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2016 CYTED Madrid Workshop

Indexfokus assessment of Navarra Logistic Sector (2015)

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Survey Goals:

- Evaluate the competitive level of the Transport and Logistics Sector of Navarra.
- Determine where the main gaps in sectorial competitiveness are
- To agree with the stakeholders a competitive strategy to raise the competitive level of the Sector.



Competitiveness Factors

FC1: Governance and Management.

FC2: Geographical location, infrastructures and Basic Services.

FC3: Sectorial economical results.

FC4: Training and Versatility of Workers.

FC5: Management and Technical Talent. Professionalism.

FC6: Differentiation of the Offer: Products/Services of the Sector.

FC7: Labor market efficiency in the Sector.

FC8: Access to Finance.


FC9: Technology as a support of the sectorial activity.

FC10: Social Economic Environment of the Sector.

FC11: Complexity of the sectorial business.

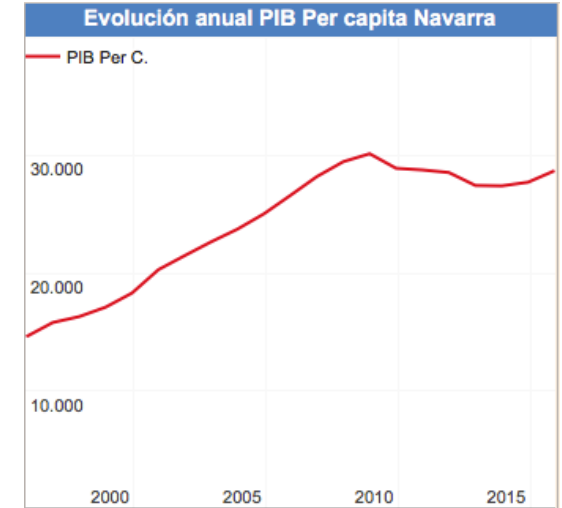
FC12: Research, Development and Innovation.

Good Practices example

- 
1. The companies of the sector or cluster take advantage of the technological advances and adapt them to their needs in a better way than the sectors that compete with it.
 2. The organizations of the Sector or Cluster promote the use of the latest technology among the companies.
 3. All the companies of the sector or cluster technologically control their processes.
 4. All the companies of the sector or cluster have new computer and management systems available.
 5. There is a perfect Digital Connection among all of its members.

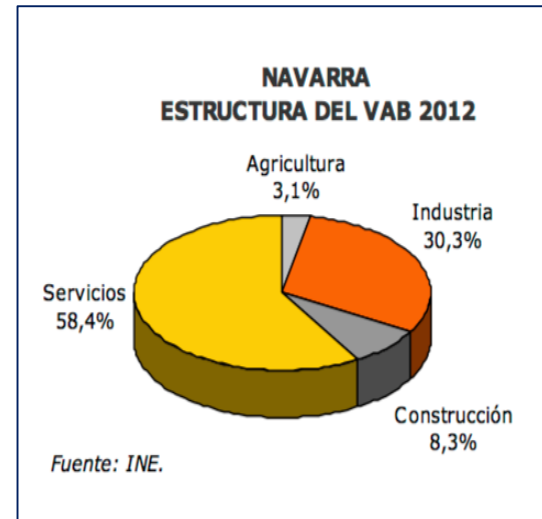
Navarra traits

- Community of 640,339 inhabitants and 10.391 Km²
- € 28.682 per capita income ranks 55th out of 273 European regions.
- More than 120 multinationals have offices or production plants.
- Unemployment rate 14,6%

