

SME GROWTH NEEDS REPORT

EMELIA ROMAGNA,
ITALY

SME
CLUSTER
GROWTH
EMPOWERED ENGINEERING



CLUSTERS
IN THE REGION

Role of
**ENGINEERING
SMES**
within the Regions



THREATS TO
ITALIAN SMES



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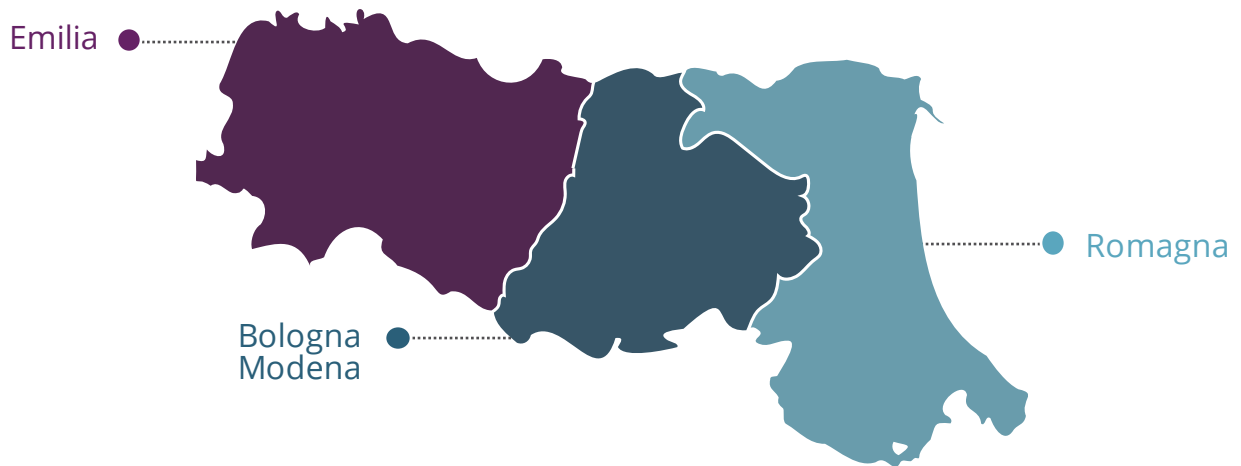


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INTRODUCTION TO THE REGION

Emilia-Romagna counts on a structured ecosystem of realities active in research and innovation, organized in collaborative networks that contribute in a coordinated way to the economic and sustainable development of the territory. Within this ecosystem, meetings, and exchanges between the various players and between them and the business world take place in a widespread and frequent way, facilitated by tools and processes developed and

tested over the course of a ten-year support policy. The current composition of the regional innovation ecosystem is the result of the sedimentation of a twenty-year innovation policy implemented by the Emilia-Romagna Region, but also of ARTER, the regional agency in support of innovation and knowledge exchange, which plays a key role in coordinating, promoting and enhancing the system itself.



Italian Region Source: (WDC, 2019)

CLUSTERS IN THE REGION



In recent years, the commitment of innovation policies in Emilia Romagna has been to enhance the assets that historically belong to the Emilia-Romagna Region, identifying realistically achievable priority settings and in compliance with the national, European, and international context. For that purpose, after identifying the most significant value chains, Emilia Romagna launched the project "CLUST-ER" as a fundamental step to enhance the capacity of the regional system to establish high-impact strategic planning to support the regional development.

"CLUST-ERs" are associations that aggregate laboratories, innovation centers, and companies focused on the priority production systems among the most significant value chains of the region. Promoted by ART-ER (Territory Research Attractiveness) and financed by the European Funds of the Emilia-Romagna Region, the "CLUST-ER" initiative constitutes the thematic oversight through interdisciplinary critical masses aimed at developing medium-long term strategic directions for the competitiveness of supply chains and developing joint strategic projects with a high regional impact in the context of collaborative research. It consists of an integrated policy to support the main clusters of the region:

- Agrifood Clust-ER
- Building Clust-ER
- Automotive & Mechatronics Clust-ER
- Healthcare and Wellness industry Clust-ER

- Cultural and Creative Industry Clust-ER
- Energy & Environment Clust-ER
- IT Services Clust-ER.



