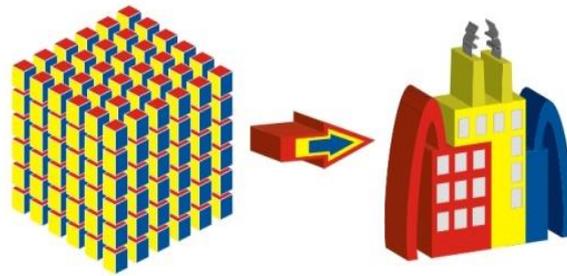


Project title: “Matrix of knowledge for innovation and competitiveness in textile enterprises - TexMatrix”
Project duration: 2016-2018

Report Benchmarking Questionnaire Part 2 - Analysis by nation: Italian Companies



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This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



MASTER DATA:

NATION

Italy

Italian companies are 9, 14% of overall sample.

With regard to the sectors covered, there are no companies involved in the production of fibers or spinning mills, and there is a smaller share of companies in Clothing / Fashion; inversely, there are most present in other areas: dyeing / finishing, both traditional and technical textiles.

The average company size is lower than the overall sample: in fact, the share of between 10 and 49 employees is dominant, and there isn't the share size over 250 employees.

The main turnover is between 1 and 10 million Euro, and some companies reach the cluser between 10 and 50 million Euros; there are no companies with turnover less than 1 million Euro and more than 50 Million Euro.

With regard to exports, on the companies sample do not appear companies devote to overall exports, the internal market, instead is very strong, in fact the shares from 0 to 50% represent 89% of the sample.

With regard to the attitude towards innovation, the trend is very similar to the overall sample, with a slight increase in research, IT and services attention.

With regard to the expected aspects of innovation activity, the trend is lower, mainly due to the increase in profits and the introduction of new products in the production line.

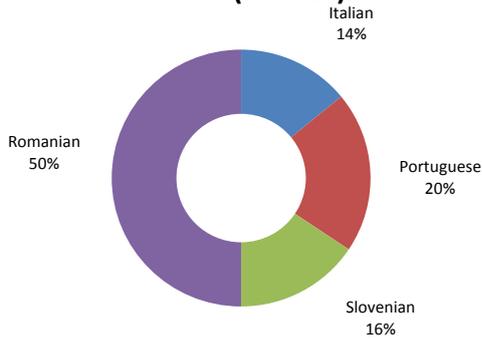
Below are the related charts, in the left column to the overall sample, while at the right column are shown graph related to nation.

For graphics convenience, the questions in the charts have been simplified.

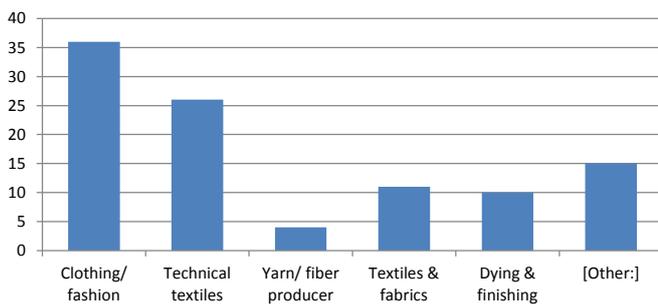
We include the general index of the questionnaire and the simplifications used in a separated annex.

Likert scale questions report the average values in the scale used from 0 to 5, while open questions show the percentage achieve.

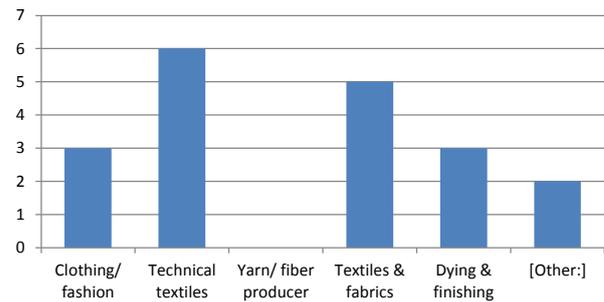
Nation (Overall)



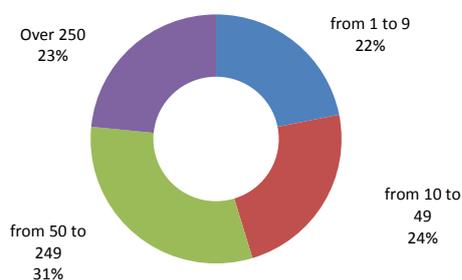
Sectors (Overall)



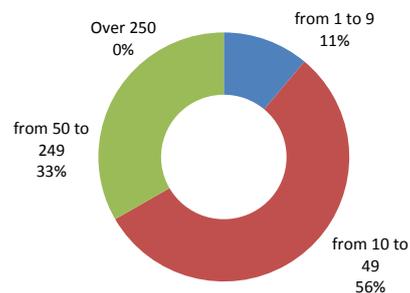
Sectors - Italy



Employees (Overall)



Employees - Italy

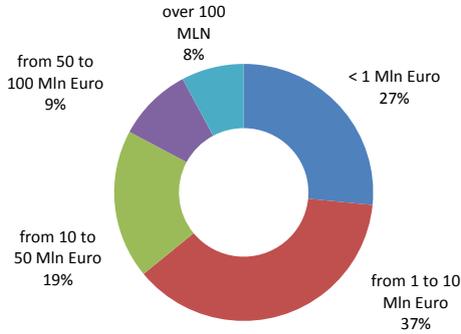




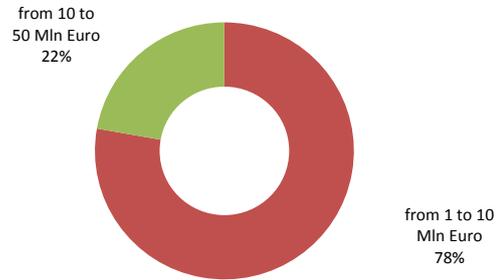
NATION

Italy

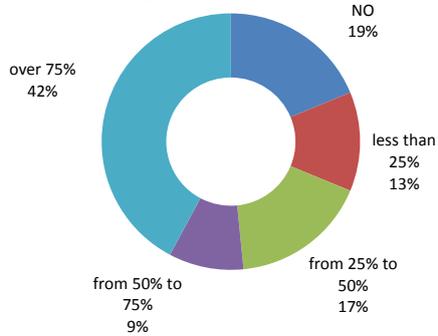
Turnover (Overall)



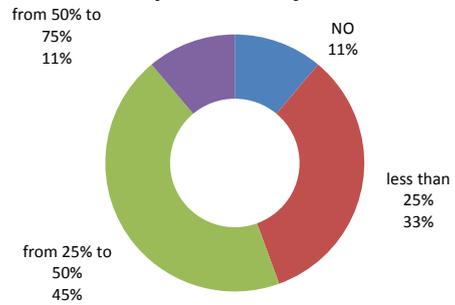
Turnover - Italy



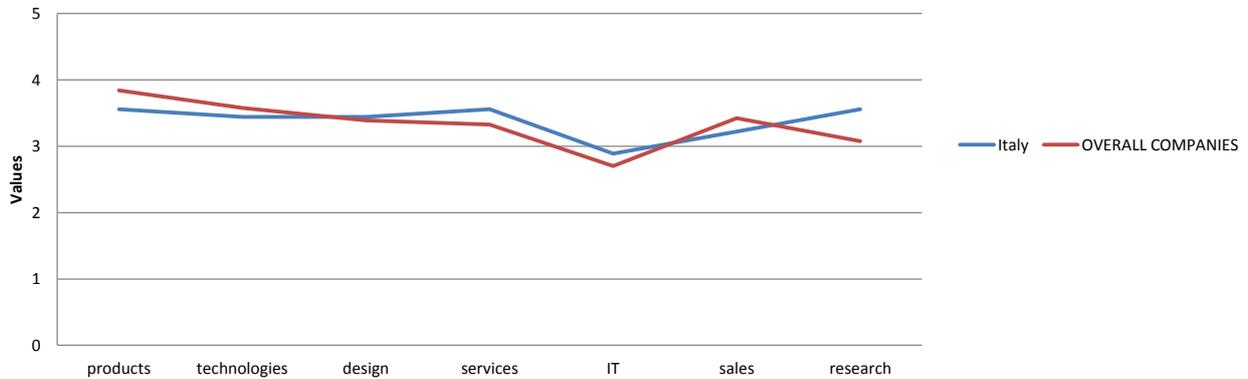
Exports (Overall)



