

ITALY IN 10 SELFIES. 2016

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A NEW ECONOMY
TO FACE THE CRISIS,
LEADERS OF THE
CLIMATE CHALLENGE.

*There is something more powerful than the brute force of bayonets:
it is the idea whose time has come.*

Victor Hugo

The Paris agreement on climate is only a first step, but it marks a change of course that was unthinkable before, while setting new opportunities. Italy can seize them if it bets on its best talented people, the first renewable and non-polluting energy source, namely human intelligence. COP21 outcome can change many perspectives: the goal to stay well below two degrees, indispensable to fight climate change, brings with it a new economy built for people, more innovative, stronger and kinder. It is neither an obvious nor a simple journey, but it offers amazing chances - due to the green economy - for our companies, territories and communities.

If we seize them, we can get over our old evils: not only public debt, but also the inequality in the distribution of wealth, lack of jobs, the burden of mafia and corruption, the often-stifling bureaucracy, the southern regions lagging behind. To do that, we need to look at Italy without illusions or bias, rather with curiosity and approval. We should start from our strengths without remaining hostages of the distorted judgments of the rating agencies. Symbola Foundation tries to do that, reading Italy with new eyes and with the rigor of numbers, by surveying the available strengths, the actors on the way.

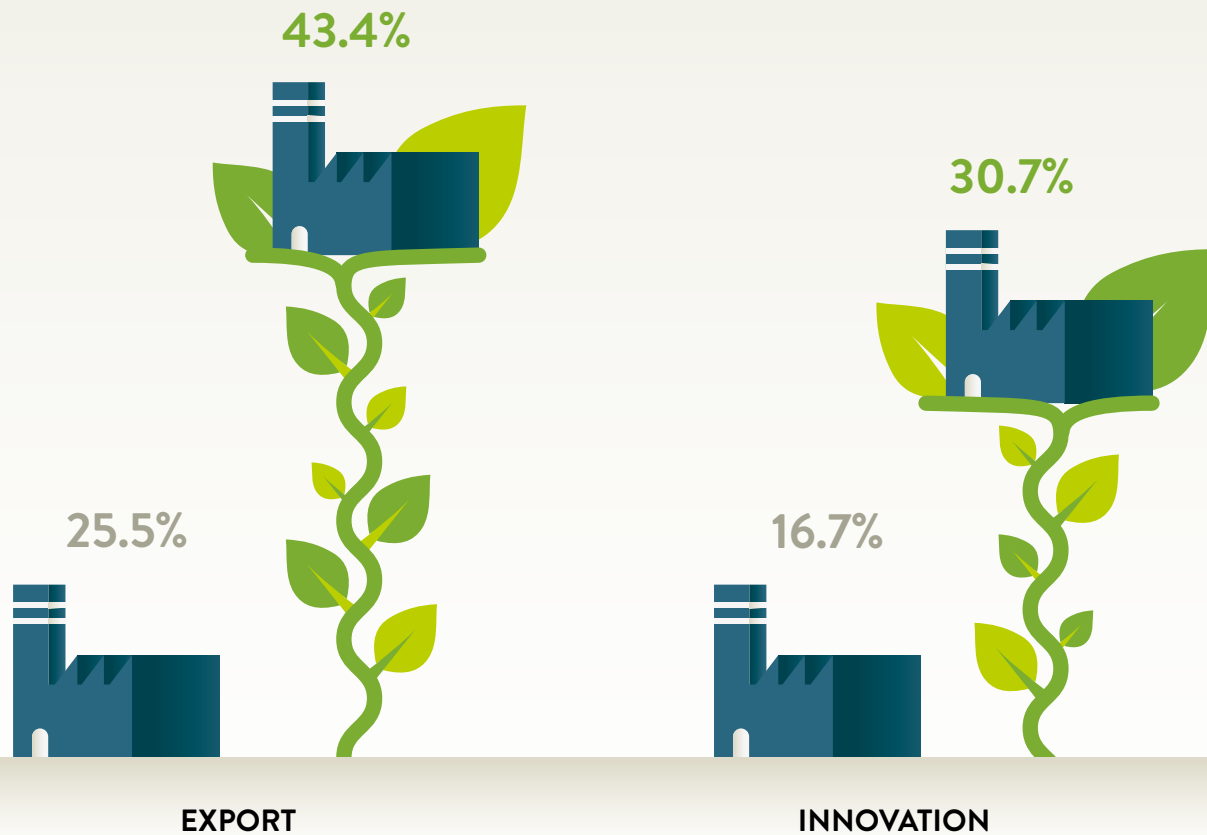
Italy in ten selfies is the result of this effort carried out along with many fellow travellers, beginning from Unioncamere and Edison Foundation, Coldiretti, Enel, Legambiente, Aaster, CNA, Ucina, UCIMU, FederlegnoArredo Federfarma, Unaprol and Crea, and many other stakeholders.