ROLE OF ENGINEERING SMEs IN THE REGION

GROWTH MANAGEMENT

In recent years, Emilia-Romagna has also shown its dynamism regarding innovation within companies, the birth of innovative start-ups and SMEs and academic spin offs. It is estimated that in the period between 2014 and 2016 that 54.7% of industrial and service companies with 10 or more employees active in the region (almost 8,700 companies) have introduced some innovation (product, process, organizational or marketing), an increase of more than 10% compared to the previous survey for the period 2012-2014. This propensity for innovation is, together with Lombardy, the highest among the Italian regions, above the national data (48.7%) and the Northeast (52.6%).

Ultimately, the good performances shown by Emilia-Romagna are certainly the result of a solid academic, research, entrepreneurial, cultural, and social structure; following a ten-year regional policy oriented towards growth, research and innovation, and above all, consolidated skills and resources in the field of research and innovation typical of local actors who are increasingly able to carry out international projects and collaborate with foreign partners.

Even with respect to employment in R&D, as observed for expenditure, the predominant share is represented by the private sector: in the region there are 26,500 employees in R&D, 71% of the total, equal to 1.35% of the total of employed in the region (compared to 0.76% in the EU28 and 0.74% in Italy). As far as public and private universities are concerned, there are 7800 employed in R&D in Emilia-Romagna are equal to 20.9% of the regional personnel in R&D and 0.4% of the overall total of regional employees.

Similarly, to what has already been highlighted for expenditure, even when it concerns those employed in R&D, the public sector still represents a limited share in Emilia-Romagna. The 2,800 workers employed at regional level represent a share of 7.3% of the national total, up by 3.0% compared to 2014 (in contrast to what was observed in the EU 28).

As for those employed in Science and Technology, Emilia-Romagna shows an excellent positioning at a national level, not far from the European average. According to the most updated estimates, in 2018,

in the region there were about 680,000 people employed in these sectors, a share equal to 20.7% of the resident population, higher than the national average (only in Lombardy is there a slightly higher share, equal to 22.7%), a few percentage points away from the European figure (21.6% in the EU28). In absolute value, the number of people employed in science and technology in the region grew by 6.3% compared to 2014, their percentage incidence on the population went from 19.4% to 20.7% today. Among those employed in science and technology, in Emilia-Romagna, those in possession of a degree are about 350,500, 51.6% of those employed in S&T. In relation to the population, they represent a share of 10.7%, a figure higher than that of the Northeast and the national average, but far from the EU28 average (14.1%).





STRUCTURES AND SUPPORT

The ecosystem is made up of places and communities that operate on priority areas of interest for the regional production system identified by the Smart Specialization Strategy of Emilia-Romagna, promoting innovation, contributing to the creation of new, knowledge-intensive business initiatives, acting in an integrated way on the provision of advanced services and innovative skills and raising the level of attractiveness of the territory.

The ecosystem is organized to be easily accessible, open, capable of detecting innovation needs and orienting them towards the most coherent solutions. The priority target of these actions is represented by the regional entrepreneurial system. Each subject is entrusted and recognised with a specific role within the ecosystem.

Confindustria Emilia-Romagna is an organisation that represents 6,500 companies in the region. It represents the needs and interests of the companies with government, research institutions and others.

ART-ER is the consortium for innovation and technology transfer in Emilia-Romagna. ART-ER's objective is to strengthen the Regional Innovation System by launching and coordinating the implementation of actions, projects, and new initiatives for enhancing innovation factors of the regional ecosystem, namely: Industry, Higher education and Research, Human Capital, Territory and Society.

PID - Points of Digital Enterprise are service structures located in the Chambers of Commerce dedicated to the dissemination of the culture and practice of digital diffusion in companies and Digital Innovation. Hubs of the main trade associations, which have the task of stimulating and promoting the demand for innovation in the production system, strengthening the level of knowledge and are the "gateway" of companies to the world of Industry 4.0 and offering a qualified level of services, also make use of a network of national and European innovation actors.

BI-REX Competence Centre which, through an articulated program of activities, aims to assist companies in the creation of new products and processes (or the improvement of existing ones) through the development and adoption of advanced technologies in Industry 4.0.

Fablabs are digital fabrication and advanced manufacturing laboratories, offering manufacturing, prototyping and adoption services of digital technologies to support businesses, the world of education and public administration.

