



ASSOLOMBARDA
Confindustria Milano Monza e Brianza

Booklet Italy, Lombardy and Milan

A cura dell'Area / Edited by

Centro Studi/Research Unit

N° 01/January 2016



Assolombarda is...

.... the **largest local** entrepreneurial Association in Italy, representing **5,750 companies** located in the area of Milan, Lodi and Monza Brianza, **employing approximately 320,000 workers** locally and several hundred thousands in the whole country.

.... the **most important association** within the Confindustria system. Confindustria is the national entrepreneurial federation.

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

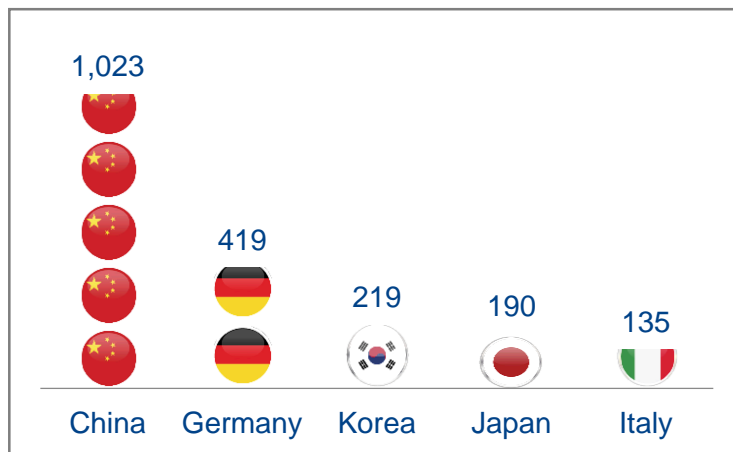
Assolombarda membership is **voluntary**.

1. Italy: perception and reality

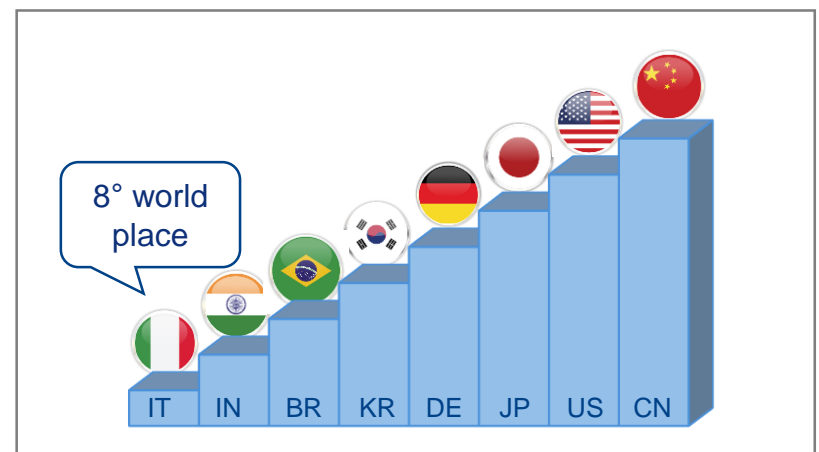
Italy and Lombardy: perception and reality

Italian manufacturing sector in global rankings

Manufacturing trade surplus - 2014
(US billion dollar)