All with one belief: Italy must have the courage to accept the challenges of a changing world without losing its soul, so as to tackle its problems and deal with the crisis.

In his extraordinary and critical speech on the GDP, on 18 March 1968, at Kansas University, Bob Kennedy remembered that GDP was unable to measure fairness, courage, wisdom in a few numbers and it could tell “everything about America, except why we are proud to be Americans.”

These ten selfies give a picture of a country that has the principles of efficiency and circular economy in its own chromosomes and that combines knowledge and innovation, knowledge with quality, beauty and green economy, often without appreciations and the required policies.

It is an Italy that makes Italy. A country to be proud of and that can lead the upcoming change.



THE GREEN ECONOMY IS THE DRIVING FORCE BEHIND THE ITALIAN COMPANIES

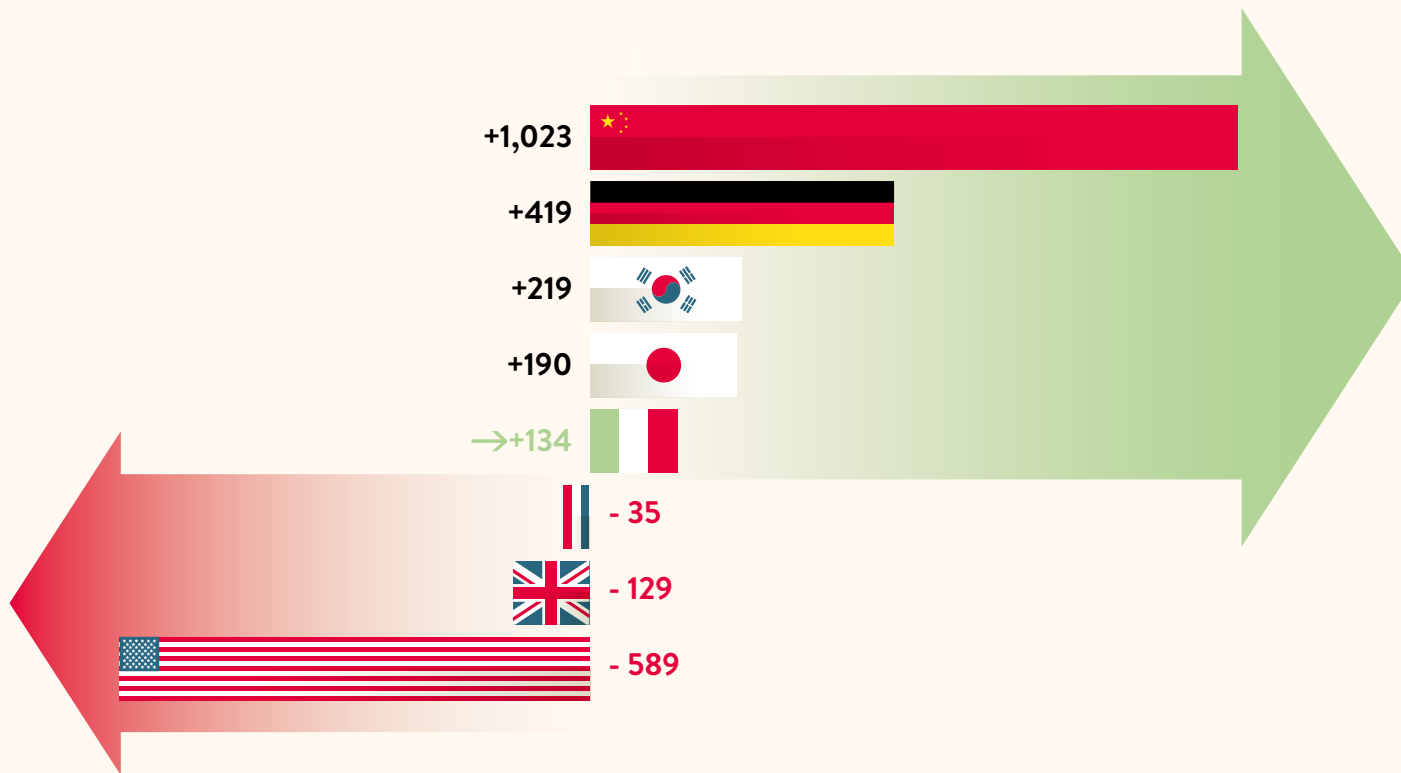
There are 372.000 Italian companies (24.5% of non-agricultural entrepreneurship, even 32% in manufactory) that ventured on the green economy during the crisis, which is worth 102,497 million euro of added value, 10.3% of the national economy.

