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INTERNATIONALISATION DYNAMICS OF SMALL AND MEDIUM ENTERPRISES: FACTORS OF COMPETITIVE ADVANTAGE

1. INTRODUCTION

The processes of globalisation have posed the concept of competitiveness at the core of the debate about sustainability of economic growth. The wide range of sources of competitive advantages (Porter 1990) provides a variety of strategic trajectories, dependent on a complex set of structural factors, both internal and external to the unit of production. The significant gap in terms of economic development registered at regional level (Rodríguez-Pose 2004) confirms indeed how the structural advantages or disadvantages of a geographic localisation cannot easily or rapidly be overcome, and that competitiveness owns a clear geographic characterisation.

The export performance is usually considered a useful synthetic empirical translation of the concept of competitiveness, both at macro and microeconomic level. From the first point of view it represents the capacity of an economic system (or subsystem) to gain, maintain, or develop competitive positions on international markets; the microeconomic perspective allows complementing the informative framework with the elements more linked to the behaviour of economic agents (namely of the production units).

In this paper we try to consider conjunctly the two complementary sides of the topic; we indeed first consider the competitive performance (on the Eastern Europe markets) of an economic regional system (Umbria) at an aggregate level, and then we shift to some microeconomic factors able to influence and explain the export capacity of Umbrian firms. As shown elsewhere (Calzoni *et al.* 2003), the region Umbria represents a particularly interesting case study, since it contains a variety of economic pathways (strongly based on the presence of Small and Medium Enterprises) able to depict a wide set of the development options that have characterised and characterise the Italian and the European economy.

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The paper is organised as follows. In paragraph two, the most updated aggregate data of Umbrian exports towards Eastern Europe are reported and discussed, considering in particular the export composition by sectors of economic activities and the most recent trends. In the second part of the paper (Section 3), the outcomes of a survey analysis carried out during the first half of 2004 are described and commented. In particular we focus on a wide set of features of the sample firms according to the geographic destination of their exports and to the length of their presence on international markets; we also describe and discuss the structure and importance of inter-firm relationships aimed at gaining competitive advantages and the competitive strategies adopted by the exporting firms according to their structural characters. Some final remarks and policy implications of our research (Section 4) conclude the paper.

2. RECENT UMBRIA'S EXPORT FLOWS

2.1. Umbria's export towards Eastern Europe countries in the biennium 2002/2003

Eastern Europe is the only geographic area, among Umbria's export destinations, that in the biennium 2002/2003 has increased its purchases from this administrative district (Nuts II level, central Italy). Umbria's export towards Eastern Europe countries, at current prices, has indeed risen from 284 to 328 millions euro (Tab. 1a), while in the other areas a general reduction has occurred¹. A decrease has indeed been recorded both for the European areas (-3.5% **EU-15**; -6.5% **Efta**) and extra-European destinations (-12.1% **Mediterranean countries**; -15.7% **Opec**; -9.5% **Nafta**; -39% **Nic's**; -42.4% **Asean**; -37.2% **Mercosur**; -17.3% **Commercial Union of the Andes**) (Tab. 1c).

The importance of Eastern European countries has continuously increased during the last years, and their incidence on Umbria's total export has grown from 11.4% of 2002 to 13.7% of 2003 (it was 10% in 2001 and only 6% in 1985; Calzoni *et al.* 2003, p. 28) (Tab. 1b). In 2003 Eastern European countries represent the third foreign market for Umbria's products, after EU-15 and Nafta (Tab. 1b).

At the European level, the export increase of 44 millions euro towards Eastern Europe has been almost balanced by the 43 millions decrement towards EU-15 (Tab. 1c). This remarkable reduction didn't influence much

¹ The data are supplied by ISTAT (National Institute of Statistics), and available at: www.istat.it.

the relative importance of EU-15 market for Umbrian exports (close to 50% in both years); The export decrease of 39 millions euro towards Nafta and Nic's arrears has instead caused the reduction of one point of their incidence on Umbria's export (from 16 to 15% and from 4 to 3% respectively). This fall has been the major responsible of the huge diminution occurred to regional long-distance export (Tab. 1b).

The growth of exports towards Eastern European countries has been determined an increase of the flows towards all the countries of the area, except for Poland (-7 millions of euro) and Hungary (-2 millions) (Tab. 2c). These two countries, in spite of their involution, do not reduce in the biennium their incidence on total regional export (2% in the case of Poland and 1% for Hungary) (Tab. 2d), but they reduce their importance with respect to total flows towards Eastern Europe (from 18 to 14% as regards Poland and from 8 to 6% for Hungary) (Tab. 2b).

Within Eastern Europe the most dynamic markets for Umbria's export have been Russia together with the other independent Republics of the former Soviet Union (+26 millions euro) and Romania (+12 millions). The contributions of Ex-Yugoslavia (+5 millions), the Slovak Republic (+4 millions), Bulgaria, the Czech Republic and the Baltic Republics (+2 millions each) have been lower. In the same biennium, the role of Albania has proved, although positive, very weak (+12 000 euro) (Tab. 2c).

The increase of export towards Ex-Yugoslavia is mostly due to Serbia and Montenegro (+6 millions euro) (Tab. 3c) that in 2003 hold 45% of Umbria's transactions to the Balkans (Tab. 3b). A smaller role is played by Macedonia (+440 000 euro), while all the other Balkan Republics reduce their purchases (Croatia - 1 million euro; Bosnia - 466 000 euro; Slovenia - 191 000 euro) (Tab. 3c).

Within the group of the Ex-URSS Republics, Russia and Ukraine cover, in 2003, respectively 67% and 28% of Umbria's outflows to the area (Tab. 4b). These two destinations also represent the most dynamic markets of the area: a significant commercial expansion has indeed happened towards Russia (+19 millions euro) and Ukraine (+ 8 millions) (Tab. 4c).

The Baltic Republics show a good commercial performance mainly through Lithuania (+1 million euro) and Latvia (+747 000 euro) (Tab. 5c). In 2003 these two states cover 95% of Umbria's export towards the Baltic Republics (Tab. 5b).

In 2003 Romania and Russia with the other Ex-URSS Republics have not only been the most dynamic countries for export's growth, but also the most important markets for Umbria within Eastern Europe. Romania absorbs indeed a share of 28% and Russia with the other Ex-URSS Republics a share of 22%. Then the other countries follow: Ex-Yugoslavia and Poland (both with 14%), Hungary (6%), the Slovak Republic (5%),

the Czech Republic (4%), Bulgaria (3%), the Baltic Republics (2%), Albania (0.6%) (Tab. 2b). From 2002 to 2003 these percentages keep alike for Romania, the Slovak Republic, the Czech Republic; decrease, as we have already seen, for Poland and Hungary, Ex-Yugoslavia (from 15 to 14%), Albania (from 0.7 to 0.6%); rise for Russia and the other Ex-URSS Republics (from 16 to 22%), Bulgaria (from 2 to 3%), the Baltic Republics (from 1 to 2%) (Tab. 2b).

In 2003 the incidence of Romania on Umbria's total export is 4, 3% for Russia's and others. The share for Ex-Yugoslavia and Poland is 2, 1% for Hungary. The other countries account for less than 1% (Tab. 2d). From 2002 to 2003 these incidences raise of one point for Romania and Russia and Ex-URSS Republics, have a very light increase for the Slovak Republic, the Czech Republic, Bulgaria, and remain the same for Ex-Yugoslavia, Poland, Hungary, the Baltic Republics, Albania (Tab. 2d).

Among Eastern Europe countries, the EU new members (Poland, Hungary, the Slovak Republic, the Czech Republic, Slovenia, Lithuania, Latvia, Estonia) represent in 2003 all together 4.7% of Umbria's export, 34.5% of Umbria's export towards Eastern Europe, 8.5% of Umbria's export towards EU-25 (Tab. 6d, 6f and 6e). In the biennium, Umbria's export towards the new EU-members has diminished, in aggregate terms, from 115 to 113 millions euro because of the remarkable decrease of Poland and Hungary and because of the reduction, less considerable, of Slovenia and Estonia, not completely balanced by the increase of the Slovak Republic, the Czech Republic, Lithuania and Latvia (Tab. 6a, 6c). This negative trend has caused a reduction of the incidence of the new EU members on Umbria's export towards Eastern Europe that shifted from 40.6 to 34.5% (Tab. 6f). The stronger commercial integration between Umbria and Eastern European countries of 2002/2003 has indeed been the outcome of the performance of Romania, Russia and others, Ex-Yugoslavia, Albania.