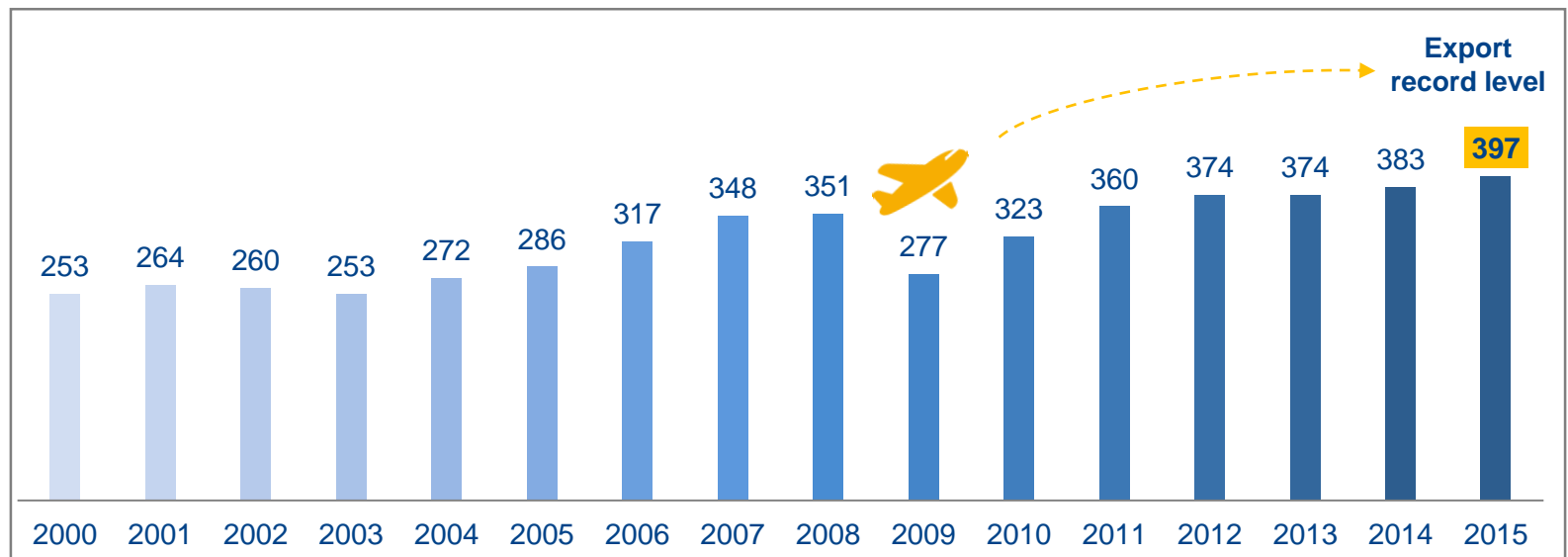
Manufacturing production - 2014



Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on WTO data

Italy and Lombardy: perception and reality

Italian manufacturing export performance 2000-2014 (billions of euro)



Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on Istat data

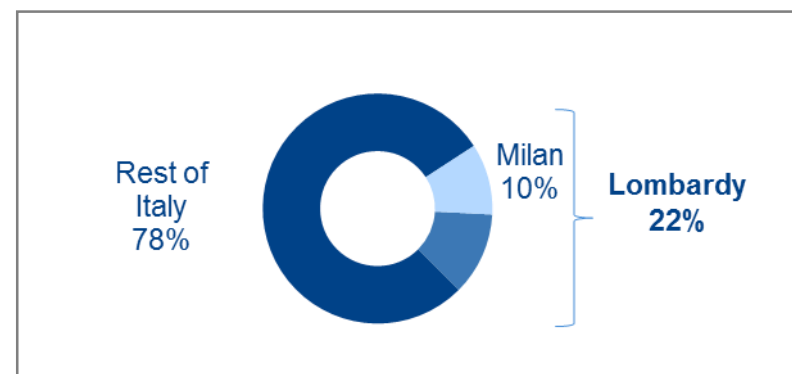
2. Lombardy's and Milan's business structure

Lombardy's and Milan's business structure

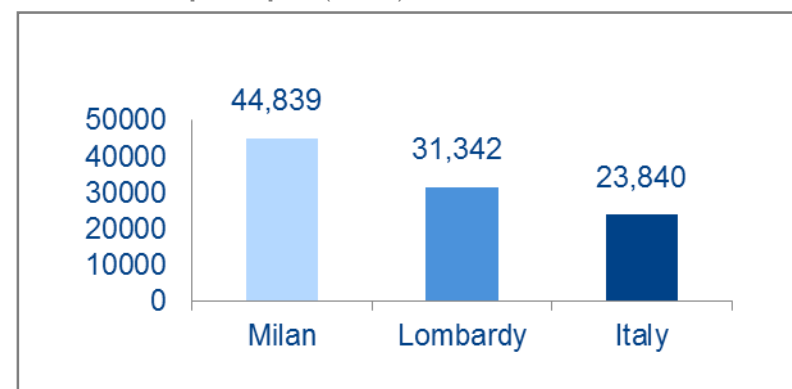
The first Italian Region: in 2014, 22% of the Italian GDP

	Lombardy	Italy	Share
Area (square Km)	23,864	302,073	7.9%
Population (1/1/2015)	10,002,615	60,795,612	16.5%
Workforce (thousand, 2014)	4,615	25,515	18.1%
GDP (nominal, millions euro, 2014)	350,025	1,613,859	21.7%
Value Added per capita (2014)	31,343	23,840	-
Enterprises (2013)	805,727	4,390,513	18.4%
R&D expenditure (millions euro, 2013)	4,541	20,983	21.6%
Import (millions euro, 2014)	110,387	356,939	30.9%
Export (millions euro, 2014)	109,546	398,870	27.5%

Gross Domestic Product %



Value Added per capita (euros)