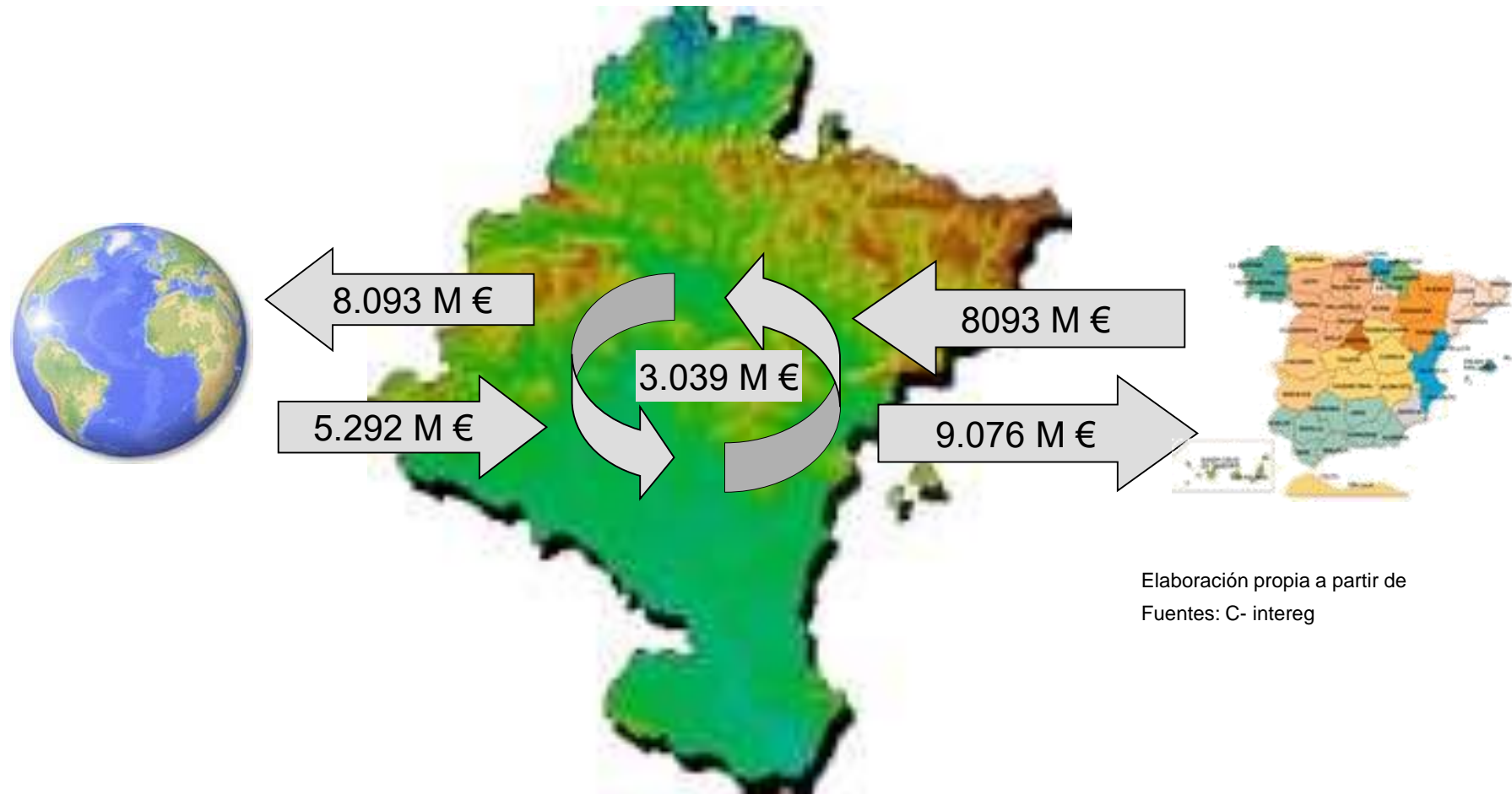


Transport Sector

- Contributes 4.15% to the GNP of Navarre
- Employs almost 11,000 people working for
- 4,150 companies, many of which are single-person companies.



