



ASSOLOMBARDA

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Confindustria Milano, Monza e Brianza, Lodi e Pavia

30/09/2020

ASSOLOMBARDA is



6,800

ASSOCIATED COMPANIES



406,000

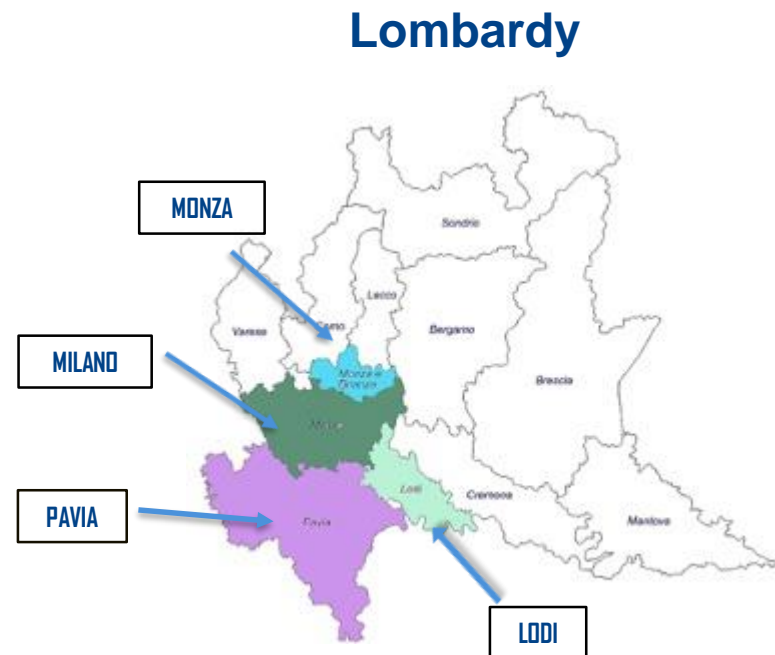
PEOPLE WORKING IN ASSOCIATED
COMPANIES

The largest local entrepreneurial Association in Italy, representing approximately 6,800 companies located in the area of Milan, Lodi, Monza Brianza and Pavia, employing more than 406.000 workers locally and several hundred thousands in the whole country.

The most important association within the Confindustria system, the national entrepreneurial federation.

OUR TERRITORY

Our member companies are located in the area of Milan, Lodi and Monza Brianza and Pavia



OUR VALUES

1

Identity

Our mission is to **foster the development** of local industry by promoting solidarity and cooperation among member firms and by protecting their interests regarding industrial, social, economic or cultural matters.



Representation

Assolombarda **protects and represents the enterprises' interests** in dealing with the political world, with social and political organizations and with local authorities as well as with trade unions.

2



3

Services

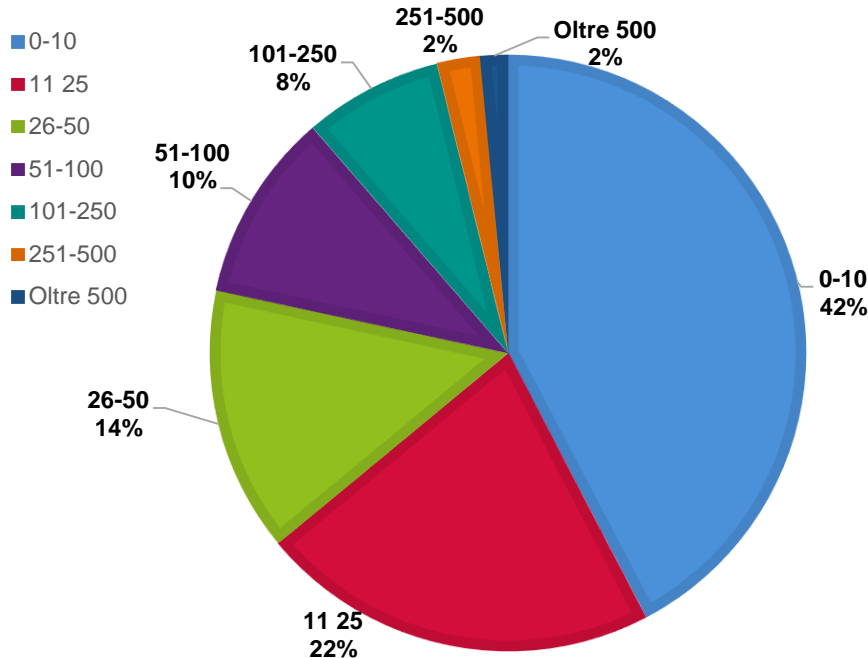
Assolombarda provides also its associated firms with a great **variety of services** to support them in managing the business functions/issues.

OUR ASSOCIATED COMPANIES

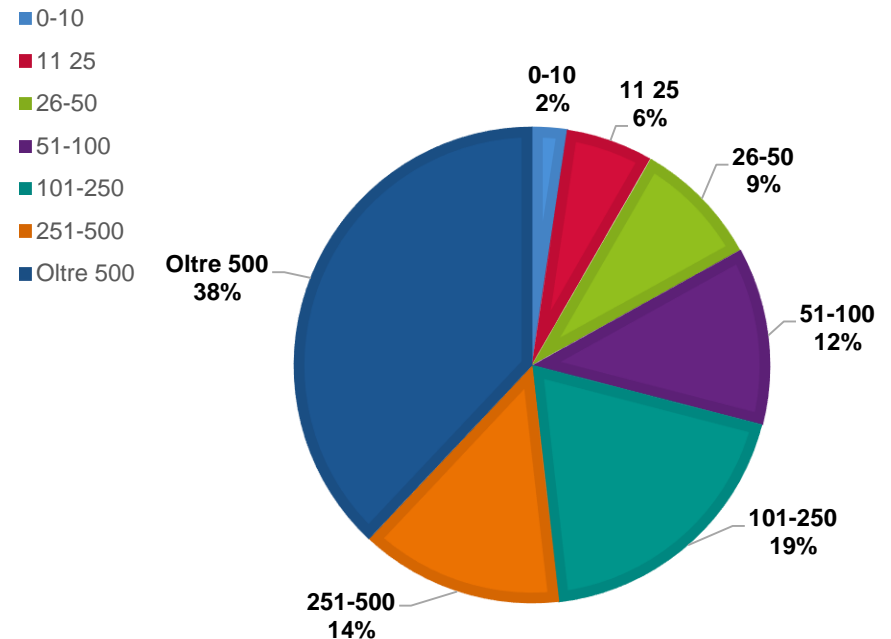
Firms of **all dimensions** and belonging to **all industrial sectors**, producing services, goods or both are eligible to become members of Assolombarda.

Assolombarda membership is **voluntary**.