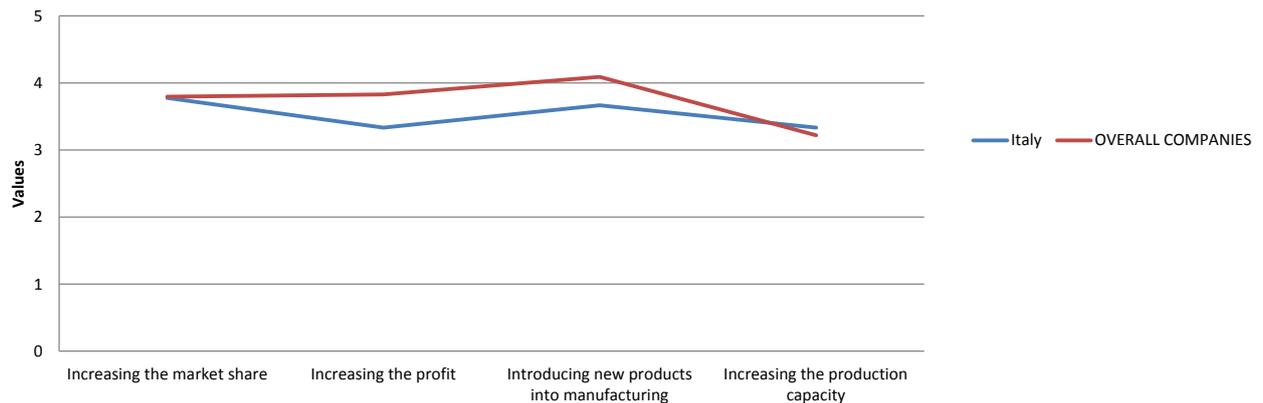
Exports - Italy



How would you rate the activity domains in the Company with regard to innovation?



How would you rate the activity domains in the Company with regard to innovation?





CONDITIONS

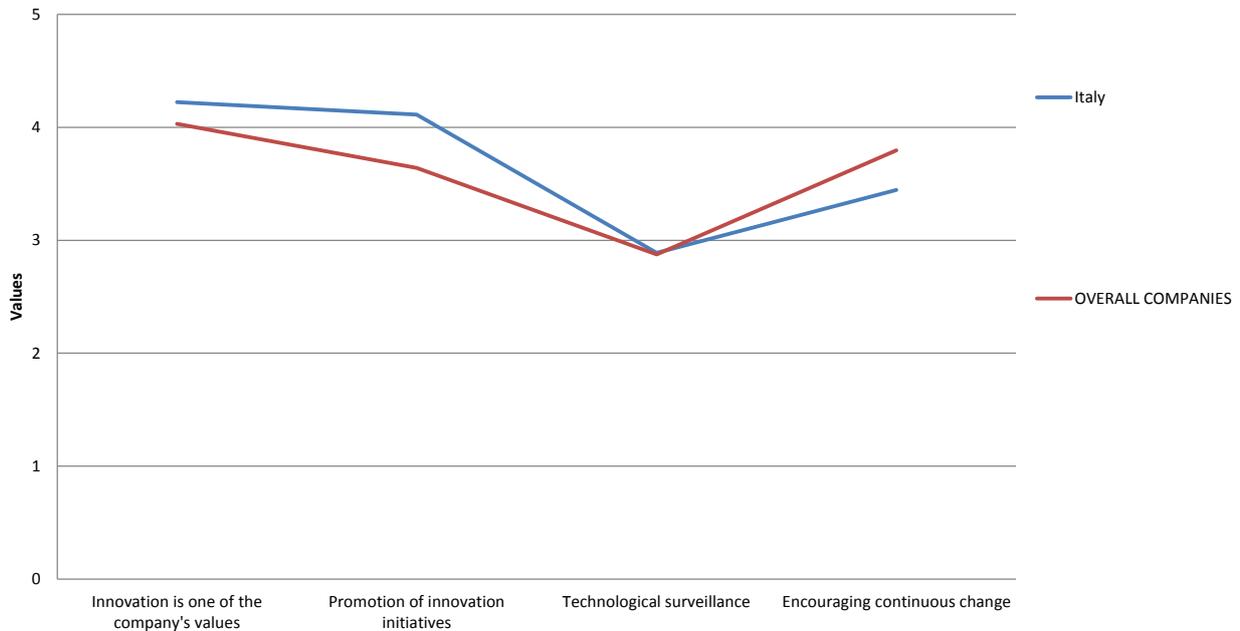
Conditions register higher values than average for innovation questions as business value (4.22; +0.19) and the promotion of innovation initiatives (4.11, +0.47). Lower values are recorded in the promotion of continuous change (3.44; -0.35).

The motivational instruments used are lower than the average, especially in career development opportunities (11.1%), financial bonuses (11.1%) and on the possibility of specialization for employees (33.3%) . The involvement in the company mission (55.6%) is rather high.

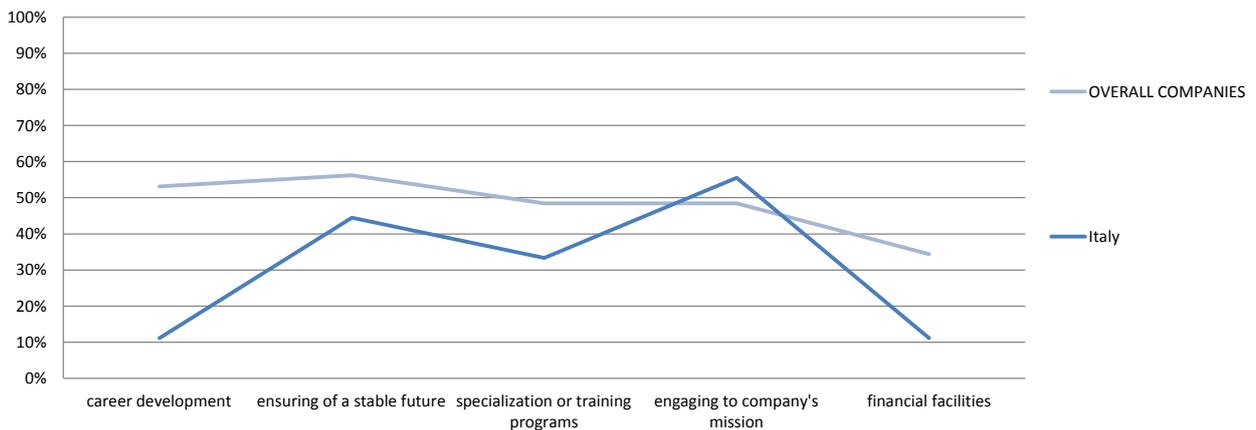
The company strategy is stronger in defining the goals to be achieved (3.33; +0.21) and its medium to long term plan (3.33; +0.55), while it is weak on the plan evaluation (2.22; -0.25), and on quantification of the required resources (2.22; -0.50).