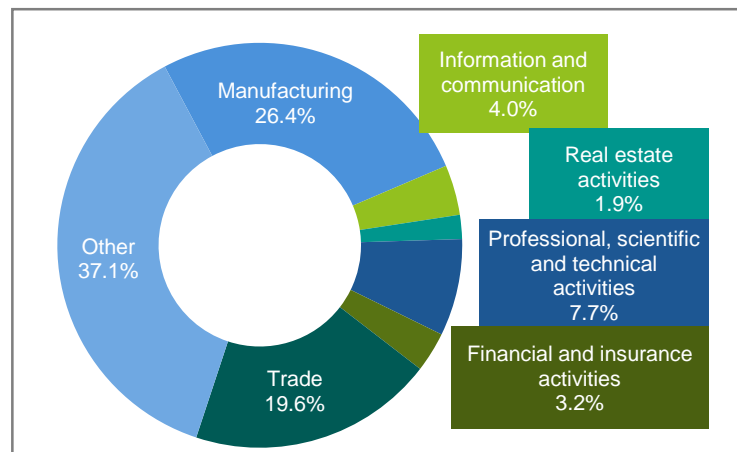


Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on Istat and Eurostat data

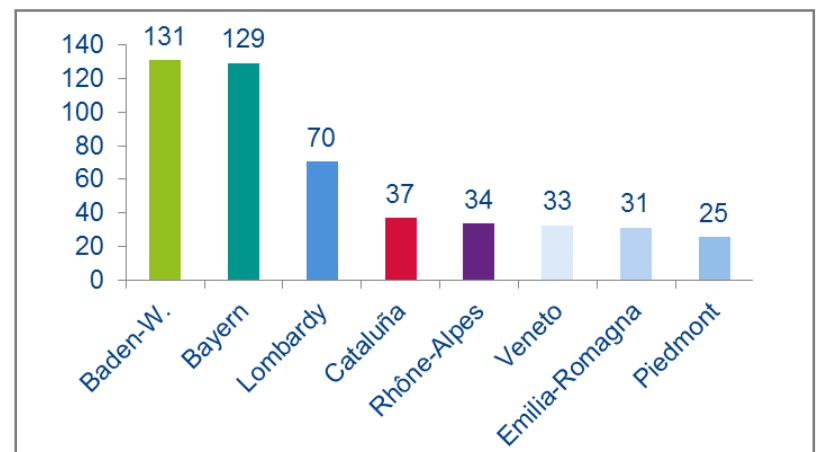
Lombardy's and Milan's business structure

Lombardy vs others: the first Region in terms of manufacturing gross value added

Workers in Lombardy by business sector - 2013



Gross value added at basic prices by region (Industry, except construction, billions of euro) - 2012



Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on Istat and Eurostat data

Lombardy's and Milan's business structure

Milan as prime location for multinationals operating in Italy: almost 3,100

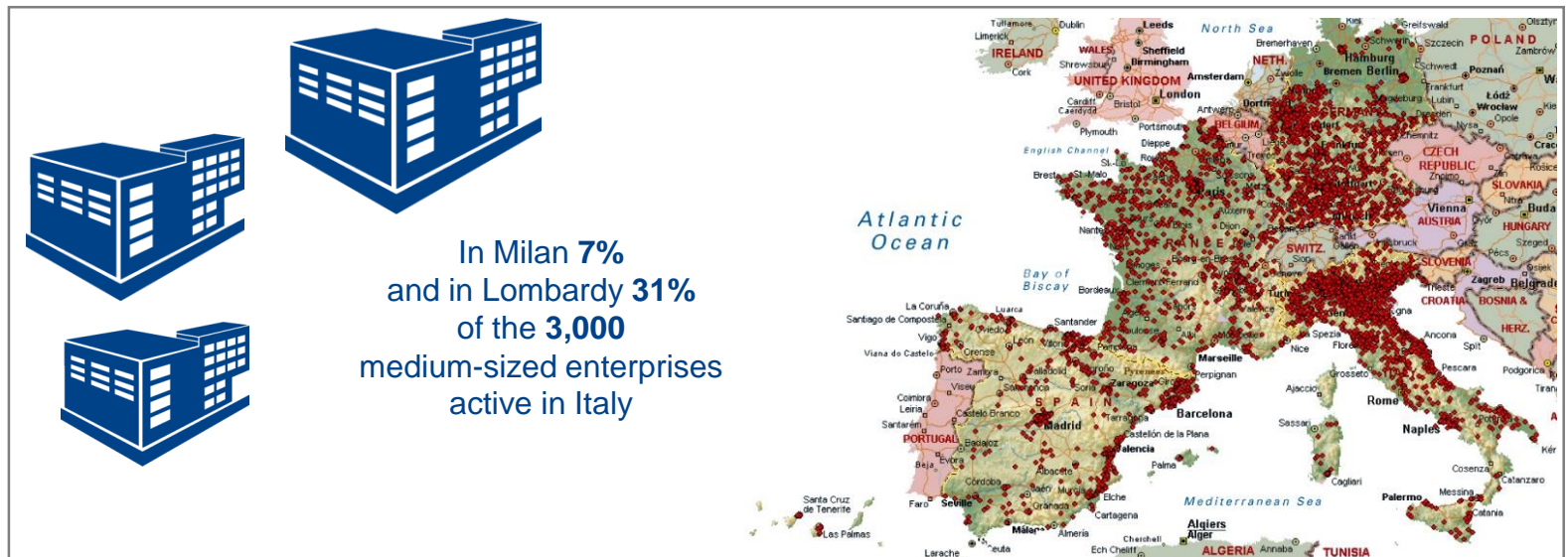
Almost **3,100** foreign multinational enterprises are located in Milan (33% of those active in Italy)
with **277,000** employees and **168 billion €** turnover



Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on Milan Chamber of Commerce data

