INDUSTRY PERSPECTIVE

The Trends of the Italian Space Sector as Monitored by the “Distretto Virtuale” Portal with a Focus on SMEs

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ABSTRACT

The “Distretto Virtuale” portal is an interactive area, featuring several virtual tools, of the Italian Space Agency’s (ASI) website (http://www.asi.it). Its community is steadily growing and includes all of the main Italian sector’s stakeholders: business, entrepreneurial associations, research entities, central and local public authorities, financial institutions, investors, consultants, etc. Some tools have been designed to promote membership, as well as “guest” access, abroad. At a macroeconomic level the portal provides, a periodical evaluation of the sector’s trends based on direct business data and a strategic report on the “integrated finance” initiatives, which are the main ASI’s activities supported by the portal. At a microeconomic level, the portal offers its virtual tools to promote the sector’s interactions with ASI and within itself, mainly (but not only) following an “integrated finance” approach: a platform where every commercial registered subject can be located by its size, capacities, and other factors, and where its technological proposals, both as prototypes and new products, can be considered and operationally supported. Special care is given to the promotion of the portal to international users and emerging countries in particular.

Keywords: Agenzia Spaziale Italiana (ASI), Distretto Virtuale, Integrated Finance, Portals, Virtual Tools

ACTUAL HIGHLIGHT: THE OCCASION OF THE 62ND IAC IN CAPE TOWN OR HOW TO STIMULATE SPACE ECONOMY THROUGH COLLABORATIONS WITH EMERGING COUNTRIES

The Italian Space Agency web portal Distretto Virtuale supports and monitors sectoral developments both at a macroeconomic and a microeconomic level. As to microeconomics, the portal is providing, among others, a registered access to national and international subjects interested in cooperating with the Agency or the sector, for technological development or business promotion. The main tool in question is the “Directory of Business and science Community”, which is actually featuring only business subjects registered in Italy. This DB can be accessed also in “guest” mode and, by means of selective queries, allows, for example,
the extraction of lists of matching firms as well as the reading and printing of their personal info-sheets. One interesting extraction concerns the list of prototype projects open to collaborations (products and prototypes showcase).

The Directory tool is sided by a Content Management platform, which unlike the Directory can feature, in a dedicated area, international subjects, even if the supported workflows are less customised. Finally, the Threaded email Communicator tool, which like the Content Manager is an open registration instrument, is dedicated to information exchanges available to all registered users, on a moderated basis.

To best profit from the portal’s opportunities, we first have to understand its whole rationale and especially its main task of promoting, measuring and monitoring economic activities in the Italian space sector, carried out by any type of subject (business firms, research entities, private and public subjects).

The periodical macroeconomic measurement of sectoral trends in Italy is a basic function of the above, and one particularly important for the potential international partners and observers in general. It offers in fact the ground for strategical considerations. This measurement is based on data (turnover, number of employees, etc.) directly updated by each firm registered in the portal’s DB (Directory) by means of a web personal info-sheet, and suitably aggregated by an inbuilt statistical operator.

**The Sector Performance and its Measurement**

All of the firms registered in the Directory (190 so far and increasing) can participate in the survey. 132 of them qualify themselves as SMEs. Theoretically, foreign firms too can register in the Directory tool, and hence contribute to the survey, on condition they have a “permanent establishment” in Italy. Obviously, their figures will only cover the Italian share of their worldwide operations.

As for the general sectoral data (turnover and employees) more than 40 firms are currently participating in the yearly survey on a regular basis, more than 30 being SMEs. The “panel” is therefore very meaningful. As for the turnover trend it shows a rather regular performance – and even slightly increasing in the whole – amounting in the years 2008–2009, respectively, 1229 and 1420M€.

A specific focus on SMEs reveals a comparatively very small sector (worth less than 10% of the total), although their performance may show a somehow stabler trend of growth: 85 and 96M€². As for the number of employees, over the same period, the general figures are 5325 and 5574, while for the SMEs are 803 and 866. The comparison of the SMEs employees figures with the turnover performance above shows, although a certain “expansion” is taking place in the whole, a lower than average sector’s productivity rate.

As to 2010, data are almost complete (only a few panel firms are late in entering the data) and they confirm the abovementioned general trends, with some more peculiar trends for the SMEs. In fact overall turnover is valued at 1538M€, while the SMEs alone account for 145M€. As to the number of employees the general figure so far is 4955, and the share of SMEs is 346. It appears then that an upward trend in turnover is not followed by employment, which drops significantly, and this is even more felt with the SMEs, which experience massive cuts in jobs, hence a productivity increase with a high social cost.

Finally, as to the vocation for international collaborations, the top ranking countries are by far EU Member States (Germany and France top of the list), with USA second best and a few collaborations in countries like Russia, China, etc. The need of diversification is therefore very strong as the capacity to extend a worldwide network of collaborations, with emerging countries especially, is the new challenge with the aim of building a stronger sector. Statistical details will be available soon, starting from year 2010, regarding variations in the main partner countries, as well as other aspects like percentage of overseas turnover, intensity...