FUNES - Furniture New European Skills 2020
Analysis of Companies Versus Scenario

STRENGTHS	BE	IT (COSMOB)	IT (ENAIP)	PL (ITD)	PT (CFPIMM)	ES (AIDIMA)	ES (FEVAMA)	TOTAL	6 of 7 Partners
Competitiveness through differentiation		1		1	1	1	1	**5**	
Competitiveness through costs		1		1	1			**3**	More representative "Strengths"
Strong tradition in wood and furniture industry		1	1	1	1	1	1	**6**	
Workers with large experience – learning by doing		1	1	1	1	1	1	**6**	
Technological modernization (CAD, CNC)		1	1	1	1	1	1	**6**	
Quality of the product		1	1	1	1	1	1	**6**	
Luxury furniture (niche market)		1	1		1	1	1	**5**	
Furniture "for life" (buying furniture to last as much years as possible)		1		1	1			**3**	
OTHER STRENGHTS		7	5	6	7	5	5		

IT (ENAIP)	**Eco-issues already part of the entrepreneurial culture** (sustainability certifications. High level of customization. Habit to deal with **new markets** (Russia, Arabia, China). **Research and development.**
PL (ITD)	**Ecologicality** (in general) of products (furniture) and technological processes. Increase in the **on-line sales** importance. Established, high position on international **markets.**
SP (AIDIMA)	Incorporation of add value. Product **design.** **Quality** managements systems.
SP (FEVAMA)	Incorporation of add value. Product **design.** **Quality** managements systems.

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WEAKNESSES	BE	IT (COSMOB)	IT (ENAIP)	PL (ITD)	PT (CFPIMM)	ES (AIDIMA)	ES (FEVAMA)	TOTAL
Feeble strategic management				1	1	1	1	4
Lack of internal skills for a sustainable decision process (subcontracting, investment on equipment, ...)					1	1	1	3
Design of new and innovative products					1		1	
Management training needs			1	1	1	1	1	5
Human resource strategy (planning, recruitment, training...)		1		1	1	1	1	5
Job design (specialization, polyvalence, ergonomics, incentive systems...)				1	1			2
Low education of workers		1	1		1	1	1	5
Workers from production near retirement age			1		1			2
Lack of competences to work with new and different materials (polymers, glasses, stones, composite, ...)		1			1	1	1	4
Rationalization of productive costs		1			1	1	1	4
Fulfilment of delivery deadlines					1	1	1	3
Costs of transportation (volume and weight)				1	1			2
Marketing Plan inexistent or feeble				1	1	1	1	4
Delivery and assembly service		1			1			2
Dependency on the distribution channels				1	1	1	1	4
Inexistent of cooperation networks for distribution				1	1			2
After sales service inexistent or feeble					1	1	1	3
Research & Development				1	1	1	1	4

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More representative "Weaknesses"

OTHER WEAKNESSES	
IT (ENAIP)	Impossibility to reduce costs. Unpredictability connected to the generational turnover within the entrepreneur family.
PL (ITD)	Comment: most of the indicated weaknesses concern mainly small and medium-sized enterprises. Worsening age structure of employees (ageing of employees). Weak cooperation between the producers and the R&D sphere. “No name products”.
SP (AIDIMA)	Lack of brand and image. Lack of cooperation between companies (Closed-innovation). Lack of technical salesmen. Small size of firms. Fear of export and internationalisation. Lack of marketing. Null management of design. Mass production. Lack of flexibility in the production (of products). Lack of qualification of the workers.
SP (FEVAMA)	Lack of Brand image. Lack of business cooperation. Company size. Export difficulties.

OPPORTUNITIES	BE	IT (COSMOB)	IT (ENAIP)	PL	PT	ES (AIDIMA)	ES (FEVAMA)	TOTAL	6 of 7 Partners
Existence of a local productive system (many companies in the region, mainly small, complementing each other, namely through subcontracting)		1	1		1	1	1	**5**	
Improving business cooperation (distribution, marketing, ...)				1	1	1	1	**4**	
Sustainable internationalization		1	1	1	1	1	1	**6**	
Availability of planning and management tools			1	1	1	1	1	**5**	
Quality Management Systems		1	1	1	1			**4**	
Raising of eco-efficiency		1	1	1	1	1	1	**6**	
Use of new raw-materials		1	1	1	1	1	1	**6**	
Medium national salary of qualified workers (comparing Portugal with other European countries)					1			**1**	
Tailored vocational training (in terms of contents and number of hours)			1	1	1			**3**	
More demanding clients (eco-consumption, customization, ...)			1	1	1	1	1	**5**	
Increasing of online sales		1	1	1	1	1	1	**6**	
Controlling of distribution channels			1	1	1			**3**	
Being alert for what is new in design and production technologies (making the costs/benefits analyses)					1	1	1	**3**	
Flexible and intelligent homes, hotels, restaurants and other "living spaces"		1		1	1	1	1	**5**	
Flexible lifestyles (people living alone, second families)				1	1	1	1	**4**	
Geriatric furniture		1		1	1	1	1	**5**	
Equipment for public spaces (Gardens, Squares, Markets, ...)				1	1	1	1	**4**	

