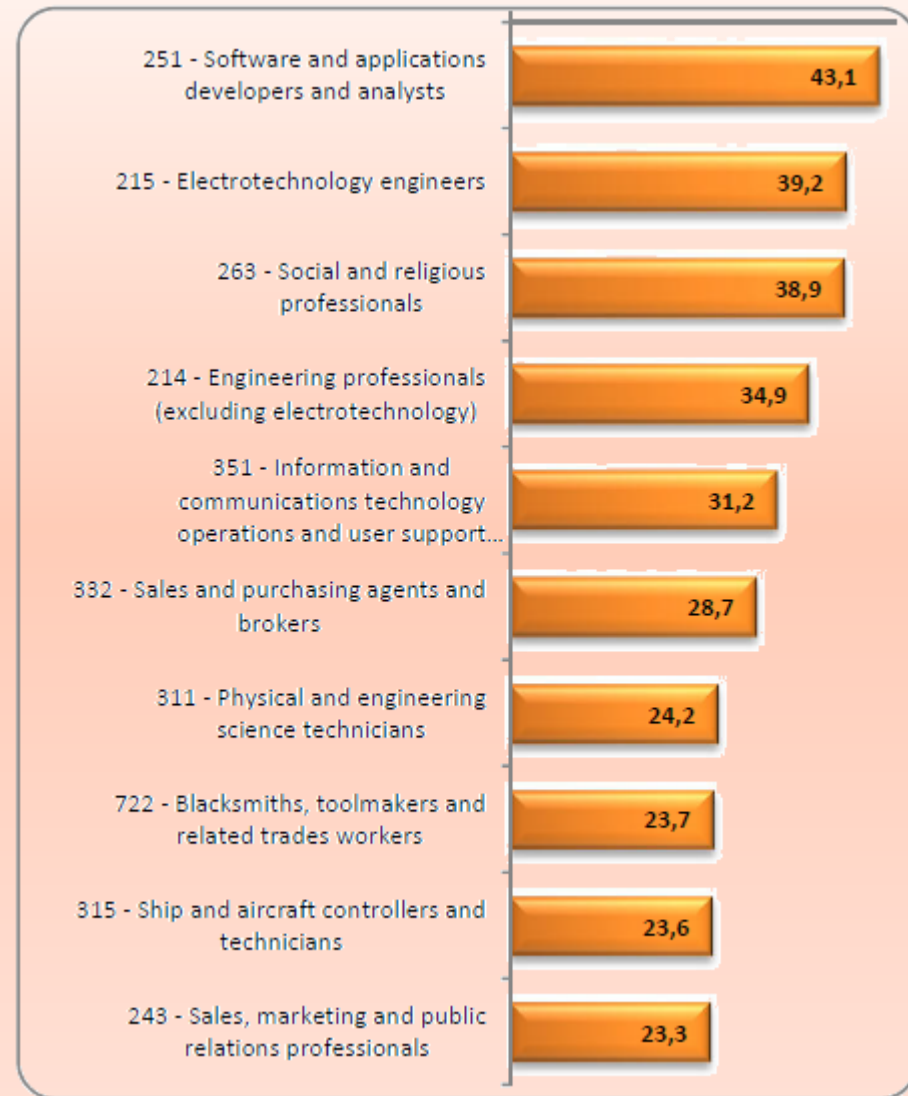


The produced outputs: some examples

Recruitment forecast by occupation

Occupations (minor groups of the classification ISCO-88)	Recruitment
513 - Waiters and bartenders	100.700
522 - Shop salespersons	80.900
911 - Domestic, hotel and office cleaners and helpers	59.900
512 - Cooks	44.000
833 - Heavy truck and bus drivers	24.300
532 - Personal care workers in health services	22.100
711 - Building frame and related trades workers	21.400
331 - Financial and mathematical associate professionals	19.200
962 - Other elementary workers	18.600
422 - Client information workers	18.500
411 - General office clerks	15.400
741 - Electrical equipment installers and repairers	13.900
412 - Secretaries (general)	13.900
723 - Machinery mechanics and repairers	12.600
432 - Material-recording and transport clerks	12.200
816 - Food and related products machine operators	11.500
332 - Sales and purchasing agents and brokers	11.200
722 - Blacksmiths, toolmakers and related trades workers	9.400
251 - Software and applications developers and analysts	9.300
834 - Mobile plant operators	9.100