This implied competitive advantages in terms of exports (43.4% of manufacturing companies that invested in the green economy is exporting constantly, compared to 25.5% of the other companies) and innovation (30.7% companies developed new products or services, compared to 16.7%).

The green economy is also good for employment. In 2015, including green jobs and other jobs that require green skills, 59% of recruitments is linked to the green economy: an army of 294.000 new green workers.

01.

Competitive advantages of manufacturing companies that made green investments between 2008 and 2014.



ITALY IS ONE OF THE **FIVE COUNTRIES IN THE WORLD** TO HAVE A **MANUFACTURING TRADE SURPLUS EXCEEDING 100 BILLION DOLLARS**

In 2014, with a manufacturing trade surplus with foreign countries amounting to 134 billion dollars (113 in 2012), the leading role of our country in the global industry is reconfirmed. You cannot say the same for countries like France (-35 billion), the UK (-129 billion), the USA (-589 billion).

02.

Countries for manufacturing trade surplus, 2014, bln \$



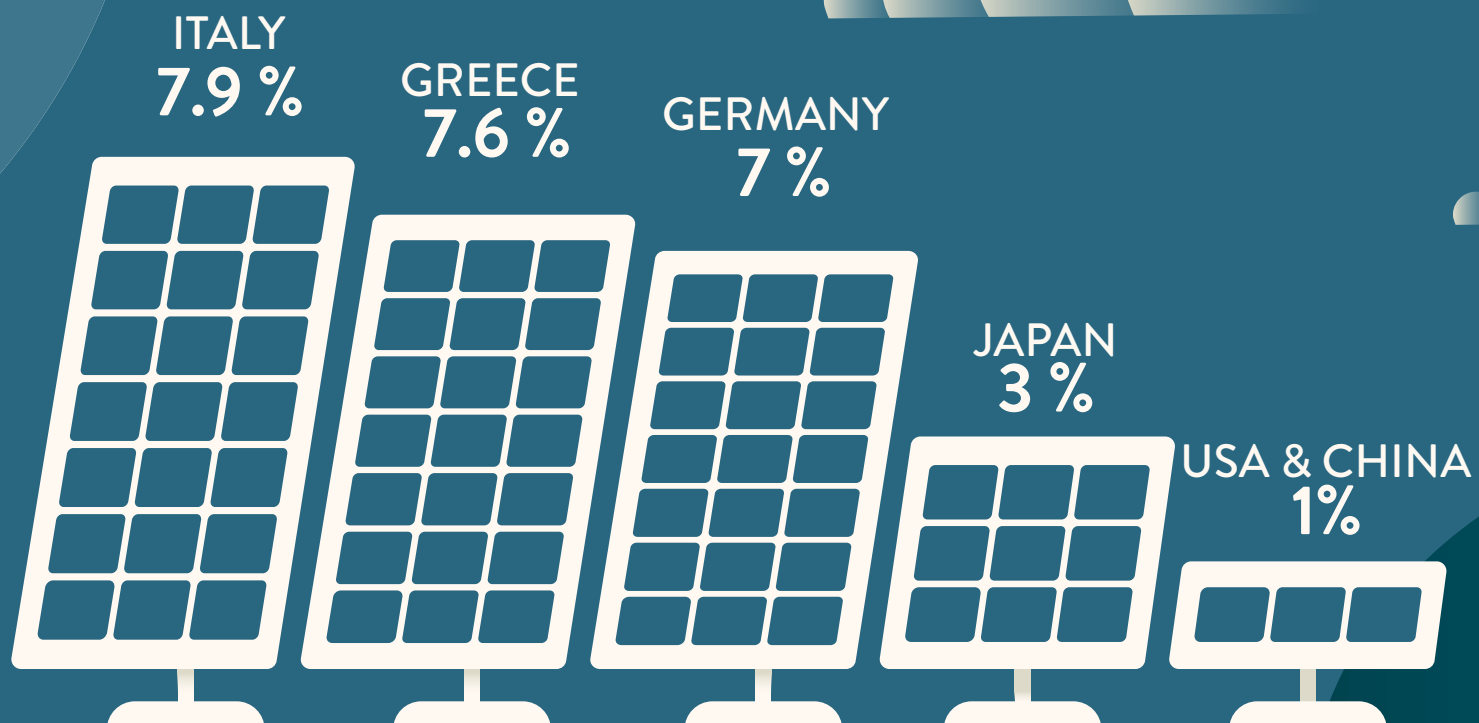
PODIUM OF 928 PRODUCTS

ITALIAN COMPANIES ARE AMONG THE MOST COMPETITIVE COMPANIES IN THE WORLD

On a total of 5.117 products - the highest level of statistical breakdown of world trade - in 2013, Italy was placed first second or third in the world for trade assets with foreign countries in 928: about one in five.

03.

Products in which Italy holds the first positions in the world for trade surplus, 2013 (Fortis-Corradini Index, Fondazione Edison®)



