



Export activities in Molise at the time of covid-19
The Impacts of the Covid-19 Pandemic on SME Internationalisation

Sommario

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Introduction

The main objective of the research is to understand how Molise's companies, during the period of the covid-19 crisis, managed to record a counter-trend compared to the rest of Italy (+26% in 2020). To do this, the research also has the sub-objectives of identifying pillars of Molise's exporting companies (343) and, at the same time, acquiring micro-data on export activity in relation to the size of the companies and the markets affected by Molise's exports.

1. Italy and the International Market

Before getting to the situation of Molise's exports, the first pages of this research will focus on the importance of exports and the effects of the pandemic in international markets and in Italy. The theme that emerges from the research is that of dynamic companies, companies that manage to continue to innovate the production process and train themselves, investing in human resources and knowledge to be able to follow the demand of the increasingly dynamic and complex international market.

1.1 Internationalisation at the time of covid19

The export of goods and services has historically been an important economic tool for the innovation of companies, for opening trade channels with distant countries and cultures, for challenging and innovating logistics, but also indispensable for balancing the foreign trade balance, indispensable for finding raw materials. Third-generation globalism is now an established reality. The development of digital technologies has had a direct influence on the capacity to transport goods and people, on the capacity for communication and the circulation of knowledge since the early 2000s, thus giving rise to a complex global market. Over the years, the international market situation has become increasingly complex with the innovation of 4.0 production processes and the development of digital technologies for the production of goods and services, the multiplication of digital platforms and the introduction of new logistics models.¹

The long process of economic development and growth, boosted by emerging markets such as China, India, Brazil has been destabilised if not wiped out by the Covid-19 pandemic crisis. The brake due to covid has been recorded with 11% drop in total imports globally compared to 2019². This clearly shows that health is the first index of human capital. The Eurozone suffered a 12% drop in exports, a loss initially estimated at 12.9%. At the end of 2020 the only country with a positive export rate was China with +0.3%³, but still a far cry from the numbers we are used to seeing from China in recent years. Italy, in the international scenario in 2020 recorded a 9.7% drop compared to 2019⁴.

Fig. 5 Prospettive per l'import nel 2020
Importazioni in frenata, soprattutto in Europa

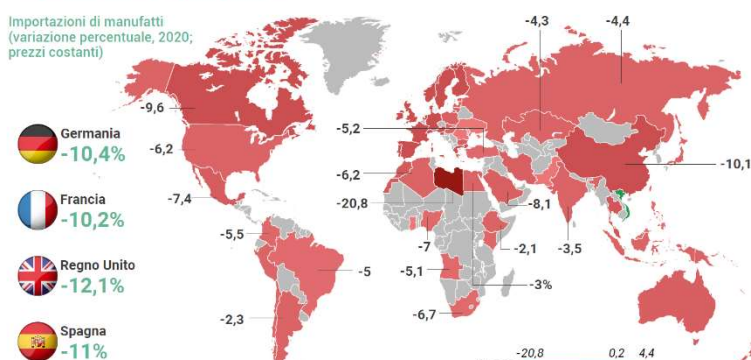


Figure 1 from *Il commercio Internazionale ai Tempi di Covid-19*, p.15.

However, international trade regained strength as early as the end of 2020 and continued to grow throughout 2021. In April 2021, world exports, according to Sole24 Ore analysts, started to grow at a faster pace than previous time series⁵. An incredible result that could coincide with the start of a new phase in the production of companies that are becoming increasingly dynamic and open to change and innovation in their production processes.

¹Festa G., Rossi. M Territory-based knowledge management in international marketing processes – the case of “Made in Italy” SMEs . European Business Review Vol. 32 No. 3, 2020 pp. 425-442 Emerald Publishing Limited

² IL COMMERCIO INTERNAZIONALE AI TEMPI DI COVID-19

³ <https://www.frontiersin.org/articles/10.3389/fpubh.2021.682693/full> The Influence of the COVID-19 Pandemic on the Imports and Exports in China, Japan, and South Korea

⁴ <https://www.ice.it/it/node/7413>

⁵ <https://www.ilsole24ore.com/art/commercio-globale-chi-traina-ripresa-AEqVsfa>

1.2 Made in Italy and Covid -19

The Italian export is a very important case study in economics because of its great success: the peculiar characteristics of its products in both technical and cultural terms. The peculiar factors of the Italian export, of the Made in Italy, as it can be deduced from the study Territory-based knowledge management in international marketing processes - the case of "Made in Italy" SMEs, edited by the European Business Review, are mainly three: on the one hand, the great export drive given by small and medium enterprises, on the other hand, its unique characteristics and its ability to succeed in combining product quality and technical skills with a mix of style, design and organisation, and finally, its territorial characteristic "the culture of the territory of origin of the production"⁶. In short, small and medium-sized enterprises not only have the ability to transform themselves and better adapt to the market, but they also make their regional particularities a very important factor of recognisability both in marketing and in the quality of raw materials. Important feature of small and medium-sized enterprises that will support exports after the crisis in 2020.

During the pandemic, when comparing Italy's performance to other countries, the contribution of exports to Italy's GDP was less unfavourable than that of the other economic components. Italy was second among the G8 countries in terms of the smallest decline in exports. The performance was better than that of France, the United Kingdom and the United States. The result of Italian exports in 2020 was -9.7%. In Italy in 2020, only Molise recorded a positive jump (26%) and the regions that experienced a smaller contraction were Basilicata (-4.4%), Abruzzo and Tuscany (-6.2%) and Liguria (-0.7%), Sardinia and Sicily both recorded the worst declines, -40.6% and -24.2% respectively.⁷

The covid 19 crisis in 2020 has halted the growth of Made In Italy and the positive export trend since 2000, as shown by the study Back on Track? A Macro-Micro Narrative of Italian Exports, written by six authors of the Italian Society of Economists⁸

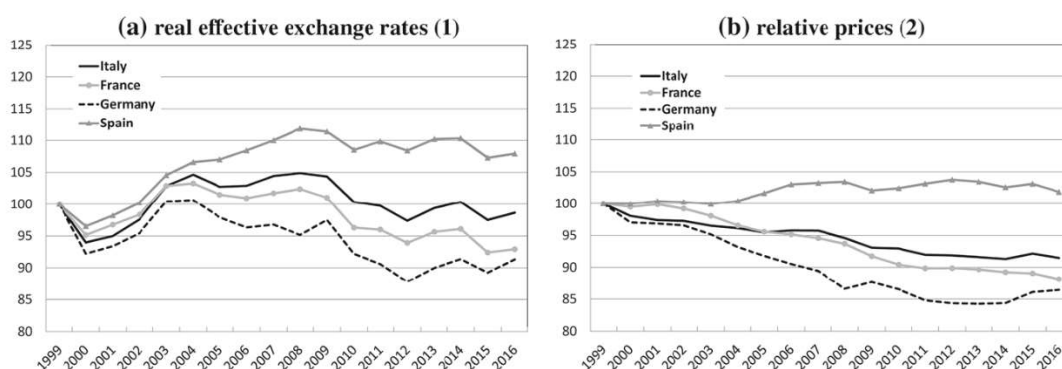


Figure 2 from Back on Track?, pag. 12.

The pillar of Made in Italy is the activity of small and medium-sized enterprises. It is precisely the size of Italian companies that becomes a relevant factor of competitiveness. Due to their size, small and medium-sized Italian companies are able to implement innovative and explorative processes with regard to product production, innovation and marketing. A crucial factor in this growth is the constant territorial exploration of small and

Back on Track? A Macro-Micro Narrative of Italian Exports

medium-sized enterprises, which are more exposed to networking processes, aggregation and the creation of industrial districts. The competitive advantage of Italian exports is given essentially by the « open system of relationships for the production and diffusion of social capital, emerging as the essential differentiating factor of a territory and of the entrepreneurship that

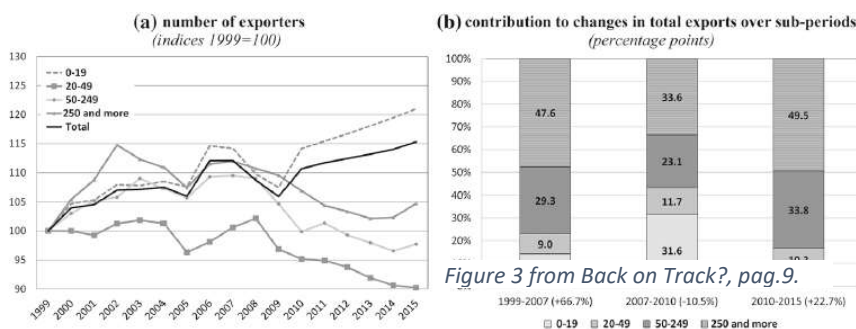


Figure 3 from Back on Track?, pag.9.