DIMENSIONS



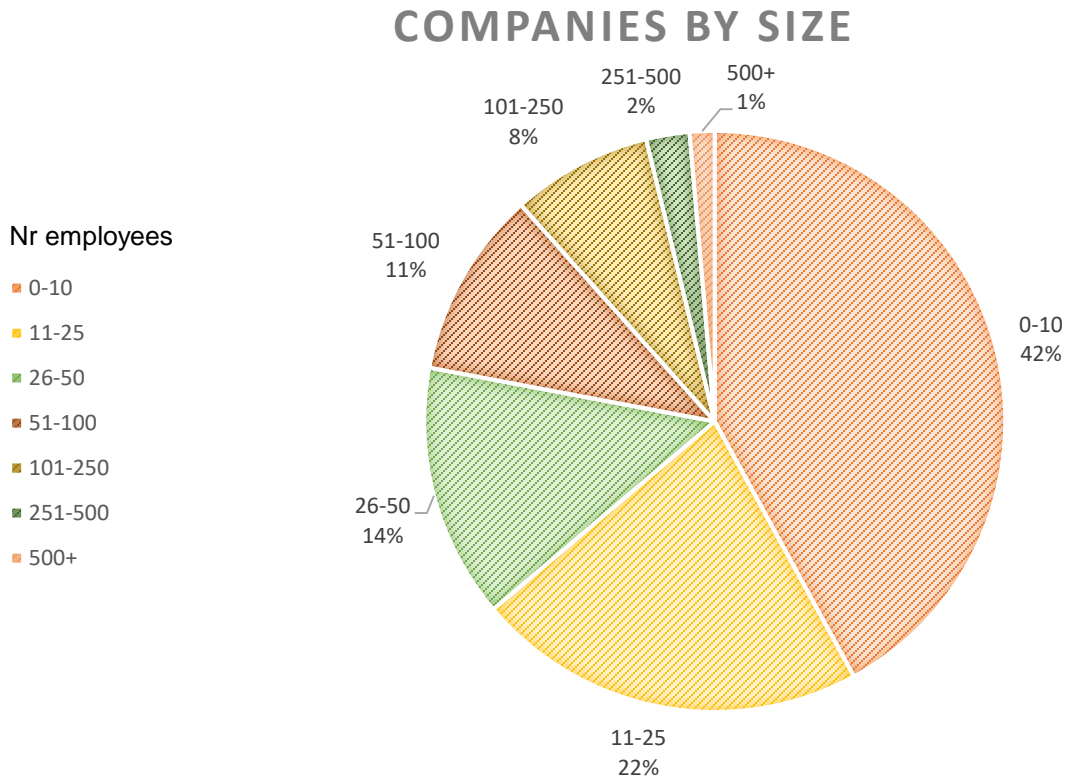
EMPLOYEES



OUR ASSOCIATED COMPANIES

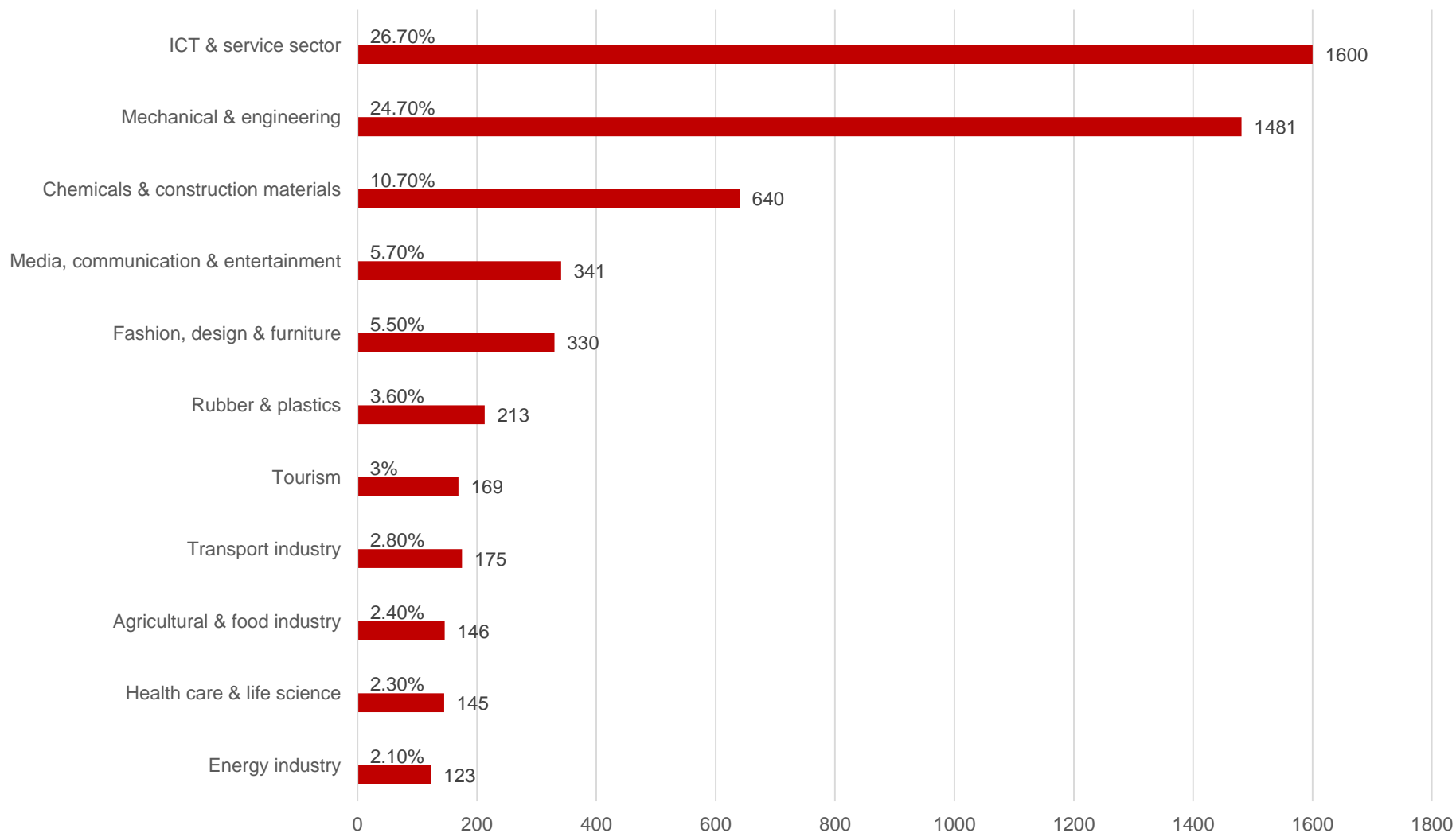
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OUR ASSOCIATED COMPANIES