MUNER Association, which arises from the synergy between regional universities and excellent car manufacturers, with the aim of giving future engineers the opportunity to study in stimulating environments, collaborating with the best engineers in the Motor Valley, and accessing the best professional equipment.

The Big Data Association was formed to interconnect and jointly exploit the knowledge, skills and research and innovation potential of this community, made up of regional universities, regional public research bodies and other local bodies. The objective is to exploit the effects of the actions and investments made and to maximise their impact, not solely at the local level but also at the national, EU and international level, contributing to the recognition of Italy and the regional territory as a reference point at the international level on the topics of big data and artificial intelligence.

Striking a balance between a better fit with needs and specialisation of the local economy and the future trends in science and technology is a clear challenge for any large, multi-disciplinary university focused on playing an increasingly major role in the global educational arena. The University of Bologna is no exception but has clearly benefited from a structured long-term approach at the regional level targeted at aligning local policies with EU Framework programs. This strong link with a supra-national programming context has made it easier to reconcile the short-term quest of an advanced industrial system mainly based on SMEs with the participation to long term innovation challenges. The University has therefore both played a key role in the creation and development of the Emilia-Romagna High Technology Network and actively intervened in the policy development process at the EU level. In either setting, its participation occurred through a mix of formal activities directly steered by its leadership, and the involvement in different roles (expert, evaluators, committee members etc.) of its faculty within regional, national, and international governing bodies.

Tecnopoli represents the territorial access point to the overall ecosystem offer and facilitate the meeting between companies and researchers and access to scientific equipment. They include service facilities for dissemination, demonstration and

information activities and hospitality facilities for companies, spaces for innovative spin-offs and for private research laboratories. In this way, the technopoles guarantee the animation of the territory on the themes of research and innovation.

Within the technopoles there are the Area S3 Spaces which have the task of encouraging the aggregation of entrepreneurs, start-uppers, university professors, students, and researchers to generate new opportunities for access to professional paths related to innovation or to develop new projects.

Network of Higher Technical Institutes are the connection between the world of education and training and by creating according to the organisational model of the Foundation in collaboration with companies, universities/scientific and technological research centres, institution schools, school, and training system.

Open Laboratories, real hubs of the Emilia-Romagna Digital Agenda, the task is to involve citizens, public administration, the third sector, universities and all the actors who have a significant role in the transformation of the information society in the urban environment in the development of collaborative projects.

Laboratories of the High Technology Network are suppliers of research skills, cutting-edge equipment, and resources for business development.

Incubators offer hospitality services and assistance to growth, to the interception of financing opportunities, up to the development of the business.



POLICY AND FINANCING

Companies and Research Institutions in Emilia Romagna use different sources to finance their projects, all of them supported by the Emilia-Romagna Region: European Research Projects; European financing, projects financed by the government through call of projects (National and regional calls), and others.

Innovation policies have been based on a strategic plan, dictated by the horizons of "Europe 2020", the ten-year strategy for growth and employment that the European Union launched in 2010, which aimed to ensure smart, sustainable, and inclusive growth for all member countries. The commitment in recent years has been precisely to enhance the assets that historically belonged to the Emilia-Romagna territory, acting in accordance with the Intelligent Specialisation Strategy (S3) and identifying realistically achievable priority settings and in compliance with the national, European, and global contexts.

As discussed at length in Sala and Sobrero (2018), the regional innovation policy can be characterized by three different stages. The 2003-2007 period was marked by actions focusing on strengthening the supply and demand of innovative activities. The Region acted as a funder using a dedicated budget and a set of competitive calls administered by an Expert Committee operating in coordination with the Regional Government, but with a high degree of autonomy and responsibility. The 2007-2013 program focused on the creation of a dedicated regional infrastructure under the direct control of the Region to solve the problem of connecting public research activities and companies, with the Regional Government acting as a central planner and pushing for a hierarchical dependence of local Universities and PRIs. The 2014-2020 program, on

the contrary, took for granted the presence of a strong set of actors playing different roles along the innovation process and acted as a facilitator investing in a preparatory phase based on public consultation to build consensus.