Umbria's export decrease towards Eastern Europe enlargement countries together with the reduction towards Cyprus (-1.5 millions of euro), Malta (-1.3 millions euro) and EU-15 is responsible for Umbria's export drop towards EU-25 (Tab. 6a and 6c) (Tab. 1a, 1c).

2.2. The structure of Umbria's foreign trade towards Eastern European countries in 2003

If we analyse the Eastern European countries of destination of Umbria's export in 2003 separately from their sub-areas of territorial reference, we notice that the most important buyers are Romania, Russia, Poland, Serbia,

Hungary, Ukraine, the Slovak Republic, the Czech Republic, Croatia, Slovenia, Bulgaria, Bosnia, Lithuania, Latvia, Albania (Tab. 7). The investigation of the composition of these flows according to their main export-import items shed light on some important structural features of Umbria's export.

Romania increases in the biennium its purchases from the region from 80 to 93 millions euro. This trend has not been balanced by the rise of Umbria's import (from 44 to 46 millions); consequently, the already positive trade balance of the region has grown from 37 to 47 millions (Tab. 8a). The main export item in 2003 is **iron and steel products** (46 millions), 50% of Umbria's export towards Romania. Then follow **textiles** (12 millions, 12%), **agricultural products** (11 millions, 12%), **leather and shoes** (8 millions, 8%), **clothes** (5 millions, 6%). The main import items in 2003 are **clothes** (22 millions, 47% of Umbria's import from Romania), **leather and shoes** (11 millions, 23%), **furniture** (3 millions, 7%), **textiles** (2 millions, 4%). As one can see, the most part of the exchanges can be connected to "intra-industry" or "horizontal" trade, because of the perfect correspondence between the most important items of import and export (textiles, leather and shoes, clothes).

Russia increases its exchanges with Umbria from 29 to 49 millions euro (Tab. 8a). In 2003 this country demands 2% of Umbria's export (the share was 1% in 2002) and 15% of Umbria's export towards Eastern Europe countries (the share was 10% in 2002) (Tab. 4d, 4c). The positive dynamics of export has been enforced by the parallel decrease of import from 96 to 21 millions, which has transformed Umbria's trade balance with Russia from negative to positive (from -67 to 41 millions) (Tab. 8a). Noteworthy is that this export boom is not due to industrial sector, but to **agricultural products**. The leading export items are indeed: agricultural products (31 millions, 64% of the total export towards the country), **clothes** (3 millions, 6%), **furniture** (3 millions, 6%), **leather and shoes** (2,5 millions, 5%). Import from Russia is mainly composed of **iron and steel products** (14 millions, 43% of the total import from the country), **wood panels** (5 millions, 16%), **leather and shoes** (870 000 euro, 3%). As regards the last item, it can be identified as a soft form of horizontal trade.

Poland was in the biennium a declining outlet for Umbria's products: the value exported dropped from 52 to 45 millions euro (Tab. 8a). It is articulated in **textiles** (5 millions, 11% of the total export towards the country), **vegetal and animal oils** (3 millions, 6%), **pipes** (3 millions, 6%), **artificial fibres** (3 millions, 6%), **paper articles** (2 millions, 5%), **electric machines and equipments** (2 millions, 4%). Import from Poland, which decreases from 11 to 10 millions, is mostly due to **clothes** (6 millions, 66% of the total import from the country), **agricultural products** (789 000 euro,

8%), **textiles** (607 000 euro, 6%), **paper articles** (461 000 euro, 5%) (Tab. 8a). Also in the case of Poland a fairly good core of horizontal trade in textiles and paper articles exists. The final output of exports and imports trend is the reduction of Umbria's positive trade balance with Poland from 41 to 35 millions (Tab. 8a).

Serbia increases its purchases from Umbria from 15 to 21 millions euro (Tab. 8b). The simultaneous contraction of Umbria's import from 20 to 18 millions gives its contribution to the improvement of the regional trade balance that becomes positive (from -5 millions to +3 millions) (Tab. 8b). Export is mainly concentrated on a single item, **leather and shoes** (17 millions, 82% of the total export towards the country), which is also, for almost the same amount, the leading item for imports (17 millions, 97% of the total import from the country). In this case nearly all the foreign trade is horizontal trade.

Hungary shows, like Poland, a reduction of Umbria's export from 23 to 20 millions euro. In spite of the import reduction from 14 to 13 millions, Umbria's positive trade balance slopes down from 8 to 7 millions (Tab. 8a). The most important export items are **iron and steel products** (10 millions, 49% of the total export towards the country), **machines and equipments** (4 millions, 19%), **metal products** (2 millions, 8%). Among imports, the most representative items are **iron and steel products** (4 millions, 32% of the total export towards the country), **agricultural products** (4 millions, 31%), **wood** (2 millions, 7%). Horizontal trade is so relevant only for iron and steel products, the most important exchange item.

Ukraine highlights a very positive export enlargement for Umbria (from 12 to 20 millions euro). Because of the parallel reduction of import from 8 to 6 millions, the already positive regional trade balance with Ukraine rises from 4 to 14 millions (Tab. 8d). Umbria's export is subdivided in **agricultural products** (10 millions, 50% of the total export towards the country), **textiles** (4 millions, 23%), **machines and equipments** (1 million, 7%), **plastic materials** (1 million, 7%), **clothes** (less than 1 million, 6%). Import is composed of **wood panels** (2 millions, 33% of the total import from the country), **chemical products** (2 millions, 32%), **clothes** (1 million, 19%). Only with reference to the last item, we can talk of horizontal trade.

The **Slovak Republic** encourages its purchases from Umbria from 14 to 18 millions euro, while Umbria reduces its import from 2 to 1 million, increasing its positive trade balance from 12 to 17 millions (Tab. 8a). Umbria's export is largely fixed on **electrical engines** (10 millions, 57% of the total export towards the country) and **machines and equipments** (4 millions, 21%). Import has among its protagonists **agricultural products** (409 000 euro, 44% of the total import from the country) and, fairly less important, **machines and equipments** (52 000, 5%), where we observe horizontal trade.

The **Czech Republic** develops stronger commercial exchanges with Umbria especially on the side of exports (from 13 to 15 millions euro); the import, on the other hand is rather constant in the biennium (6 millions); the result is an improvement of the already positive regional trade balance (from 7 to 9 millions) (Tab. 8a). In this case we are in presence of strong "inter-industry trade". Umbria's export leading items are indeed **machines and equipments** (8 millions, 55% of the total export towards the country), **vegetal and animal oils** (2 millions, 12%), **plastic materials** (1 million, 8%), while import's ones are **chemical products** (3 millions, 48% of the total import from the country), **paper articles** (934 000 euro, 16%), **motor-vehicles** (627 000 euro, 10%).

Croatia reduces its purchases from Umbria from 11 to 10 millions of euro, while Umbria records an equivalent increase of imports (from 2 to 3 millions), so that the region positive trade balance suffers a contraction from 8 to 7 millions (Tab. 8b). Umbria's export is marked by **iron and steel products** (more than 2 millions, 26% of the total export towards the country) and **machines and equipments** (2 millions, 22%). Import is represented mainly by **furniture** (2 millions, 57% of the total import from the country) and **machines and equipments** (547 000 euro, 18%).

Slovenia does not change significantly the purchases from Umbria in the biennium (9 millions euro each year), distributed among **iron and steel products** (2 millions, 23% of the total export towards the country), **vegetal and animal oils** (1 million, 15%), **other metal products** (less than 1 million, 11%) (Tab. 8b). The parallel increase of Umbria's import from 4 to 7 millions reduces the regional positive trade balance from 6 to 2 millions (Tab. 8b). The top items of Umbria's import are **electric power** (3 millions, 40% of the total import from the country), **pottery articles** (1 million, 14%), **iron and steel products** (1 million, 14%). Only with regards to this last item we can talk of horizontal trade.

Bulgaria increases its commercial relations with Umbria from 7 to 9 millions euro, while Umbria reduces its import from 15 to 12 millions, so that commercial deficit lowers from -8 to -3 millions (Tab. 8a). Umbria's export structure is based on **machines and equipments** (more than 2 millions, 26% of the total export towards the country), **textiles** (2 millions, 22%), **leather and shoes** (less than 2 millions, 18%), **rubber products** (800 000 euro, 9%). The leader items for imports are the same of exports: **textiles** (more than 3 millions, 24% of the total import from the country), **leather and shoes** (3 millions, 22%), **rubber products** (2 millions, 20%). Horizontal trade is the insignia of Umbria's foreign trade's architecture with Bulgaria.