⁶ Festa G., Rossi. M. Territory-based knowledge management in international marketing processes – the case of “Made in Italy” SMEs . European Business Review Vol. 32 No. 3, 2020 pp. 425-442 Emerald Publishing Limited p. 428

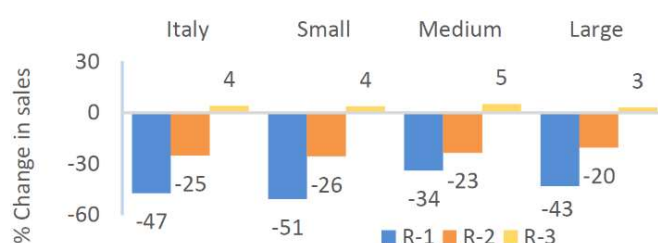
⁷ Report ICE sull'internazionalizzazione, <https://www.ice.it/it/node/7413>.

⁸ M.Bugamelli · S. Fabiani · S. Federico · Felettigh · C. Giordano · A. Linarello · Back on Track? A Macro-Micro Narrative of. Italian Exports, April 2018.

is present in this territory, working as an inextricable milieu that continuously takes-in and takes-out pieces of local and even global knowledge »⁹. In fact, as we can see from the image at the end of the previous page ¹⁰, the greatest weight of Italian exports (if we disaggregate the sales of Italian and foreign multinational groups) is given by the small and medium-sized enterprises that export between 10 and 19 products per year abroad. As we will see shortly, it is precisely the capacity for innovation and transformation of the production process, networking and exchange of social capital that have been the characteristics that have led Italian small and medium-sized enterprises to resist the Covid-19 crisis and achieve better results in 2021 than in 2019.

The yearbook of foreign trade and international activities of enterprises, published in 2021 by ISTAT and ISTAT-ITCE, the agency for the promotion abroad of the internationalisation of Italian enterprises, devotes its report to the *Effects of Covid-19 and reaction strategies of exporting enterprises*¹¹.

The report records, in the period 2020 - first half of 2021, for 57.5% of exporting companies between June and October 2020, compared to the same period in 2019, larger losses of 10%. More than 700,000 employees of exporting companies worked in Smart working. During the Covid-19 crisis, the companies affected by serious operational risk had 8.6% of the total export value. More than twenty thousand companies, 22.2% of the total, said in November 2020 that they expected serious operational risks in early 2021. However, the Notebook notes that, during the same period, dynamic companies, i.e. companies with "strongly change-oriented behaviours and strong interactions with risks/opportunities generated by the market" estimated a lower operational risk in percentage terms 17.5 per cent than those with low dynamism 27.5 per cent¹².



Note: The R-1 series refers to changes May 2020 vs May 2019, R-2 refers to October/November 2020 vs October/November 2019, R-3 refers to March/April 2021 vs March/April 2020.

Figure 4 From Enterprise Surveys Follow up on Covid -19. World bank group. p 2.

The report also notes that exporting companies are also those that have accelerated towards the use of digital technologies, moving from 16.3% to 23% of activity on digital platforms. However, as we can see from the image on the left, provided by the third follow up of the covid-19 questionnaire administered by world bank in almost all countries of the world, Italian companies, after the collapse of the first months of 2020 have started to recover percentages of sales already in the fourth quarter of 2020, and then grow on average by 4% already by March 2021 compared to March 2020¹³.

2. Molise exports and covid 19

Molise is part of this international and Italian export situation with a figure that goes against the Italian average. Molise's exports continued to grow by 26% driven by the automotive and agri-food sectors throughout 2020 and the figures for the first half of 2021 are encouraging, with exports almost matching those of the previous year in 6 months.

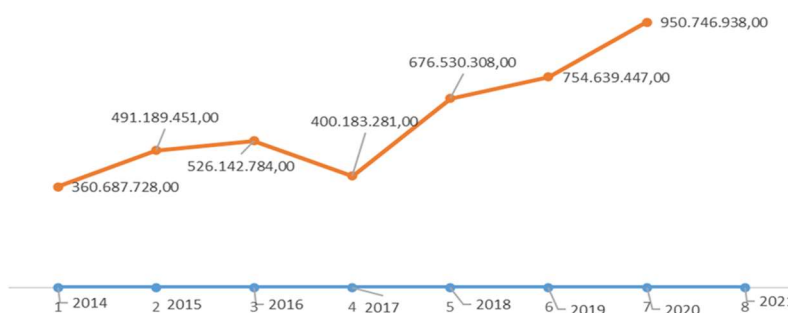


Figure 5 Molise per year export Trend. Data from Istat. Our Elaboration.

⁹ Festa G., Rossi M Territory-based knowledge management

¹⁰ Autori vari banca d'Italia, *Back on Track?*, Pag. 9.

¹¹ Ministero degli Affari Esteri e della Cooperazione Internazionale, Rapporto ICE 2020-2021

¹² Ministero degli Affari Esteri e della Cooperazione Internazionale, Rapporto ICE 2020-2021

¹³ World Bank Group, ENTERPRISE SURVEYS FOLLOW-UP ON COVID-19, Italy, Round 3.

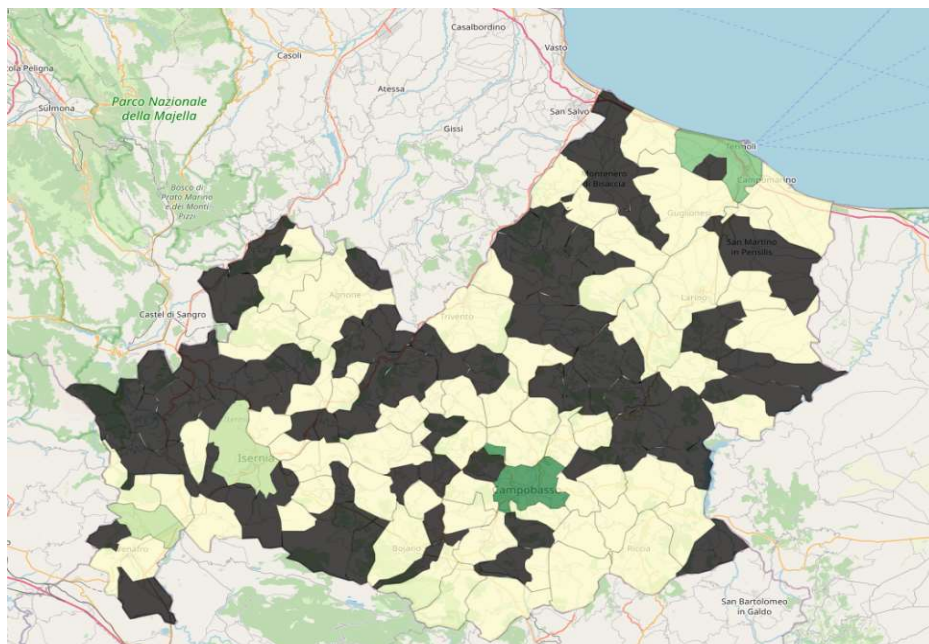


Figura 6 Molise wealth concentration 2021 (up to 1700 companies)



Figure 7 Export prov CB and IS (From Istat ICE)

The location and distribution of Molise's companies that export abroad, in terms of turnover, is distributed as follows: 93% of companies operate in the province of Campobasso, the remaining 7% are distributed in the province of Isernia. In all likelihood, the companies that export are scattered throughout the territory of the province of Campobasso, with higher concentrations in terms of turnover and not in terms of the presence of companies between Campobasso and Termoli. Subsequent research will have to be carried out to identify all 343 companies active in exporting in Molise, since many of these could be micro-enterprises; Italian exports are in fact driven by companies that export on average between 0 and 50 products per year. The companies that responded are in fact scattered throughout the territory: IS (Miranda, Roccaravindola) CB (Campomarino, San Polo Matese, Termoli, Riccia, Fossalto). Molise's major exporting companies with a strong vocation for innovation include: Molisana, a pasta producer, with its innovative formats and communication; Dr Group, with its great drive for innovation in the automotive sector; Martino Taste, a company active in the export and production of different variants of Cous Cous; and Sirio srl, which recovers milk processing waste (whey) and has recently signed a research and development agreement with the Ministry of Economic Development.¹⁴ Other companies active in exporting include Barone, Barletta, La Vida MEDICAL, Gruppo NICE, RELAX, Miramed travel, Colavita, Cantina Cliternia, Cooperativa Allevatori Riccia, Moda Impresa, Tenute Fierro, La Meccanica Oriente, Ass.El, Centro Tartufi Molise.