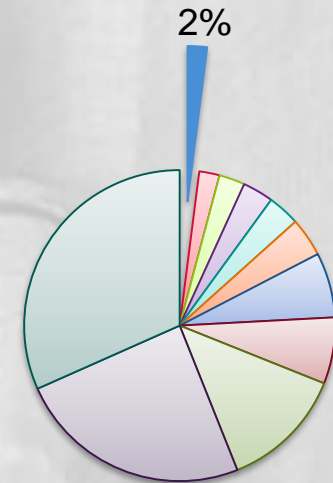
SECTORS



Healthcare & Life Science

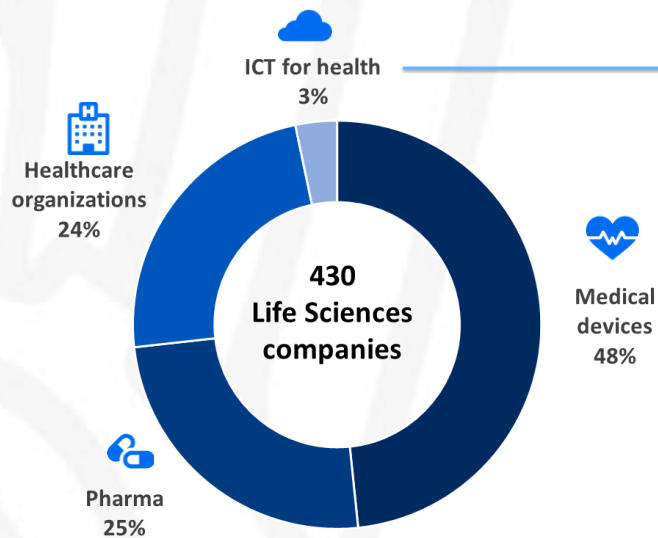
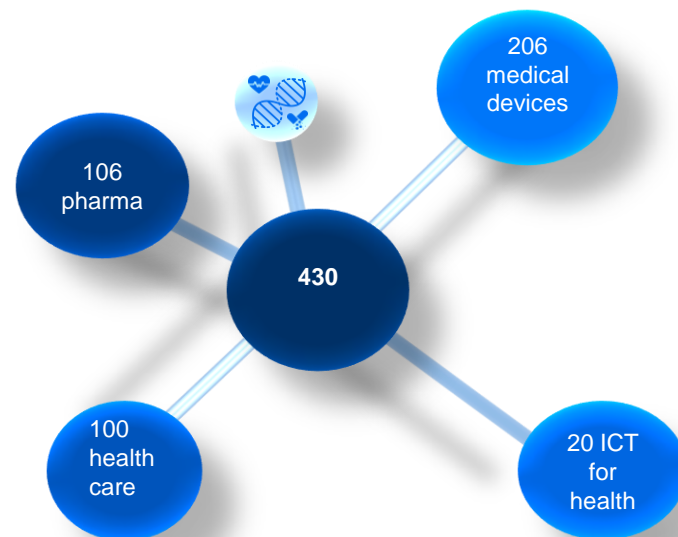
Healthcare and life sciences are leading sectors in the Milan area. Assolombarda counts among its members high quality private hospitals and clinics, institutes for scientific research, nursing homes and home care providers.

- PRIVATE HOSPITALS (hospitalisation, care & rehabilitation)
- INSTITUTES OF SCIENTIFIC RESEARCH, HOSPITALISATION & HEALTH CARE
- RETIREMENT HOMES
- CLINICAL LABORATORIES & GROUP PRACTICES
- CLINICS

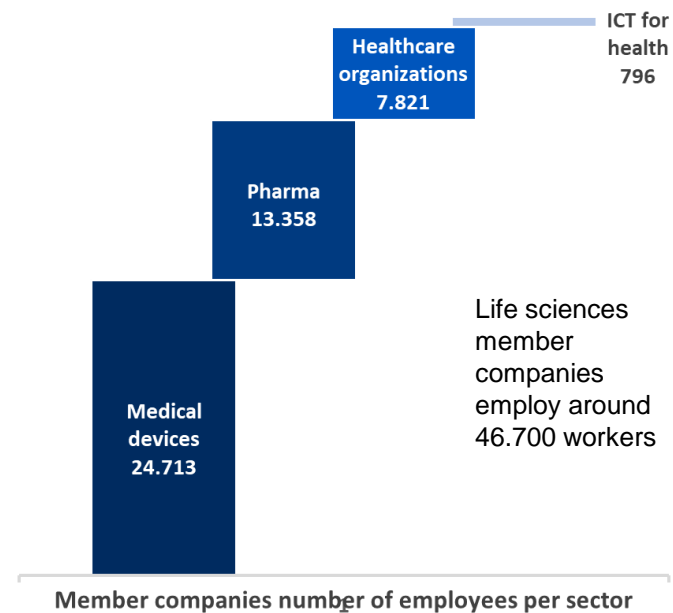


Life Sciences in Assolombarda

Assolombarda represents about **430 companies working directly in Life Sciences**, from research, to pharmaceutical and Medical devices development, to patients treatment and care



Considering the other ICT companies which could be healthcare providers the number of member enterprises rotating around the life science industry would be 650



The strength of Assolombarda

The relevance of Assolombarda within the Life Sciences is proven by our role in two strategic entities:

The Lombardy Life Science Cluster, created by Lombardy Region, is a public-private organization that promotes the collaboration among public and private stakeholders within the industry, from universities to enterprises



The National Life Science Cluster, created by the Ministry of Education, University and Research, which represents the main national industrial associations and support the development of the industrial policies for the industry at the national level



The relevance of the Life Science Industry in Lombardy

Lombardy Region has a very strategic role in life sciences compared to other Italian Regions, given the high presence of companies in the territory

Lombardy life science industry presents a value of output of 55,8 billion euro (30% of the industry value added at the national level)

The value added is equal to 20,7 billion euro (22,3% of the industry value added at national level)

The overall value added of the life science industry in Lombardy GDP is 11% (in Italy 10% of the GDP)

Lombardy life science industry employs almost 339.000 people (19,9% of the population employed within the industry in Italy)

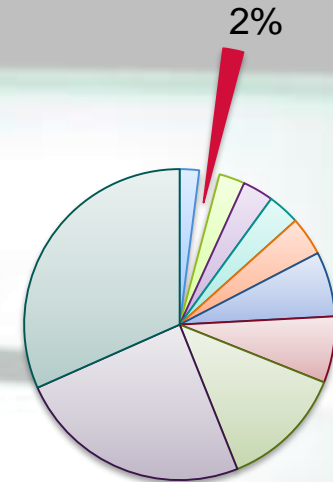
Energy Industry

The energy sector in Assolombarda includes leading Italian companies involved in the production, transportation and distribution of conventional and non-conventional energy.

Group key words: smart city and energy efficiency.

Our companies are qualified to design extraction methods and focused on the future of the energy market (smart cities, energy-saving, home automation systems, etc.).

- ENERGY EXTRACTION ENGINEERING
- ENERGY PRODUCTION
- ENERGY TRANSPORTATION AND DISTRIBUTIONS



The Green Economy Network



Promoted by Assolombarda together with a group of companies active in the green economy sector, the **Green Economy Network** was established in June **2011**.

With the aim of encouraging new alliances between companies providing products, technologies and services for environmental and energy sustainability.

The Network is an instrument to acquire national and global market visibility, to find new partners and to do business, to take part in tender and call for bids.

400 Enterprises



25000
Employees



50 Billion €



The Green Economy Network



Each company can choose to be listed in one or more of the following supply chains or thematic areas.



Acqua
Water &
Wastewater



Rifiuti
Waste



Aria
Air & Climate
Change



Mobilità
Sostenibile
Sustainable
Mobility



Suolo
e bonifiche
Site
Remediation



Rumore
Esterno
Noise and
acoustic
control



Energie
Rinnovabili
Renewables
Energy



Energie
Convenzionali
Conventional
Energy



Efficienza
Energetica
Energy
Efficiency



Prodotti
Ecocompatibili
Eco-friendly
Products

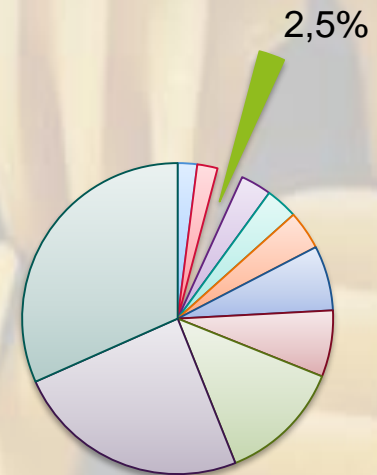
The on-line Repertory is a precise showcase of the companies, based on the thematic sphere of competency which enhances their visibility and facilitates partnerships.

www.greeneconomynetwork.it

Agricultural & Food Industry

Almost 150 companies in Assolombarda belong to the food sector, characterised by tradition, quality and strong presence on foreign markets.

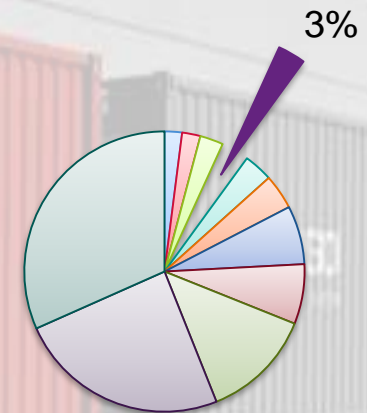
- AGRICULTURE
- FOOD INDUSTRY
- BEVERAGE & LIQUORS
- CONFECTIONARY
- DISTRIBUTION



Transport Industry

More than 160 leading transport and logistic companies are members of Assolombarda.