Research spending from the private sector constitutes the majority component. In 2016, private sector funding amounted to 2.3 billion euros (16.2% of the national total), corresponding to 75.7% of total R&D expenditure. This is followed by higher education expenditure (528 million euros, equal to 17.5%), that of the public administration (193 million euros, 6.4% of the total) and, with a residual share, that of the non-profit sector (13.8 million euros, 0.5%).

Emilia-Romagna ranks at the top of the Italian regions in terms of the percentage share of R&D employees on total employment, with 1.9% in 2016 (latest data available from the government), a better figure than both European comparison (1.35% in the EU28) and national comparison (1.3%). There are 37,400 employees in research and development, corresponding to 12.5% of the national total, which place the region second after Lombardy (20.3%). According to government statistics, among the personnel employed in research and development in Emilia-Romagna, the number of researchers counts 15,000 people (of which 7,700 in the private sector), equal to 40.1% of those employed in R&D. Compared to 2014, the number of R&D employees in the region increased by 23.2% (+16.3% in Italy; +6.2% in the EU 28); in relation to the population, in the same period the incidence of R&D employees increased by +0.3 percentage points (+0.16 in Italy; +0.05 in the EU 28).

GO INTERNATIONAL



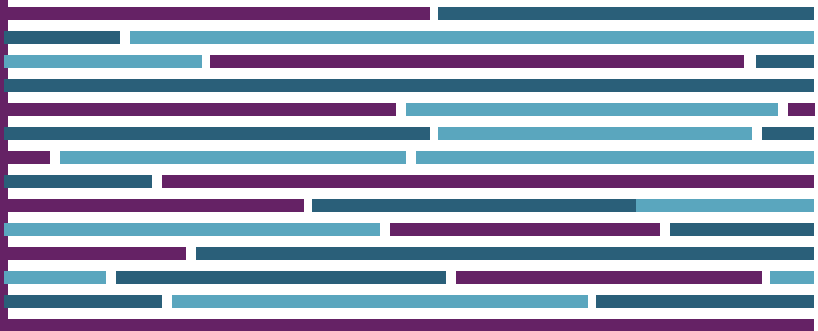
The Emilia-Romagna region promotes the internationalisation of its companies and research institutes keeping active international relations with several countries and European regions through the collaboration with European and non-European institutions. There is a greater interest for collaboration on the main sectors that are congruent to the regional policies, including environmental protection and the fight against climate change, economy, agriculture, training and work, youth policies, innovation and research, social services, social and solidarity economy, culture, sport, and international cooperation.

Emilia-Romagna presents a specialisation on the mechanics industry and its innovative products contributes to the development of specific industrial fields. The automotive industry is one of the main sectors of the region and has some of the biggest industries like Ferrari, Maserati, Lamborghini and Ducati. This sector exports represent around 16% of Italy's export activities.



KNOWLEDGE MANAGEMENT WITHIN STEM

In general, STEM professionals - are of fundamental importance for the labour market, for innovation and for the creation of a competitive advantage in knowledge-intensive economies. In this context, the demand from the labour market has progressively grown, to the point that the scarcity of immediately available skills is a problem, a scarcity that generates many difficulties in the scouting and recruitment of qualified personnel in most of the countries EU28. Taking into consideration the residents who at the regional level have obtained a tertiary level qualification in scientific-technological disciplines, in Emilia-Romagna in 2016 there were 15.8 young graduates aged 20-29 for every thousand residents, a figure higher than in the Northeast (14.7) and the national average (13.8), a slight increase compared to 2014. That the STEM disciplines are a strategic segment is also confirmed by the employment conditions of 30-34-year-old graduates. At a national level, for example, ISTAT notes that the employment rate reaches the highest levels precisely in the context of technical-scientific disciplines



INNOVATION EXPENDITURE

As regards investments in Research and Development, the region has already reached the national target (1.53% of GDP) set under the Europe 2020 Strategy, though there is still a gap compared to the European target (3.0%). According to the most updated estimate (2016), total expenditure on research and development in Emilia-Romagna is around 3 billion euros, equal to 1.96% of regional GDP (up from 1.70% in 2014). This value appears to be just below the EU28 average (2.04%) well above the Northeast (1.56%) and the national average (1.37%). In relation to the inhabitants, the regional system spends a figure of 679.6 euros on research and development, a figure higher than the national average (382.0 euros per inhabitant) and European (589.7 euros).