Hard to fill jobs by occupation



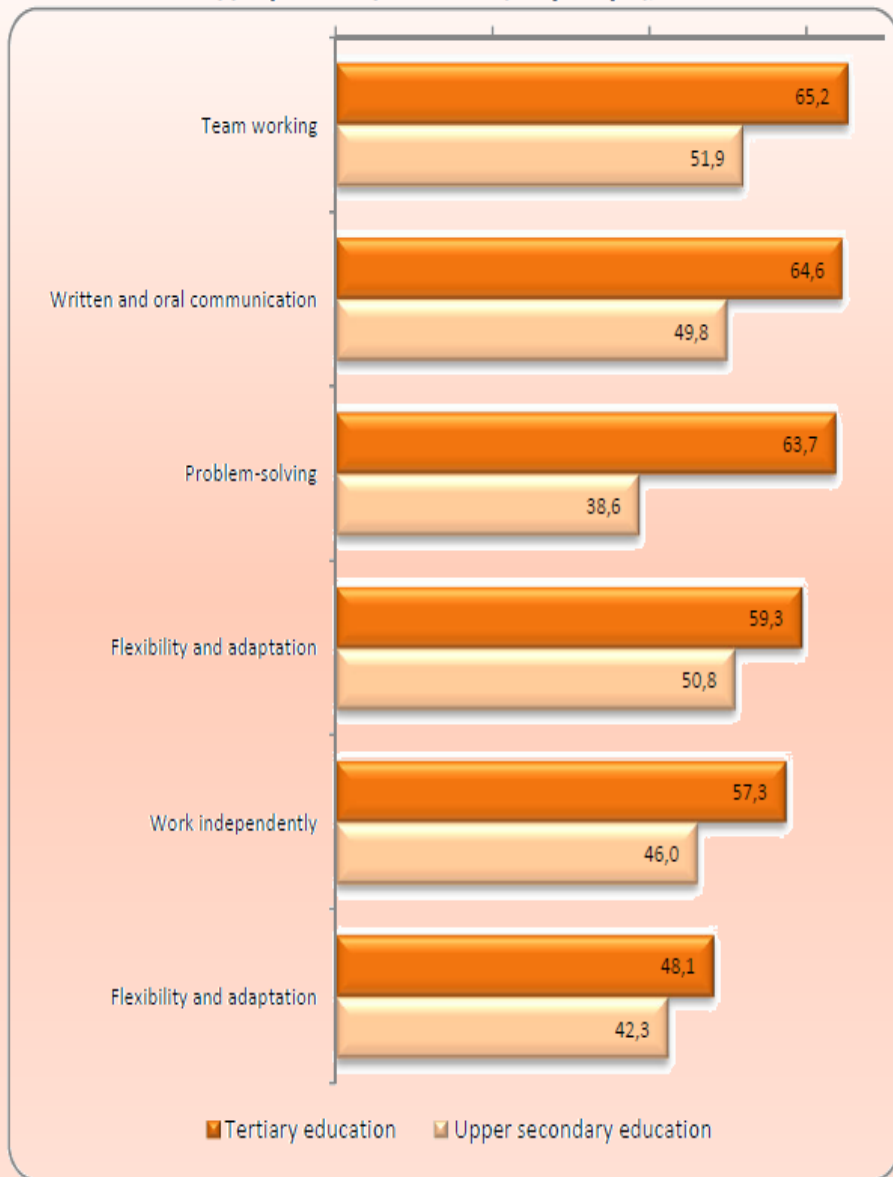
Most difficult professional roles to find

	Percentage of difficulty in finding the professional profiles	Hiring of graduates (*)	Of which: difficult to find	% diff in finding	Degree most required (or exclusively)
1	Information system programmer	1.060	900	84,6	Information technology
2	Industrial plant designer	270	110	40,2	Mechanical and marine engineering
3	Services sector project manager	290	120	39,4	Bank, financial and insurance economics
4	Auditor	770	270	35,4	Business, marketing and administration economics
5	Commercial manager	220	80	34,1	Business, marketing and administration economics
6	Software consultant	290	100	33,3	Computer engineering
7	Chemistry researcher	240	80	32,2	Chemistry
8	Mechanical designer	1.780	560	31,3	Mechanical and marine engineering
9	Building designer	290	90	30,2	Civil and construction engineering
10	Analist programmer	470	140	30,0	Computer engineering
11	IT programmer	1.120	330	29,7	Computer engineering
12	Male/female nurse	3.450	950	27,4	Health care, nursing and obtetrics professionals
13	Marketing manager	210	60	26,1	Business, marketing and administration economics
14	Administrative employee	2.950	760	25,8	Business, marketing and administration economics
15	Expert on safety in the workplace	290	70	25,3	Unspecific degree

