

PTWs' Economic Contribution to Society

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Two main ways of looking at PTWs' industry:

- Focusing on the key features such as productivity, added-value, etc. and the competitive profile
- Focusing on the tangible social and economic contribution that PTWs provide to nowadays society.

The latter dimension is more difficult to define and measure, but at the same time this is the key issue that has to be highlighted: scooters and motorcycles are more and more adopted by European citizens as the most affordable and quick mode of transport able to beat traffic congestion.

This is a fact that has important impacts for policy makers as well as for manufacturers and components' suppliers.

Industry Key Features

After a brief introduction aimed at comparing EU-25 PTWs' industry with other sectors such as Chemistry, Food, Beverages and Tobacco, Electronic and Optical, etc., the presentation will focus on the two major market approaches that were identified for the Italian Market: the so called "Vertical" and "Horizontal" market approach. A brief chart on major global PTWs' manufacturers helps to highlight different strategic choices among Japanese, European and USA major manufacturers. At the end of this section, a brief look at non-European markets and their expected future development completes the picture.

BUT IS IT THE MOST APPROPRIATE WAY TO LOOK AT PTWs' INDUSTRY?

Of course not, since this industry is facing a strategic discontinuity due to the **evolution of the concept of mobility**.

PTWs Social and Economic Value

The world is changing fast: on average, people are more informed and connected than in the past, and can rely upon higher per capita incomes.

This means that people look for more mobility, but also that mobility itself is changing, mainly due to social and economic trends, such as – for instance - the evolution of families and the role of women, the impact of digital technologies, etc...

These trends lead to a new concept of mobility, based on multi-purpose and multi-destination routes.

Since the need for mobility is normally satisfied by cars (without a coherent development of infrastructures), more mobility means also more traffic congestion, that brings about important environmental, economic and social implications.

PTWs represent an efficient and effective answer to the need for more mobility, both in case of Labour Mobility, as well as in case of Social Mobility.

The challenge for manufacturers and components' suppliers is to reap the most benefits from the two different kinds of mobility.

The challenge for policy makers is to promote PTWs through appropriate strategies. This could lead also to interesting impacts, for instance on GDP ...