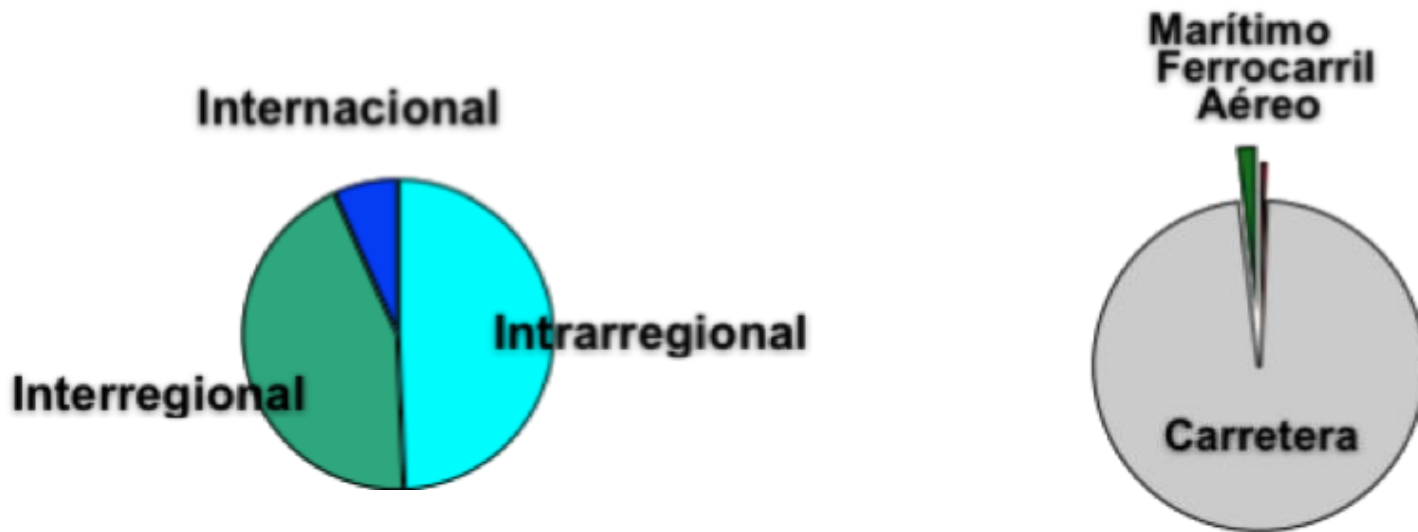
Economic flow of Navarre goods 2010



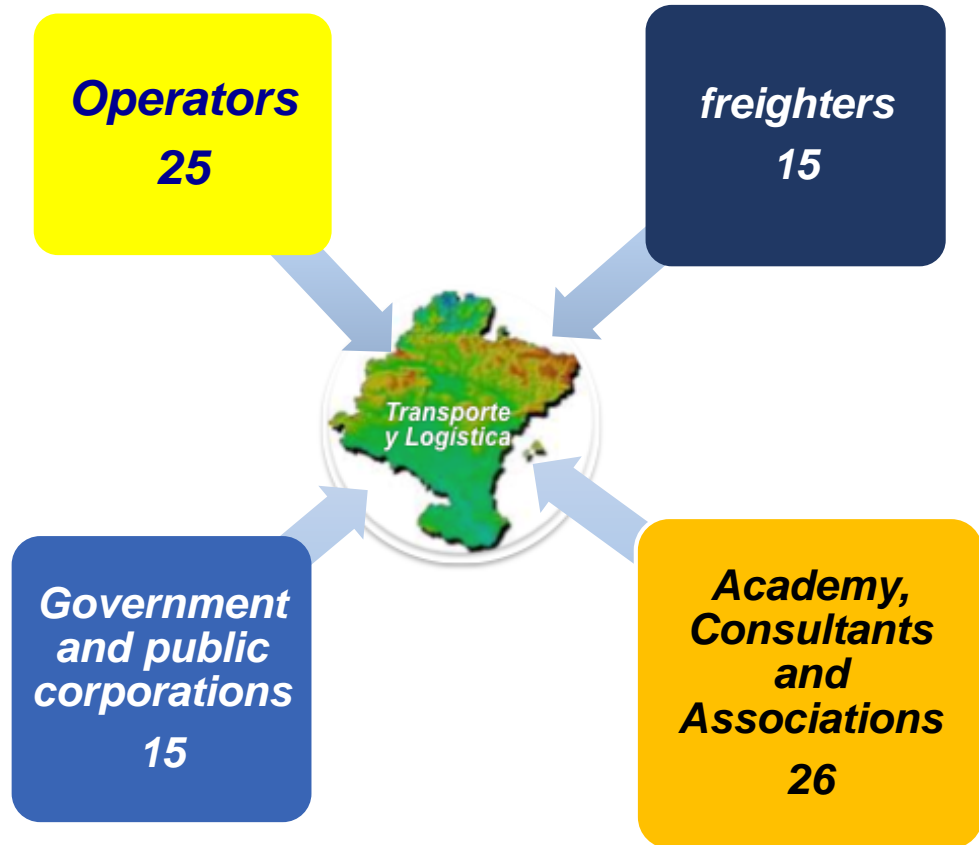
Elaboración propia a partir de
Fuentes: C- intereg

Distribution of the Transport of Goods of Navarre in 2007 according to scope and mode in thousands of Tons:

	Ferrocarril			Carretera			Marítimo			Aéreo			Total		
	m T	% L	% C	m T	% L	% C	m T	% L	% C	m T	% L	% C	m T	% L	% C
Intrarregional	0	0,0	0,0	30154	100,0	50,6	0	0,0	0,0	0	0,0	0,0	30154	100,0	49,4
Interregional	255	0,9	61,4	26602	99,1	44,7	0	0,0	0,0	0	0,0	0,0	26857	100,0	44,0