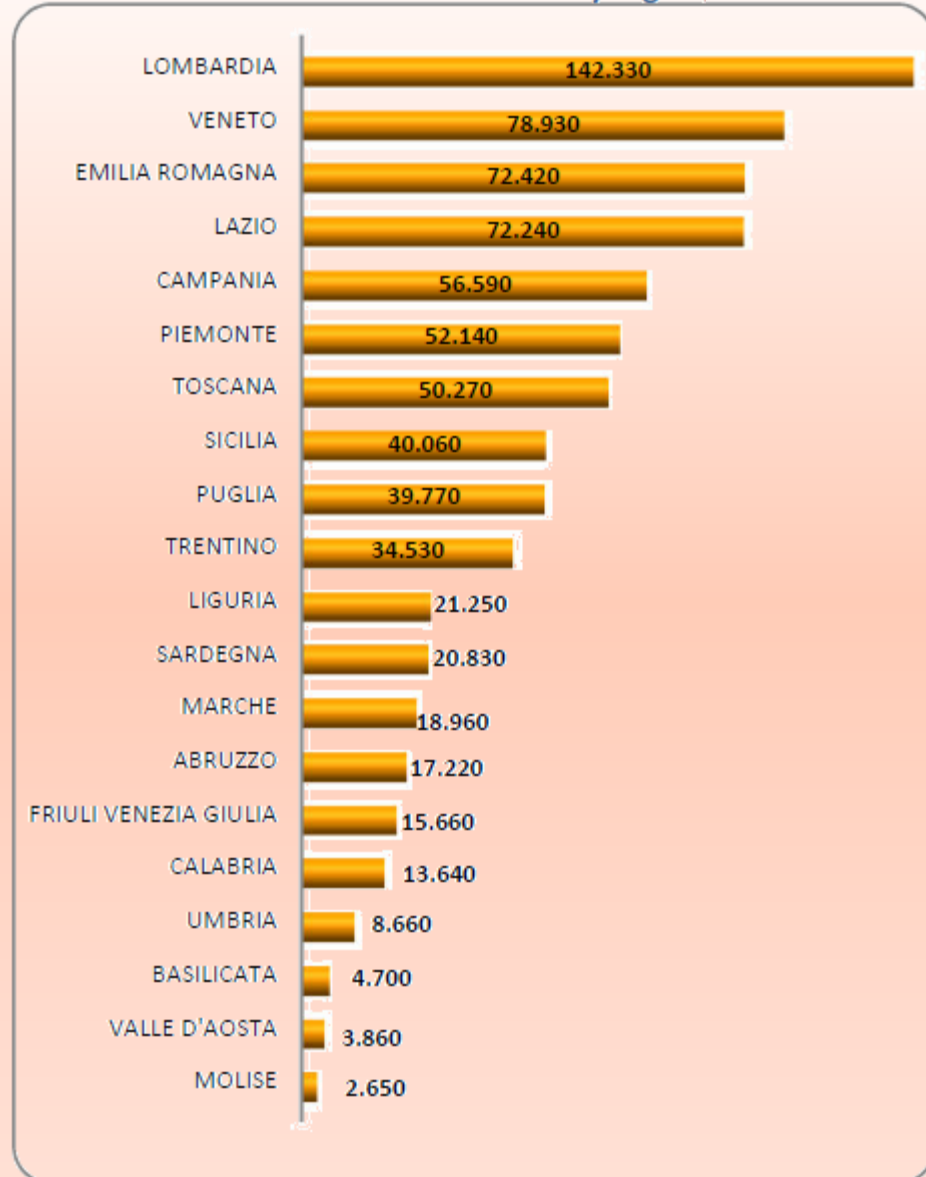
(*) Professions in which hirings of graduate people exceed 200 units. Absolute values rounded to tens.

The produced outputs: some examples

Generic skills enterprises consider "very important" for candidates



Recruitment forecasts by region



grazie

FOR MORE INFOs:

Matteo Beghelli
Unioncamere Emilia-Romagna
matteo.beghelli@rer.camcom.it