

Project: “Digital and sustainable transformation of SMEs in Veneto” - PID VENETO

Funded by:

Veneto Region

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The Veneto Congiuntura survey by Unioncamere del Veneto uses the same manufacturing sample used to monitor the economic trends mentioned above to provide an annual snapshot, starting in 2017, of the state of adoption of “4.0-5.0” technologies. This survey has now become part of a broader project by the Veneto chamber system on the role of Digital Enterprise Points in supporting Veneto SMEs in their digital and sustainable transformation. It is based on scientific support from the University of Padua, Ca' Foscari University of Venice, and the University of Verona.

The latest monitoring was carried out in the second quarter of 2025, in which over 2,000 Veneto companies with at least 10 employees were interviewed, involving around 120,000 employees.

During the period under consideration, the increase in investment was remarkable: when the survey began in 2017, only one in three companies reported having adopted at least one 4.0 technology. Today, ‘adopters’ represent 54% of the companies surveyed, rising to 67.2% for exporters and 79.2% for those with more than 50 employees.

Even more interesting is the progression in the number of technologies used. Taking 100 as the number of “adopting companies,” in 2017 only 15% said they were investing in three or more technologies (a proxy for a complex and multidimensional approach to digital transformation), while today “multi-adopting” companies represent 33% of the sample. This figure rises to 40% when considering the subset of exporting companies.

What are companies investing in most? The survey distinguishes between technologies already adopted and investment forecasts for the next three years.

The picture of technologies already adopted shows that companies are still mainly focused on *core* manufacturing activities and the production process: 26.3% of the companies surveyed have invested in *robotics and automation* and will continue to do so over the next three years (22% of respondents). This is complemented by investments related to data protection and hardware management: *cybersecurity services* (adopted by 21.9% of the

sample) and *cloud services* (adopted by 20% of respondents), items that continue to have significant, albeit reduced, weight in investment intentions for the next three years.

However, a truly significant change in perspective seems to be emerging for the immediate future. Investments in *artificial intelligence*, which to date have involved just 4.9% of companies, will reach 38.2%, becoming the priority for the next three years. There is also an increase in the propensity to invest in *Big Data Analysis* (from 5.1% to 13.8%) and *Data Integration* (from 12.8% to 16.8%).

Veneto manufacturing companies, at least in their stated intentions, seem to have understood that process efficiency also requires a rethinking of business models and the ability to process information quickly, within new adaptive and predictive decision-making logics that are more suited to unpredictable scenarios.

There are technological areas that are still niche, such as the '*Digital Twin*' and *Blockchain*. Regarding the latter, however, it should be noted that companies have invested and will continue to invest in '*tracking and tracing*' systems to support supply chain logistics. Therefore, if anything, it is necessary to understand whether there are specific barriers to Blockchain that lead companies to prefer more traditional tracking systems.

Regarding barriers, it is interesting to highlight the following aspect: in companies where the adoption of 4.0 technologies is more widespread, there is greater awareness of the "technological," "skills," and "institutional" barriers that need to be addressed. Conversely, in companies with lower rates of technology adoption, economic' and 'psychological' barriers still prevail, often preventing them from understanding the full potential and benefits of investment. This is a target that will be very important to work on, precisely within the PID project.

Investments in technology accompanied by full awareness of the benefits and their implications, including at the organizational level, generate "virtuous circles." This is demonstrated by one final piece of data: companies that invest in environmental sustainability are also those with the highest investment rates in Industry 4.0 technologies. There is even a subgroup of even more virtuous companies that manage their investments in digital technology in an integrated manner, precisely in line with the "twin transition" approach, both in the service of business and sustainability.