Internacional	160	3,9	38,6	2785	68,5	4,7	1116	27,4	100,0	6	0,1	100,0	4067	100,0	6,7
Totales	415	0,7	100,0	59541	97,5	100,0	1116	1,8	100,0	6	0,0	100,0	61078	100,0	100,0



Application of the Indexfokus methodology to the Navarre sector of logistics and freight transport



Expert profile:

- ✓ CEOs,
- ✓ Departmental Directors, Owners,
- ✓ Senior Officials,
- ✓ Technical Officials,
- ✓ Specialized Consultants, Professors,
- ✓ University teachers ...

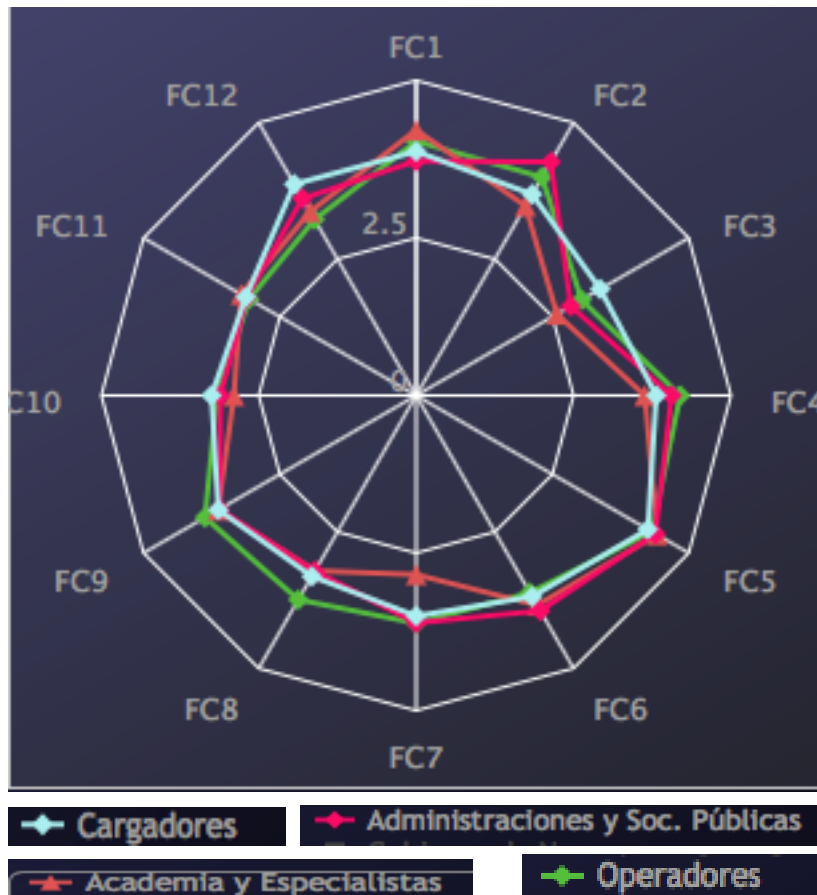
Participation in the evaluation process:

- ✓ Guest Expert: 189
- ✓ Experts Contributors: 74
- ✓ Stakeholders or Stakeholders:
 - ✓ Operators,
 - ✓ Chargers,
 - ✓ Administration and Ss. Public
 - ✓ Academy and Consultants
- ✓ Subgroups: 22
- ✓ Subgroups with > 5 reviewers: 10
- ✓ Visions: 2. Internal and External
- ✓ Scope of the Activity.
 - ✓ National and international

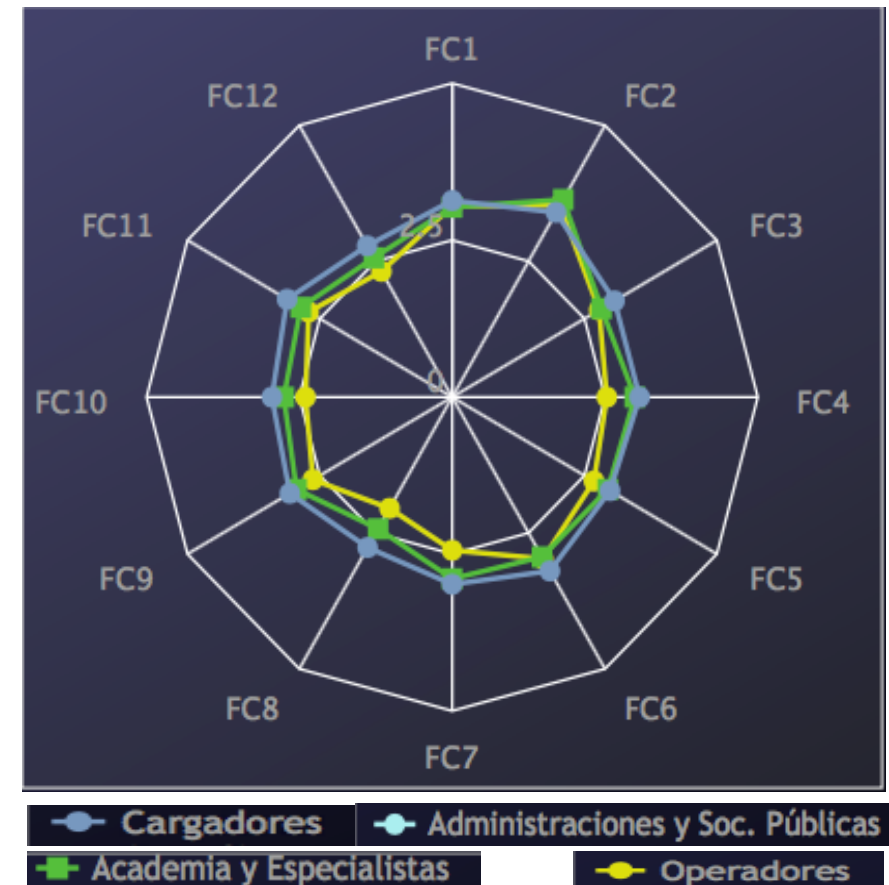
Datos Evaluación Multifocal					Fecha : 24/11/16
Interesados	Asignados a Ponderación	Asignados a Graduación	Ponderan	Gradúan	Colaboran
Operadores	58	30	31	25	25
Carga General	38	18	19	16	16
Operador Logístico	26	15	16	13	13
Distribución	20	10	10	8	8
Temperatura Controlada	11	6	6	5	5
Cargadores	55	16	16	12	12
Automoción	11	4	4	3	3
Agroalimentario	18	6	6	3	3
Industrial	13	3	3	3	3
Otros	13	3	3	3	3
Proveedores	7	0	0	0	0
Financieros (Bancos, Seguros)	1	0	0	0	0
Fabricantes	3	0	0	0	0
Otros Proveedores	3	0	0	0	0
Administraciones y Soc. Públicas	30	18	18	16	16
Gobierno de Navarra	5	3	3	3	3
Sociedades Públicas Navarras	12	10	10	9	9
Administración del Estado y Soc. Estatales	13	5	5	4	4
Asociaciones Sectoriales	19	11	12	9	9
Academia y Especialistas	29	19	19	17	17
Medios de Comunicación	5	2	2	2	2
Modo Carretera	54	28	29	24	24
Modo Ferrocarril	5	3	3	2	2
Modo Marítimo	8	1	1	1	1
Modo Intermodal	13	7	7	5	5
Visión Navarra	158	73	73	61	61
Visión Exterior	39	16	17	14	14
Ámbito Interior	60	31	32	26	26
Ámbito Internacional	63	28	29	24	24
Otros Evaluadores y Proveedores	56	29	30	26	26
Subgrupos 30	189	87	88	73	73