In Leadership in general, values are quite low in adopting specific leadership figures (1.78; -0.74) and in providing a dedicated budget line (1.89; -0.52)

CONDITIONS: Innovation Culture



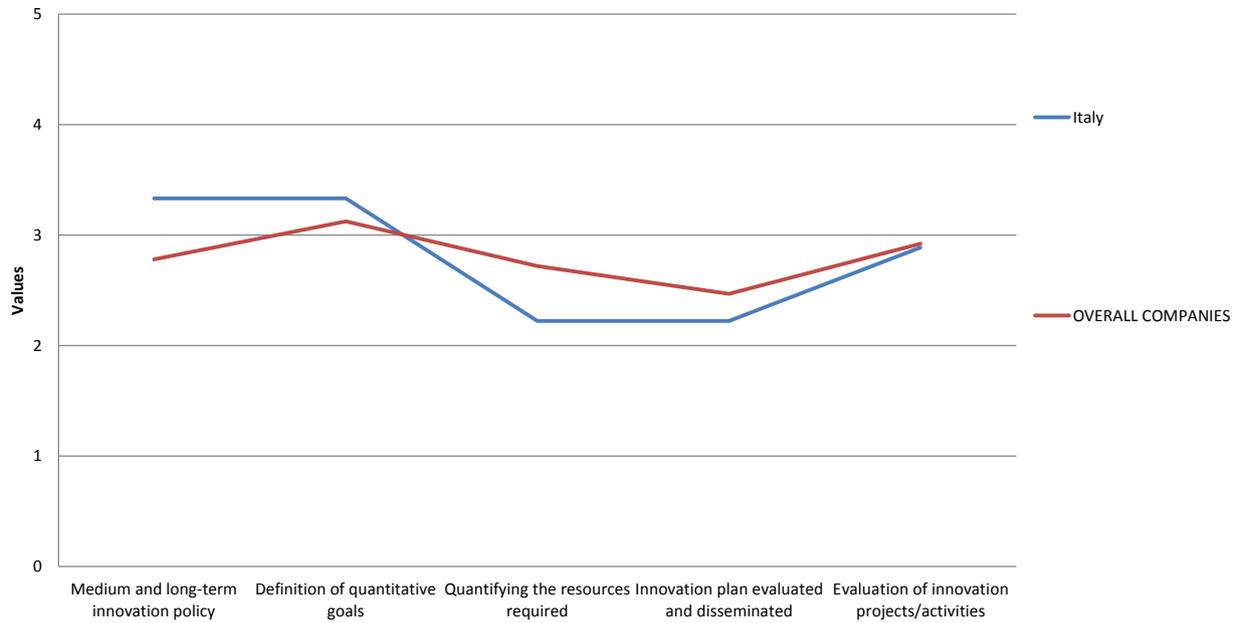
Motivation instruments for innovation activities



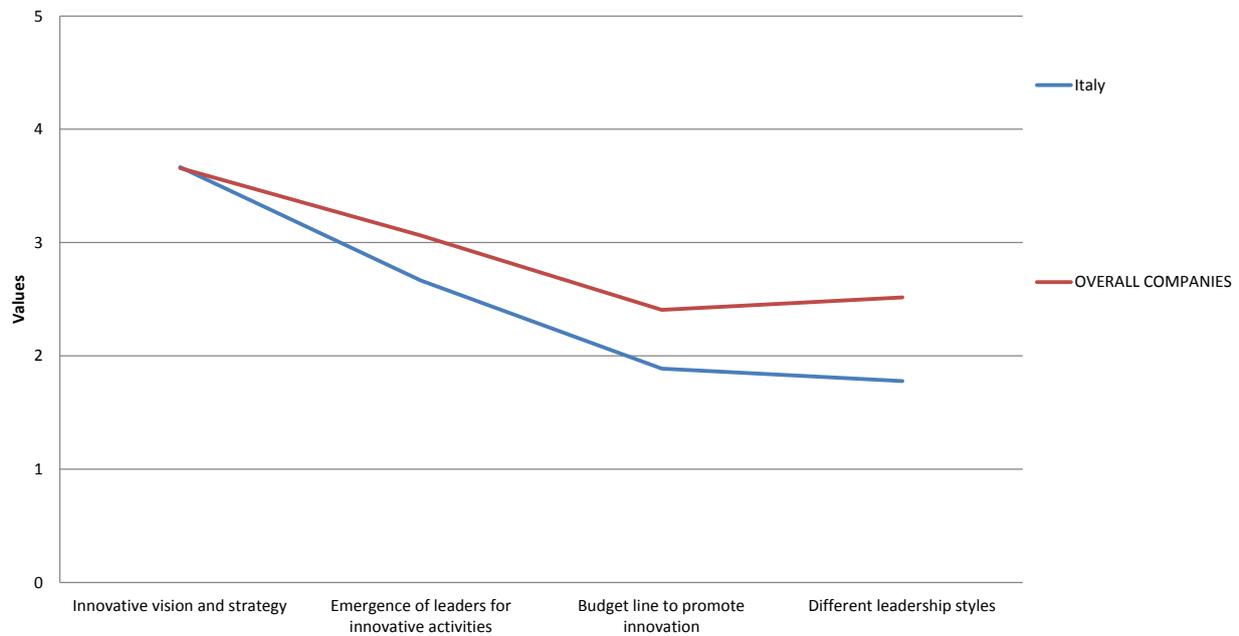


CONDITIONS

CONDITIONS: Innovation strategy



CONDITIONS: Innovation Leadership



RESOURCES

Human resources see lower values than the cumulative sample, especially regarding the employment of policy devoted to their management (2.56; -0.59) and on trainings (2.44; -0.57). The involvement of employees and their adequate skill level is assessed to be higher (3.11 and 3.33) than other human resources questions, but is still remain lower than the overall average (-0.58 and -0.23).

Training activities register more attention to internal (44.4%) and traditional (33.3%) training, especially if provided by authorized organizations (44.4%), it is adopted more technical training (33.3%) and managerial training (22.2 %), while there is no job-rotation or work-based training.

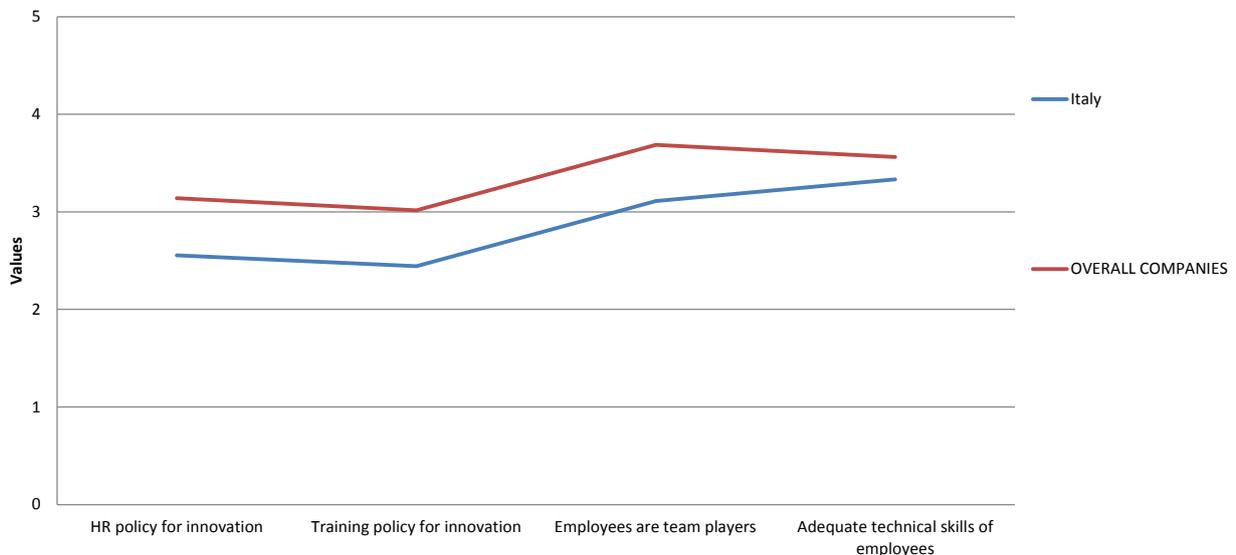
Organizational resources show a parallel trend to the overall average but noticeably detached: knowledge management records the lowest value (1.67) and it is the highest detachment one (-1.29), followed by the definition of procedures to stimulate creativity (1.89 ; -1.11), and the use of multidisciplinary teams (2.33; -0.95) and opening to external partnerships (3.22; -0.72).