Lombardy's and Milan's business structure

250 European medium-sized enterprises are located in Milan, 1,000 are located in Lombardy

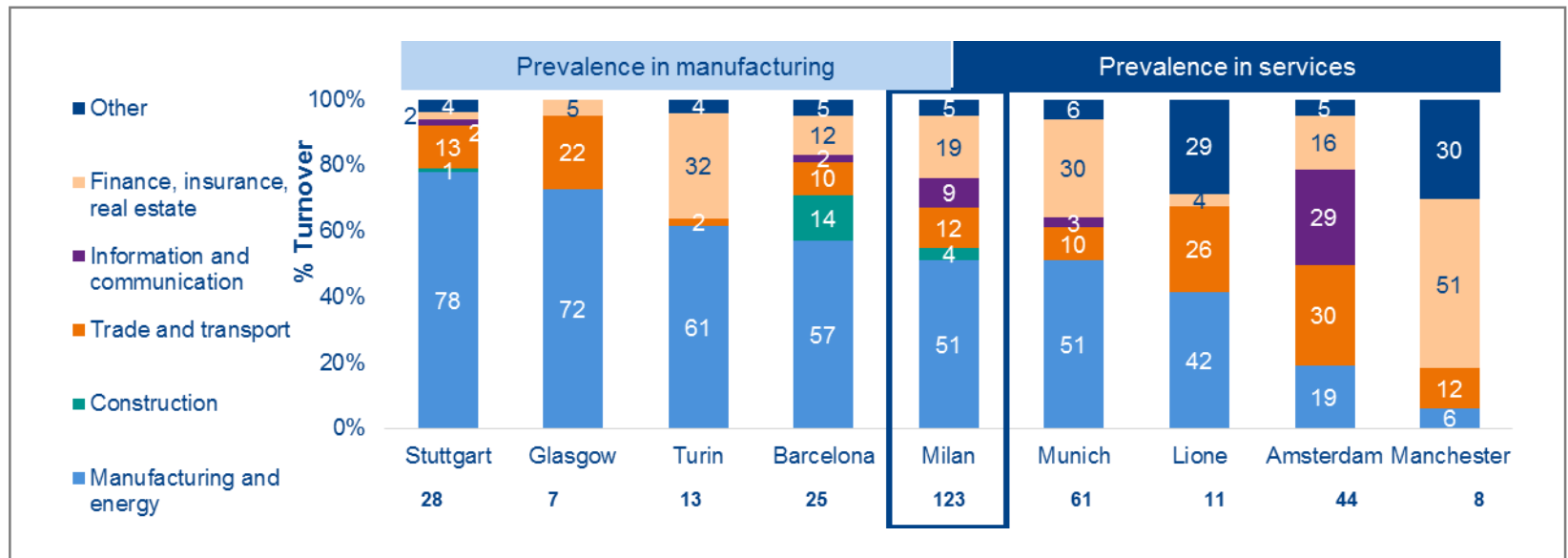


Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on Milan Chamber of Commerce data

Lombardy's and Milan's business structure

123 large enterprises in Milan

Number of enterprises with turnover >1Bln €

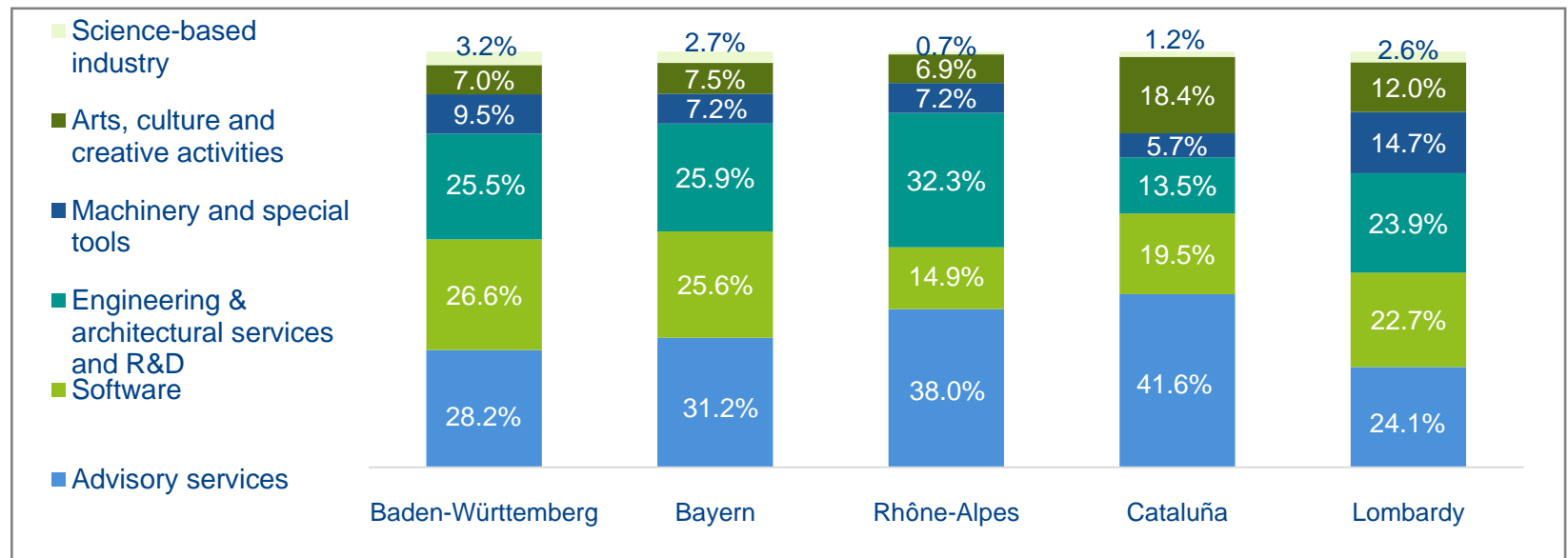


Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on BCG data

Lombardy's and Milan's business structure

Over 12,000 knowledge-intensive startups born in Lombardy (2007-2013)