The vision of stakeholders:

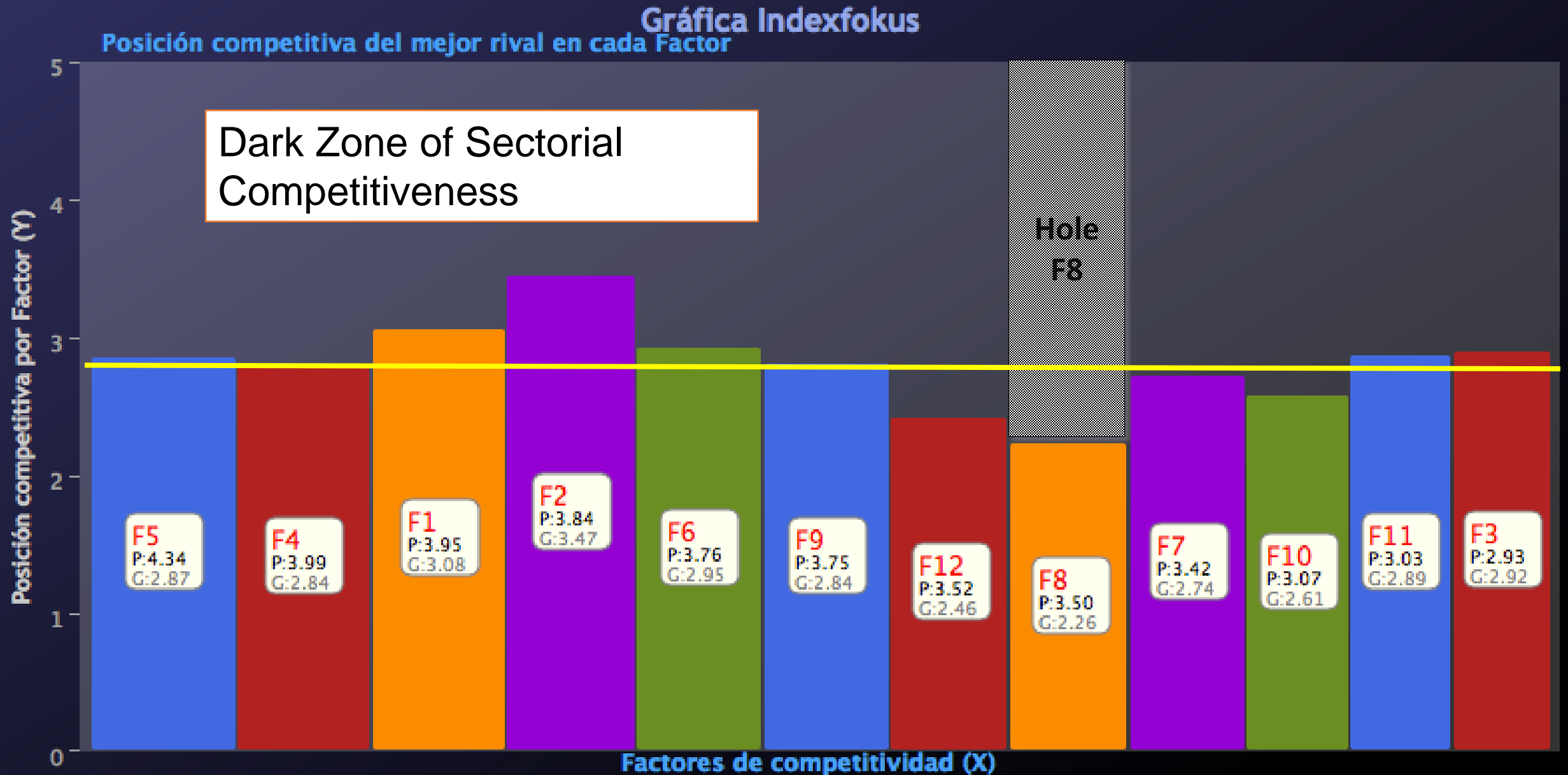
About the Market



About Navarra Sector

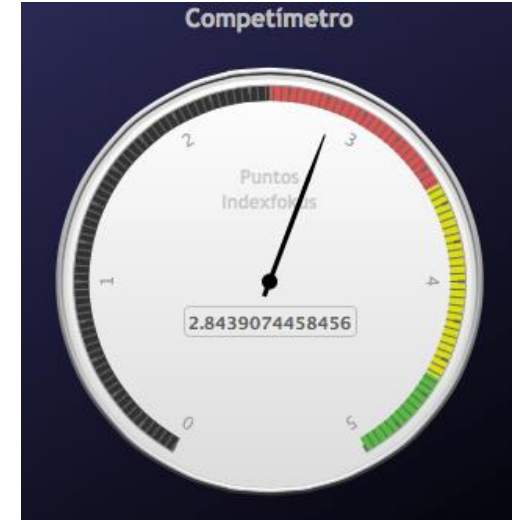


Indexfokus Chart



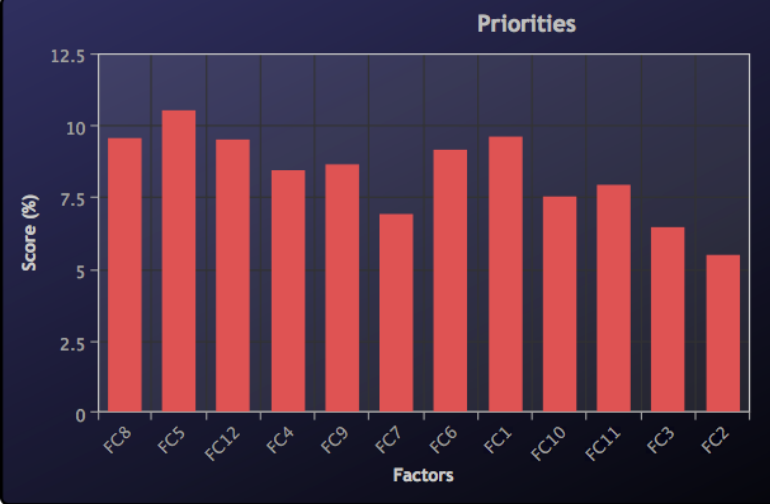
Indexfokus Indices

General
Index



Competitiveness Indices by Interest Groups





Gaps perceived by Academia,
Consultants and Associations

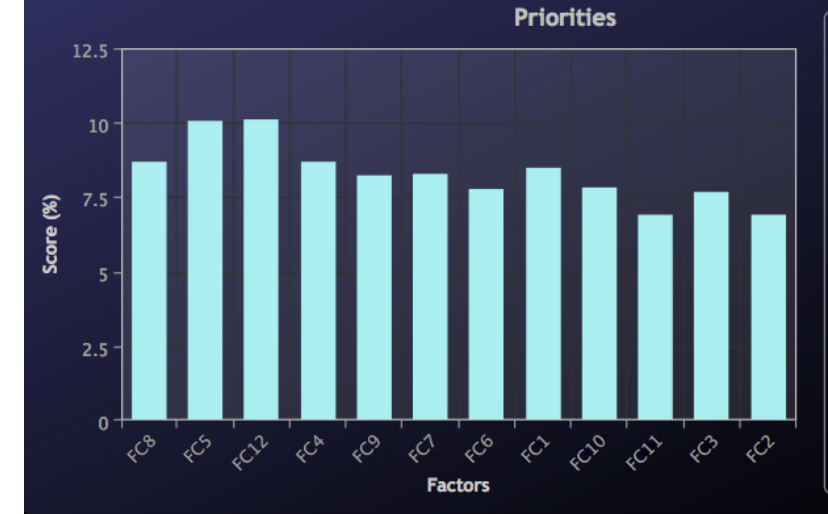
Gaps perceived by Operators



Gaps of competitiveness perceived
from the stakeholders perspective

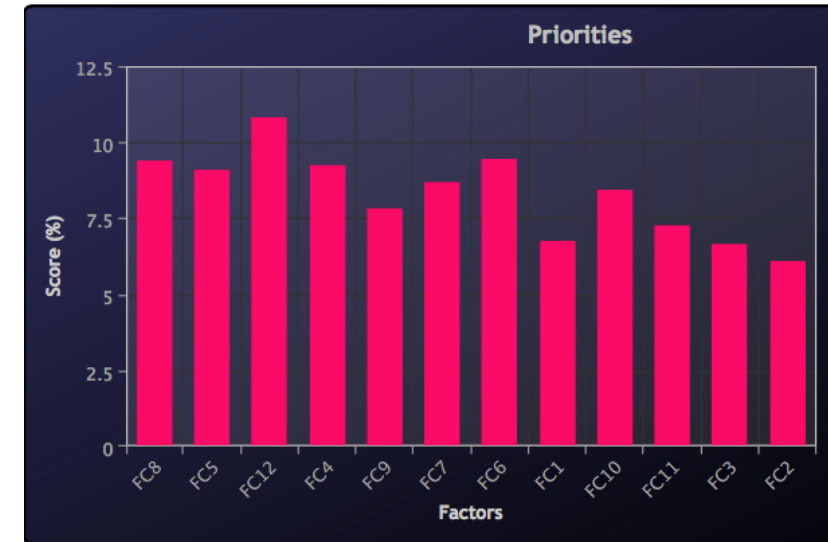


Path for improvement in each
competitiveness factor



Gaps perceived by freighters

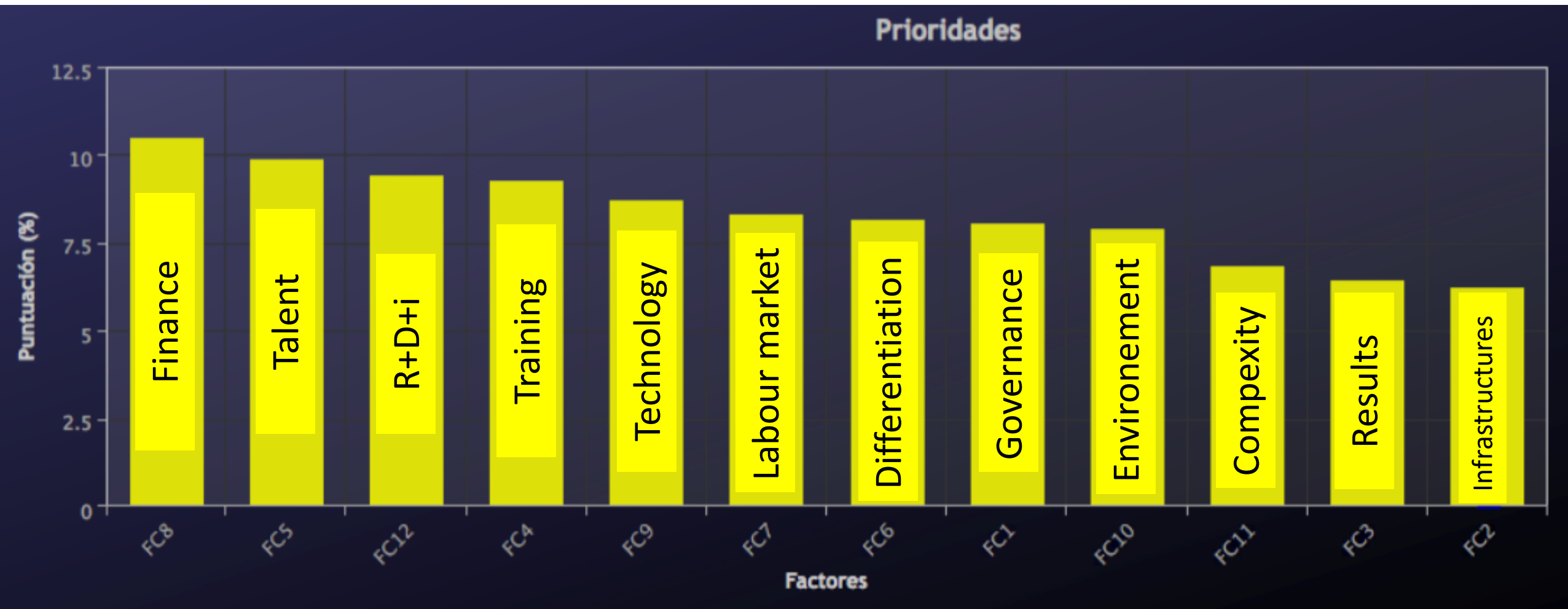
Gaps perceived by Academy,
Consultants and Associations



Lessons learned that affect Research, Development, Innovation and technology applied to the sector in Navarra.

- Since the Government perspective, R&D&I, Financing and Differentiation are the biggest problems.
- The shippers consider that they are R&D&I and the managerial talent
- Academia and consultants believe that the major problems are the managerial level and the governance of the sector.
- The operators, the protagonists of the sector, find the problems in the Financing, training and versatility of the workers and in the managerial talent existing in the sector.