- TRANSPORTATION OF GOODS & PASSENGERS
- LOGISTICS
- INFRASTRUCTURES
- RAILROAD TRANSPORT

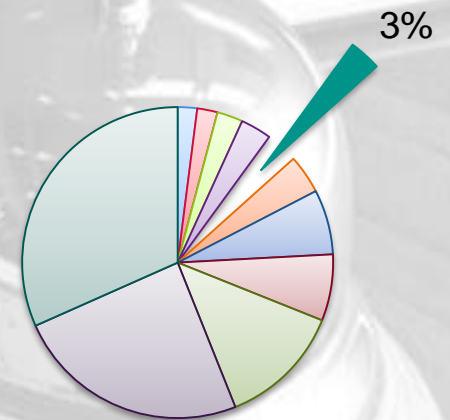


Tourism

Assolombarda member companies feature all major players of the tourism industry.

Tourism is deeply rooted locally and drives other Italian sectors - i.e. fashion, design, lifestyle, etc.

- HOTELS AND HOTEL CHAINS
- TOUR OPERATORS
- PROFESSIONAL CONGRESS ORGANIZERS



starwood
Hotels and
Resorts

)C Dorchester Collection

FOUR SEASONS
Hotels and Resorts

AIM
GROUP
INTERNATIONAL

nh
HOTELS

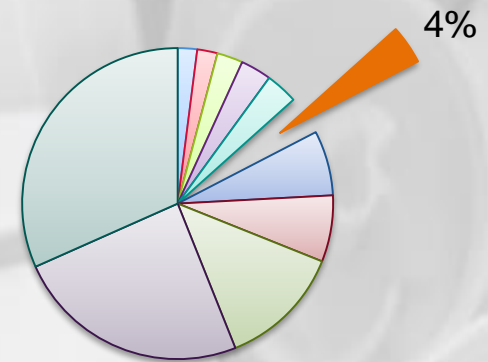
TriumphGroup
THE PEOPLE NETWORK

Rubber & Plastics

This group of companies has a strong identity connected with the raw materials used in the production process.

The Group's products are used in a wide range of sectors: from automotive to pharmaceutical and construction industry.

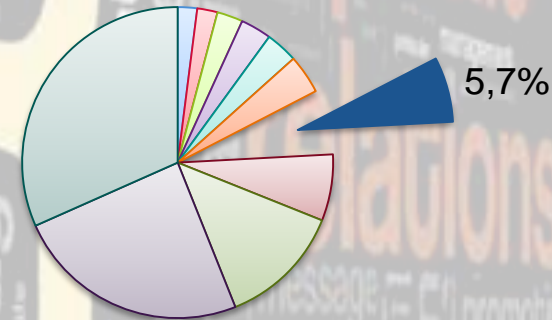
- PLASTIC MATERIALS
- RUBBER MATERIALS & CONDUCTORS



Media, Communication & Entertainment

Companies in Assolombarda embody the history of Milan as the “City of Communication”, featuring leading Italian broadcasting, publishing and communication companies.

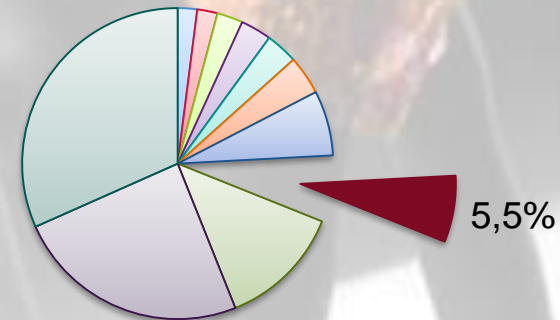
- PUBLISHING AND MEDIA INDUSTRY
- B2B COMMUNICATION SERVICES
- MUSIC INDUSTRY



Fashion, Design & Furniture

This sector is the heart of the so-called “Made in Italy” and the soul of Italian lifestyle. Our fashion and design companies are market-oriented and constantly involved in innovation, while preserving tradition and quality.

- TEXTILE
- LEATHER INDUSTRY
- GOLDSMITH'S ART AND JEWELRY
- DESIGN FURNITURE AND INTERIOR DESIGN ITEMS



Cassina

Kartell


CANALI
1934

Powellato

OLTREFRONTIERA
PROGETTI

PROVASI
Designers and Manufacturers

Reggiani

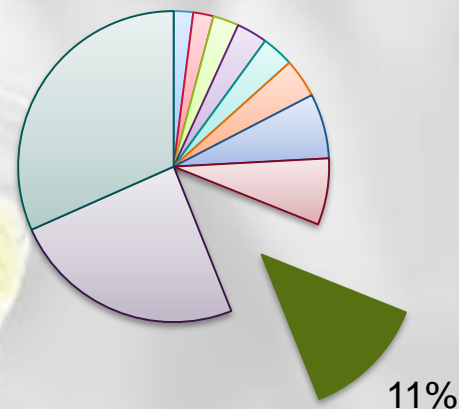
lualdiporte

Artemide®

Chemicals & Construction Materials

The 640 companies of the chemical group are constantly involved in research and innovation in different areas (i.e. life sciences, recycling, advanced materials, etc.) and in ensuring environmental sustainability.

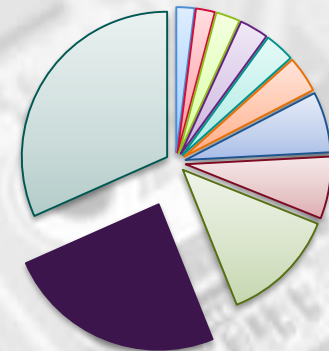
- PHARMACEUTICAL INDUSTRY
- BIOMEDICAL AND BIOTECH INDUSTRIES
- COSMETICS
- GLASS & CERAMICS
- CONSTRUCTION MATERIALS



ICT & Service Sector

Digitalization, open innovation, facility management and young professional training are the key words of this group, featuring 1,600 companies operating in different business areas (digital, engineering, services, employment agencies, ICT, etc.).

- DIGITAL
- ENGINEERING
- B2B SERVICES
- TELECOMUNICATIONS

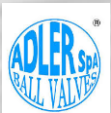


27%



The largest group of companies in Assolombarda, with almost 1,500 enterprises: a key sector for the Italian Economy.

- 25%



OUR SERVICES

Since the beginning, relations with trade unions have always been our core activity...

but...

...in the last 10-15 years we have started offering support and services to sustain member companies' competitiveness and help them facing daily business life

INSTITUTIONAL
RELATIONS

ENVIRONMENT

LABOUR/ TRADE UNIONS
RELATIONSHIP

ENTERPRISE CULTURE
AND CSR

EDUCATION AND
TRAINING

SOCIAL
WELFARE

ENERGY

RESEARCH AND
INNOVATION

INTERNATIONAL RELATIONS,
TRADE & FDI

TAX SERVICES &
CORPORATE LAW

FINANCE AND
CREDIT

CITY PLANNING &
MOBILITY

OCCUPATIONAL
SAFETY & HEALTH



Focus on Internationalization, Trade & FDI

How to help companies become international

- Presentation of business opportunities
- Organization of country presentations and b2b events
- Support in the process of approaching new markets
- Organization of trade missions abroad
- International networking:
 - foreign agencies, professionals, trade associations, chambers of commerce
- Continuous flow of information:
 - website, newsletter, targeted mailing
- Relations with related EU directorates, Italian Foreign Ministry, Italian Trade Commissions, Milan Chamber of Commerce, Milan Cityhall, Regione Lombardia (Lombardy regional government)
- Advising on all issues related to international trade: customs procedures, payment terms, contracts, transportation

Assolombarda for foreign companies

What can Assolombarda offer to foreign companies investing in our territory?