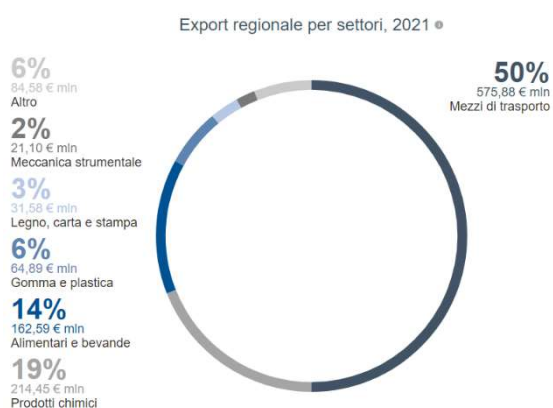


Figure 8 Molise Export per Economic Sector (from Ista ICE)

However, the Molise data confirms the strength of dynamic companies that are open to change, as noted by Ice-Istat in export activities. As a matter of fact, in Molise, highly dynamic companies account for 70% of the total export turnover and analysing the historical series 2017 - 2021 we can see that the consolidation of the growth of Molise's exports is due to highly dynamic companies. Not only Dr, now a large and famous automotive group in Molise and others in the technology sector and in the production of electronic and chemical materials, but also agricultural companies and the agri-food sector have registered a substantial increase in Molise exports (due to the use by producers of new techniques). In fact, from the research Rural Small And Medium Enterprises Development In Molise (Italy)

¹⁴ Ministero dello Sviluppo Economico <https://www.mise.gov.it/index.php/it/per-i-media/2043373-agroindustria-giorgetti-investimenti-in-molise-per-42-milioni-di-euro>

published in 2019, how in Molise rural agricultural enterprises have innovated between 2002 and 2016 for 29% digital technologies and new processes of work organization, and for 24% have formulated and offered on the market new products or services.¹⁵

2.1. Export in Molise

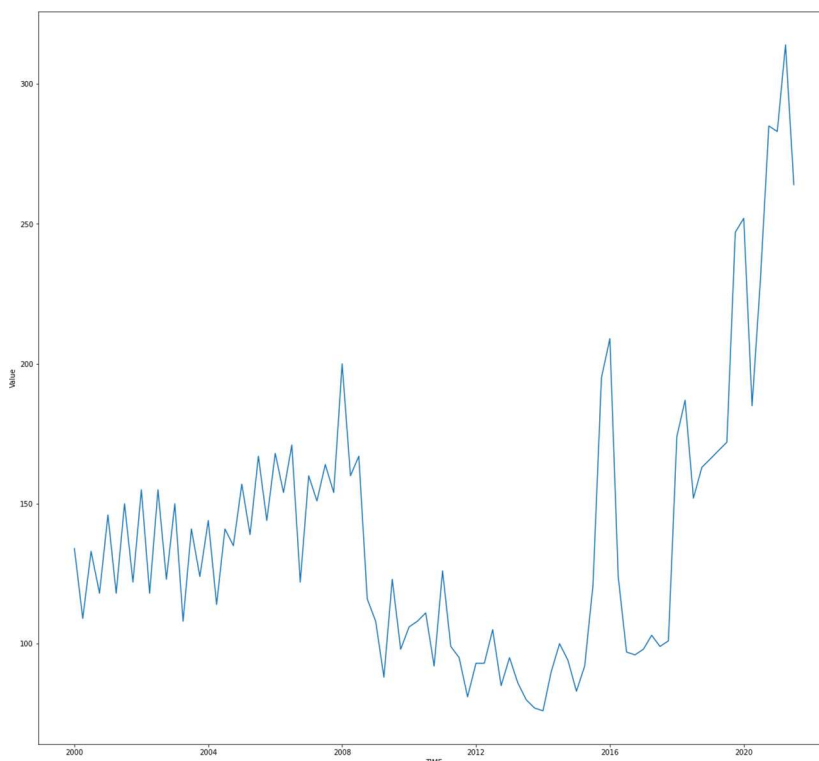


Figure 9 Molise quarterly export Trend. Data from Istat. Our Elaboration.

As we can see in the image above, exports from Molise between 2020 and 2021, the years of the Cov-19 pandemic crisis, have never been as high as they have been in the last 20 years. This is why it is interesting to study this phenomenon and understand it better. After the substantial zeroing of the push to export activities by the fashion sector until 2008 / 2009, which from 40% of Molise exports became zero and the steel sales with the exploit of 2015 +50%, emerges, from the end of 2017 and the beginning of 2018 the automotive sector as a real development sector for foreign trade and for the economy of Molise that will become in recent years

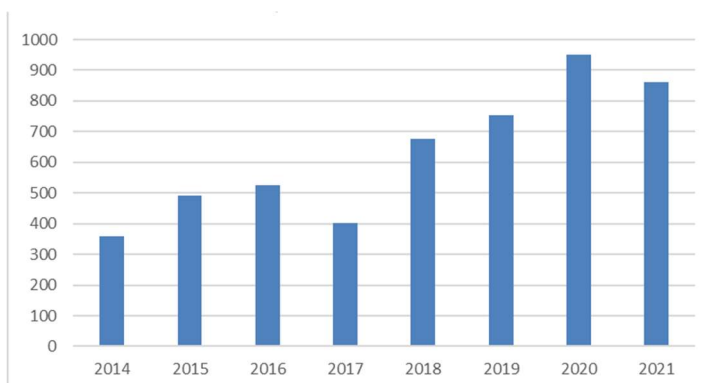


Figure 10 Molise export Trend. Data from Istat. Our Elaboration.

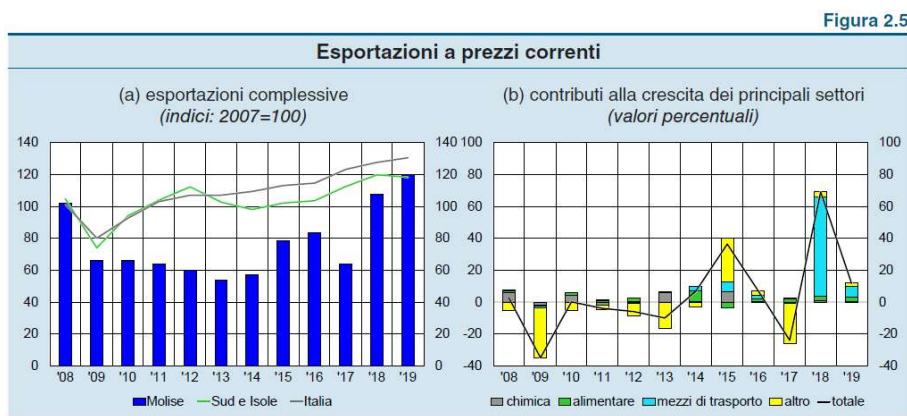
more than half of Molise exports. In the years relating to the covid-19 crisis, however, there was a percentage increase in sales for all product sectors. Molise's exports are greater to non-EU countries than to EU countries, with exports to non-EU countries accounting for 13% of the total. The weight of exports on the total GDP of Molise is on average 11.8% according to SACE, and is expected to increase in 2021. Exports are handled in Molise by around 343 companies.

¹⁵ Ievoli C., Belliggiano A. Information And Communication Infrastructures And New Business Models In Rural Areas: The Case Of Molise Region In Italy, Europ. Countrys. · Vol. 11 · 2019 · No. 4 · p. 475-496 DOI: 10.2478/euco-019-0027 p. 581.

2.1 Exports Molise, Series 2019 - 2020 – 2021

2.1.1 Exports 2019

In 2019, Molise's merchandise exports increased by 11%, the growth was mainly driven by the automotive sector, which already accounted for 50% of Molise's exports in 2019. Exports in 2019 on average grew by around 5% for all commodity sectors, due to higher exports of food and plastic products.

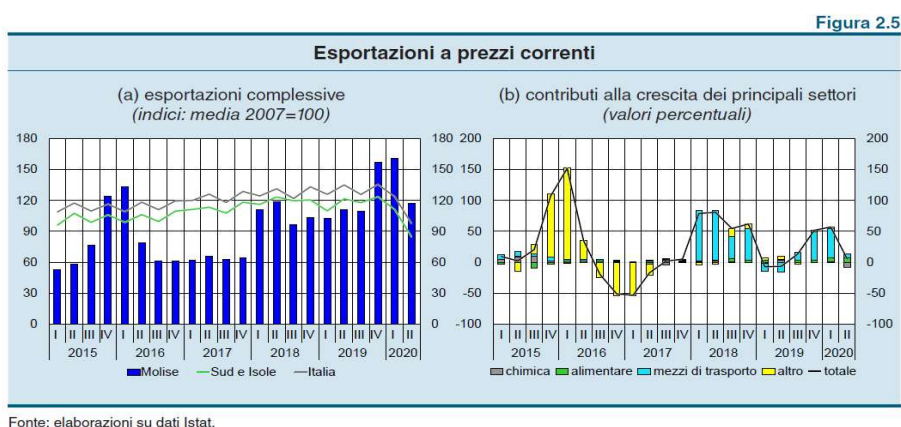


Exports increased to EU countries by 4.6%, with increases to Germany, the UK for plastic products and France for food products. Exports to non-EU countries increased by 16.7%, due to the strong increase in exports to Turkey.