12,121 knowledge-intensive startups - out of 52,675 located in Italy - were born in Lombardy (2007-2013)

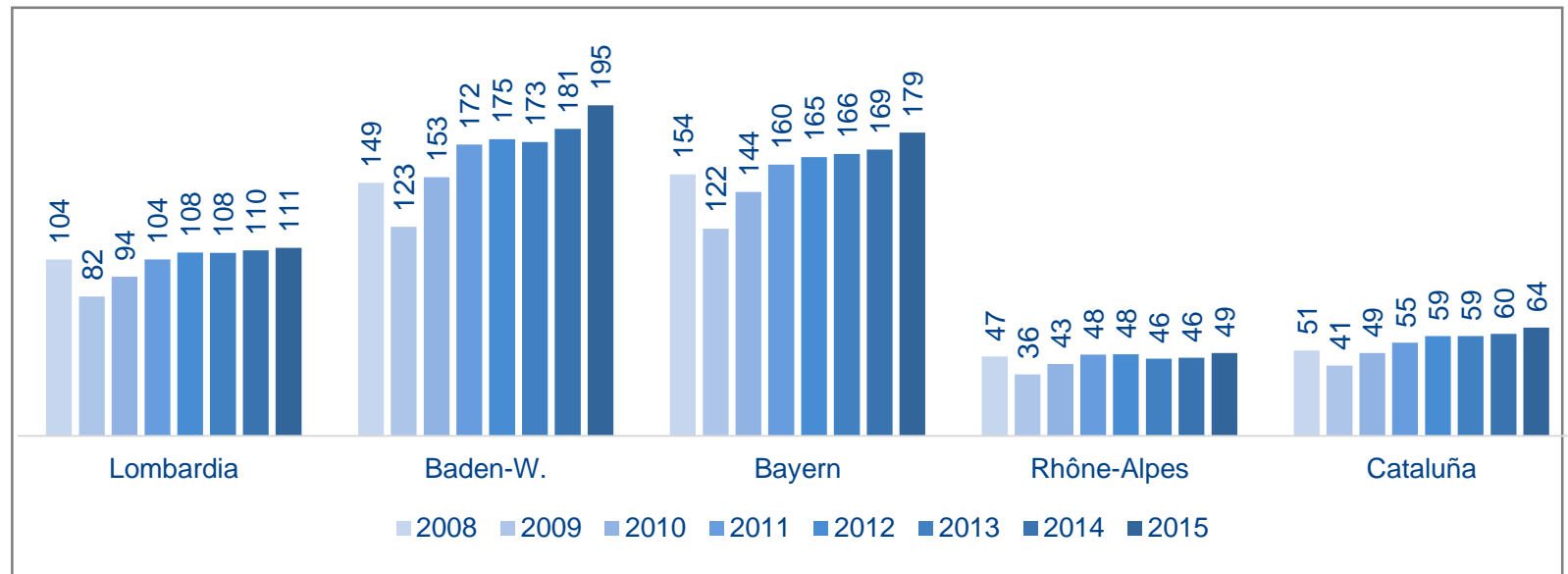


Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza and Politecnico of Milano data

Lombardy's and Milan's business structure

Export: Lombardy vs other European Regions

Export 2008-2015 (billions euro)