Institutional support and services

First of all be a local partner and a facilitator for:

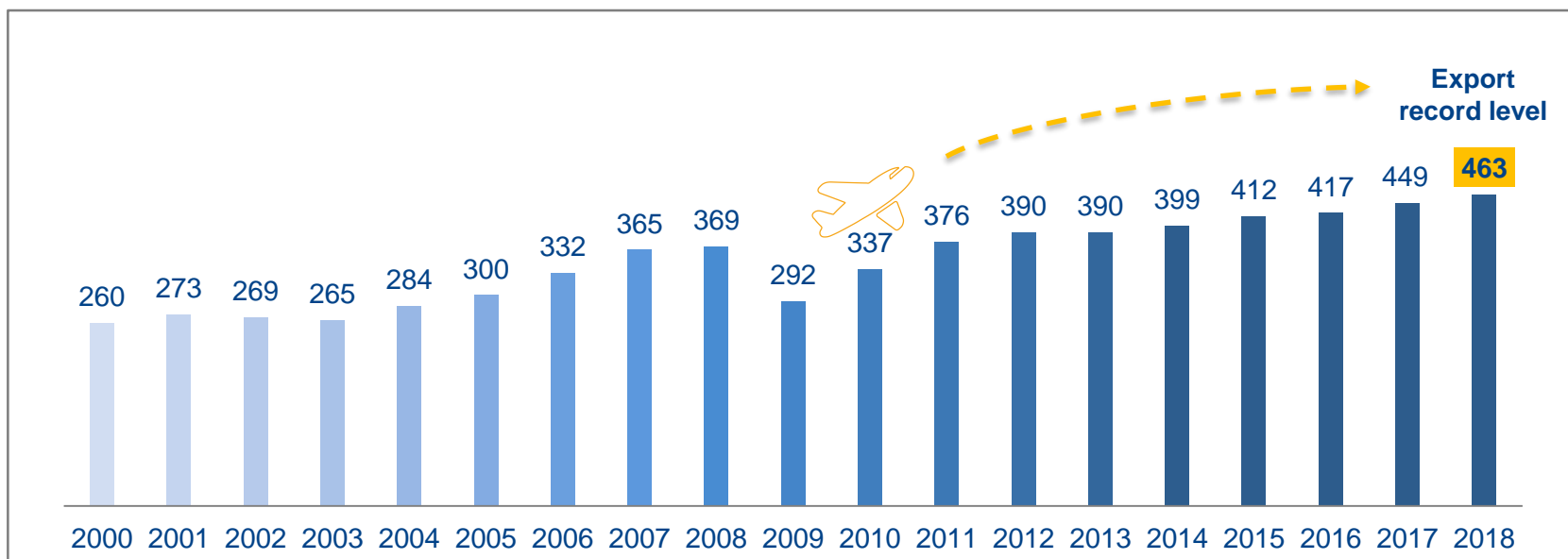
- Understanding the ***local business environment*** and business culture;
- Strengthening the ***network and contacts*** with local enterprises/partners;
- Building up relations with ***PA and local authorities***;
- Building up relations with ***universities and research centers***;
- Being introduced to our ***banking partners***;
- Providing information about ***industrial sites/locations*** through a new database 'Investire nel territorio' (Invest in Milan);
- but also ... providing ***tailor made services*** through a network of local professionals/consultants thanks to our service company (Assolombarda Servizi) and in cooperation with Invest in Lombardy (regional agency).

Lombardy and Milan: business structure

Italy and Lombardy: perception and reality

Italian manufacturing export performance 2000-2018

Italian manufacturing export (billion euro)

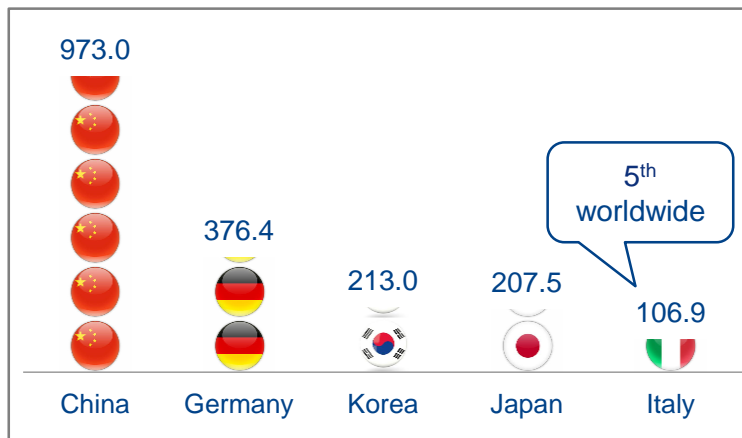


Source: Assolombarda on Istat data

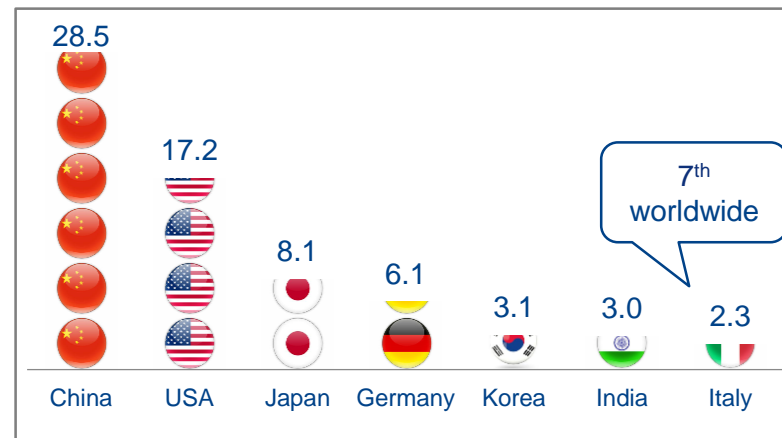
Italy and Lombardy: perception and reality

Italian manufacturing in global rankings

Manufacturing trade surplus - 2017
(US billion dollar)



Share of global manufacturing value added - 2018
(% on current prices - US dollar)



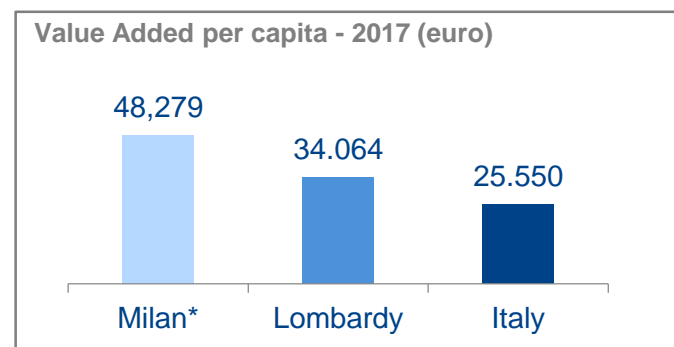
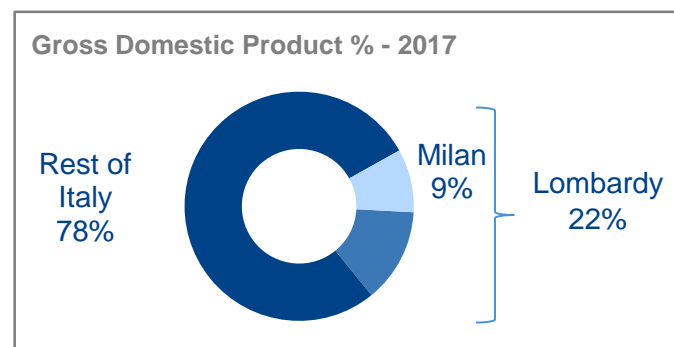
Source: Assolombarda on WTO and CSC data