Material resources have higher values: in the ascending order, access to specialized resources (2.22; -0.89) is lower than the average, and the definition of a technological innovation plan (2.89; -0.44) while the search for innovative material record more attention than overall average(4.22; +0.52).

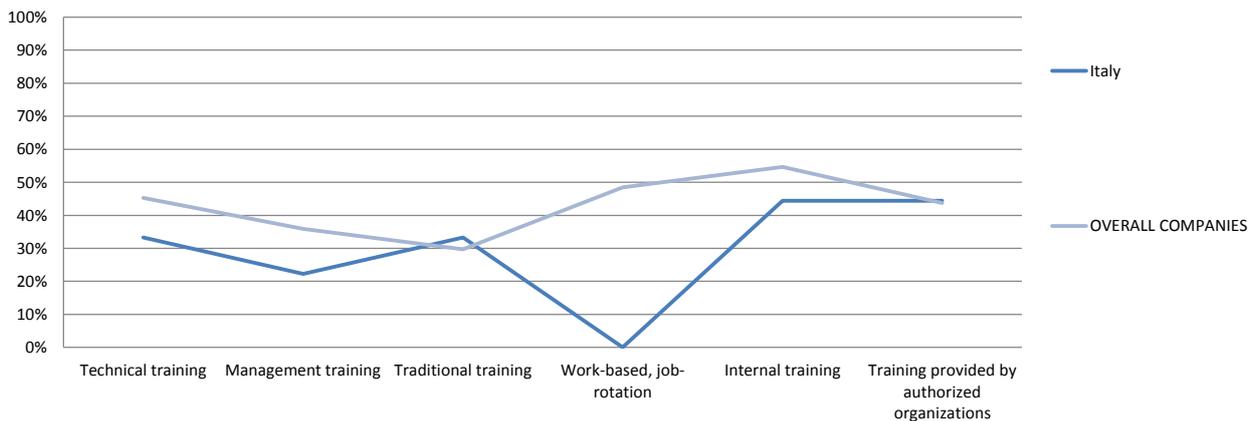
External relations see values within a range from 3.33 to 4.11, but, compared with the overall average, they are lower on sector fairs (3.33; -0.43) and on analysis of market trends and social behaviors (3.44; -0.46); while are higher on establishing relationships with research institutions or universities (3.44; +0.23) and on involving customers and suppliers (4.11; +0.50).

Seek for external financing sources shows a slight increase compared to the overall average (+0.10) but is still a low value: 2.56.

RESOURCES: Human resources



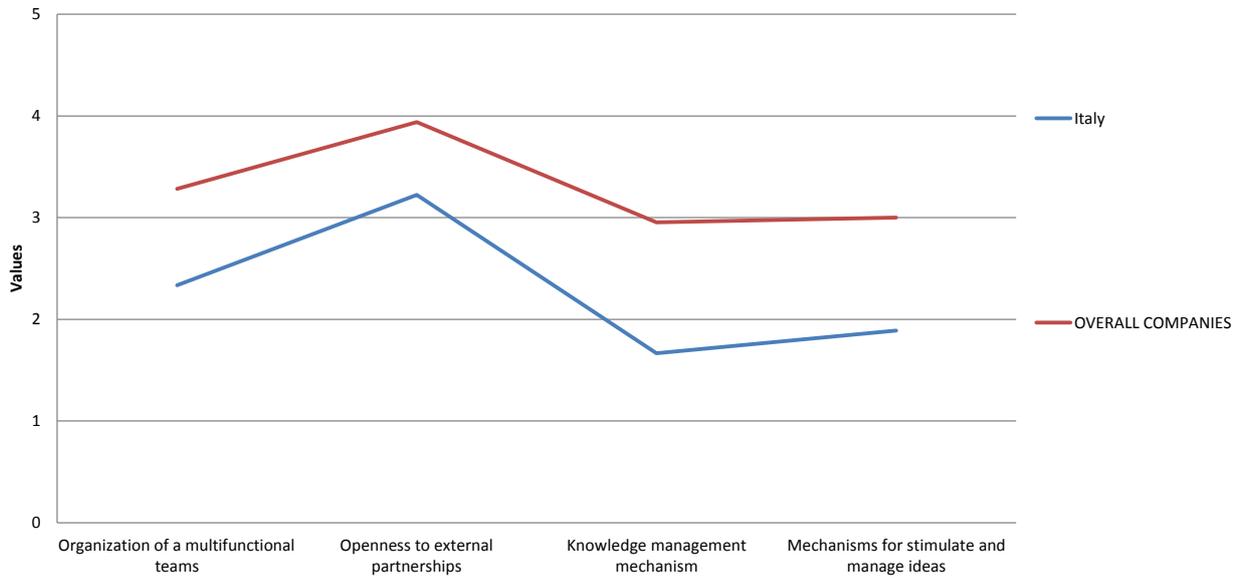
What types of training activities does the enterprise organize for its personnel?