Bosnia keeps in the biennium its purchases from Umbria almost at the same level (5 millions each year), while the Italian region reduces its import from 8 to 7 millions, so that trade deficit falls from -2 to -1,6 millions (Tab. 8b). **Leather and shoes** and **metal products** are the most important items of export and import and the engine of horizontal trade. **Leather and**

shoes absorb 4 millions of export (76% of the total towards the country) and 6 millions of import (91% of the total from the country). **Metal products** (444 000 euro) represent 9% of Umbria's export and 5% of import (348 000 euro).

The **Baltic Republics** are not characterized by the same trend of foreign trade in the biennium. Lithuania and Latvia increase imports from Umbria: the first from 2 to 3 millions euro, the second from 1 to 2 millions, while Estonia reduces it (from 287 000 to 278 000 euro). The contextual expansion of imports from Lithuania (from 46 000 to 52 000 euro) and from Latvia (from 66 000 to 111 000 euro) can't manage to worsen Umbrian trade balance. Indeed, trade balance improves as regards Lithuania (from 2 to 3 millions) and also as regards Latvia (from 1 to 2 millions). Instead, the positive trade balance with Estonia, because of Umbria's import increase (from 58 000 to 89 000 euro), lowers from 229 000 to 189 000 euro (Tab. 8c). The main export's items towards Lithuania are **machines and equipments** (2 millions, 65% of the total export towards the country) and **agricultural products** (414 000 euro, 12%), while import is founded on **wood and furniture** (44 000 euro, 85% of the total import from the country). In the case of Latvia we find almost the same structure of foreign trade: export is driven by **machines and equipments** (2 millions, 90% of the total export towards the country) and **food products** (60 000 euro, 3%) and import by **wood** (55 000 euro, 50% of the total import from the country) and **peat** (39 000 euro, 35%).

Albania shows a certain steadiness of Umbria's export in the biennium (2 millions euro each year), while regional import increases from 2 to 4 millions, with a deterioration of the already negative trade balance from -237 000 to -2 millions euro (Tab. 8a). Umbria's export is divided into **machines and equipments** (665 000, 65% of the total export towards the country), **paper articles** (478 000 euro, 23%), **metal products** (220 000 euro, 11%). Import is concentrated mainly on **iron and steel products** (4 millions, 90% of the total import from the country) and, quite less important, on **paper articles** (115 000 euro, 4%), where horizontal trade appears.

2.3. Evolution of horizontal trade between Umbria and Eastern Europe countries from 2001 to 2003

An analysis of the evolution of horizontal trade between Umbria and Eastern Europe countries shows that this type of trade appears in 2003 in three new countries (the Slovak Republic, Croatia, Bosnia) in which it was not so significant in 2001 (Calzoni *et al.* 2003, p. 29). In 2003 the Slovak Republic and Croatia see horizontal trade emerging in **machines and equip-**

ments with an incidence on the global transactions towards the country respectively of 20% and of 12.9%, while Bosnia in **leather and shoes**, but with negative sign (-19.4%)². This negative sign could indirectly prove that experiences of productive de-localization of Umbria's firms or experiences of inter-firms cooperation (like joint-ventures, collaboration agreements) have been rising in the Ex-Yugoslavia area. This phenomena follow the ones which are already in progress, in this specific field, in other Eastern European countries (like in Bulgaria with -49% and in Romania with -1.9%), though with less intensity in comparison with the past (in 2001 the incidence of horizontal trade of leather and shoes on the global Umbria's interchange was -11.8% in Bulgaria and -21.5% in Romania). Differently from Bosnia, Bulgaria and Romania, horizontal trade of **leather and shoes** shows in 2003 a positive incidence in Russia and Serbia (respectively of 2.5% and of 0.5%), while in 2001 the incidence was negative for both countries (-0.6% and -24.3%).

A comparative analysis of the most important Umbria's import-export items towards Eastern European countries reveals that Serbia, Slovenia, Hungary and Ukraine have in 2003 only one item of horizontal trade which is the same of 2001: **leather and shoes** in the case of Serbia, **iron and steel products** in the case of Slovenia and Hungary, **clothes** in the case of Ukraine. From 2001 to 2003 the incidence of horizontal trade has become much more weaker, although positive, for Ukraine (from 12.5 to 0.3%) and for Hungary (from 26.2 to 16.4%); while it has become positive for Slovenia (from -2.4 to 7%). Also Albania converts from negative to positive the incidence of horizontal trade in **paper articles** (from -0.2 to 5.2%), while **clothes** are no more important in 2003 compared to 2001.

Horizontal trade for Bulgaria, Poland and Romania is in 2003 represented by more than one single item. For Bulgaria is a matter of **leather and shoes, textiles, rubber products**; for Poland of **textiles** and **paper articles**; for Romania of **leather and shoes, textiles, clothes**. We have already examined horizontal trade of leather and shoes and its trend. Textiles horizontal trade incidence on the global inter-exchange in 2003 is 7.9% in Poland, 6.9% in Romania, -4.5% in Bulgaria (the 2001 share was 8.2% in Poland, 7.6% in Romania, -2.8% in Bulgaria). Paper articles horizontal trade share is 4.1% in Poland (2001 share was 0.7%). Clothes horizontal trade referred to Romania weights in 2003 on the total commercial flows for -11.8% (the 2001 share was -26.5%). Rubber products incidence of horizontal trade related to Bulgaria slopes down in the biennium from -29.8 to -7.8%.

² The share of horizontal trade is measured by a percentage ratio given by the export/import difference of a specific item exchanged between Umbria and a foreign country and the global regional trade flow (export + import) towards the same country in a given period.

We can finally express some other considerations in order to supply further elements to explain the nature of Umbria's international exchanges from and towards Eastern Europe countries, beyond the form of horizontal trade. We have already seen that almost the whole foreign trade of Bulgaria, Serbia, Bosnia is ruled by horizontal trade especially in mature sectors (leather and shoes and textiles) and that a large share of Romania's exchanges is governed, always in traditional sectors (leather and shoes, textiles, clothes), by the same kind of transaction. But the presence of inter-industry trade characterizes completely the Baltic Republics and the Czech Republic and also other Eastern Europe countries, more or less decisively. Inter-industry trade is crucial in Russia, Ukraine, Albania, which have, at the same time, small bulks of horizontal trade in mature sectors (in leather and shoes, clothes and paper articles). These industries become much more considerable quantitatively and more advanced qualitatively in Poland, Hungary, the Slovak Republic, Croatia, Slovenia, where inter-industry trade is anyway prevalent. Among some of the countries interested by inter-industry trade we observe also an evolution of foreign trade.

In comparison with data referred to 2001, the exchanges between Umbria and Russia and between Umbria and the Baltic Republics explained by the "theory of comparative advantages" seem to lose importance in 2003. Among the Baltic Republic only Latvia goes on selling raw materials in exchange for Umbria's industrial products (wood and peat in exchange for machines and food products), while Lithuania tends to an "inter-industry trade" which, however, takes place no more between natural resources and industrial products, but among products of mature sectors (wood and furniture from Lithuania in exchange for Umbria's machines and agricultural products). In the case of Russia, unlike 2001 when natural resources were sold in exchange for Umbria's industrial products (non ferrous based minerals in exchange for furniture, clothes, leather and shoes, machines and equipments), the foreign trade is in 2003 mostly an "inter-industry trade" of finished products with the presence of a small core of horizontal trade in leather and shoes in course of consolidation.