HEI ROLE

Emilia-Romagna contains four public universities: University of Bologna, University of Modena and Reggio Emilia, University of Ferrara, and University of Parma. These universities are located on the main cities with decentralised campuses, and they have

active research activities and an important role on enhancing the innovation process through their technology transfer offices and joint research projects.

SOLUTIONS TO BARRIERS

There is some evidence that regional innovation policies are important for strengthening the good performances illustrated and to try improving the situations in which a region suffers a significant delay compared to its European regional competitors.

There is a shared need to increase research activity and likewise the number of researchers involved in stabilizing the research and development function and increasing the advanced skills present in companies.

Another crucial node for the full development of the regional ecosystem is the support for the technological and organisational strengthening of the supply chains, the consolidation of innovative start-ups, particularly in the areas of the regional Smart Specialization Strategy (S3), and the enhancement of high-level services knowledge.

According to many, an important push towards investments in research and development with a view to greater collaboration and financial sustainability of companies, even small ones, also passes through support for the growth of companies. This is done through targeted investments, the establishment of stable networks, the strengthening of the medium/long-term credit

market with a view to relaunching the productive investments of businesses and promoting the national and European risk capital market for business growth.

Support for businesses is not just about their ability to innovate and specialise, but also about greater support for their internationalisation processes, the strengthening of business processes through the dissemination of advanced information and communication technologies and support for the attraction of investments. All these medium and long-term objectives constitute the challenges in which the Emilia-Romagna region must engage and naturally constitute the fulcrum of future planning activities.

The regional system was distinguished by the ability to access funds from the Horizon 2020 Program for research and innovation projects. Among the Italian regions, Emilia-Romagna is third in terms of number of participations (915) and fourth in terms of contributions received (281 million euros), respectively equal to 10% and 9% of the national share.

DESCRIBE THE REGION FROM A GROWTH STANDPOINT

Emilia-Romagna continues to be one of the Italian regions with the greatest manufacturing specialization (there are almost 501,000 employed in manufacturing in the region, corresponding to over ¼ of total regional employment). Of these, about four out of 10 workers are employed in high or medium-high technology sectors (this is more than 202,000 employed, whose share is growing compared to 38% in 2014). Compared to the national and EU28 level, the regional production system shows greater specialization in medium-high technology sectors (they represent 35.5% in Emilia-Romagna, 28.1% in Italy and 30.9% in EU28), while confirming that it has slightly less developed high-tech sectors (4.0% in Emilia-Romagna, 5% in Italy, 6.9% in the EU28). In the last four years, employees in the regional manufacturing industry have grown by over 22,000 units (+4.6%). This growth was driven by the medium-high technology sectors (+23.2 thousand employees, equal to +14.6%). In relation to total employment, the incidence of people employed in the high and medium-high technology manufacturing sectors is equal to 10.2% in Emilia-

Romagna, a value among the highest among the Italian regions (only Piedmont does better, with 11.1%), above the Northeast (8.1%), the national average (6.1%) and the EU28 (5.8%).

In regard to the broad services sector, the tertiary component with the highest knowledge intensity counts over 601,000 employees in Emilia-Romagna, equal to 30.2% of regional employment. Among the knowledge-intensive services, those at the highest technological level, with 45,700 employed in the region, represent 7.6% of the tertiary sector and 2.3% of regional employment (compared to 2.6% nationally and 3.0% in the EU28).

According to the Emilia-Romagna regional office (2021), the region counts with a higher percentage of R&D personnel by working population in comparison to Italy as a whole. Patent applications (per million inhabitants) and the total of S&T graduates (by 1,000 inhabitants) are higher than the Italian and European average.



CLUSTER COUNCIL MEETING

PARTICIPANTS

Firstname	Surname	Position
Rosa	Grimaldi	Professor of Entrepreneurship and Innovation Management at Unibo
Donata	Folesani	Intellectual Property Unit Manager at ART-ER
Andrea Barzetti	Barzetti	CEO at ALMA CUBE
Nicolò	Cavina	Professor at UNIBO
Federica	Mori	European Industrial Policy Project Manager at Confindustria Emilia-Romagna
Danilo	Mascolo	Head of Innovation and Business Development at Big Data Research and Innovation Excellence (BI-REX)
Filippo	Forni	Head of Research and Innovation at Confindustria Emilia-Romagna
Franco	Callegati	Councilor at CesenaLab
Marco	Baracchi	General Manager at CRIT
Silvia	Vecchi	Head of the Industrial Partnership Unit at UNIBO
Valeria	Carpenè	Industrial Partnership Officer at UNIBO

CONTENT OF THE DISCUSSIONS

Considering the difficulty of matching agendas and pandemic restrictions, the Italian group decided not to set a group meeting but to make short individual meetings held in July of 2021.