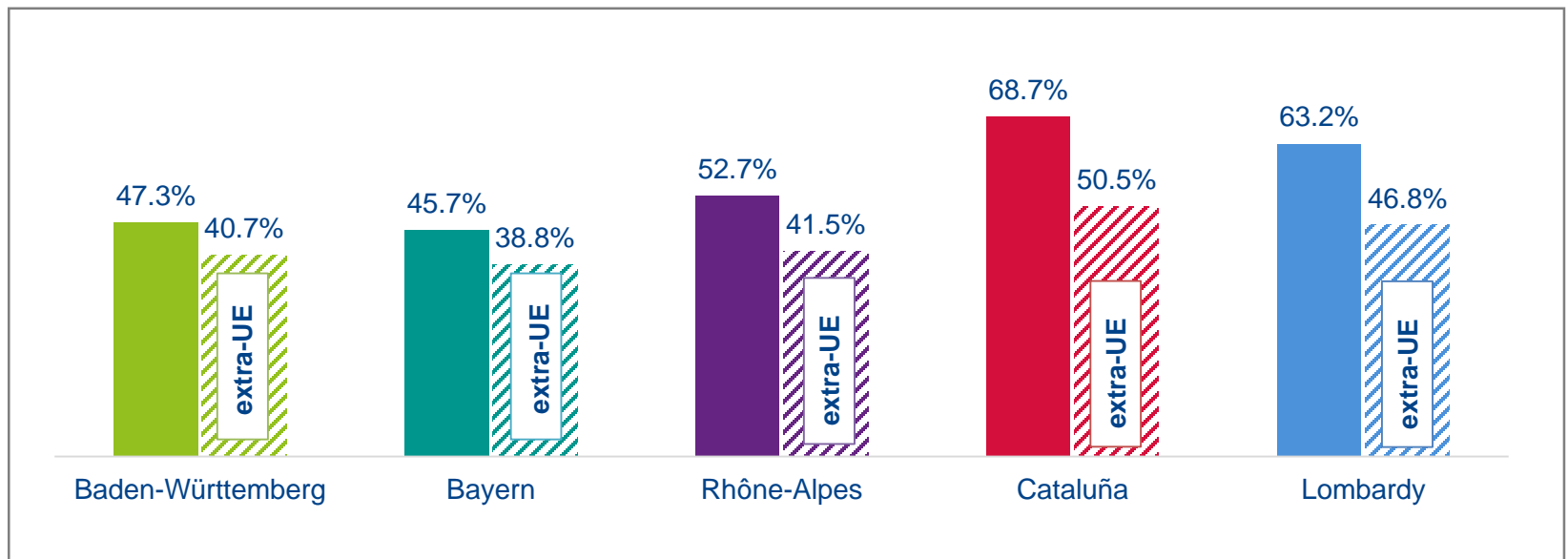


Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on Istat, Destatis, Idescat, Douanes et droits indirects data

Lombardy's and Milan's business structure

Openness to international trade: even better than in German Länder ...

Manufacturing exporting firms (% of firms, 2013)



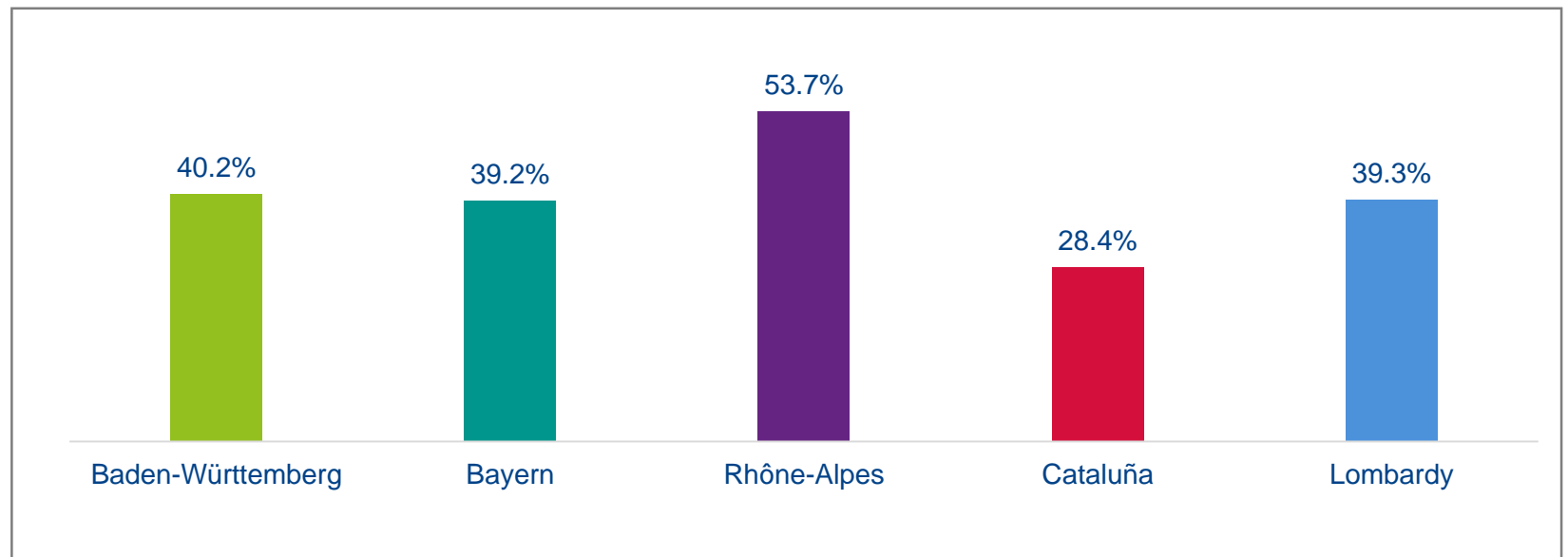
Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on Survey Data