The Competitiveness Gaps of Sector





Governance



Infrastructures



Results



Training



Talent



Differentiation



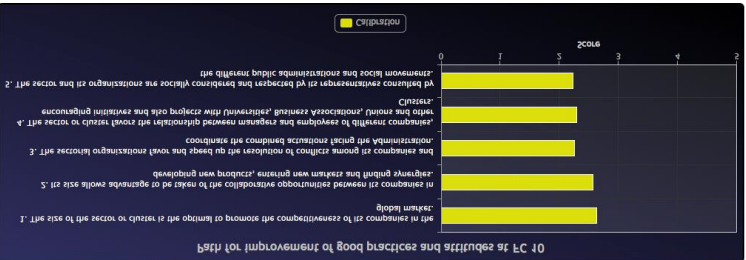
Labor market



Finance



Technology



Eco-social environment



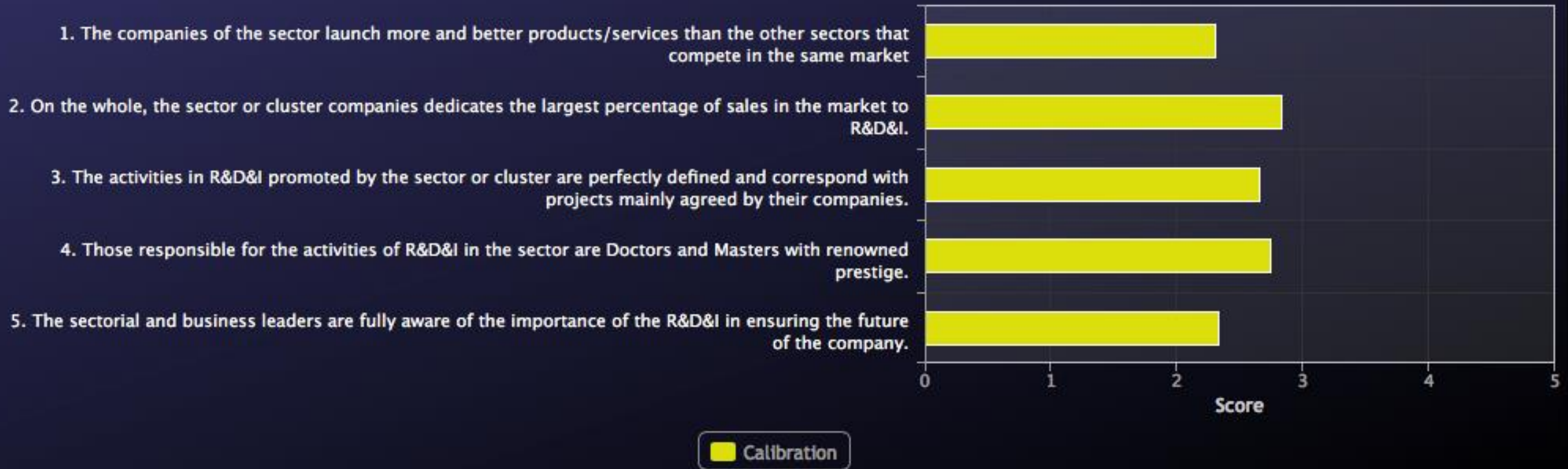
Business complexity



R&D&I

R&D&I

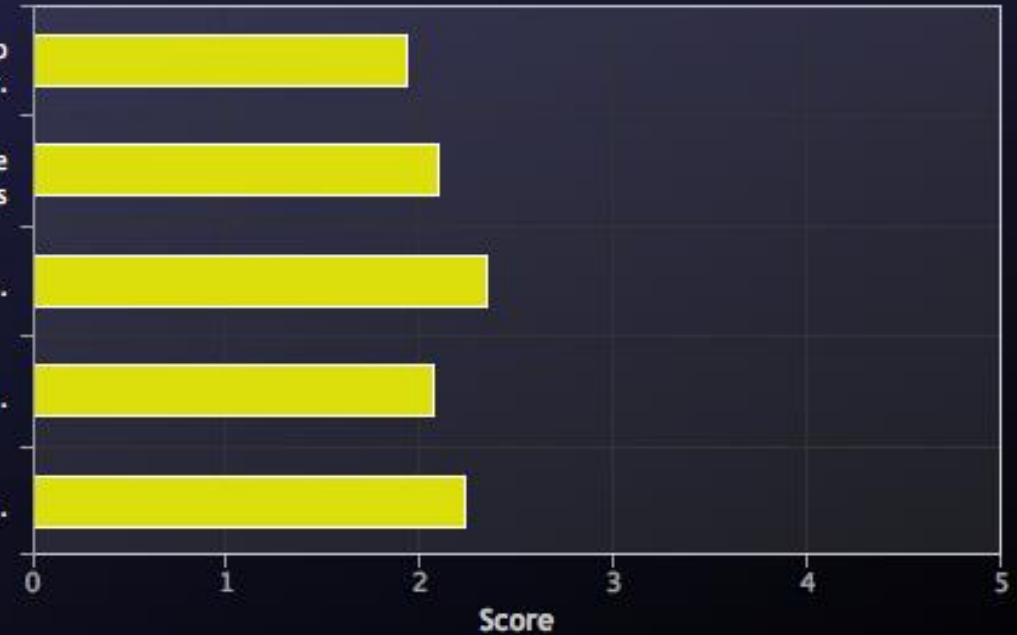
Path for improvement of good practices and attitudes at FC 12



Technology

Path for improvement of good practices and attitudes at FC 9

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Calibration

Customer opinion about the survey



Navarra Trámites Temas Gobierno Actualidad



Thanks!

www.businessfokus.com

www.indexfokus.com



Fuente: Confederación de Empresarios de Navarra.

Resumen: La relación causa-efecto entre competitividad y calidad de vida es evidente. No es posible alcanzar determinadas cotas de bienestar social sin aplicar inteligentemente los recursos y las capacidades de la sociedad en la creación de valor. El sector del Transporte y la Logística de Mercancía de Navarra juega un factor crítico en la competitividad de la Comunidad Foral. Navarra es una región periférica en España, en Europa y sin acceso directo al mar.

La insuficiente colaboración de expertos en los modos de transporte ferroviario y marítimo tal vez no valoren objetivamente las infraestructuras que se requieren actualmente para conectar Navarra a los grandes corredores globales de las mercancías. Para que Navarra sea competitiva a nivel global, necesita estar conectada con sus mercados a costes competitivos y por eso su sector del transporte y de la logística debe ser muy competitivo.

En este estudio se han descubierto algunos huecos de la competitividad sectorial que a veces pasan desapercibidos ante la apariencia de otros. También se ha sugerido una manera de enfocar los recursos y capacidades a las actividades que puedan cubrir esos huecos. Para elevar la competitividad sectorial deberán esforzarse todos sus stakeholders, aunque corresponda a los Operadores liderar el esfuerzo empresarial y a las Administraciones Públicas generar el marco apropiado para que ese esfuerzo pueda tener éxito.

Objetivos del estudio: Evaluar la competitividad del Sector y proponer una estrategia competitiva.

Metodología de desarrollo: Indexfokus.

Ámbito de análisis del estudio: Navarra.

Si le interesa este estudio, puede solicitarlo a través del apartado "[Peticiones de Información](#)" del menú principal.