All the discussions addressed to the same three main topic, and consisted on listen about their opinions about them. The three topics discussed correspond to the main objectives of the project.

CONTENT OF THE DISCUSSIONS

The three topics are listed below:

- Mobility and Exchange of SMEs personnel

Visiting National and international institutions (public and private) in support of SMEs

- Training programs

For each topic, the participants indicated, on a 7-point Likert scale, about their perceived usefulness of actions that the project might implement to support SMEs' Growth.

- Mobility and Exchange of SMEs personnel

The first topic approached the importance of exchange between SMEs and Clusters of other companies from other regions and countries in order to clarify the main actions they perceive as valuable to SMEs' growth.



Graph 1: Mobility and Exchange of SMEs Personnel



According to the participants, the graph above shows that acquiring new skills and competencies and generating connections are the most useful actions. The rationale behind this is the urgency for SMEs to access complementary assets and resources through wide networks in order to boost their innovation process and expand their markets beyond Italian frontiers. The main challenge of SMEs to compete in global markets is to overcome their primary liability, which is their small size. Being small puts them in a challenging condition regarding accessing critical human capital and additional financial resources and establishing interactions with public research organizations and Universities. The possibility of joining key networks of companies, also considering their value chain, makes them more likely to open their opportunities to expand their market or establish partnerships with other companies in other countries or regions.

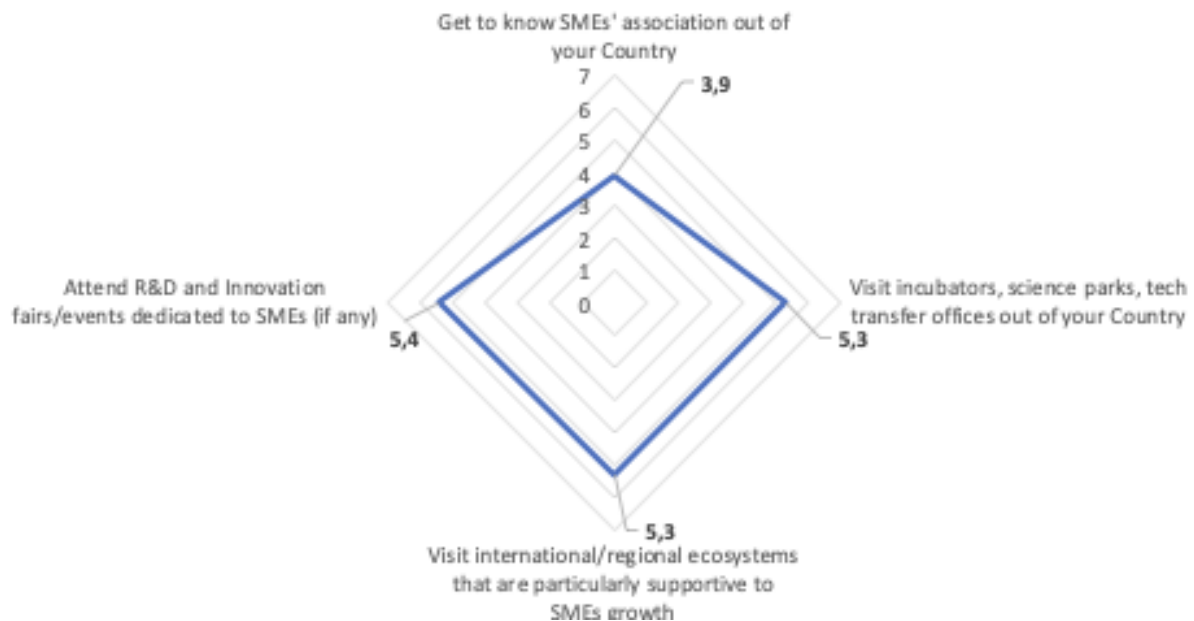
The third most helpful action is the possibility to know other SMEs' business models. It reflects the importance of knowledge shared between SMEs embedded in different contexts and markets. Knowing other SMEs' business models indicates the importance of benchmarking to support SMEs' growth by knowing other realities and understanding how to face issues with different perspectives.