3. Lombardy's and Milan's strengths

Lombardy's and Milan's strengths

Enterprises' R&D investments in Lombardy: not too far from German Länder

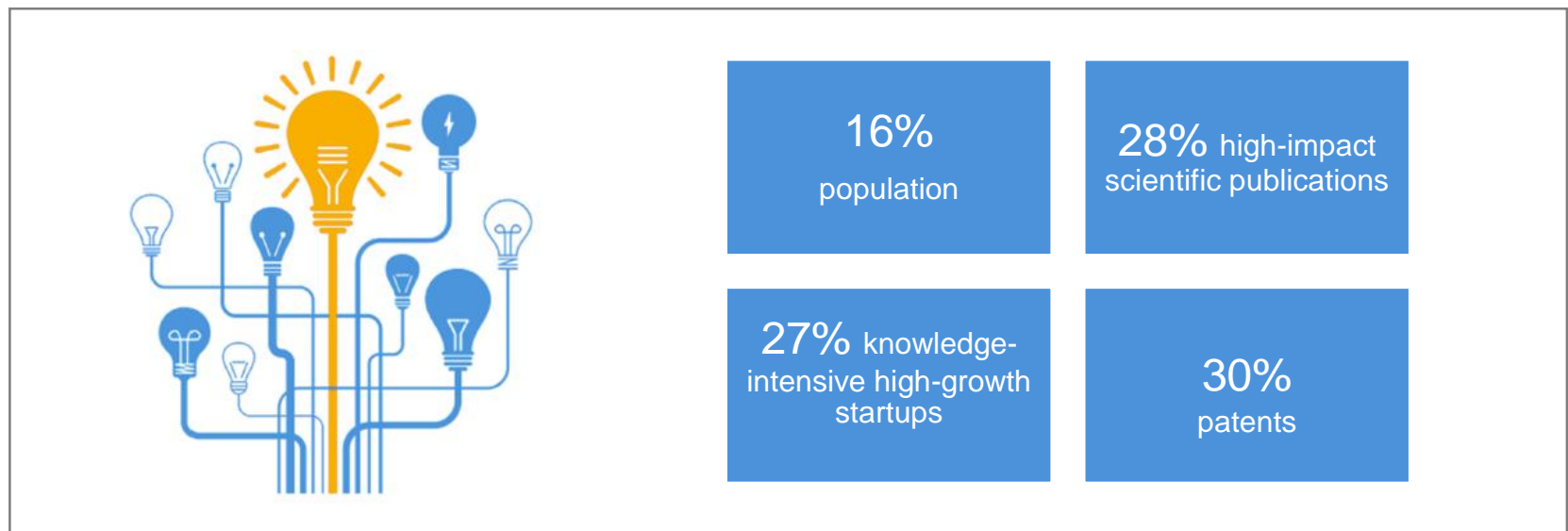
R&D activity in manufacturing
(% of firms, 2011-2013)



Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on Survey data

Lombardy's and Milan's strengths

Innovation: the role of Lombardy in Italy



Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on Istat data, Politecnico of Milano, CRIOS Bocconi

Lombardy's and Milan's strengths

Strong presence of public and private high quality research centers

Some examples:

13 Universities



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

12 CNR (National Research Council) Institutes and 25 territorial sections of CNR Institutes



18 Institutes for Treatment and Research



9 Technological Clusters in Lombardy

AEROSPACE



www.aerospacelombardia.it

ENERGY&CLEANTECH



www.energycluster.it

AGROOFOOD



www.clusteragrofoodlombardia.eu

GREEN CHEMISTRY



www.chimicaverdelombardia.it

STRATEGIC PROJECT:

«CLUSTER»

monitoring of the
technological regional
clusters by Confindustria
Lombardia's system and its
its Local Associations

MOBILITY



www.clusterlombardomobilita.it

TECHNOLOGIES FOR LIVING ENVIRONMENTS



www.clustertav.lombardia.it

LIFE SCIENCE



Cluster Lombardo
Scienze della vita

www.lombardialifesciences.it

ADVANCED MANUFACTURING



www.afil.it

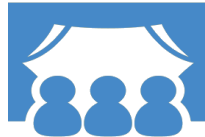
SMART CITIES



www.clusterscclombardia.it

Lombardy's and Milan's strengths

Lombardy drives Italian creativity



19% of italian cultural enterprises

26% of italian cultural enterprises value added

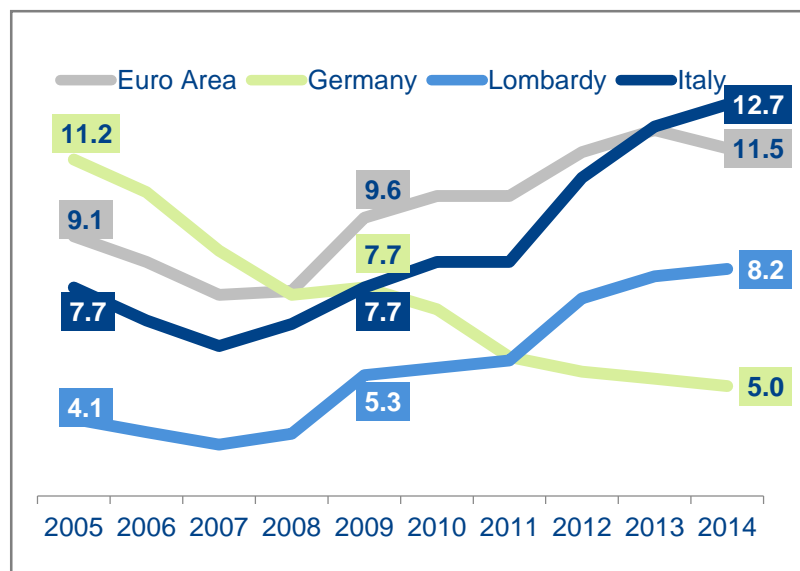
300,000 jobs originating from cultural activities

Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on Symbola data (2014)