Lombardy and Milan: business structure

Lombardy, the leading Italian Region: in 2017, 22.2% of the Italian GDP

	Lombardy	Italy	Share
Area (sq. km.)	23,864	302,073	7.9%
Population (1/1/2018)	10,036,258	60,483,973	16.1%
Workforce (thousand, 2018)	4,711	25,970	18.1%
GDP (nominal, million euro, 2017)	383,175	1,724,955	22.2%
Value Added (per capita, 2017)	34,064	25,550	-
Enterprises (2018)	816,088	5,150,743	15.8%
R&D expenditure (million euro, 2016)	4,758	23,172	20.5%
Import (million euro, 2018)	133,861	423,998	31.6%
Export (million euro, 2018)	127,061	462,899	27.5%

Source: Assolombarda on Istat and Prometeia data

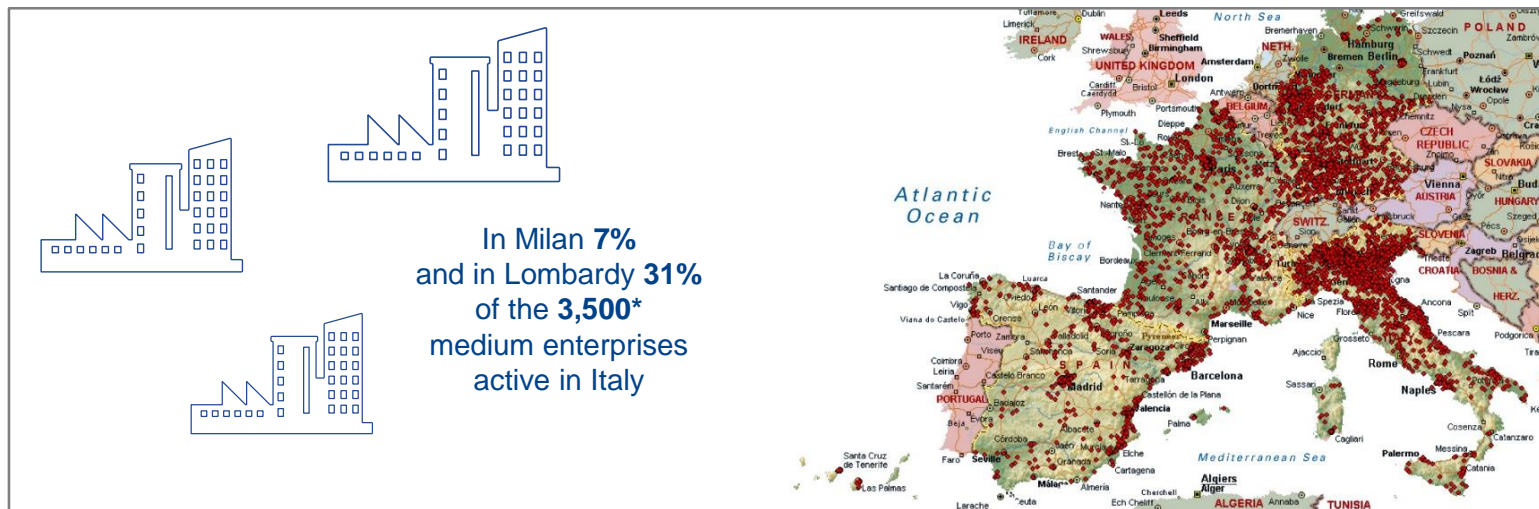


(*) estimated value

Lombardy and Milan: business structure

250 manufacturing medium enterprises located in Milan 1,100 located in Lombardy

Number of medium manufacturing enterprises, with 50 to 499 persons employed and a sales volume of 15 to 330 million euro (excluding subsidiaries of large corporations or those under foreign control)



* Italian medium-sized manufacturing companies account for approximately 16% of the domestic manufacturing value added and of Italian exports

Source: Assolombarda on Mediobanca – Unioncamere data

Lombardy and Milan: business structure

Milan the prime location for over 4,500 multinational companies operating in Italy

Foreign multinational enterprises

4,579 foreign multinational companies located in Milan (32,1% of those active in Italy)
with **465,875** employees and **€ 224 billion** turnover

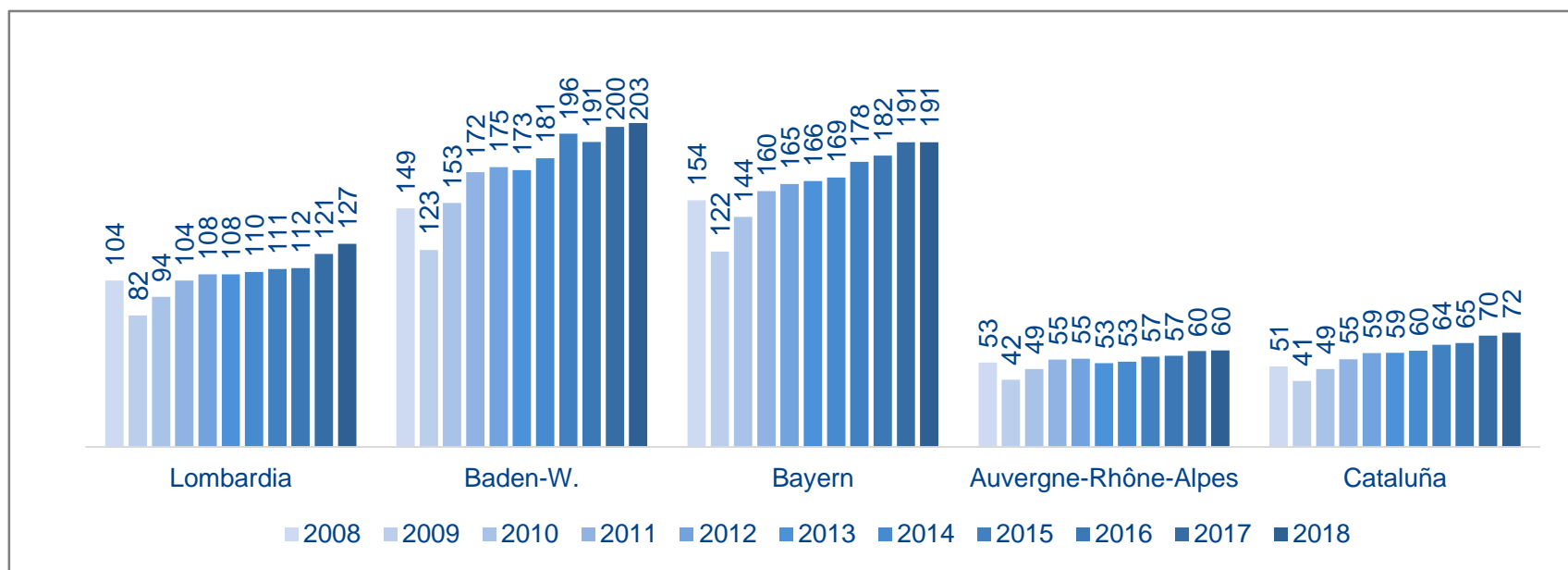


Source: Assolombarda on Milan Chamber of Commerce data

Lombardy and Milan: business structure

Export: Lombardy vs other European regions

Export (billion euro)