2.4. Final remarks on Umbria's export towards Eastern European countries in the biennium 2002/2003

By analysing the geographical destination of Umbria's export and the structure and evolution of Umbria's foreign trade towards Eastern European countries in the biennium 2002/2003, we can highlight the following points:

1) in Eastern European countries a re-orientation has taken place: "inter-areas exchanges" are prevailing on "intra-area exchanges" to an even larger extent than forecasted by various gravitational models elaborated at the beginning of the transition from planned to market economy (Baldwin 1994; Rodrik 1994; Winters, Wang 1994). Eastern European countries actually trade less with each other and more with the rest of the world, especially with Western Europe. Trade between Eastern European countries and Umbria has gradually intensified over these last years (Calzoni *et al.* 2003, p. 28) (Calzoni, Montesi 2003, p. 7-9) (Daddi *et al.* 2004, p. 55-56), as it has happened towards European Union (*Eastern...* 2002; Cornelius *et al.* 2002, p. 58-66; Letta 2003, p. 65-68);

2) the new EU member countries of Eastern Europe, which in 2003 were still at the threshold to EU membership, have not been the driving force of trade integration between Umbria and Eastern Europe in comparison with Romania, Russia, Ukraine, Serbia, mostly because of the disappointing performance of Poland and Hungary. Poland and Hungary decrease their purchases from Umbria in spite of their good pre-conditions and engines of growth (Warner 2002; Calzoni *et al.* 2003, p. 29) and in spite of the optimistic estimates concerning real GDP and real internal demand in 2003 (OECD 2002);

3) Ex-Yugoslavia shows increasing commercial and productive integration with Umbria, as well as with EU, which is its main trading partner (Gligorov 2002, p. 117);

4) trade flows between Eastern Europe and Umbria have been guided mainly by inter-industry trade in some countries (the Baltic Republics, the Czech Republic, Russia, Ukraine, Albania, Poland, Hungary, the Slovak Republic, Croatia, Slovenia) and by horizontal trade in some others (Bulgaria, Serbia, Bosnia, Romania) in mature sectors (above all agriculture, textiles, clothes, food products, leather and shoes, furniture, paper articles) or in a little more technological sectors (machines and equipments, iron and steel products, metal products, rubber products, artificial fibres, plastic materials, chemical products);

5) the existing forms of inter-industry trade are "pure" only in the case of the Baltic Republics and the Czech Republic, while in the other Eastern European countries they are mixed with cores of horizontal trade of variable importance;

6) Russia and Lithuania have made significant progress in transforming their trade structure with Umbria, with a reduction of the importance of primary goods in their export towards the region;

7) trade integration between Eastern Europe and Umbria has been accompanied by growing production integration. This is evidenced by the

strong presence of horizontal trade in some mature sectors (especially leather and shoes, clothes, textiles, rubber products) consistent with Umbria's direct investments flows towards Eastern Europe (mainly in Romania for shoes and clothes and in Bulgaria for shoes, textiles, and rubber products) which, differently from the past, begin to choose also Ex-Yugoslavia (mostly Bosnia, the true revelation of 2003, and Serbia for shoes production).

3. A MICROECONOMIC ANALYSIS OF EXPORTS DYNAMICS IN UMBRIA

This second part of the paper adopts a more microeconomic perspective in order to complement the aggregate information supplied in the previous paragraph. We report the most important findings of a survey carried out during the first half of 2004 and aimed at investigating various aspects of exporting firms in Umbria³. Although the ISTAT database on exports is very accurate and reliable, since it records every single sale abroad, the complexity of the phenomenon of firm (and of systems of firms) internationalisation encourages further deepening of study (through survey analysis) in order to understand some crucial aspects otherwise invisible. For example, the structural features of the firms, the export dynamics of groups of firms (so their cooperative strategies), or the identification of the exports performed by national buyers (middleman), whose presence could distort significantly the data about the origin of export flows (in the Istat database the export origin is of course recorded in the region of legal residence of the buyer, who sells the products abroad, and not in the region where the productive process takes place).

After briefly describing the sampling techniques and the characteristics of the sample of firms of the survey, in the following paragraphs we report and discuss the most important outcomes emerged from the study.

3.1. Methodological aspects and characteristics of the sample

The starting database for the definition of the sample has been the Regional Chamber of Commerce archive of the firms that operate abroad (SDOE), where all the firms that have, or have had, international commercial

³ Two authors of the present paper (C. Montesi and C. Perugini) were part of the research team. The full final report of the research (Daddi *et al.* 2004) is available (in Italian language) at the Department of economics of the University of Perugia.

relations, are listed. In particular, the enterprises that compose the database are those who performed, during the last years, at least one export or one import operation (even though in the database is not specified when these operations exactly took place). From this list, have been exclusively selected those firms belonging to industry, craftsmanship or agriculture; the service sector has been excluded. The set of these firms was made up of 628 units and since a mail delivering of the questionnaire was decided, we didn't extract a sample but the whole population was asked to fill the questionnaire. The collection of completed questionnaires lasted about 6–7 weeks; the percentage of firms that answered immediately has not been, as usual for mail surveys, very large, but after some phone solicitations at the end of the period 240 filled forms were collected. This number, representing 38.2% of the population, was considered as adequate and satisfactory for the aims of the research⁴.

Not all the 240 firms have been considered equivalently. The survey was indeed aimed at recording and investigating the firms that exported in 2002. As already underlined, in the starting database it was not possible to distinguish *a priori* the year when the export was performed. Some of the questionnaires received referred indeed to firms that exported in the past years but not in 2002; consequently, these firms were excluded. The remaining set of observations on which the research was based was so reduced to 193 units; under the hypothesis that the share of exporter firms in 2002 recorded among the respondents (193 out of 240, that is 80.4%) could be referred also to the whole population, it can be stated that the firms of the Umbria region that exported in 2002, were 506. Under this assumption, both the percentage of exporters and non-exporters in 2002 represent 38.2% of the population⁵.

The following table describes the sector distribution of the 193 firms of the survey.

⁴ It is opportune to make some specifications about the firms that didn't answer the questionnaire. One of the main reason for a missing answer is the impossibility to respond to the questions posed. So, the sub-population of the firms belonging to the SDOE archive that are not exporting since some years is probably characterised by a below average answering rate. This hypothesis is reinforced by the fact that for these firms (not exporting anymore), the interest for the survey is reduced and the incentive to answer is low. If these considerations were true (and this could be tested only through an *ad hoc* survey), the answering rate of the firms on which the survey is focused would be considerably higher.

⁵ The comparison between this survey and the previous one, carried out in 1957, shows that the sampling rate is slightly lower. The gap is lower than 3%, but since the size of the population of the present research is larger (of about 28%), we can conclude that the representativeness of the two surveys is equivalent.

Table 1

Distribution of the firms of the sample by sector of activity

Sector	Absolute frequency	Percentage frequency
Food and beverage	26	13.5
Textile and clothing	33	17.1
Processing of wood / furniture	19	9.8
Processing of minerals	31	16.1
Mechanics	52	26.9
Paper-Printing (chemicals) iron and steel processing	24	12.4
Other	6	3.1
Non manufacturing products	2	1.0
Total	193	100

As regards the sectors of economic activity, the sample reflects adequately both the productive structure of the region and its traditional export performance (see first part of the paper).

The representativeness of the analysis is also reinforced by the distribution of the firms into the different size classes (number of workers) that reflects the structural character of the regional productive system, made up of sets (more or less systemic) of small and medium enterprises; only the firms with less than five workers have a low importance (4.1%), while the 55% of the sample falls in the 10-49 worker size class.

3.2. Results

3.2.1. Export seniority and geographic destination

A first relevant evidence emerging from the survey deals with the internationalisation seniority of the exporting firms: more than 75% of them exports since more than ten years, while the new-exporters (since less than two years) represent only 3.1% of the sample. Even though about three quarters of the firms investigated show a stable position on international markets, this feature does not correspond to an increase of the importance of exports on the total sales of the firms. The international markets are indeed the first outlet only for 39.7% of the firms, while respectively for 55.1 and 5.2% the domestic and regional markets prevail. If compared with previous surveys, the international position of Umbrian firms

becomes weaker (Grasselli 1995, p. 2)⁶. The share of export on total sale is positively correlated with the length of the presence of the firms on international markets. This evidence confirms that firm internationalisation is a gradual process that takes place in the medium/long run. This also suggests that the effectiveness of policy measures aimed at encouraging internalisation processes can be adequately assessed only over consistent time periods.

Another significant evolution, with respect to the previous survey (1995), concerns the geographical destination of exports: the share of Western Europe, although decreases from 66.2 to 49.2%, and even though it should be considered more like a "domestic" market especially after the introduction of the Euro currency, still represents the most important market for Umbrian products⁷.