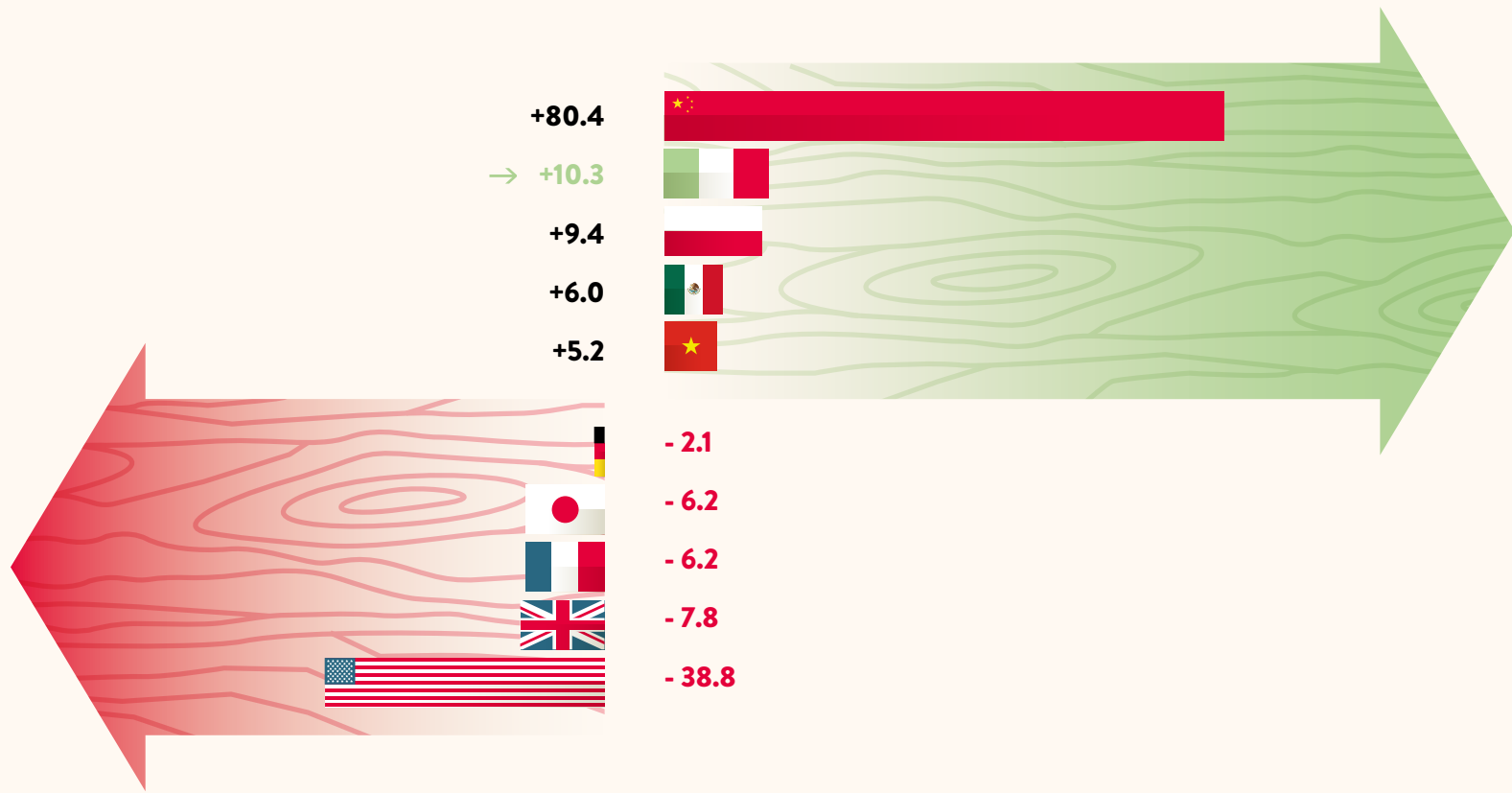
OUR COUNTRY IS IN THE **FOREFRONT** FOR **RENEWABLE ENERGY SOURCES** IN THE WORLD

Italy is the first country in the world for the contribution of photovoltaics in the national electricity mix (7.9%, figures for 2013), better than Greece (7.6%) and Germany (7%), but also better than Japan (under 3%), US and China (less than 1%).

In 2012, Italy was the first (with 39%) among the big EU countries, coming joint with Spain and ahead of Germany (24%), France (17%), Britain (15%), also for the share of renewable energy in electricity production. In 2014, the share of renewables exceeded 43%.

04.

Share of photovoltaic production on the total production of electricity, 2013



THE ITALIAN INDUSTRY OF WOOD FURNITURE IS THE SECOND IN THE WORLD FOR THE TRADE SURPLUS

With a surplus of 10 billion dollars, the Italian industry of Wood Furniture is the second one in the international ranking for balance trade, preceded only by China (80 bn), but ahead of Polish competitors (9 billion), Mexico (6 bn), Vietnam (5 billion) and Germany (-2.1 bn).

It is also among the first in Europe, with € 56.4 million, in R&D investments, which increasingly nurture green innovation and efficiency in the use of materials and energy: ahead of British companies (44.6), Germany (39.9) and France (17.5).

05.

Trade balance of the wood furniture industry (on 37 products internationally surveyed), 2014, bln \$



OUR COUNTRY IS THE **WORLD LEADER** IN THE **AGRI-FOOD INDUSTRY** FOR **89 PRODUCTS** AND BOASTS THE **MOST SUSTAINABLE AGRICULTURE**