Source: Assolombarda on Istat, Destatis, Idescat, Douanes et droits indirects data

Lombardy and Milan: business structure

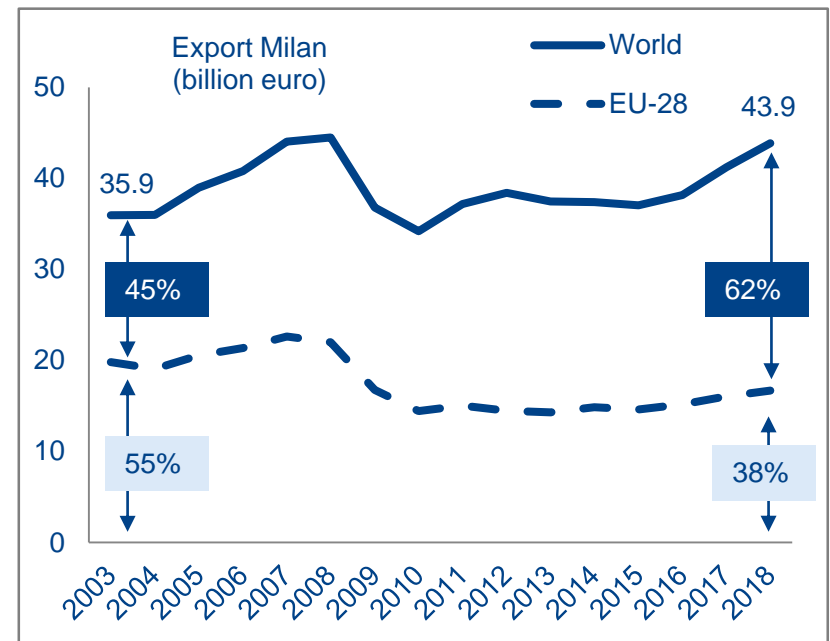
Export: Lombardy's main trade partners

Lombardy's main trade partners - 2018
(million euro)

		Export 2018	% change 2018-2008
1	Germany	17,073	19.5%
2	France	12,302	1.0%
3	USA	10,002	70.2%
4	Switzerland	7,228	44.4%
5	Spain	7,180	11.0%
6	United Kingdom	5,185	9.7%
7	China	4,433	84.5%
8	Poland	3,997	52.2%
9	Netherlands	3,101	18.1%
10	Austria	2,701	18.8%

Source: Assolombarda on Istat data

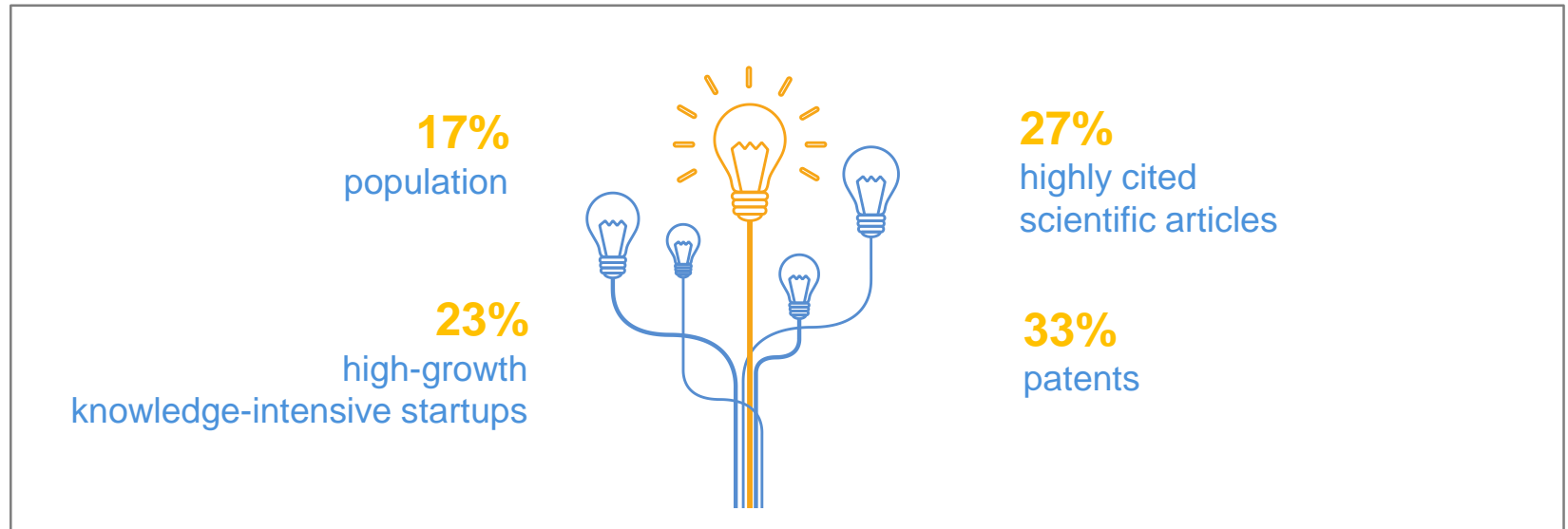
Repositioning on extra-EU markets: the case of Milan - 2018



Lombardy and Milan: strengths

Lombardy and Milan: strengths

Innovation: the role of Lombardy in Italy

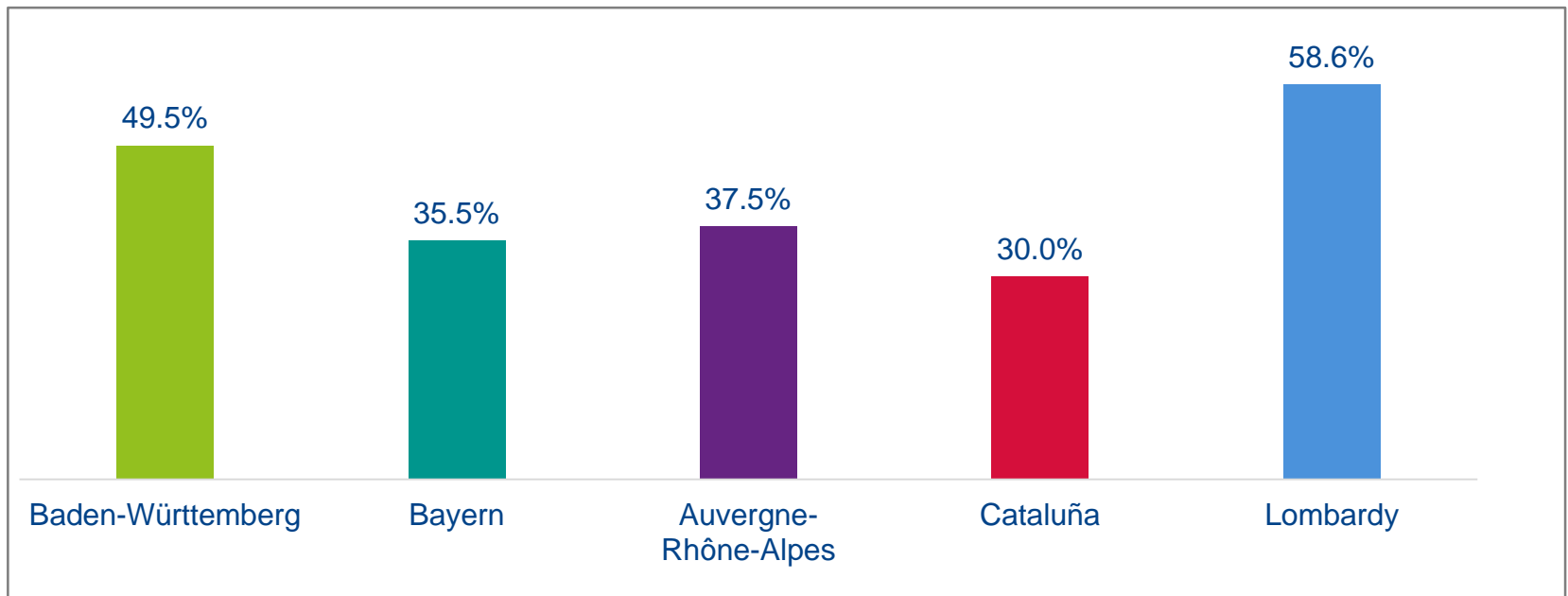


Source: Assolombarda, Booklet Ricerca e Innovazione n. 2/2017

Lombardy and Milan: strengths

Business R&D investments in Lombardy: catching-up to German regions

R&D activity in manufacturing firms - 2015-2017 (% of firms)