The shares of exports towards North America (23.4%), second outlet for the firms of the sample, and Eastern Europe (third market with 8.2%) are more than doubled (the percentage in 1995 were respectively 9.3 and 2.9%), and this witnesses the growing trade integration with the new members of the EU and the increase of the "long distance" exports, directed towards the destinations more protected from the currency crises and instability that afflicted recently many areas, especially South East Asia. In this context, exports towards Japan reduced from 4.9 to 2%, while Central and Southern America starts to be a significant outlet (4.7%). The geographic destination of Umbrian exports strongly depends on the sectors of activity of the firms: food, textile and mechanics are the more important exporting industries in Northern America; paper-printing (chemicals) iron and steel processing, wood and furniture and non manufacturing products for Western Europe; wood and wood products, mechanical products, textile and clothes for Eastern Europe. This area also represent the most important market for the smallest firms, for those entered on international markets more recently and with the lowest share of exports on total sales; North America is instead the principal outlet for the senior, larger and stronger exporters. This suggests that size and export experience influence the geographical range of exports, confirming the gradualism (also geographical) of export dynamics.

These features should be considered in the light of recent evolutions in terms of currency values (in particular the Euro appreciation against the USA dollar) that suggest significant evolutions in the trade destination of Umbrian (and European) exports.

⁶ The percentage of firms for which international markets were the principal outlet was 43.6, while the "domestic" firms accounted for 51.5%.

⁷ The outcome is consistent with the recent results of some researches about Umbrian exports. See, for example: Calzoni, Montesi 2003; Calzoni *et al.* 2003, p. 27-29.

3.2.2. Export performance and inter-firm relationships

A second set of considerations can be proposed with regards to inter-firm relationships aimed at promoting internationalisation processes. In general, the density of these relationships can be considered weak for the firms of the sample, and the most important typology is represented by formal or informal cooperation agreement. As regards the participation of Umbrian firms (as share holders) in foreign companies, these are prevalently functional to the production functions, and this confirms the strong trend towards decentralisation of production processes or phases of them; the same can be stated with regards to formal or informal agreements signed with foreign enterprises, that suggest an increasing importance of the forms of "enlarged" internationalisation.

Some important correlations are registered between inter-firm relations and firm size or export seniority. In the first case, the different types of interaction are significantly linked to the size (larger classes with stronger links). In the second case, the stronger propensity to cooperate seems connected to a consolidated presence on international markets. From the sectoral point of view, the mechanic industry records the highest number of the different kinds of agreement, especially at the local and international level (weaker ties are registered at national levels)⁸.

As regards the linkage between the export share on total sales and inter-firm relations, the stronger densities are registered for export shares lower than 50%. This especially holds for the participation of Umbrian firms in the foreign firms equity.

3.2.3. The competitive strategies

A third set of reflection focuses the competitive strategies adopted by the firms and the difficulties met in the penetration on foreign markets.

The analysis of the export strategies shows how the "traditional channels" are the most important: in particular, direct foreign customers account for 50.2% of total export sales. This channel is followed by multimandatory agents (25.2%) and buyers (8.15); that is, channels that imply a low active involvement of the exporting firms. A very scarce importance is assigned to the new modality of international market access, such as subcontracting contracts (0.17%); only slightly more important is the products commer-

⁸ This outcome referred to mechanics is consistent with the evidences proposed by another research focused on collaboration and cooperation agreements (see Grasselli 1994).

cialisation by means of participated foreign firms (1.1%), or the use of national intermediaries (2.8%). Also the trade through owned branches is not still very common (3.2%), even though positive correlations between the use of this channel and the size, the share of sales exported and the export seniority are recorded. With respect to the previous analysis (referred to 1995), the use of buyers doubles its importance (from 4 to 8.1%); the role of multimandatar agents is slightly stronger (from 23.3 to 25.2%); the importance of direct contact with foreign customers is instead decreased (from 53 to 50.2%). Among the most innovative trade channels, the use of foreign branches has grown (from 2 to 3.2%), while both the commercialisation through participated foreign firms and the recourse to national intermediaries have decreased.

From the sectoral point of view, significant peculiarities emerge. Always inside the traditional channels, the textile and clothing industry shows the highest use of buyers; the least evolved sectors in the recourse to innovative channels are those of the wood and furniture, mineral processing and paper-printing (chemicals) iron and steel processing. The experimentation of the most innovative channels is more diffused among the senior exporting firms.

From the point of view of the competitive factors (productive efficiency, product diversification, trade and marketing abilities, product innovation) on which the competitive strategies are based, it is clear how, in the most of cases, the combination of different factors is considered the best option.

In particular the principal strategic trajectory is based on the mix of product differentiation/product innovation (19% of the sample). Other three combinations follow (12%): productive efficiency/product differentiation; efficiency/innovation; differentiation/trade and marketing abilities. The crucial role of the characteristics of the product (unicity or strong differentiation of the product) emerges clearly: it is indeed part of three out of the four most important strategic combinations.

The firms with a low or medium share of export on total sales, as well as the young exporters, choose prevalently the association of productive efficiency and product differentiation, while innovation/differentiation is the combined option for the senior firms and for those able to sell higher share of products on foreign markets.

As regards the sectors, those ones that show a strategic orientation more clearly defined are mechanics, based essentially on the combination productive efficiency/product innovation; wood processing/furniture, focused on the mix between efficiency and differentiation; and finally the mineral processing industry, where the competitive advantage is pursued through the produce differentiation and the trade and marketing efficiency.

The perception of the factors of disadvantage in the access to international markets provides useful information also in terms of policy-making implications. The low price based competitiveness, caused by stronger international competition (24.9%) represent the most critic area, followed by the difficulties met in the research of distribution channels (17%) and by the fall of competitiveness determined by the appreciation of the euro/dollar exchange rate. The obstacles to communication derived by insufficient knowledge of foreign languages and the high taxation by local government represent instead marginal critical aspects. It can also be stated that when the share of export on total sales, the export duration, and the firm size, grow, the difficulties linked to price competition increase, while those connected with language knowledge tend to disappear.

From the sectoral point of view, some peculiarities emerge with regards to the food industry, where the assessment of the customers' solvency and the credit collection are recorded as critical areas: in the textile and clothing and in the mineral processing, the core problem is the identification of distributive channels; in the paper-printing (chemicals) iron and steel and wood and furniture industries the main obstacle is logistics.

On the basis of the information supplied so far, we can propose some comments about the distinctive features of the sectors to which the exporting firms belong. From the survey a notable evolution pattern clearly emerges in the sectors of mechanics, mineral processing and textile/clothing. The first one for the relevant export propensity (30.8% of the firms export above 70% of their products), for the stable export tradition (78.8% of the firms export since nine or more years), for the geographic destination not exclusively close, for the clear stronger propensity to set up cooperation and collaboration agreement with other firms, for the clear strategic trajectory (based on the mix of productive efficiency and product innovation). The second one (mineral processing), again for the strong incidence of exports on total sales (it is indeed the leading sector, since 45.2% of the firms belonging to this industry exports more than 70%), for the well established export tradition (nine firms out of ten export since more than 9 years), for the strong long distance export propensity (27% of the firms export in Northern America), and for a well defined strategic orientation founded on the combination product differentiation/trade and marketing efficiency. Finally, textile and clothing emerges again for a good propensity to export (30.3% of the firms export more than 70%), for the strong historical presence on international markets (78.8% of the firms are senior exporters), and again for the intercontinental export propensity (39.1% of exports in Northern America).

3.2.4. The importance of export services

The last set of considerations concerns the utilisation, by the firms, of the export services provided by public and private actors and the assessment of their levels of efficiency.

Among the most meaningful evidences, the poor use of assistance and advisory services (performed in Umbria essentially by firms consortia connected to the different enterprise organisations) emerges clearly. Moreover, one fourth of the firms surveyed claims not to use assistance services at all, while one third completely ignores advisory services. As a logical consequence, more than one third of the firms does not recur to any body or organisation specialised in the promotion and development of the access to foreign markets. Since a remarkable amount of public financial resources is allocated to the provision of these services, a deep consideration and investigation on the reasons that determinate this high share of firms not resorting to these services, is necessary. In particular it is urgent to verify, through a deeper analysis, if the missed demand for the services is determined by reasons internal to the firms (for example the incapacity of the management to render explicit their latent needs; that could stem, for example, from insufficient entrepreneurial culture); or if it is to be connected to factors linked to services supply, that could turn out insufficiently and inadequately promoted, too expensive, or not consistent with the actual necessities of the firms (especially for those who operate since a longer time on international markets and that don't need anymore a basic assistance service, but exert a more sophisticated demand); or if it is not adequate, from a qualitative point of view, to effectively contribute to the rationalisation of the internationalisation processes.