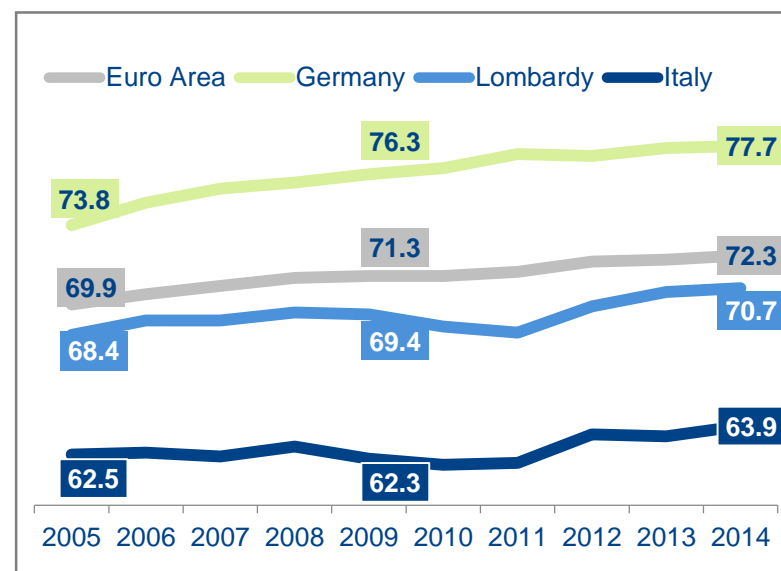
Lombardy's and Milan's strengths

Labour market: much better than Italy

Unemployment rate



Activity rate



Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on Istat and Eurostat data

Lombardy's and Milan's strengths

A knowledge hub

Why are Lombardy and Milan a knowledge hub?

Because here you find:

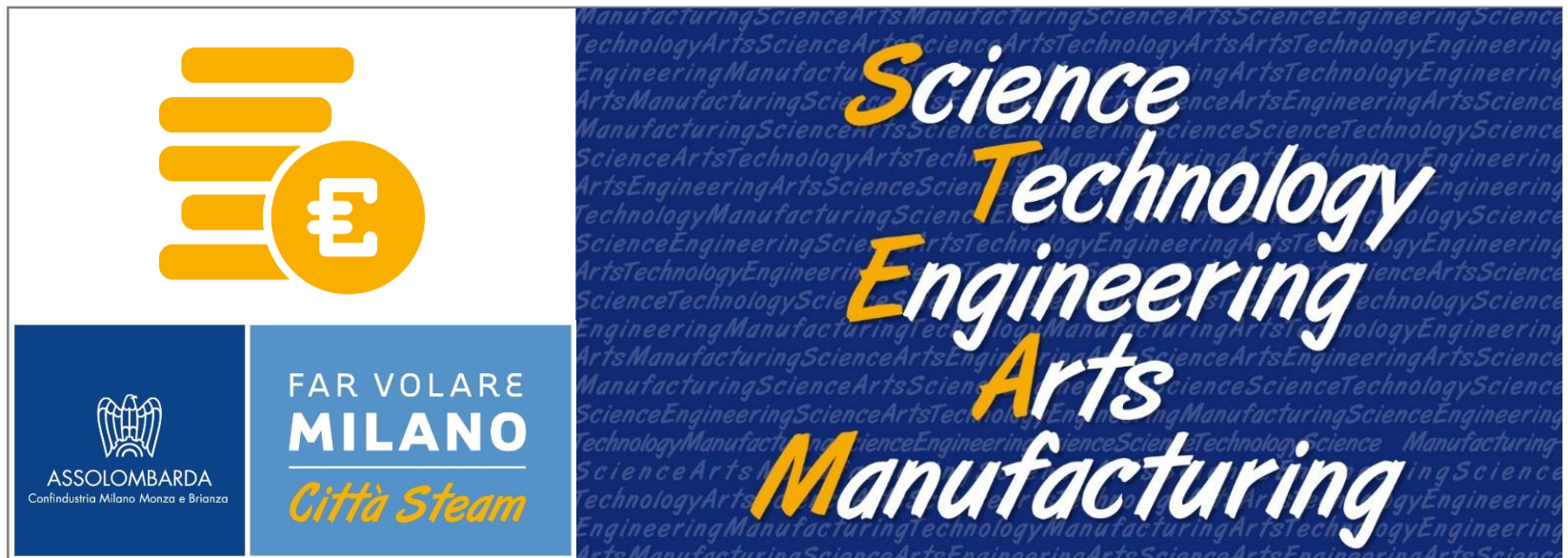
- a **multi-sectorial economic system**, with a core manufacturing sector integrated with a highly developed service sector (especially in Milan);
- a virtuos **network of small and medium enterprises** well integrated with large enterprises and multinational companies;
- the concentration of 13 **long-standing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



Lombardy's and Milan's strengths

«Milan S.T.E.A.M. city»

Investing in «Milan S.T.E.A.M. city» means to add about 17-24 billion € of value added to 2025



Source: Tableau de Bord Assolombarda Confindustria Milano Monza e Brianza on BCG data



ASSOLOMBARDA

Confindustria Milano Monza e Brianza

www.assolombarda.it
www.farvolaremilano.it
www.assolombardanews.it



Valeria Negri
Valeria.negri@assolombarda.it