More representative "Opportunities"

OTHER OPPORTUNITIES	
IT (ENAIP)	There is not a big pressure from the low costs markets, because the target of the sector is different. Italy industry is developing a more aware and widespread perception of the opportunity to sell. Italy itself as a brand and as a lifestyle (especially in certain sectors such as food, fashion and furniture).
PL (ITD)	New trends in design and production technologies – new tools of the cost/benefits analyses. Economic prosperity in the country, Europe and in the world, as well as a favourable exchange rate of PLN/€. Development of the industries supplying materials and components for the furniture industry (sawmilling industry and wood-base panel industry). Development of construction as the main creator of the demand for furniture. Popularisation of the networking concept (clusters, technology platforms etc.) Increased mobility of prospect employees. Medium national salary of qualified workers (comparing Poland with other European countries).
SP (AIDIMA)	Eco-design. Design for All (people elderly, disabled...). Design management. Smart cities. Diversification. Improve flexibility. Customization.
SP (FEVAMA)	- Design for all (adapted furniture) - Improve flexibility, diversification - Design management (ecodesign, ...)

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THREATENS	BE	IT (COSMOB)	IT (ENAIP)	PL	PT	ES (AIDIMA)	ES (FEVAMA)	TOTAL	6 of 7 Partners
Countries with low costs production (Asian and Eastern European countries)		1		1	1	1	1	**5**	
Companies located out of industrial parks					1			**1**	More representative "Threatens"
Increasing costs of raw materials		1		1	1	1	1	**5**	
Increasing of the production costs (energy, equipment, ...)		1	1	1	1	1	1	**6**	
Difficulties in applying legislation (environmental, commercial, ...)		1			1			**2**	
Low purchasing power of families		1		1	1			**3**	
Mobility difficulties of workers (they all want to be near their homes)				1	1	1	1	**4**	
Increasing of emigration of young qualified workers					1	1	1	**3**	
Portuguese furniture industry is not attractive for qualified workers, namely young people				1	1			**2**	

OTHER THREATENS

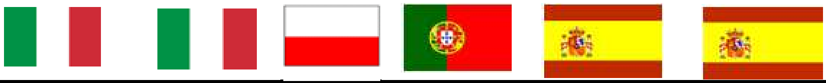
IT (ENAIP)	Stagnation in consumption. Reduction of the number of people who can afford high quality furniture. Difficulties in the integration of immigrant in the production network. High cost of salaries compared to other areas in which lower-quality companies can produce their furniture.
PL (ITD)	Decreased demand from the main trade partners (in particular Germany).
SP (AIDIMA)	Spanish furniture industry is not attractive for qualified workers, namely young people. Lack of skilled workers in the area of manufacturing. There are no studies for the sector. Lack of funding by the poor image of the sector, pigeonholed and related to the construction/building sector.
SP (FEVAMA)	Spanish furniture industry is not attractive for qualified workers, namely young people. Lack of skilled workers in the area of manufacturing. There are no studies for the sector. Lack of funding by the poor image of the sector, pigeonholed and related to the construction/building sector.

STRENGHTS	WEAKNESSES
Strong tradition in wood and furniture industry	Feeble strategic management
Workers with large experience – learning by doing	Management training needs
Technological modernization (CAD, CNC)	Human resource strategy (planning, recruitment, training...)
Quality of the product	Low education of workers
Competitiveness through differentiation	Lack of competences to work with new and different materials (polymers, glasses, stones, composite, ...)
Luxury furniture (niche market)	Rationalization of productive costs
	Marketing Plan inexistent or feeble
	Dependency on the distribution channels
	Research & Development

OPPORTUNITIES	THREATENS
Existence of a local productive system (many companies in the region, mainly small, complementing each other, namely through subcontracting)	Countries with low costs production (Asian and Eastern European countries)
Improving business cooperation (distribution, marketing, ...)	Increasing costs of raw materials
Sustainable internationalization	Increasing of the production costs (energy, equipment, ...)
Availability of planning and management tools	Mobility difficulties of workers (they all want to be near their homes)
Quality Management Systems	
Raising of eco-efficiency	
Use of new raw-materials	
More demanding clients (eco-consumption, customization, ...)	
Increasing of online sales	
Flexible and intelligent homes, hotels, restaurants and other "living spaces"	
Flexible lifestyles (people living alone, second families)	
Geriatric furniture	
Equipment for public spaces (Gardens, Squares, Markets, ...)	

Note: More representative items selected by all the Partners.

NUMBER OF SELECTED ITEMS PER PARTNER



	IT (COSMOB)	IT (ENAIP)	PL (ITD)	PT (CFPIMM)	ES (AIDIMA)	ES (FEVAMA)	TOTAL
Strenghts	8	5	7	8	6	6	**40**
Weaknesses	5	3	9	18	12	12	**59**
Opportunities	8	10	13	17	13	13	**74**
Threatens	5	1	6	9	5	5	**31**