With these premises in mind, it should also be noted that the survey also allowed underlining how the demand for export services is strongly concentrated on the traditional ones (among the assistance services, the financial funding of international fairs participation, exhibitions, foreign missions; among the advisory services, the fiscal, contractual, duty and legal support). Analogous results are recorded also in terms of informative channels used as a support of the activities performed abroad, where the traditional visit abroad or the trade intermediaries still play the prominent role compared to other more complex and innovative options. It is thus evident how in contexts of growing competition, the exclusive reliance on these low structured and not specialised channels of information translates into an expansive renunciation of the most part of the competitive advantage connected to effective and efficient information.

In the field of the second level networks⁹ to which the firms resort in order to establish, develop or consolidate their presence on international markets, the role of the Chambers of Commerce, that should be prominent considering their institutional functions and their financial efforts, appears clearly insufficient. Considering the general features of the Umbrian exporting firms (senior exporters with low share of exports on total sales, predominantly proximity exporters, with no structural connections on foreign markets, with low utilisation of export services), the integrated regional services system should in the near future operate in order to increase the export propensity of the firms and orientate them towards more enlarged internationalisation options and towards not only neighbouring markets.

4. FINAL REMARKS

In the present phase of globalisation and internationalisation of economic systems, the small and medium enterprises could seem destined to disappear or, in a more optimistic view, to be confined to the margins of the productive systems. On the other hand SMEs represent in each country of the EU a crucial productive reality and this is witnessed by the fact that in 2000 the average number of worker per enterprise, in the 15 Countries of the old EU, was six. SMEs are able, because of their flexibility, to adapt rapidly to the conjunctures; but they can't, because of their reduced dimension, reach an adequate force of penetration on the large global markets.

The effective answer to this evidence of facts can only be innovation, in its largest meaning, and the export experience of Umbria, considered in this paper, shows it clearly. Umbria, from this perspective is not in a favourable geographic position, since it is the only Italian region without any direct access to the sea or bordering on foreign countries. Nonetheless its position on international markets has traditionally been relevant. Also according to the analysis of the export composition of Umbria carried out in the first part of the paper with reference to Eastern Europe, the most relevant sectors of exports belong to the light industries, with products realised in areas with high density of small and medium enterprises.

This evidence is, as shown in second part of this article, the outcome of complex strategies, largely based on the combination of productive and marketing innovations. Too weak is instead the role of inter-firm organisa-

⁹ For the definition of *firms network* of the first, second and third level see Montesi 1995.

tional innovations (that is the creation of local or inter-local relationships), and so the development of the cooperative attitudes that could favour the access and the maintenance of strong positions on international markets. The proper and sustainable mix between competitive and cooperative behaviours, as the experience of the industrial districts clearly shows, can represent one possible way to gain high levels of efficiency and profits also operating on the less protected international markets. This strategic trajectory can represent a useful term of reference especially for the countries that recently entered the EU, since the struggle for competitiveness should now be afforded not only on foreign markets, but also on the domestic ones, where competition is growing because of imported products.

It is finally useful to underline the role that can be played by the public agents on the promotion of internationalisation processes for SMEs. Our results suggest that we are still very far from a sufficient knowledge of the needs and of the critical areas of the enterprises, and that, prior to undertaking any further policy intervention, a strong cognitive effort is needed. This would prevent, beyond the waste of public resources, the reproduction of harmful and consolidated power positions of some agents presently supplying services without any efficiency and effectiveness assessment of their role.

Moreover, again from a policy-making point of view, the experience of the intervention so far implemented at the regional level shows that too little attention has been paid to the sub-regional social and economic differentiation of Umbria. As we also showed elsewhere (Calzoni *et al.* 2003), the boundaries of even a small administrative region can contain a very diversified mosaic of social, economic and productive environments, which demand differentiated policy measures.

The outcomes of the research evidence the necessity of a complex strategic and systemic action, able to involve not only the management of the firms, but also the Institutions to which is demanded the crucial task of favouring the optimal development of the firms' action and governance. This means that, in order to afford the challenges of the present times, the quality of the entrepreneurial class and the quality of the political class should advance together. This means that the quality of economic results depends on the quality of the men who operate in the systems of the society. Under this view, economics loses the attribute of "sad" science, only governed by profit or by the political power mechanisms, and it assumes the status of a human science that, already in the second half of the fifteenth century, our Master Luca Pacioli taught at the University of Perugia.

STATISTICAL APPENDIX

Table 1a

Umbria's export towards the main destination areas (in euro)

	2002	2003
European Union at 25 members	1 374 443 030	1 326 396 110
European Union at 15 members	1 246 518 477	1 203 332 398
Nafta	410 661 164	371 457 188
Eastern Europe	283 675 269	328 052 701
Mediterranean countries	120 005 000	105 543 452
Nic's	101 131 172	61 653 440
Efta	63 234 254	59 113 358
Opec	52 418 965	44 189 350
Asean	17 235 633	9 929 737
Mercosur	10 590 779	6 645 912
Commercial Union of Andes	5 565 832	4 603 470
Total Umbria	2 495 785 987	2 394 198 659

Table 1b

Share on Umbria's total export (in %)

	2002	2003
European Union at 25 members	55.1	55.4
European Union at 15 members	49.9	50.3
Nafta	16.5	15.5
Eastern Europe	11.4	13.7
Mediterranean countries	4.8	4.4
Nic's	4.1	2.6
Efta	2.5	2.5
Opec	2.1	1.8
Asean	0.7	0.4
Mercosur	0.4	0.3
Commercial Union of Andes	0.2	0.2

Table 1c

Umbria's export towards the main destination areas (absolute variations and in %)

	euro	% variations
	2002/2003	2002/2003
European Union at 25 members	-48 046 920	-3.5
European Union at 15 members	-43 186 079	-3.5
Nafta	-39 203 976	-9.5
Eastern Europe	44 377 432	15.6
Mediterranean countries	-14 461 548	-12.1
Nic's	-39 477 732	-39.0
Efta	-4 120 896	-6.5
Opec	-8 229 615	-15.7
Asean	-7 305 896	-42.4
Mercosur	-3 944 867	-37.2
Commercial Union of Andes	-962 362	-17.3
Total Umbria	-101 587 328	-4.1

Table 2a

Umbria's export towards Eastern Europe (in euro)

	2002	2003
Romania	80 487 190	92 960 639
Russia and other	46 491 539	73 073 094
Ex-Yugoslavia	42 342 898	46 975 571
Poland	52 538 975	45 105 443
Hungary	22 679 080	20 424 645
Slovak Republic	13 636 924	17 668 928
Czech Republic	12 783 045	14 722 347
Bulgaria	6 783 025	9 206 896
Baltic Republics	3 854 931	5 825 264
Albania	2 077 662	2 089 874
Total Eastern Europe	283 675 269	328 052 701
Total Umbria	2 495 785 987	2 394 198 659

Table 2b

Share on Eastern Europe export (in %)

	2002	2003
Romania	28.4	28.3
Russia and other	16.4	22.3
Ex-Yugoslavia	14.9	14.3
Poland	18.5	13.7
Hungary	8.0	6.2
Slovak Republic	4.8	5.4
Czech Republic	4.5	4.5
Bulgaria	2.4	2.8
Baltic Republics	1.4	1.8
Albania	0.7	0.6
Total Eastern Europe	100.0	100.0

Table 2c

Umbria's export towards Eastern Europe (absolute variations and in %)

	2002/2003	2002/2003
Romania	12 473 449	15.5
Russia and other	26 581 555	57.2
Ex-Yugoslavia	4 632 673	10.9
Poland	-7 433 532	-14.1
Hungary	-2 254 435	-9.9
Slovak Republic	4 032 004	29.6
Czech Republic	1 939 302	15.2
Bulgaria	2 423 871	35.7
Baltic Republics	1 970 333	51.1
Albania	12 212	0.6
Total Eastern Europe	44 377 432	15.6

Table 2d

Umbria's export towards Eastern Europe.
Share on Umbria's export (in %)