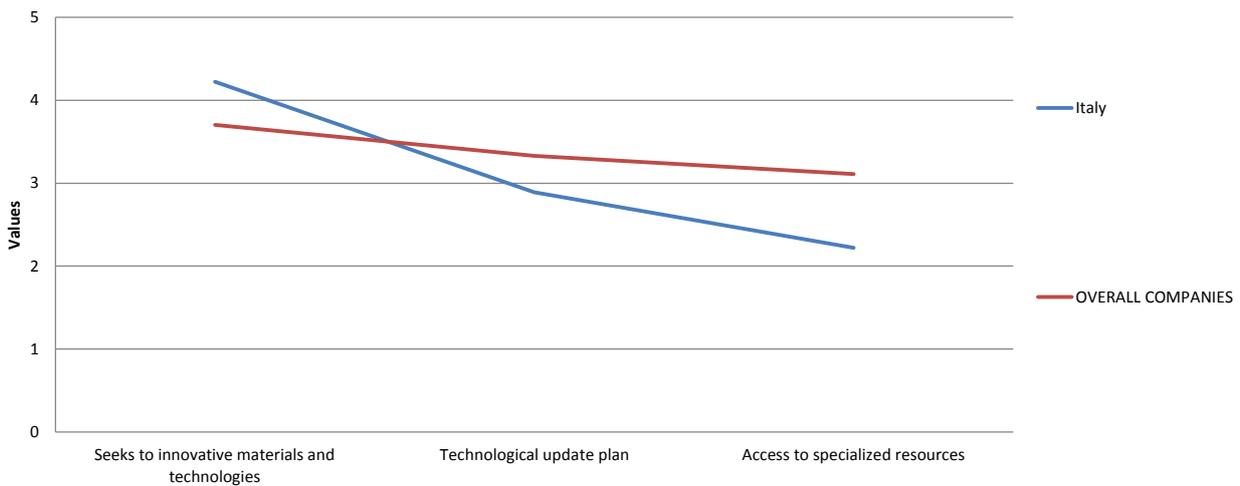


RESOURCES

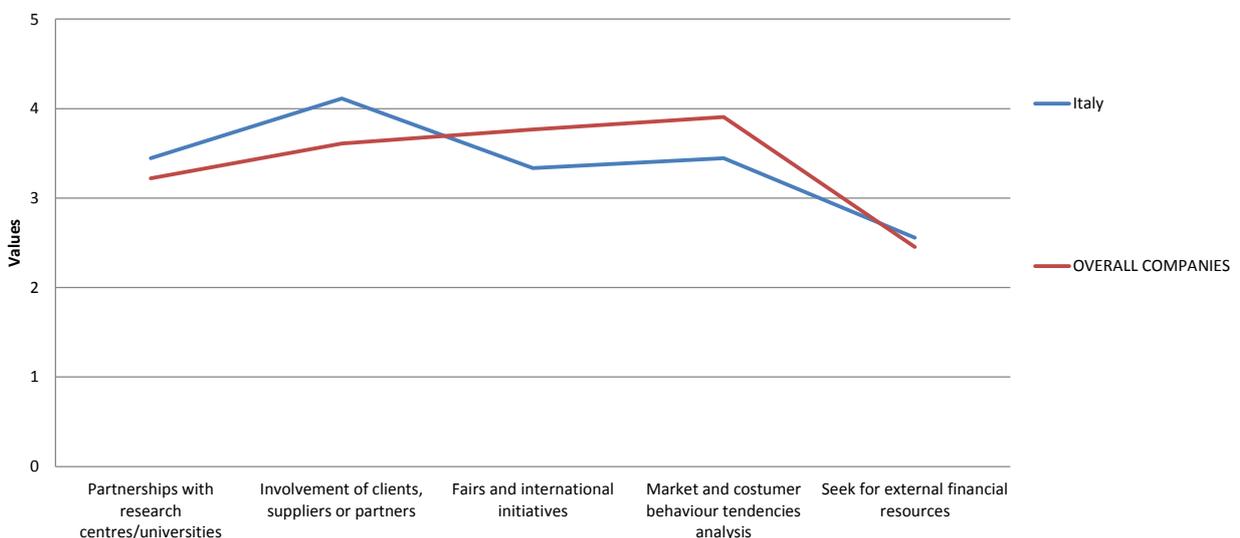
RESOURCES: Organizational structure



RESOURCES: Material resources



RESOURCES: External Relationships and Financial Resources





ACTIVITIES

Activities related to innovation shows lower trends than the overall average, it must be noted the higher difference is in knowledge monitoring (1.67; -1.11), and on using I.P.R. (1.56; -1.09) and registered patents (1.67; -0.88). The other questions are in the range between -0.16 and -0.52.

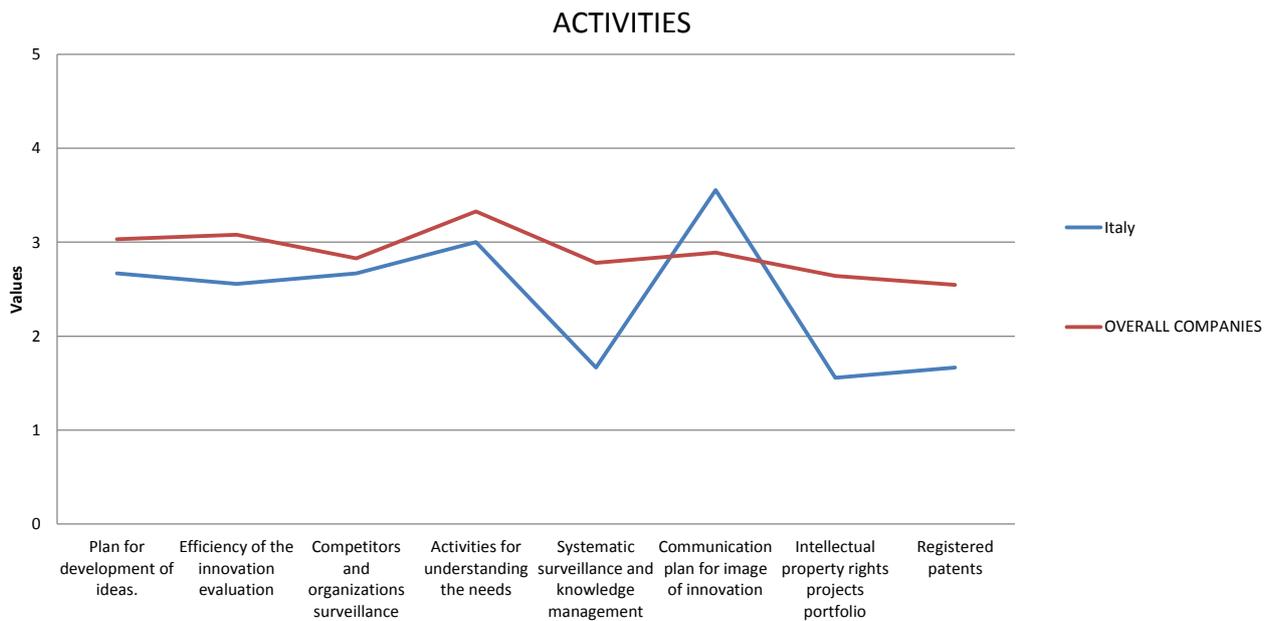
The only exception is on managing a communication plan (3.56): this question records an higher value (+0.66).

Innovation methods adopted involve greater involvement of customers and suppliers (77.8%) and a greater attendance at business fairs (77.8%), while lower values than the overall average are on the development of ideas from internal staff (44.4%) and the use of scientific magazines(11.1%).

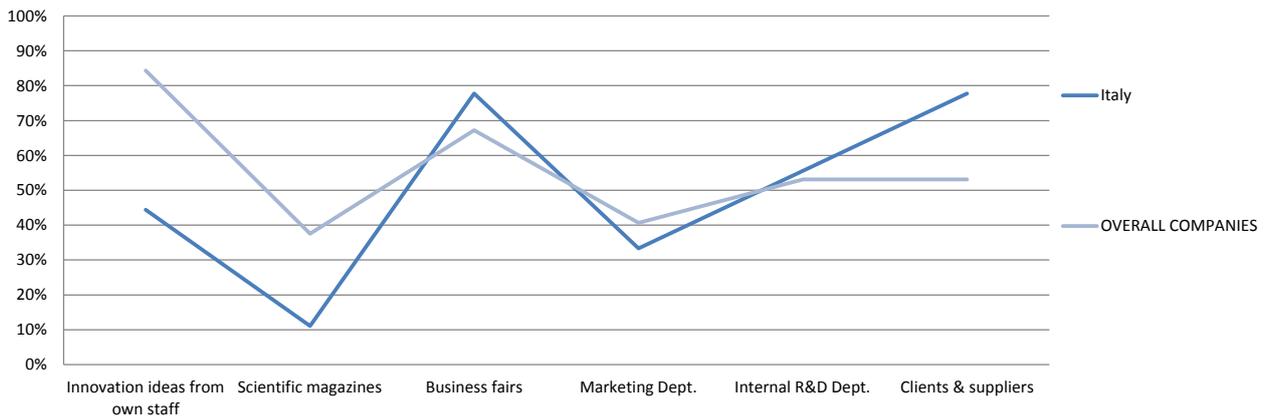
The instruments used to manage the portfolio of projects indicate a lack of financial data use, and a lesser degree of attitudes to internal analysis (66.7%) compared to overall average. The same share concerns the use of technology reports, the use of staff skills (higher than average), even environmental analyzes show greater sensitivity (33.3%).

The management of partnerships mainly involves the use of specific agreements (66.6%), partnerships in research projects (55.5%) and members in professional associations (44.4%), and is in line with the overall sample. Direct communication (44.4%), is the only one exception case, lower than the average.

Regarding I.P.R. there is a total lack of interest in patent acquisition and documentation; licensing and design is 11.1%, while internal patents (33.3%) are in line with the average, and more attention is paid to models and labels (44.4 %).