The topics less useful were learning more about regional/national policies supporting SMEs. This impression may reflect a general lack of trust towards decision-makers, which is likely to change over the years, given the significant investments observed in the last five years that national governments and single regions have been making to support SMEs.



VISITING NATIONAL AND INTERNATIONAL INSTITUTIONS (PUBLIC AND PRIVATE) IN SUPPORT OF SMES

Another topic was the importance of visiting other institutions (public and private). One of the actions predicted for the project is to promote visits and interactions between SMEs and other institutions (HEIs and associations, etc.). This way, an important discussion is how these visits can help the SMEs foster their growth process.



Graph 2: MoVisiting national and international Institutions (public and private) in support of SMES

According to the participants, visits related to improving their knowledge and relationships are useful actions to support SMEs' growth. Following the results obtained on the first topic, attending fairs and events specifically for SMEs is probably the most valuable action. There is coherence with the necessity to expand knowledge and connect to SMEs from other countries (highlighted on the first topic discussed in the previous section), and the positive impact of participation on an event dedicated to SMEs can promote. Usually, these occasions are a strategic opportunity to expand their market perception and meet potential partners and competitors. SMEs often do not have the chance to engage in these events or even understand their importance. Because of this, the participants conclude that it is worthwhile to foster these events between Small and Medium Companies in order to enhance their competitiveness and market knowledge.

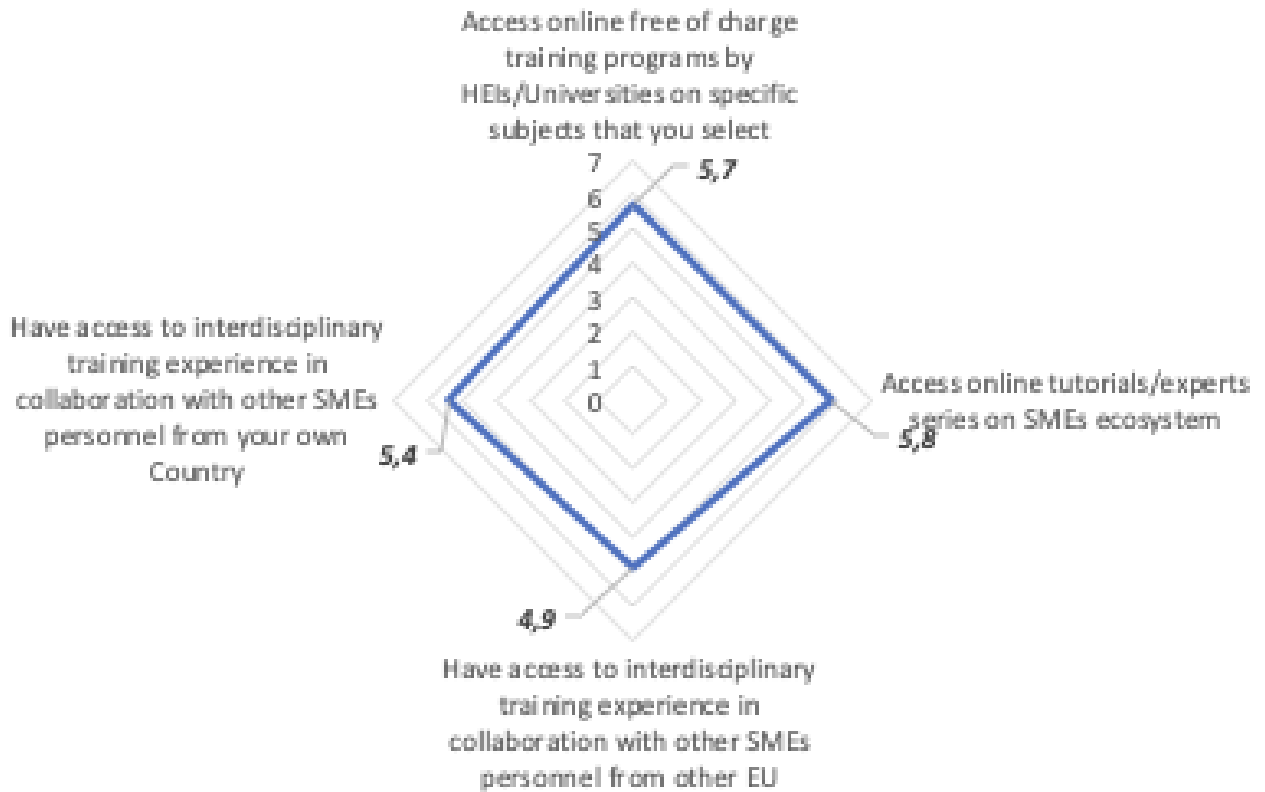
Participants also highlighted the importance of stimulating visits to incubators, science parks, TTOs,