In 2017, Molise still did not return to the pre-crisis export levels of 2008, going through a period of long stagnation. Between 2018 and 2019, export growth returns to be sustained and, above all, it seems to continue to grow even in the first months of 2020 despite the approach of the financial economic crisis that will be caused by the stop of production activities due to the health emergency and the lockdown status.

2.1.2 Exports 2020

In the first half of 2020, the value of Molise's exports grew by 30.2%¹⁶, at the end of 2020, compared to the same period in 2019 with a positive growth balance of 26.25%¹⁷. The situation in Molise goes against the trend compared to Italy and Southern Italy. The increase, as in the previous three years, is mainly due to the increase in sales of vehicle parts and engines, and represents more than half of Molise's exports.



However, exports as a whole were fuelled by all other sales segments, which grew by an average of 7.1%, driven mainly by food exports, which grew by 41.5% in the first half of the year, mainly offsetting the decline in chemical exports between April and June 2020.

¹⁶ Report banca d'Italia sulle economia regionale pag 9

¹⁷ Fonte istat, dati.istat, elaborazione nostra

Tavola a2.4

Commercio estero FOB-CIF per settore
(milioni di euro e variazioni percentuali sul periodo corrispondente)

SETTORI	Esportazioni			Importazioni		
	1° sem. 2020	Variazioni		1° sem. 2020	Variazioni	
		2019	1° sem. 2020		2019	1° sem. 2020
Prodotti dell'agricoltura, silvicoltura e pesca	2	-10,9	6,4	3	-52,6	-10,1
Prodotti dell'estrazione di minerali da cave e miniere	7	-63,3	∞	∞	-24,1	-60,5
Prodotti alimentari, bevande e tabacco	75	20,9	41,5	16	11,9	-7,4
Prodotti tessili e dell'abbigliamento	2	-35,1	-42,1	5	4,2	-39,4
Pelli, accessori e calzature	∞	283,4	-61,1	1	13,2	-30,1
Legno e prodotti in legno; carta e stampa	11	29,9	1,9	7	77,2	-11,7
Coke e prodotti petroliferi raffinati	∞	43,8	-24,7	∞	-26,8	-62,6
Sostanze e prodotti chimici	62	1,1	-17,6	58	12,4	-5,2
Articoli farm., chimico-medicinali e botanici	6	14,3	368,2	5	68,7	40,6
Gomma, materie plast., minerali non metal.	22	79,2	3,5	14	12,9	-24,2
Metalli di base e prodotti in metallo	4	-23,2	-10,1	9	-23,2	-40,8
Computer, apparecchi elettronici e ottici	∞	-6,2	-7,8	5	76,0	67,1
Apparecchi elettrici	7	10,1	-20,2	4	24,9	17,6
Macchinari ed apparecchi n.c.a.	6	-39,8	-11,4	133	-20,9	104,7
Mezzi di trasporto	228	14,4	62,5	46	-6,5	12,6
Prodotti delle altre attività manifatturiere	2	23,4	-52,3	5	-7,8	-46,6
Energia, trattamento dei rifiuti e risanamento	∞	-60,3	-48,4	∞	15,9	-77,6
Prodotti delle altre attività	4	479,7	-13,0	7	13,6	-3,8
Totale	438	11,7	30,2	317	-5,2	19,4

Fonte: Istat.

Exports in 2020 increased mainly to the United States, driven by the automotive sector, and contracted to European Union countries, mainly due to a decline in chemical exports to the Netherlands and England.

Tavola a2.5

Commercio estero FOB-CIF per area geografica
(milioni di euro e variazioni percentuali sul periodo corrispondente)

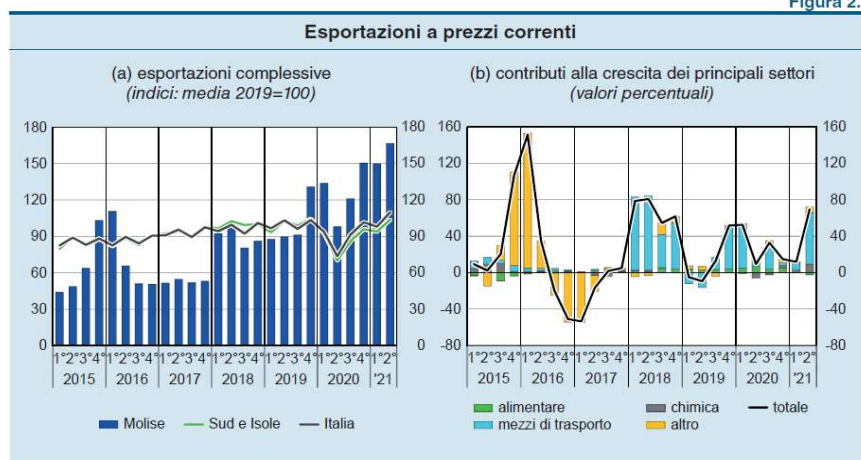
PAESI E AREE	Esportazioni			Importazioni		
	1° sem. 2020	Variazioni		1° sem. 2020	Variazioni	
		2019	1° sem. 2020		2019	1° sem. 2020
Paesi UE (1)	117	3,6	-10,2	119	-10,1	-26,7
Area dell'euro	97	2,7	-10,7	100	-14,3	-21,6
di cui: Francia	15	9,7	-12,3	27	-15,6	3,9
Germania	33	13,1	-6,4	38	-23,4	-33,0
Spagna	10	-10,6	-29,3	8	11,4	-39,6
Altri paesi UE	19	8,6	-7,5	20	8,9	-44,9
Paesi extra UE	321	16,5	55,7	197	1,5	92,7
Altri paesi dell'Europa centro-orientale	11	18,4	-10,8	8	169,0	-4,4
Altri paesi europei	53	177,2	-31,0	4	-14,5	-58,1
di cui: Regno Unito	12	14,4	-19,9	2	-8,6	-66,8
America settentrionale	210	1,1	162,8	63	-2,1	169,9
di cui: Stati Uniti	204	0,3	167,3	56	-3,0	164,7
America centro-meridionale	5	-18,8	27,4	73	-22,1	376,7
Asia	29	-35,2	23,5	47	23,1	12,3
di cui: Cina	8	-67,5	4,6	28	70,5	-1,1
Giappone	5	30,5	-11,1	9	33,7	53,3
EDA (2)	5	4,9	68,9	2	-33,0	93,1
Altri paesi extra UE	13	9,7	32,7	2	1,5	-25,7
Totale	438	11,7	30,2	317	-5,2	19,4

Fonte: Istat.

(1) Aggregato UE27 post-Brexit. - (2) Economie dinamiche dell'Asia: Corea del Sud, Hong Kong, Malaysia, Singapore, Taiwan, Thailandia.

2.1.3 Exports 2021

Figura 2.5



During the first half of 2021, the value of exports increased by 36.3 per cent compared to the same period in 2020, in comparison to 2019 the growth in sales was 78.3 per cent. The pandemic does not seem to be slowing down Molise's exports. It is necessary to understand how exports have grown and with a growth rate in countertendency with the rest of Italy and Southern Italy. The transport equipment sector is still the driving force behind exports and at the end of the first half of the year accounted for 58.2% of Molise's exports. The other sectors grew by a total of 17.8%, with exports of chemical products recovering. Food exports fell compared to 2020, but were higher than in 2019.

Tavola a2.4

Commercio estero FOB-CIF per settore
(milioni di euro e variazioni percentuali sul periodo corrispondente)

SETTORI	Esportazioni			Importazioni		
	1° sem. 2021	Variazioni 2020	1° sem. 2021	1° sem. 2021	Variazioni 2020	1° sem. 2021
Prodotti dell'agricoltura, silvicoltura e pesca	4	-17,5	103,5	4	26,1	14,8
Prodotti dell'estrazione di minerali da cave e miniere	4	349,6	-46,5	2	87,0	296,2
Prodotti alimentari, bevande e tabacco	70	32,3	-5,9	17	-16,3	8,1
Prodotti tessili e dell'abbigliamento	2	-33,9	-4,9	7	-28,9	29,2
Pelli, accessori e calzature	..	-95,9	293,0	1	-16,6	9,6
Legno e prodotti in legno; carta e stampa	16	7,6	48,6	6	-21,8	-16,5
Coke e prodotti petroliferi raffinati	..	-86,6	-53,0	..	-35,8	65,0
Sostanze e prodotti chimici	88	-6,1	38,4	72	-3,0	20,6
Articoli farm., chimico-medicinali e botanici	7	634,3	24,2	9	53,2	94,8
Gomma, materie plast., minerali non metal.	26	3,1	21,2	14	-21,7	-4,7
Metalli di base e prodotti in metallo	5	-2,8	10,4	17	-13,9	80,1
Computer, apparecchi elettronici e ottici	..	-36,3	-6,6	4	0,7	-10,4
Apparecchi elettrici	8	0,1	16,7	5	38,9	22,4
Macchinari ed apparecchi n.c.a.	10	-3,5	78,6	133	37,3	2,4
Mezzi di trasporto	348	40,3	53,7	77	16,5	67,1
Prodotti delle altre attività manifatturiere	4	-34,4	74,2	6	-11,0	9,8
Energia, trattamento dei rifiuti e risanamento	-	-48,4	-100,0	..	-74,8	32,5
Prodotti delle altre attività	4	337,3	6,4	8	508,3	14,4
Totale	597	26,0	36,3	383	11,8	19,9

Fonte: Istat.