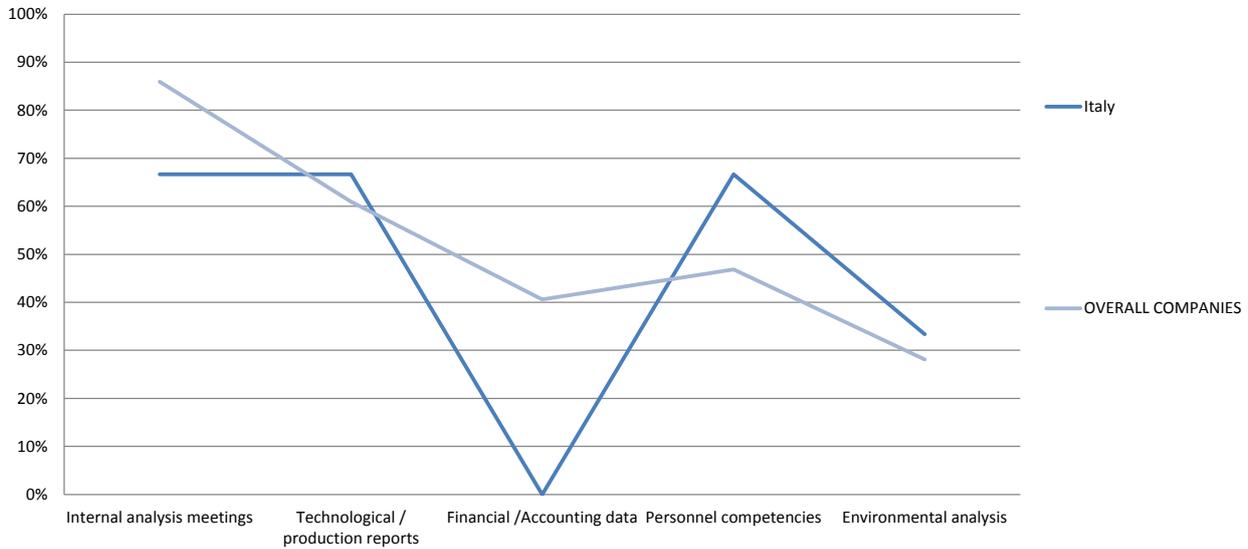
What methods and sources for innovation does the enterprise apply?



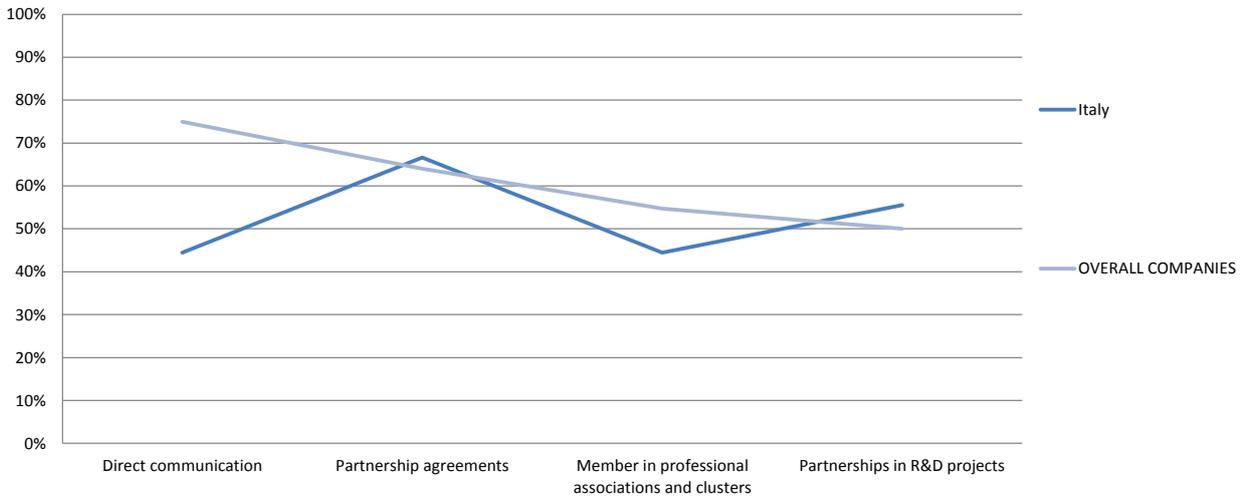


ACTIVITIES

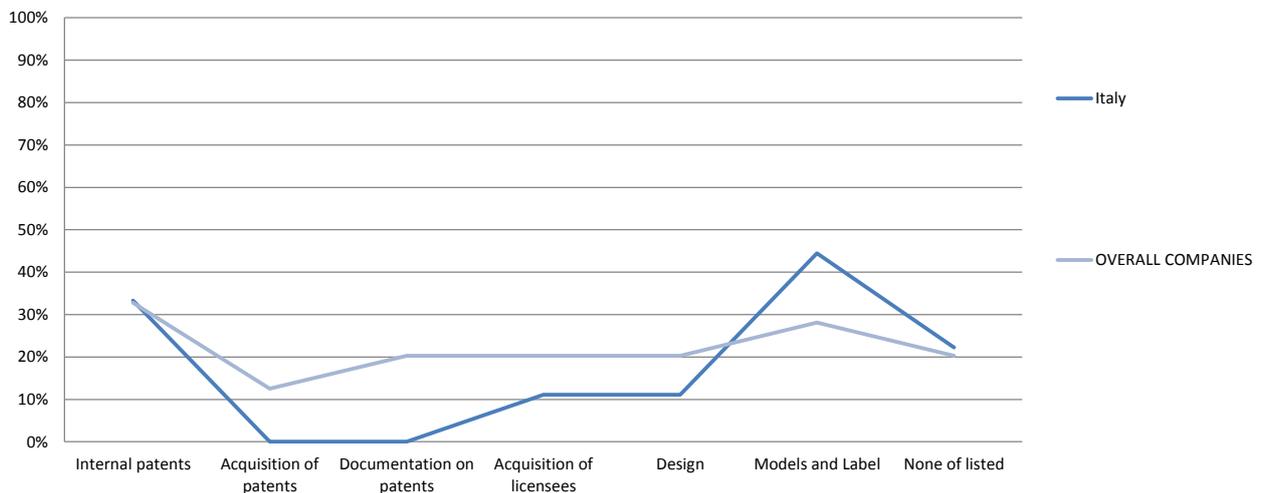
The company manages an innovation projects portfolio by using following instruments



The company has the following instruments for establishing of partnership



What activities regarding IPR does the enterprise apply?





RESULTS

Results show values slightly above the average, except for I.P.R. (1.56; -0.69) consistent with what was found in the activities. More attention is registered to customer satisfaction (3.67; +0.34) and on sustainable technologies (2.78; +0.15).

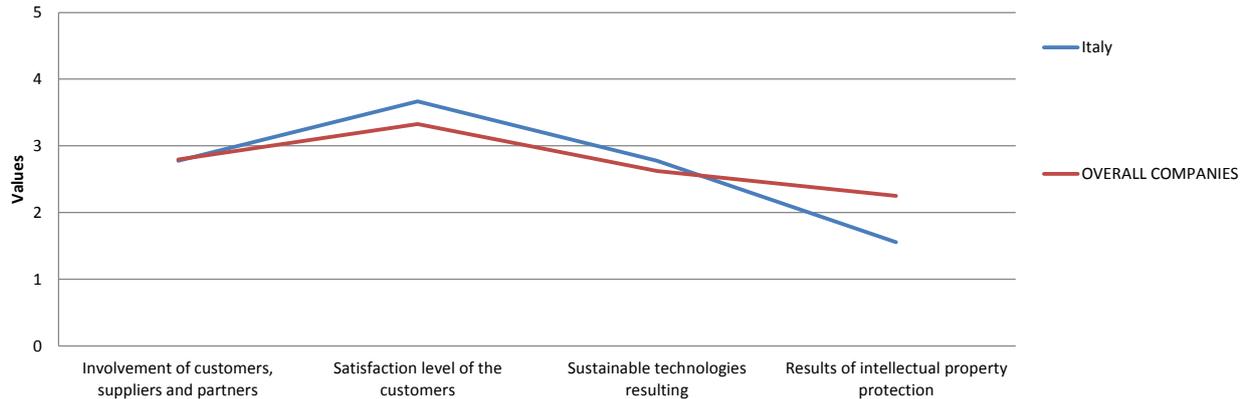
The assessments of innovation activities are less considered: the increase on size dimension (0), the increase of use I.P.R. (0), the reduction on protection expenses (0), and increase in profits (33.3%).