	2002	2003
Romania	3.2	3.9
Russia and others	1.9	3.1
Ex-Yugoslavia	1.7	2.0
Poland	2.1	1.9
Hungary	0.9	0.9
Slovak Republic	0.5	0.7
Czech Republic	0.5	0.6
Bulgaria	0.3	0.4
Baltic Republics	0.2	0.2
Albania	0.1	0.1
Total Eastern Europe	11.4	13.7

Table 3a

Umbria's export towards Ex-Yugoslavia (in euro)

	2002	2003
Serbia and Montenegro	15 343 721	21 287 028
Croatia	10 868 316	9 774 197
Slovenia	9 599 413	9 408 304
Bosnia	5 553 805	5 087 684
Macedonia	977 643	1 418 358
Total ex-Yugoslavia	42 342 898	46 975 571
Total Umbria	2 495 785 987	2 394 198 659

Table 3b

Share on Ex-Yugoslavia export (in %)

	2002	2003
Serbia and Montenegro	36.2	45.3
Croatia	25.7	20.8
Slovenia	22.7	20.0
Bosnia	13.1	10.8
Macedonia	2.3	3.0
Total ex-Yugoslavia	100.0	100.0

Table 3c

Umbria's export towards Ex-Yugoslavia (absolute variations and in %)

	2002/2003	2002/2003
Serbia and Montenegro	5 943 307	38.7
Croatia	-1 094 119	-10.1
Slovenia	-191 109	-2.0
Bosnia	-466 121	-8.4
Macedonia	440 715	45.1
Total ex-Yugoslavia	4 632 673	10.9

Table 3d

Umbria's export towards Ex-Yugoslavia. Share on Umbria's export (in %)

	2002	2003
Serbia and Montenegro	0.6	0.9
Croatia	0.4	0.4
Slovenia	0.4	0.4
Bosnia	0.2	0.2
Macedonia	0.0	0.1
Total ex-Yugoslavia	1.7	2.0

Table 4a

Umbria's export towards the Ex-Urss Republics (in euro)

	2002	2003
Russia	29 350 788	48 811 120
Ukraine	12 498 733	20 202 914
Byelorussia	1 000 221	1 463 236
Kazakhstan	572 174	1 014 193
Turkmenistan	1 143 849	732 617
Moldavia	640 406	525 266
Georgia	434 092	163 893
Armenia	230 741	84 131
Uzbekistan	67 360	47 259
Azerbaijan	471 094	23 134
Tajikistan	0	4 078
Kirghizistan	82 081	1 253
Total Russia and others	46 491 539	73 073 094
Total Umbria	2 495 785 987	2 394 198 659

Table 4b

Share on the Ex-Urss Republics export (in %)

	2002	2003
Russia	63.1	66.8
Ukraine	26.9	27.6
Byelorussia	2.2	2.0
Kazakhstan	1.2	1.4
Turkmenistan	2.5	1.0
Moldavia	1.4	0.7
Georgia	0.9	0.2
Armenia	0.5	0.1
Uzbekistan	0.1	0.1
Azerbaijan	1.0	0.0
Tajikistan	0.0	0.0
Kirghizistan	0.2	0.0
Total Russia and others	100.0	100.0

Table 4c

Umbria's export towards the Ex-Urss Republics (absolute variations and in %)

	2002/2003	2002/2003
Russia	19 460 332	66.3
Ukraine	7 704 181	61.6
Byelorussia	463 015	46.3
Kazakhstan	442 019	77.3
Turkmenistan	-411 232	-36.0
Moldavia	-115 140	-18.0
Georgia	-270 199	-62.2
Armenia	-146 610	-63.5
Uzbekistan	-20 101	-29.8
Azerbaijan	-447 960	-95.1
Tajikistan	4 078	-
Kirghizistan	-80 828	-98.5
Total Russia and others	26 581 555	57.2

Table 4d

Umbria's export towards the Ex-Urss Republics. Share on Umbria's export (in %)

	2002	2003
Russia	1.2	2.0
Ukraine	0.5	0.8
Byelorussia	0.0	0.1
Kazakhstan	0.0	0.0
Turkmenistan	0.0	0.0
Moldavia	0.0	0.0
Georgia	0.0	0.0
Armenia	0.0	0.0
Uzbekistan	0.0	0.0
Azerbaijan	0.0	0.0
Tajikistan	0.0	0.0
Kirghizistan	0.0	0.0
Total Russia and others	1.9	3.1

Table 4e

Umbria's export towards Ex-Urss. Share on Eastern Europe export (in %)

	2002	2003
Russia	10.3	14.9
Ukraine	4.4	6.2
Byelorussia	0.4	0.4
Kazakhstan	0.2	0.3
Turkmenistan	0.4	0.2
Moldavia	0.2	0.2
Georgia	0.2	0.0
Armenia	0.1	0.0
Uzbekistan	0.0	0.0
Azerbaijan	0.2	0.0
Tajikistan	0.0	0.0
Kirghizistan	0.0	0.0
Total Russia and others	16.4	22.3

Table 5a

Umbria's export towards the Baltic Republics (in euro)

	2002	2003
Lithuania	2 077 022	3 308 667
Latvia	1 490 703	2 238 571
Estonia	287 206	278 026
Total Baltic Republics	3 854 931	5 825 264
Total Umbria	2 495 785 987	2 394 198 659
Total Umbria towards EU at 25	1 374 443 030	1 326 396 110

Table 5b

Share on the Baltic Republics export (in %)

	2002	2003
Lithuania	53.9	56.8
Latvia	38.7	38.4
Estonia	7.5	4.8
Total Baltic Republics	100.0	100.0

Table 5c

Umbria's export towards the Baltic Republics (absolute variations and in %)

	2002/2003	2002/2003
Lithuania	1 231 645	59.3
Latvia	747 868	50.2
Estonia	-9 180	-3.2
Total Baltic Republics	1 970 333	51.1

Table 5d

Umbria's export towards the Baltic Republics. Share on Umbria's export (in %)

	2002	2003
Lithuania	0.1	0.1
Latvia	0.1	0.1
Estonia	0.0	0.0
Total Baltic Republics	0.2	0.2

Table 5e

Umbria's export towards the Baltic Republics. Share on European Union at 25 (in %)

	2002	2003
Lithuania	0.2	0.2
Latvia	0.1	0.2
Estonia	0.0	0.0
Total Baltic Republics	0.3	0.4

Table 6a

Umbria's export towards new EU member Eastern European countries (in euro)

	2002	2003
Poland	52 538 975	45 105 443
Hungary	22 679 080	20 424 645
Slovak Republic	13 636 924	17 668 928
Czech Republic	12 783 045	14 722 347
Slovenia	9 599 413	9 408 304
Lithuania	2 077 022	3 308 667
Latvia	1 490 703	2 238 571
Estonia	287 206	278 026
Total enlargement countries	115 092 368	113 154 931
Total Umbria towards EU at 25	1 374 443 030	1 326 396 110
Total Umbria	2 495 785 987	2 394 198 659

Table 6b

Share on Enlargement countries export (in %)

	2002	2003
Poland	45.6	39.9
Hungary	19.7	18.1
Slovak Republic	11.8	15.6
Czech Republic	11.1	13.0
Slovenia	8.3	8.3
Lithuania	1.8	2.9
Latvia	1.3	2.0
Estonia	0.2	0.2
Total enlargement countries	100.0	100.0

Table 6c

Umbria's export towards new EU member Eastern European countries (absolute variations and in %)

	2002/2003	2002/2003
Poland	-7 433 532	-14.1
Hungary	-2 254 435	-9.9
Slovak Republic	4 032 004	29.6
Czech Republic	1 939 302	15.2
Slovenia	-191 109	-2.0
Lithuania	1 231 645	59.3
Latvia	747 868	50.2
Estonia	-9 180	-3.2
Total enlargement countries	-1 937 437	-1.7

Table 6d

Umbria's export towards new EU member Eastern European countries. Share on Umbria's export (in %)

	2002	2003
Poland	2.1	1.9
Hungary	0.9	0.9
Slovak Republic	0.5	0.7
Czech Republic	0.5	0.6
Slovenia	0.4	0.4
Lithuania	0.1	0.1
Latvia	0.1	0.1
Estonia	0.0	0.0
Total enlargement countries	4.6	4.7

Table 6e

Umbria's export towards new EU member Eastern European countries. Share on European Union at 25 (in %)