Tavola a2.5

Commercio estero FOB-CIF per area geografica
(milioni di euro e variazioni percentuali sul periodo corrispondente)

PAESI E AREE	Esportazioni			Importazioni		
	1° sem. 2021	Variazioni		1° sem. 2021	Variazioni	
		2020	1° sem. 2021		2020	1° sem. 2021
Paesi UE (1)	144	-5,0	22,7	153	-16,3	25,4
Area dell'euro	117	-6,5	20,5	127	-12,7	27,6
di cui: Francia	17	-7,0	17,8	19	0,8	-23,7
Germania	44	1,6	32,6	54	-15,5	43,8
Spagna	12	-26,6	26,3	8	-20,6	-2,1
Altri paesi UE	27	3,1	33,1	26	-28,9	15,4
Paesi extra UE	454	42,3	41,3	230	45,4	16,4
Altri paesi dell'Europa centro-orientale	7	-19,1	-36,0	5	-27,0	-37,3
Altri paesi europei	91	-9,9	72,6	9	-38,8	88,8
di cui: Regno Unito	15	-8,8	27,3	5	-42,5	137,8
America settentrionale	305	84,8	45,5	71	79,0	12,6
di cui: Stati Uniti	298	86,2	46,6	65	83,6	16,8
America centro-meridionale	6	6,8	20,3	66	87,1	-9,8
Asia	31	14,6	4,8	77	23,3	63,5
di cui: Cina	7	-6,9	-9,0	56	29,0	96,7
Giappone	6	-4,6	32,1	9	32,1	-1,2
EDA (2)	4	51,2	-17,4	2	43,1	4,0
Altri paesi extra UE	14	47,9	3,7	2	-20,3	33,3
Totale	597	26,0	36,3	383	11,8	19,9

Fonte: Istat.
(1) Aggregato UE-27. - (2) Economie dinamiche dell'Asia: Corea del Sud, Hong Kong, Malaysia, Singapore, Taiwan, Thailandia.

In the meantime, Molise's exports record almost equal levels in July 2021 845 million in the first half of the year compared to a total of 952 million in 2020. Exports are growing in all sectors. Net of these encouraging data and trends, what has been the driving force behind growth in terms of skills and competencies in the various production sectors? But what are the compositions of the 343 Molise companies that export, and what were their reactions and perceptions during the covid 19 pandemic crisis? Did they open up new markets? Did they implement logistics and shipping departments? Did they implement new e-commerce policies?

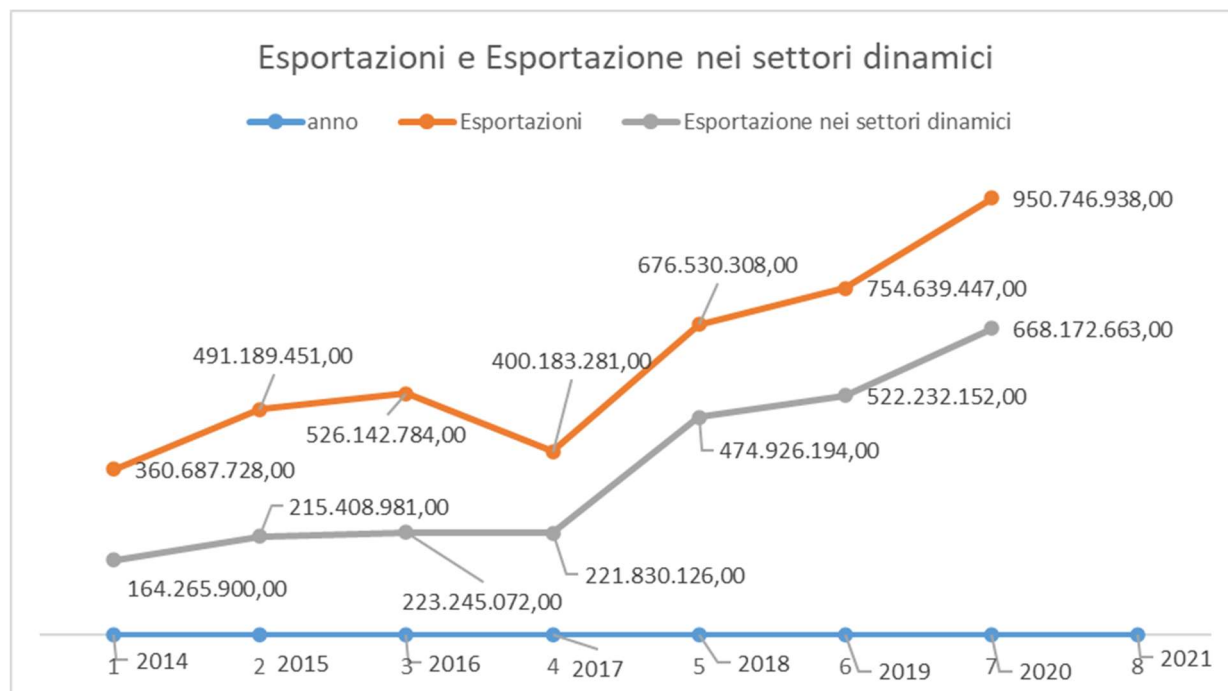


Figure 11 Molise year export Trend with disaggregate data from dynamic sector. Data from IstatICE. Our Elaboration.

The most important fact is that in Molise, the substantial increase in exports is fuelled by the drive of companies competing in dynamic sectors. Since 2009, with the adoption of the new Ateco 2007 classification, the dynamic sectors are: CE-Chemical substances and products; CF-Pharmaceutical, chemical-medicinal and botanical articles; CI-Computers, electronic and optical apparatus; CJ-Electrical apparatus; CL-Transportation means;

M-Professional, scientific and technical activities; R-Artistic, entertainment and recreational activities; S-Other service activities.

The ICE ISTAT report notes that the greatest competitive advantages in the international market could come from those companies operating in "the leading sectors of our export that are best equipped in terms of the way work is carried out, the adoption of digital technologies, the optimisation of processes and market flexibility". We would like to point out that while we are writing this research, one of the companies that responded to the questionnaire has signed an agreement for research and development with the Ministry of Economic Development, supporting the thesis that there is a close correlation between increased exports, research and development and presence in highly dynamic markets.

3. The research tool

3.1 Literature review and indicators

The research tool was constructed on the basis of the analysis of the literature on this subject cited so far in relation to the analysis of the micro-data provided by ISTAT and ISTAT-ICE, and the consultation of the Sace report and data from the Bank of Italy.

The development of the indicators, therefore, was constructed so as to understand the effects on exports of covid -19 firstly with regard to production and sales levels, trade sectors and foreign markets and secondly we tried to construct indicators that could record the reason for the positive performance in relation to the factors of the innovation of the production process, logistics and skills, in relation to the strong data emerged from the analysis of the literature that sees exports by companies operating in dynamic sectors and implementing policies of innovation of the production process, work organization and according to market demand, represent in Molise 70% of the export volume.

The questionnaire proposed for monitoring the performance of Molise's exports during the covid 19 crisis was constructed on the basis of the questionnaire for small and medium sized enterprises of the bank of Italy, for example using questions relating to the digitalisation of enterprises and questions relating to the logistical aspect of business activity and on the basis of the World Bank questionnaire on covid-19 administered in Italy and in many other countries in the world.

As a result, the parameters to be specifically monitored and taken as indicators are:

Production and Export
Commercialisation and Digital Solutions
Innovation and Digital Jobs
Public Aid
Expectations

3.2 Questionnaire questions

The indicators were then translated into questions:

Produzione ed Export
1. Nome Impresa
2. Che tipo di attività di commercio estero svolge la sua impresa?
3a. Nell'anno 2019 qual è stata la percentuale dell'export sul fatturato totale dell'impresa?
3b. Nell'anno 2020 qual è stata la percentuale dell'export sul fatturato totale dell'impresa?
4. La sua impresa esporta un bene ad alto o basso valore per unità?
5. Verso quali mercati esteri esporta la sua impresa?
6. Settore produttivo della sua impresa
1. Durante il 2020, per quanti giorni la sua impresa è stata forzosamente chiusa a causa del Covid-19?
2. Nel biennio 2020/2021 cosa ha comportato la crisi Covid-19 per l'attività d'esportazione della sua impresa?