Instead, the reduction in resource consumption (44.4%) or the reduction of production cycle (22.2%), and the purchase of new equipment (44.4%) register higher values than overall sample.

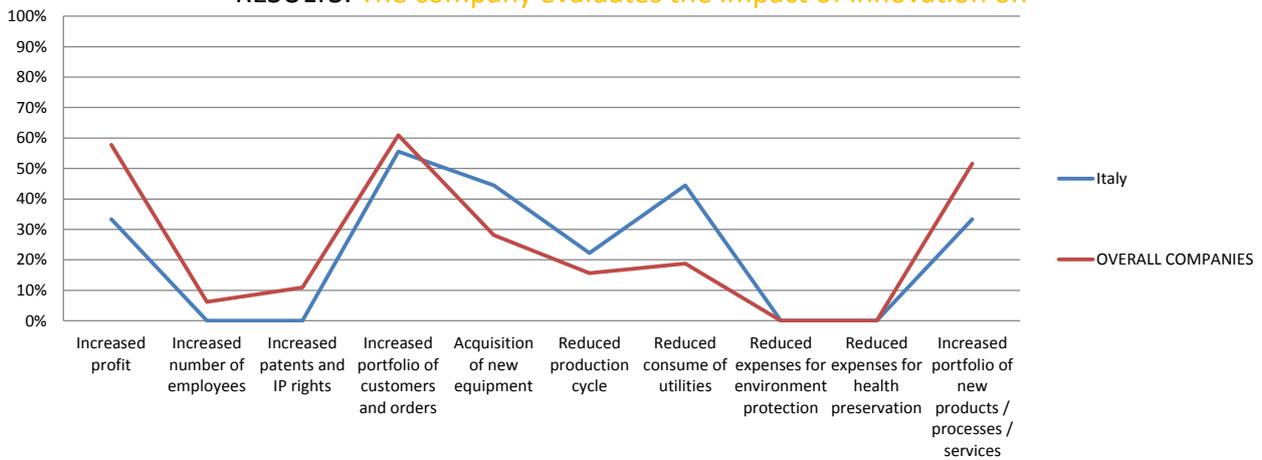
Image returns are generally considered higher than the overall average, especially in terms of brand image (3,11; +0,16) and related to brand success (3,22; +0,30), although it is lower in terms of assessment of growth visibility (2.89; 0.13).

Factors that block innovation are assessed lower than the average (3.22; -0.14).

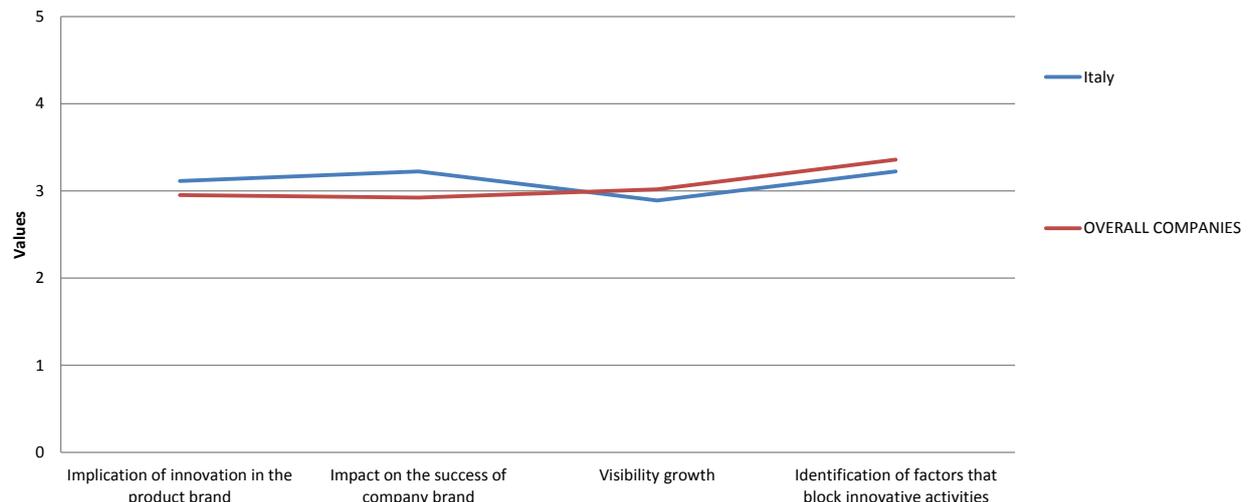
RESULTS: Evaluation and monitoring



RESULTS: The company evaluates the impact of innovation on



RESULTS: Image and learning from failure





APPENDIX

Index - Bench Mark questionnaire and related tabloid used on graph

	Extended Form (questionnaire)	Simplified Form	Likert	Tick
In what industry does your Company operate?	Clothing/ fashion	Clothing/ fashion		●
	Technical textiles	Technical textiles		●
	Yarn/ fiber producer	Yarn/ fiber producer		●
	Textiles & fabrics	Textiles & fabrics		●
	Dying & finishing	Dying & finishing		●
	[Other:]	[Other:]		●
How many employees have your Company?	1 to 9	1 to 9		●
	10 to 49	10 to 49		●
	50 to 249	50 to 249		●
	more than 249	more than 249		●
Does your Company export some of its products?	No	No		●
	Less than 24% of sales	Less than 24% of sales		●
	25% to 50% of sales	25% to 50% of sales		●
	50% to 75% of sales	50% to 75% of sales		●
	more than 75% of sales	more than 75% of sales		●
What is your Company turnover?	<1M Euro	<1M Euro		●
	1 M Euro - 10 M Euro	1 M Euro - 10 M Euro		●
	10 M Euro - 50 M Euro	10 M Euro - 50 M Euro		●
	50 M Euro - 100 M Euro	50 M Euro - 100 M Euro		●
	> 100 M Euro	> 100 M Euro		●
How would you rate the activity domains in the Company with regard to innovation?	a) products	products		●
	b) technologies	technologies		●
	c) design	design		●
	e) services	services		●
	f) IT	IT		●
	g) sales	sales		●
	h) research	research		●
What share of the revenue devotes to the promotion of innovation activities?				
What are the specific objectives of the innovation strategy applied in the Company?	a) Increasing the market share	Increasing the market share		●
	b) Increasing the profit	Increasing the profit		●
	c) Introducing new products into manufacturing	Introducing new products into manufacturing		●
	d) Increasing the production capacity	Increasing the production capacity		●
Your position in the Company	Owner/ CEO	Owner/ CEO		●
	Head of Marketing	Head of Marketing		●
	Head of R&D	Head of R&D		●
	Head of Manufacturing	Head of Manufacturing		●
	Head of Quality control	Head of Quality control		●
	Head of Export	Head of Export		●
	Head of Human Resources	Head of Human Resources		●
	[Other:]	[Other:]		●
Other:	Other:			
Gender	M	M		●
	F	F		●
Age				
CONDITIONS: Innovation culture	Innovation is one of the company's values	Innovation is one of the company's values	●	
	The company promotes innovation initiatives on a regular basis	Promotion of innovation initiatives	●	
	The company has mechanisms for technological surveillance of the sector and of the competition to feed the strategy of innovation (surveillance-competition, environment, technology)	Technological surveillance	●	
	The company encourages continuous change	Encouraging continuous change	●	
	a) opportunities for career development	career development		●
	b) confidence in the organizational management and ensuring of a stable future	ensuring of a stable future		●