	2002	2003
Poland	3.8	3.4
Hungary	1.7	1.5
Slovak Republic	1.0	1.3
Czech Republic	0.9	1.1
Slovenia	0.7	0.7
Lithuania	0.2	0.2
Latvia	0.1	0.2
Estonia	0.0	0.0
Total enlargement countries	8.4	8.5

Table 6f

Umbria's export towards new EU member Eastern European countries. Share on Eastern Europe export (in %)

	2002	2003
Poland	18.5	13.7
Hungary	8.0	6.2
Slovak Republic	4.8	5.4
Czech Republic	4.5	4.5
Slovenia	3.4	2.9
Lithuania	0.7	1.0
Latvia	0.5	0.7
Estonia	0.1	0.1
Total enlargement countries	40.6	34.5

Table 7

Umbria's export towards Eastern European countries (2003)

	Values in euro	% Eastern Europe	% Umbria export
Romania	92 960 639	28.3	3.9
Russia	48 811 120	14.9	2.0
Poland	45 105 443	13.7	1.9
Serbia and Montenegro	21 287 028	6.5	0.9
Hungary	20 424 645	6.2	0.9
Ukraine	20 202 914	6.2	0.8
Slovak Republic	17 668 928	5.4	0.7
Czech Republic	14 722 347	4.5	0.6
Croatia	9 774 197	3.0	0.4
Slovenia	9 408 304	2.9	0.4
Bulgaria	9 206 896	2.8	0.4
Bosnia	5 087 684	1.6	0.2

Tab. 7 (cd.)

	Values in euro	% Eastern Europe	% Umbria export
Lithuania	3 308 667	1.0	0.1
Latvia	2 238 571	0.7	0.1
Albania	2 089 874	0.6	0.1
Byelorussia	1 463 236	0.4	0.1
Macedonia	1 418 358	0.4	0.1
Kazakhstan	1 014 193	0.3	0.0
Turkmenistan	732 617	0.2	0.0
Moldavia	525 266	0.2	0.0
Estonia	278 026	0.1	0.0
Georgia	163 893	0.0	0.0
Armenia	84 131	0.0	0.0
Uzbekistan	47 259	0.0	0.0
Azerbaijan	23 134	0.0	0.0
Tajikistan	4 078	0.0	0.0
Kirghizistan	1 253	0.0	0.0
Total Eastern Europe	328 052 701	100.0	13.7
Total Umbria	2 394 198 659		100.0

Table 8a

Umbria's Foreign Trade towards Eastern European countries (in euro)

	2002			2003		
	export	import	trade balance	export	import	trade balance
Romania	80 487 190	43 676 580	36 810 610	92 960 639	46 068 063	46 892 576
Russia and others	46 491 539	113 555 952	-67 064 413	73 073 094	32 231 849	40 841 245
Ex-Yugoslavia	42 342 898	53 087 501	-10 744 603	46 975 571	55 880 947	-8 905 376
Poland	52 538 975	11 569 831	40 969 144	45 105 443	9 672 346	35 433 097
Hungary	22 679 080	14 268 826	8 410 254	20 424 645	13 701 063	6 723 582
Slovak Republic	13 636 924	1 831 492	11 805 432	17 668 928	938 163	16 730 765
Czech Republic	12 783 045	5 964 389	6 818 656	14 722 347	5 996 787	8 725 560
Bulgaria	6 783 025	14 767 900	-7 984 875	9 206 896	12 456 578	-3 249 682
Baltic Republics	3 854 931	169 864	3 685 067	5 825 264	252 946	5 572 318
Albania	2 077 662	2 314 981	-237 319	2 089 874	4 232 446	-2 142 572
Total Eastern Europe	283 675 269	261 207 316	22 467 953	328 052 701	181 431 188	146 621 513

Table 8b

Umbria's Foreign Trade towards Ex-Yugoslavia (in euro)

	2002			2003		
	export	import	trade balance	export	import	trade balance
Serbia and Montenegro	15 343 721	19 945 748	-4 602 027	21 287 028	17 710 250	3 576 778
Croatia	10 868 316	2 379 968	8 488 348	9 774 197	3 033 969	6 740 228
Slovenia	9 599 413	3 901 091	5 698 322	9 408 304	7 353 346	2 054 958
Bosnia	5 553 805	7 612 703	-2 058 898	5 087 684	6 745 165	-1 657 481
Macedonia	977 643	19 247 991	-18 270 348	1 418 358	21 038 217	-19 619 859
Total ex-Yugoslavia	42 342 898	53 087 501	-10 744 603	46 975 571	55 880 947	-8 905 376

Table 8c

Umbria's Foreign Trade towards the Baltic Republics (in euro)

	2002			2003		
	export	import	trade balance	export	import	trade balance
Lithuania	2 077 022	45 975	2 031 047	3 308 667	52 032	3 256 635
Latvia	1 490 703	65 958	1 424 745	2 238 571	111 993	2 126 578
Estonia	287 206	57 931	229 275	278 026	88 921	189 105
Total Baltic Republics	3 854 931	169 864	3 685 067	5 825 264	252 946	5 572 318

Table 8d

Umbria's Foreign Trade towards the Ex-Urss Republics (in euro)

	2002			2003		
	export	import	trade balance	export	import	trade balance
Russia	29 350 788	96 147 845	-66 797 057	48 811 120	21 056 715	27 754 405
Ukraine	12 498 733	8 325 559	4 173 174	20 202 914	6 230 154	13 972 760
Byelorussia	1 000 221	42 967	957 254	1 463 236	132 796	11 330 440
Kazakhstan	572 174	9 030 837	-8 458 663	1 014 193	4 643 948	-3 629 755
Turkmenistan	1 143 849	0	1 143 849	732 617	0	732 617
Moldavia	640 406	0	640 406	525 266	167 314	357 952
Georgia	434 092	8 744	425 348	163 893	922	162 971
Armenia	230 741	0	230 741	84 131	0	84 131
Uzbekistan	67 360	0	67 360	47 259	0	47 259
Azerbaijan	471 094	0	471 094	23 134	0	23 134
Tajikistan	0	0	0	4 078	0	4 078
Kirghizistan	82 081	0	82 081	1 253	0	1 253
Total Russia and others	46 491 539	113 555 952	-67 064 413	73 073 094	32 231 849	40 841 245

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DYNAMIKA INTERNACJONALIZACJI MAŁYCH I ŚREDNICH PRZEDSIĘBIORSTW: CZYNNIKI PRZEWAGI KONKURENCYJNEJ

Aktualnie, gdy działalność gospodarcza podlega intensywnemu procesowi globalizacji, konkurencyjność zaczyna odgrywać kluczową rolę, zarówno w teorii, jak również w procesie kodyfikacji efektywnych działań i przedsiębiorczych zachowań. W rozważaniach tych z różnym nasileniem podkreśla się znaczenie wielu czynników związanych z innowacyjnością, elastycznością i postępem technologicznym. Możliwości małych i średnich przedsiębiorstw (MŚP) w zakresie zdobywania powyższych czynników determinujących poziom ich konkurencyjności stają się obecnie ważnym zagadnieniem, jako że większość systemów produkcyjnych w krajach Unii Europejskiej składa się przede wszystkim z MŚP. Dlatego też szanse na przetrwanie będą miały tylko te, które będą w stanie zdobyć przewagę konkurencyjną na międzynarodowych rynkach.

Niniejszy artykuł omawia kwestię konkurencyjności w działaniach eksportowych, zarówno na poziomie makro-, jak i mikroekonomicznym. Poziom makro został omówiony przez rozważenie najaktualniejszych danych nt. zagregowanej wielkości eksportu Umbrii (region w środkowych Włoszech – poziom NUTS 2) na obszar Europy Wschodniej. Z kolei analiza mikroekonomiczna została oparta na przeprowadzonej niedawno ankiecie (Daddi *et al.* 2004) badającej firmy – eksporterów z obszaru Umbrii, a w szczególności ich cechy wraz z kluczowymi kwestiami wpływającymi na kształt realizowanych przez nie strategii konkurencyjności. Przypadek Umbrii jest szczególnie pouczający, ponieważ na jego przykładzie można zobrazować wiele ścieżek rozwoju, charakterystycznych dla Włoch.

Wyniki przedstawionych badań dostarczają użytecznych informacji na temat niektórych aspektów dynamiki konkurencyjności małych i średnich przedsiębiorstw, jak również pozwalają na wyciągnięcie ważnych wniosków co do możliwości podejmowania interwencji w zakresie promowania internacjonalizacji MŚP.