3. Di quanto è aumentata o diminuita in termini percentuali la quota di esportazioni rispetto al 2018?
4. La sua impresa ha aggiustato o convertito la sua produzione o i servizi che offre, in relazione alla crisi Covid-19?
Commercializzazione e Soluzioni Digitali
5. Durante la pandemia la sua azienda ha iniziato ad esportare su nuovi mercati?
6. Quali sono stati i principali canali di vendita per trovare nuovi acquirenti durante il Covid-19?
7. La sua impresa ha iniziato o incrementato la sua presenza su piattaforme digitali di E-Commerce in risposta alla crisi Covid-19?
8. A quanto ammonta attualmente la % delle vendite online per esportazioni sul totale delle esportazioni?
Innovazione e Lavoro digitale
9. Ha implementato soluzioni digitali per la produzione o ha innovato il processo produttivo nel periodo compreso tra il 2020 e il 2021?
10. La sua impresa ha adottato soluzioni digitali per il lavoro da remoto o smart working durante la crisi Covid-19?
11. Quant'è stata la percentuale di lavoratori in smart working durante il periodo 2020 ?
12. Rispetto al 2021, la fornitura di materie prime o beni finiti da esportare durante il 2020:
13. Quanto hanno inciso le attività di formazione, ricerca e sviluppo per affrontare la crisi Covid-19?
14. Quanto è stato importante, durante la crisi Covid-19, avere un buon reparto logistica?
15. Quali delle seguenti competenze sono state più importanti per la sua azienda durante il periodo 2020 - primo semestre del 2021?
Aiuti Pubblici
16. Hai ricevuto aiuti finanziari pubblici per la crisi Covid-19 in relazione alle attività di esportazione?
Aspettative
1. Quali sono le sue aspettative sull'export nei prossimi sei mesi?
2. Sarebbe interessato per la sua azienda a ricevere servizi alle imprese e fondi per l'internazionalizzazione?
3. Sarebbe interessato per la sua azienda a ricevere informazioni sui voucher per l'internazionalizzazione?

3.3 Sample and method of administration

The questionnaire was administered by sending an email and filling in the Google Form.

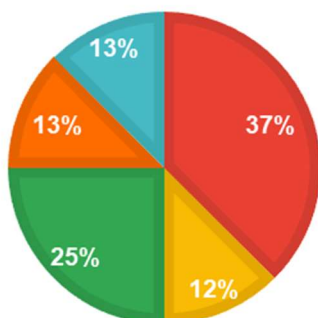
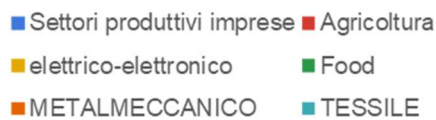
Small and medium-sized enterprises in Molise are fully covered by the sample (44 medium-sized enterprises, and 258 small enterprises). Given the low number, large companies (5) and some micro enterprises (113) were also included. The sample chosen covers 70% of total turnover in Molise even though it represents 30% of total enterprises. In chiaro one can also read the data of the micro enterprises that represent 84% of the Molise enterprises with 30% of the total turnover towards which a new research can move. The need of the research, in fact, is to understand how the exporting companies have reacted to the covid 19 crises and how they have maintained or opened new markets, what has been the impact of new technologies on the work the production and the marketing of the product, how has changed the way of acquiring customers, and the way of promoting the products.

Thirty-seven enterprises responded to the questionnaire, of which eight carry out export activities. Of these, only 1 carries out indirect export activities.

4. The results of the survey

Production sector of your company:

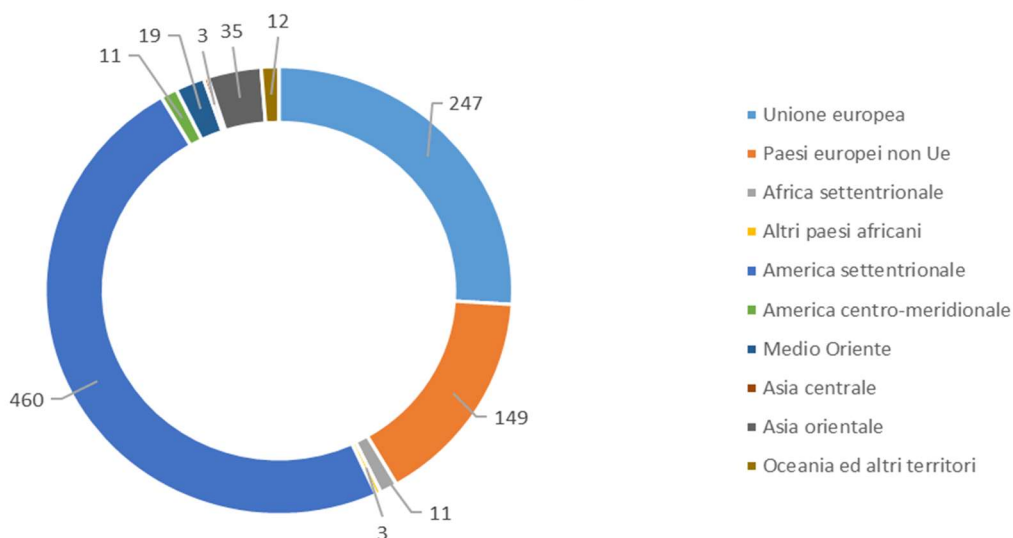
SETTORI PRODUTTIVI IMPRESE



The SMEs responding to the questionnaire are electrical-electronic, agricultural, textile, food, and represent about 4% of total Molise exports.

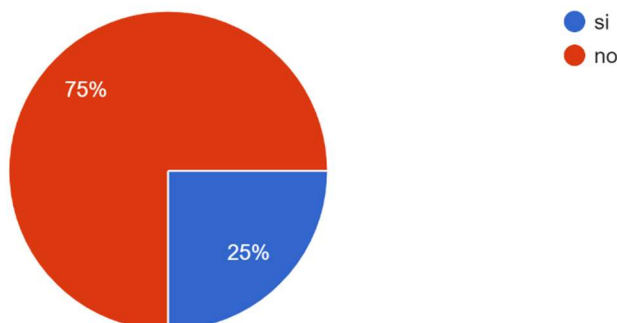
To which foreign markets does your company export?

Main countries Molise export



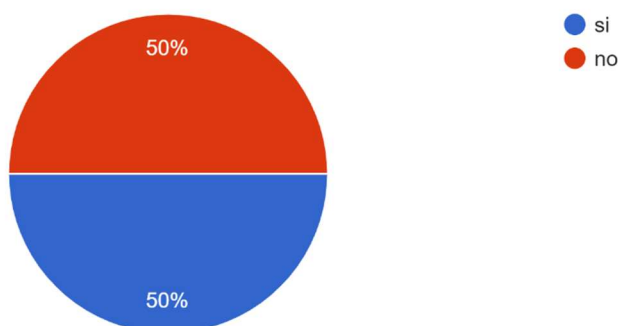
- The SMEs responding to the questionnaire confirm the data of the aggregate ISTAT ICE, 50% of SMEs export mainly to North America and 25% to Europe.
- Agricultural SMEs export to Japan and North America.
- Textile SMEs export to Korea, Switzerland, Germany and North America.
- SMEs in the electrical electronics sector trade with several countries from South-East Asia to North America.

During 2020, how many days was your company forced to close because of Covid-19 and use Smart Working?



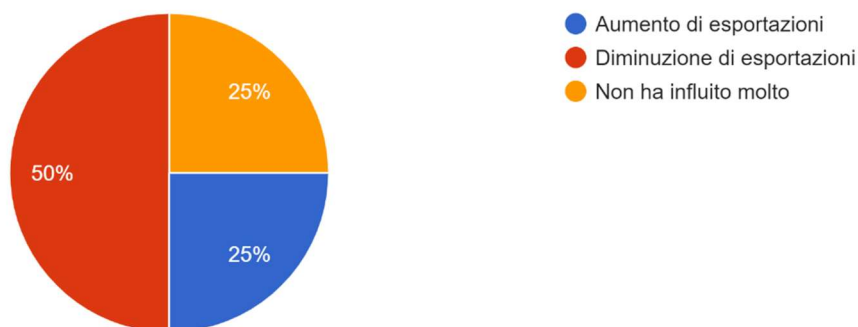
- 25% of SMEs use digital solutions for smart working and remote working
- Of this 5%, SMEs see 50% and 35% of total employees working from home respectively
- Most of the SMEs that responded to the questionnaire did not use digital solutions for smart working
- Only one company was forced to close during the first lockdown in 2020

Did you implement digital solutions for production or innovate the production process in the period between 2020 and 2021?



- During the Covid -19 pandemic crisis 50 % of the responding companies successfully implemented an innovation in the production process or introduced a digital solution for production.