What are the motivation instruments for innovation activities inside the enterprise?	c) possibility of participating in specialization or training programs	specialization or training programs		●
	d) connecting the personnel to the company's objectives and mission	engaging to company's mission		●
	e) salaries increase, bonuses, other financial facilities	financial facilities		●
CONDITIONS: Innovation strategy	There is a medium and long-term innovation policy shared by all employees	Medium and long-term innovation policy	●	
	The innovation strategy translates into quantitative goals and targets in the medium and long term	Definition of quantitative goals	●	
	The innovation strategy quantifies the resources required for its implementation	Quantifying the resources required	●	
	There is an innovation plan that is regularly evaluated and disseminated by all employees	Innovation plan evaluated and disseminated	●	
	The innovation projects/activities that running in the company are regularly assessed	Evaluation of innovation projects/activities	●	
CONDITIONS: Leadership	The top management conveys an innovative vision that guides the definition of the organization's strategy (values, mission, ...)	Innovative vision and strategy	●	
	The leadership structures promote the emergence of leaders for the development of innovative activities, through the accountability and autonomy of their collaborators	Emergence of leaders for innovative activities	●	
	There is a budget line to promote innovation activities	Budget line to promote innovation	●	
	The innovation policy brings about different leadership styles in the company	Different leadership styles	●	
RESOURCES: Human resources	The company has an HR policy which encourages innovation	HR policy for innovation	●	
	The company has a training policy that promotes innovation	Training policy for innovation	●	
	Employees are team players when it comes to innovation	Employees are team players	●	
	There are employees with adequate technical skills to perform R&D/innovation activities	Adequate technical skills of employees	●	
What types of training activities does the enterprise organize for its personnel?	a) Technical training	Technical training		●
	b) Management training	Management training		●
	c) Traditional training (i.e.: lessons by a teacher on a classroom)	Traditional training		●
	d) Work-based, training on the job, job-rotation or e-learning	Work-based, job-rotation		●
	e) Internal training	Internal training		●
	f) Training provided by authorized organizations	Training provided by authorized organizations		●
RESOURCES: Organizational structure	The company's innovation structure promotes the organization of a multifunctional teams to solve problems, when needed	Organization of a multifunctional teams	●	
	There is openness to external partnerships with other companies and / or suppliers that stimulate innovation	Openness to external partnerships	●	
	The company has mechanisms for knowledge management	Knowledge management mechanism	●	
	The company has mechanisms to stimulate and manage ideas	Mechanisms for stimulate and manage ideas	●	
RESOURCES: Material resources	The company seeks access to innovative materials and technologies	Seeks to innovative materials and technologies	●	
	The company has a regular technological update plan	Technological update plan	●	
	The company has access to specialized resources in the textile area, like databases, critical information and reports	Access to specialized resources	●	
RESOURCES: External relationships	The company has established partnerships with research centres/universities	Partnerships with research centres/universities	●	
	Clients, suppliers or partners are involved in the innovation process (open innovation)	Involvement of clients, suppliers or partners	●	
	The company is involved in fairs and international initiatives within the textile sector	Fairs and international initiatives	●	
	The company regularly analyses market and customer behaviour tendencies	Market and customer behaviour tendencies analysis	●	
RESOURCES: Financial sources	The company seeks for external financial resources to promote innovation	Seek for external financial resources	●	
ACTIVITIES: Management of ideas	The company has a plan for the development and implementation of innovative ideas.	Plan for development of ideas.	●	
	a) Innovation ideas from own staff	Innovation ideas from own staff		●
	b) Scientific magazines	Scientific magazines		●



What methods and sources for innovation does the enterprise apply?	c) Business fairs	Business fairs		●
	d) Marketing Dept.	Marketing Dept.		●
	e) Internal R&D Dept.	Internal R&D Dept.		●
	f) Clients & suppliers	Clients & suppliers		●
ACTIVITIES: Management of innovation projects portfolio The company manages an innovation projects portfolio by using following instruments:	a) Internal analysis meetings	Internal analysis meetings		●
	b) Technological / production reports	Technological / production reports		●
	c) Financial /Accounting data	Financial /Accounting data		●
	d) Personnel competencies	Personnel competencies		●
	e) Environmental analysis	Environmental analysis		●
ACTIVITIES: Management of innovation projects portfolio	The company evaluates the efficiency of the implemented innovation projects (in relation to financial results)	Efficiency of the innovation evaluation	●	
ACTIVITIES: Surveillance and knowledge management	The company develops a consistent plan for competitors and organizations surveillance	Competitors and organizations surveillance	●	
	The company develops systematic activities for understanding the needs, expectations and market opportunities	Activities for understanding the needs	●	
	The company has information and communication systems enabling systematic surveillance and knowledge management	Systematic surveillance and knowledge management	●	
ACTIVITIES: Innovation promotion	The company has a communication plan that projects an image of innovation in the textile sector	Communication plan for image of innovation	●	
The company has the following instruments for establishing of partnership:	a) direct communication	Direct communication		●
	b) partnership agreements	Partnership agreements		●
	c) member in professional associations and clusters	Member in professional associations and clusters		●
	d) partnerships in R&D projects	Partnerships in R&D projects		●
ACTIVITIES: IPR	The company manages the intellectual property rights of its innovation projects portfolio	Intellectual property rights projects portfolio	●	
	The company has registered patents	Registered patents	●	
What activities regarding IPR does the enterprise apply?	a) Internal patents	Internal patents		●
	b) Acquisition of patents	Acquisition of patents		●
	c) Documentation on patents	Documentation on patents		●
	d) Acquisition of licensees	Acquisition of licensees		●
	e) Design	Design		●
	f) Models and Label	Models and Label		●
	g) None of listed	None of listed		●
RESULTS: Evaluation and monitoring	The company monitors the involvement of customers, suppliers and partners in the innovation process	Involvement of customers, suppliers and partners	●	
	The company monitors the satisfaction level of the customers in the innovation process	Satisfaction level of the customers	●	
	The company evaluates the results of applying sustainable technologies resulting from innovation (renewable energies, green technologies, recycled raw materials)	Sustainable technologies resulting	●	
	The company evaluates the results of intellectual property protection	Results of intellectual property protection	●	
The company evaluates the impact of innovation on	a) Increased profit	Increased profit		●
	b) Increased number of employees	Increased number of employees		●
	c) Increased portfolio of patents and other IP rights	Increased patents and IP rights		●
	d) Increased portfolio of customers and orders	Increased portfolio of customers and orders		●
	e) Acquisition of new equipment	Acquisition of new equipment		●
	f) Reduced production cycle	Reduced production cycle		●
	g) Reduced consume of utilities (electricity, gas, water etc.)	Reduced consume of utilities		●
	h) Reduced expenses for environment protection	Reduced expenses for environment protection		●
	i) Reduced expenses for health preservation	Reduced expenses for health preservation		●
	j) Increased portfolio of new products / processes / services	Increased portfolio of new products / processes / services		●
	[Other:]	Other		
RESULTS: Image	The company evaluates the implication of innovation results in the product brand	Implication of innovation in the product brand	●	
	There is an evaluation of the innovation policies impact on the success of the company brand	Impact on the success of company brand	●	
	There is a regular assessment of the growth level of the company visibility	Visibility growth	●	
RESULTS: Learning from failures	The company identifies factors (cost, knowledge, market, etc.) that block innovative activities, or causes failure	Identification of factors that block innovative activities	●	