and regions embedded in a supportive ecosystem. They are necessary to show these companies the value of these initiatives and how a robust business ecosystem is critical to boosting the growth of all stakeholders. Sometimes SME entrepreneurs may see these institutions as a waste of time and money. However, the participants made clear that it is essential to demonstrate that a healthy and solid ecosystem is the best way to achieve success for all stakeholders. At the same time, institutions like incubators, science parks, and TTOs are partners in innovative activities that will guarantee their competitiveness.

However, the experts were not very enthusiastic about the usefulness of presenting SMEs' associations from other countries. This scepticism is related to the limitation of these associations' actions and the lack of a direct impact on SMEs' activities. In light of this perception, it is important to stress the role of these associations in strengthening the business ecosystem that they are engaged.

TRAINING PROGRAMS

Finally, the experts evaluated ways to promote training programs, as predicted by the project. The central issue is to analyse which type of content SMEs would appreciate more.



Graph 3: Training Programs

The graph above shows that, in their perception, the four propositions are valuable. However, the one with highest interest to the participants is promoting content related to SMEs' ecosystem. They believe that improving their knowledge about the role of the actors inside an ecosystem and the importance of endorsing the connection between the stakeholders is the main point that deserves special attention in the training program. In fact, among the companies previously interviewed, there is a gap of knowledge about the role of some institutions that compose the business ecosystem.

The second point regards training programs promoted by HEIs on specific topics (like financing, innovation, business model, digital transition, entrepreneurial mindset, capital and internationalization for SMEs, etc.). The participants consider them as a valuable and necessary initiative. There is a lack of knowledge about these topics, which inhibits these companies' growth. They recognize the importance of supporting these SMEs in developing internal skills not related to the external environment.

The third point was the access to training considered the collaboration of SMEs personnel from their country. That answer reiterates the lack of knowledge on developing collaboration between these actors even though this is an essential strategy to keep SMEs' competitiveness.

The less useful topic, but not irrelevant, is a training program that approaches collaboration with other countries. Even though internationalization is strategic to the growth process of these companies, most of the companies are not prepared yet for these movements, and they need to solve in-house problems in the first place. The participants' point-of-view probably reflects their concern about the further step, after SMEs have better knowledge and consciousness about the local ecosystem, management tools, and the benefits of improving their collaboration with other companies.

ADDITIONAL COMMENTS

Besides these points, some participants added some comments that can support the development of further activities. Their main concern is the development of collaboration skills in SMEs.

During the meetings, the participants stressed the importance of enhancing collaboration with Research Technology Organizations (RTOs) and SMEs. In particular, they defend these institutions' role in engaging SMEs companies on Research Projects that European sources could fund (e.g., ERC Program Proof of Concept, which funds the development of innovative ideas and exploration of their commercial and social innovation potential). This kind of action can enhance the relationship between universities and SMEs and improve companies' innovation processes.

Following the partnership argument, the participants highlighted the lack of skills and knowledge on open innovation strategy. According to them, there is a necessity to develop a strategy combining disruptive with graded innovation. SMEs companies need support to leverage networks with end-users. Another point that emerged is the need to facilitate access to competence centres to help these companies test new technologies before investing in the acquisition.

The internationalization issue completes their list of concerns. According to them, it is relevant to encourage international collaboration with other SMEs, and it is more crucial to some specific sectors like those related to digital technologies. They evaluate that the effort in this direction is still weak, and it needs special attention on training programs targeting these companies' growth.