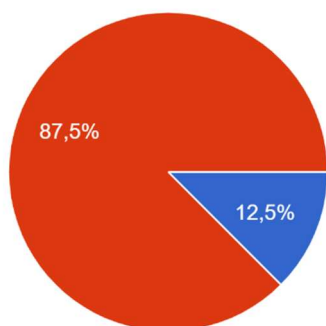
Nel biennio 2020/2021 cosa ha comportato la crisi Covid-19 per l'attività d'esportazione della sua impresa?



- 50.% of companies report a decrease in export volumes, the remainder an increase or stability in exports.

- If we cross the data on turnover performance with the data on innovation in the production process, we find that companies that have innovated have not reported a decrease in exports.

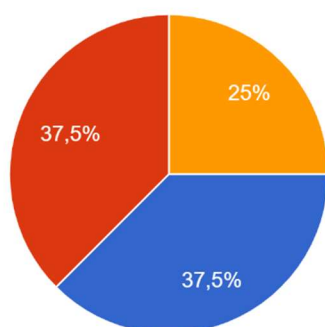
La sua impresa ha aggiustato o convertito la sua produzione o i servizi che offre, in relazione alla crisi Covid-19?



● Si
● No

- Of the companies that responded to the questionnaire, only 14.3% converted or transformed their products or services.

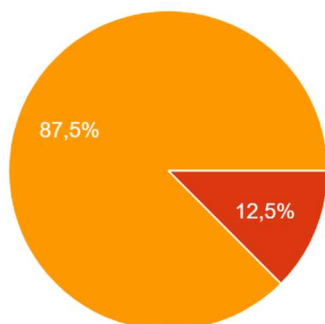
Compared to 2021, the supply of raw materials or finished goods to be exported during 2020:



● È aumentata
● È rimasta la stessa
● Si è ridotta

- Most companies had no problem finding the raw materials for production
- Only 25% had difficulties in finding raw materials for production

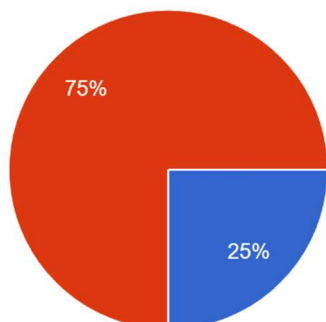
Quali sono stati i principali canali di vendita per trovare nuovi acquirenti durante il Covid-19?



● Fiere OnLine
● Siti Ecommerce
● Contatti diretti

- All SMEs in Molise continue to export thanks to direct contact with international companies, demonstrating that networking is one of the strengths of Italian SMEs.

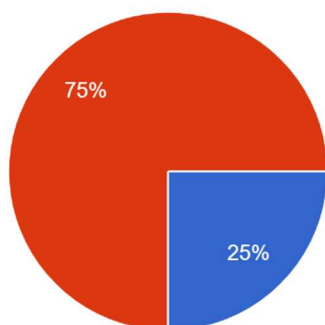
Has your company started or increased its presence on digital E-Commerce platforms in response to the Covid-19 crisis?



● si
● no

- Only 25% of the SMEs responding to the questionnaire improve their presence on the ecommerce platform or implement a new digital policy to improve their export activity.

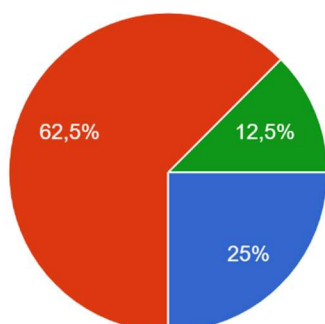
Which of the following skills were most important for your company during the period 2020 - first half of 2021?



● Si
● No

- Only 25% of the companies surveyed during the period of the Covid - 19 pandemic managed to export to new markets.

Which of the following skills were most important for your company during the period 2020 - first half of 2021?



● Logistica
● Risorse Umane
● Digital Analysis e big data analytics
● Communication and Marketing
● Programmatori Informatici

- The most important skill that helped SMEs in Molise was Human Resources 57.1%.
- Other important skills required in 2020 were Communication and Marketing (14.3%) and Logistics (28.6%).

As the size of the company increases, logistics skills become more and more important.

Expectations of Molise SMEs

- Only one SME has received public aid in relation to export activity.
- 50% of SMEs think that they will see an increase in their export activity in 2021/2022.
- 87.5% of SMEs might be interested in receiving funds for internationalisation.
- 75% of SMEs might be interested in using vouchers for internalisation.

5. Good practices and recommendations

5.1 Good practices at Italian level - SIMEST

- Through the PNRR and the funds allocated by the Next Generation EU programme, Simest has opened up financing opportunities at subsidised rates for companies engaged in export activities, in order to strengthen internationalisation processes and launch digital and ecological transition processes.
- Funds will be provided to small and micro enterprises with a non-repayable share of up to 25%.
- If, on the other hand, the small and medium-sized enterprise operates in southern Italy, the share can rise to 40% non-repayable.

5.1.1 Opportunities - SIMEST Intervention: Digital and Ecological Transition of SMEs and Mid Caps with an international vocation

Who can participate:

- Italian SMEs or MID CAPs, established as corporations and having filed with the Companies Register at least two balance sheets covering two complete financial years.
- must have a Foreign Turnover whose average of the last two financial years is at least 20% of the total company turnover, or at least 10% of the company turnover of the last deposited balance sheet;

Excluded sectors:

- In accordance with Article 1 of EU Regulation 1407/2013, the so-called "de minimis" rule, enterprises mainly active in the fishing and aquaculture sectors and in the sector of primary production of agricultural products are excluded from the subsidy. In particular, the following activities: SECTION A - Agriculture, forestry and fishing all activities SECTION C - Manufacturing - only activities in the following classes: - 10.11 - Production of meat other than poultry meat and slaughterhouse products - 10.12 - Production of poultry meat and slaughterhouse products
- fossil fuel related
- related to waste landfills and incinerators
- related to mechanical biological treatment plants

Amount of intervention:

- The maximum amount of the Grant that the Applicant Company may apply for is equal to the lower of (i) €1,000,000.00, and (ii) 25% of the average revenues resulting from the last two financial statements approved and filed by the Applicant Company. If the Applicant Company has already submitted an application for the Digital and Ecological Transition pursuant to Circular 1/PNRR/394/2021, it will be possible to submit a new application, in addition to the previous one, up to the maximum total amount of € 1,000,000.00.
- Without prejudice to the maximum amount of the Intervention, at the date of the Committee's decision the total exposure of the Applicant Company to the Fund3 (including the exposure expected as a result of the grant of the Intervention which is the subject of the Application) shall not exceed 50% of the average revenues of the last two approved and filed balance sheets.

The Applicant Company may apply for a share of Co-financing:

(i) up to 40% of the maximum amount of the Support, if it has at least one operational headquarters active for at least 6 months from the date of submission of the Application, in one of the following regions: Abruzzo, Basilicata, Calabria, Campania, Molise, Puglia, Sardinia and Sicily;

(ii) up to 25% of the Maximum Amount of the Assistance, if it has its operational headquarters in a region other than those indicated in point (i).

Without prejudice to the foregoing, the Co-financing is granted by SIMEST in any case within the limits of the overall maximum amount per Applicant Company (in terms of a single company, as defined in article 2 of Regulation (EU) 1407/2013), applicable under the Temporary Framework, under the conditions set out in the relevant resolution of the Facilities Committee of 30 September 2021, subject to prior authorisation by the European Commission pursuant to article 108 TFEU. This amount is to be considered inclusive of the aid under the "de minimis" regime and of the other amounts received as non-repayable by SIMEST.

TEMPORARY FRAMEWORK

In order to counteract the economic and social effects of the COVID-19 outbreak, various support measures have been adopted at European level. With the Communication from the Commission 'Temporary framework for State aid measures to support the economy in the current COVID-19 outbreak - COM 2020/C 91 I/01', Member States were authorised to adopt aid to the economic fabric by way of derogation from the ordinary State aid rules. Section 3.1 is dedicated to 'Aid in the form of direct grants, repayable advances or tax breaks'. There are several conditions for accessing this type of aid and there are specific ceilings. These ceilings were extended by the amendment C(2021) No 564 of 28 January 2021 published on 10 February 2021:

;

- - 225.000,00 euro for the agricultural sector
- - 270.000,00 euro for the fisheries and aquaculture sector;
- - 1.800.000,00 euro for sectors other than the above.

DURATION OF THE LOAN AND TERMS OF REPAYMENT

The total duration of the Financing is 6 years from the date of the Conclusion of the Contract, of which:

- Pre-amortisation period: 2 years

- Repayment period: 4 years

The loan is repaid in 8 semi-annual instalments in arrears with a constant principal amount, starting from the end of the grace period.

Subsidised interest rate equal to 10% of the EU Reference Rate⁴ for the entire duration of the loan: 0.051%.

The co-financing portion is not subject to guarantees.

The disbursement of the Grant is made in two tranches, to the Dedicated Current Account of the Applicant Company, subject to the positive verifications and controls foreseen for the Project Line, as follows:

- 1st instalment: equal to 50% of the Grant, as an advance, will be paid within 30 days from the date of fulfilment of any conditions precedent (including any guarantees) which must be satisfied within 3 months from the Signing Date.