Source: Assolombarda, *The performances of European firms: a benchmark analysis*, forthcoming

Lombardy and Milan: strengths

Strong presence of high-quality public and private research centers

13 universities

1 Institute for Advanced Study

12 CNR (National Research Council) Institutes and 18 territorial sections of CNR Institutes



3 sections of the Italian National Institute for Nuclear Physics and one European Joint Research Center

19 Institutes for Treatment and Research

700 Research and Technology Transfer Centers



Source: Assolombarda on CNR and Regione Lombardia data

Lombardy's strengths

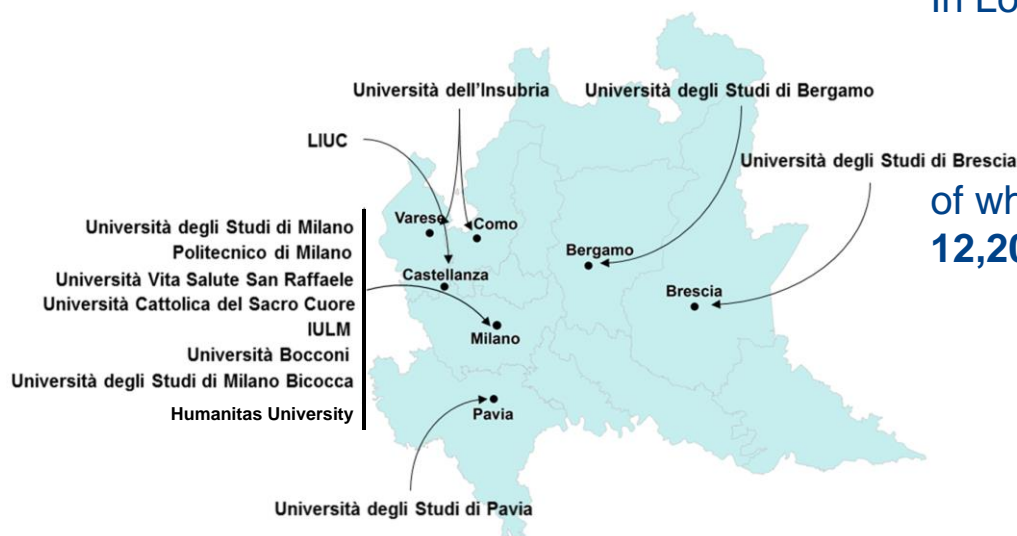
University: high concentration (13) and international attractiveness

In Lombardy almost **280,000 university students**

of which **14,500 coming from abroad** (around **12,200 in Milan**)

equal to **5%** of the total number of students

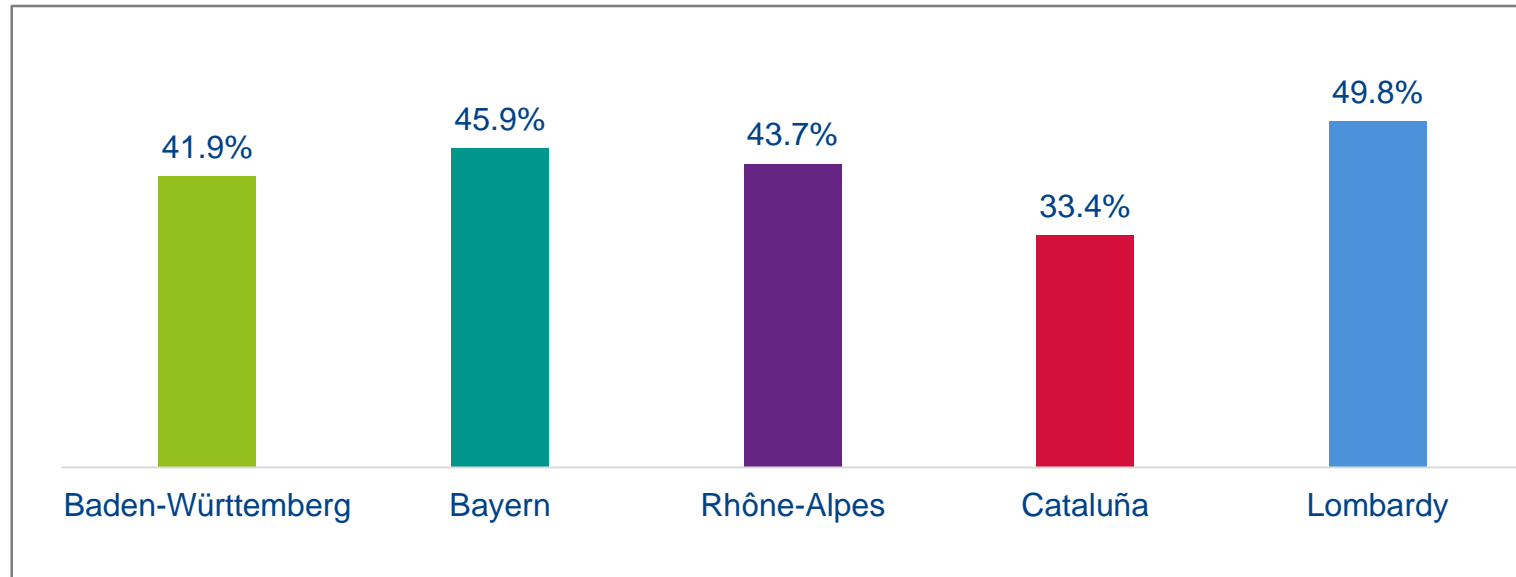
The equivalent figure is **10%** in France
8% in Germany
3% in Spain



Lombardy and Milan: strengths

Business R&D investments in Lombardy: catching up to German regions

R&D activity in manufacturing firms - 2013-2015 (% of firms)



Source: Assolombarda Confindustria Milano Monza e Brianza on Assolombarda Confindustria Milano Monza e Brianza, *The performances of European firms: a benchmark analysis*

Lombardy and Milan: strengths

5 typical vocations for Milan

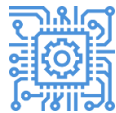
Value chains and sectorial specializations that are internationally recognized and have a high growth potential



Life sciences



Agribusiness



Manufacturing 4.0



Finance



Art, culture and design

Lombardy's strengths

In short, Lombardy and Milan are a knowledge hub thanks to

- a **multi-sectorial economic system**, with a core manufacturing sector integrated with a highly developed service sector (especially in Milan);
 - a thick **network of small and medium enterprises** coexisting and interweaving with **large enterprises** and **multinational companies**;
 - the concentration of **13 long-standing and prestigious universities**, closely connected to the entrepreneurial system;
 - a strong specialization in knowledge-intensive sectors and the availability of **high-skilled human capital**.



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