- 2nd instalment: equal to the balance of the Eligible Expenditure reported and documented - within the maximum limit of the approved Grant - shall be paid within 30 days from the date of fulfilment of any conditions precedent (including the receipt of any guarantees requested), which must be met within 3 months from the verification of the reported expenses as per paragraph 5.4 "Consolidation" below.

ELIGIBLE COSTS

Digital Transition Costs which shall represent at least 50% of the Eligible Costs financed:

- 1.1. digital integration and development of business processes
- 1.2. implementation/modernisation of organisational and management models from a digital perspective
- 1.3. investment in technological equipment, computer programmes and digital content
- 1.4. digital consultancy (i.e. digital manager)
- 1.5. disaster recovery and business continuity
- 1.6. blockchain (exclusively for the notarization of production and business management processes)
- 1.7. investment and training expenses related to Industry 4.0 (e.g. cyber security, big data and data analysis, cloud and fog computing, simulation and cyber-physical systems, visualisation systems, virtual and augmented reality, advanced and collaborative robotics, additive manufacturing, internet of things and machines).

Sustainability and internationalisation costs, which shall represent no more than 50% of the Eligible Costs financed:

- 2.1. expenses for sustainability investments in Italy (e.g. energy and water efficiency, climate impact mitigation, etc.)
- 2.2. expenses for internationalisation (e.g. investments for a single new commercial structure in a foreign country, consultancy for internationalisation, promotional expenses and expenses for international events in Italy and abroad, expenses for product certifications and brand registration, etc.)
- 2.3. expenses for environmental assessments/certifications related to the financing, including any expenses for verification of compliance with the Technical Guidelines of the European Commission (2021/C 58/01) on the application of the principle "Do no significant harm" (DNSH) pursuant to Article 17 of Regulation (EU) 2020/852

HOW TO PARTICIPATE

The Applicant Company may submit only one Application for Digital and Ecological Transition to SIMEST, without prejudice to the possibility, for companies that have already submitted an Application for Digital and Ecological Transition in accordance with Circular no. 1/PNRR/394/2021, to submit a new Application, in addition to the previous one, up to the maximum total amount of € 1,000,000.00 as indicated in Paragraph 3.1. To apply for the Intervention, the Applicant Company shall register on the Portal, fill in the Application in all its parts, with digital signature by the legal representative and send it through the same Portal: <https://myareasacesimest.it/Registrati>

Opening of the Portal for the submission of applications (from 3 May to 10 May - except for early closure).
Pre-opening 27 April.

5.1.2 Opportunities - SIMEST Intervention: Development of electronic commerce of SMEs in foreign countries (E-commerce)

To whom it is dedicated:

Italian SMEs, established as corporations and having filed at least two balance sheets covering two complete financial years with the Companies Register.

How it works?

Facilitated-rate financing under the "de minimis" regime with non-repayable co-financing under the "Temporary Framework*" for the implementation of a digital investment project for the creation or improvement of a

proprietary (dedicated) e-commerce platform or access to a third-party platform (market place) for the marketing of goods or services produced in Italy or under the Italian brand name.

Maximum amount that can be financed:

- **For an own platform: up to €300,000 and in any case not more than 15% of the average revenue shown in the last two approved financial statements filed by the company.**
- **For a third-party platform: up to € 200,000 and in any case not more than 15% of the average revenue resulting from the last two approved financial statements filed by the company**

Minimum amount of € 10,000

Maximum grant: up to 40% for SMEs in the South (i), up to 25% for the remaining SMEs.

Duration of financing: 4 years, of which 1 year of pre-amortisation.

What can be done:

(i) the creation of a new own Platform, carried out by a subject/supplier in possession of the professionalism requirement;

(ii) the improvement of an existing own Platform;

(iii) access to a new space or store of a third party Platform for the marketing in foreign countries of goods or services produced in Italy or under the Italian brand name.

The own platform must be implemented by a subject/supplier that meets the requirement of "professionalism", i.e:

i) be active for at least two years

ii) have created at least two platforms in the two years preceding the request for Funding and Co-Funding, as resulting from the "Declaration made by the supplier of the applicant company's own platform on the requirement of professionalism".

Opening of the Portal for the submission of applications (from 3 May to 10 May - unless closed early). Pre-opening 27 April.

Eligible costs:

a) Creation and development of an own platform or the use of a market place: creation, acquisition and configuration of the platform, hardware and software components, software component extensions to extend functionality (e.g. order management software, payment circuits, cloud services, integration with ERP, CRM, AI and augmented reality), creation and configuration of apps, start-up costs for the use of a market place.

b) Investments for the own platform or market place o expenses for hosting the platform domain o fees for using the platform or a market place o expenses for investments in data and platform security o addition of content and graphic solutions o expenses for the development of platform access monitoring o expenses for the development of navigation data analysis and tracking o consultancy aimed at developing and/or modifying the platform o registration, homologation and trademark protection o expenses for international product certifications.

c) Promotional expenses and training related to the project o expenses for indexing the platform or the market place o expenses for web marketing o expenses for communication

5.1.3 Opportunities - SIMEST Intervention: Facilitated financing and extraordinary measures for the trade fair sector (currently not available)

To whom it is dedicated:

To all SMEs, individually or in combination, MidCaps and Large Companies.

How it works:

Low-interest financing of expenses for the exhibition area, logistics expenses, promotional expenses, and consultancy costs related to participation in trade fairs/exhibitions in foreign countries, including system missions promoted by MISE and MAECI and organised by ICE - Agenzia, Confindustria and other institutions and trade associations. Expenses incurred for participation in international trade fairs in Italy are also eligible for financing.

Funding can cover up to 100% of the budgeted expenses, up to a maximum of 15% of the revenues of the last financial year.

Maximum amount that can be financed: € 150,000.

Duration of the loan: 4 years, of which 12 months of pre-amortisation.

5.1.4 Opportunities - SIMEST Intervention: Temporary Export Manager (currently not available)

Temporary placement in a company of specialised professionals (Temporary Export Manager) aimed at implementing internationalisation projects.

Who it is dedicated to

All joint-stock companies (including those set up as a "Subject Network"). In order to be eligible for financing, it is necessary to have deposited at least two balance sheets covering two complete financial years with the Companies' Register.

How it works

The financing can cover up to 100% of the budgeted expenses, up to a maximum of 15% of the average revenues resulting from the last two approved and filed financial statements.

Maximum amount that can be financed: € 150,000.00

Minimum amount to be financed: € 25,000.00

Duration of the loan: 4 years, of which 2 years of pre-amortisation, during which only interest is paid, and 2 years of amortisation for the repayment of capital and interest.

5.2 Good practices at Italian level - INVITALIA

- Invitalia in 2020 financed vouchers for micro and small enterprises to obtain advice on internationalisation from the Temporary Export Manager (TEM).
- The TEM was intended to help micro and small enterprises to: analyse and research new international markets; find new customers; assist with internationalisation contracts; stimulate the enterprise's presence on E-commerce platforms; integrate online marketing channels; and evolved logistics management.
- The invitalia fund has also provided access to vouchers for internationalisation by networks of micro and small enterprises.
- 20,000 euros to micro and small enterprises for a consultancy contract.
- 40,000 euro to networks for a consultancy contract.
- The company may receive an additional contribution of €10,000 if it achieves the following results on foreign sales volumes
- an increase of at least 15% in turnover from foreign transactions in the financial year 2022, compared to the same turnover in the financial year 2021.
- at least 6% of the turnover from foreign transactions in the financial year 2022 as a percentage of the total turnover.

5.3 Recommendations

- An important recommendation comes from the Notebook on the effects of covid-19 on internationalisation produced by ISTAT-ICE. The recommendation is to encourage the development of internationalisation processes within the company, rather than simply encouraging export activity. Companies seem to be more interested in networking mechanisms and in opening up new markets through the exchange of technology and culture, rather than becoming passive export actors.
- An important recommendation is to encourage the training and development of human capital within companies. Technological and cultural innovation is the key strategy to keep companies competitive in the increasingly complex and dynamic international market.
- Last but not least, it is important to stimulate industrial districts and networking between different geographical areas of Italy and the world. Not only to consolidate new markets, but above all for the innovation processes that can arise from territorial contamination at the level of local/global interaction.

5. Conclusions

The direction of the SIE project confirms its importance, training for companies is a great vehicle as a weapon to resist crises such as the one caused by the covid-19 pandemic. The results of the research, even if they give a partial picture of the situation in Molise, confirm that the good export performance of Molise companies was supported by the innovation process and the production process implemented by the companies. It would be necessary to continue extending the research and to understand how and in what way the enterprises deployed on-the-job training processes given that, to an innovation of the production processes, the enterprises that responded do not consider formal training activities of great importance.

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