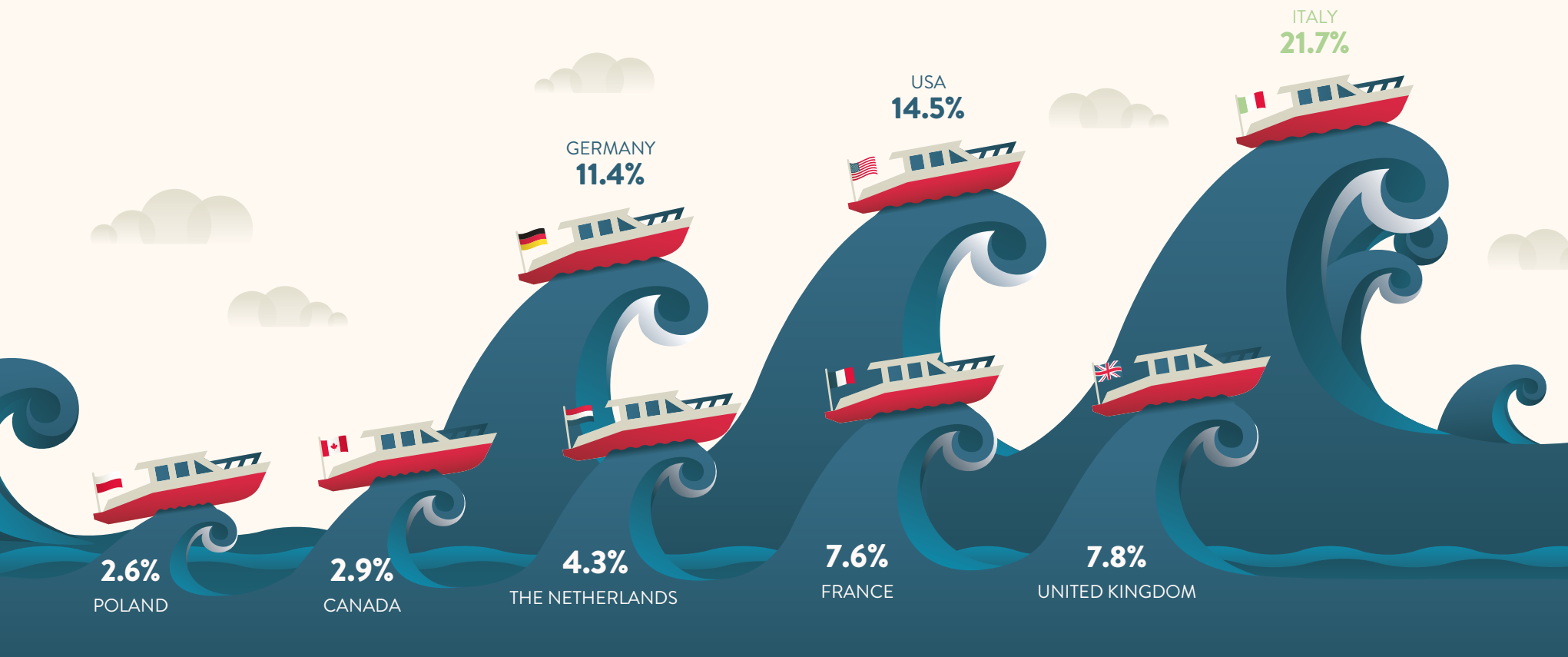
Among the products of the Italian agri-food industry, no less than 27 products are unrivaled on the international markets. From pasta to tomatoes and other vegetables, vinegar, oil, beans, cherries: all absolute champions in the world market shares. We are second and third for 62 other products: in short, we are on the podium of the international trade for 89 products. This year, the agri-food exports increased by 8 percentage points in the first nine months, reaching 27 billion euro.

This is also thanks to the success of EXPO but, above all, because our country is the strongest country in the world for 'distinguishing' products: first in the food sector, with 278 among PDO, PGI and TSG products, and in the wine industry with 523 RDO, DOCG (controlled and guaranteed denomination of origin), RGI wines. Furthermore, Italy is first in Europe in the organic farming sector for number of companies and among the first countries in the world for farmland. With 814 tons per each million euro produced by the industry, Italian agriculture emits 35% greenhouse gases less than the EU average, and it does better than Spain (12% less), France (35%), Germany (39%) and the UK (58% less greenhouse gas).

06.

Food products in which Italy holds the top positions in the world in terms of market shares, 2014

FONDAZIONE SYMBOLA, *ITALY IN 10 SELFIES. 2016*
 SOURCE | *Agricultural-food focus*, Fondazione Symbola,
 Unioncamere, Fondazione Edison, Coldiretti

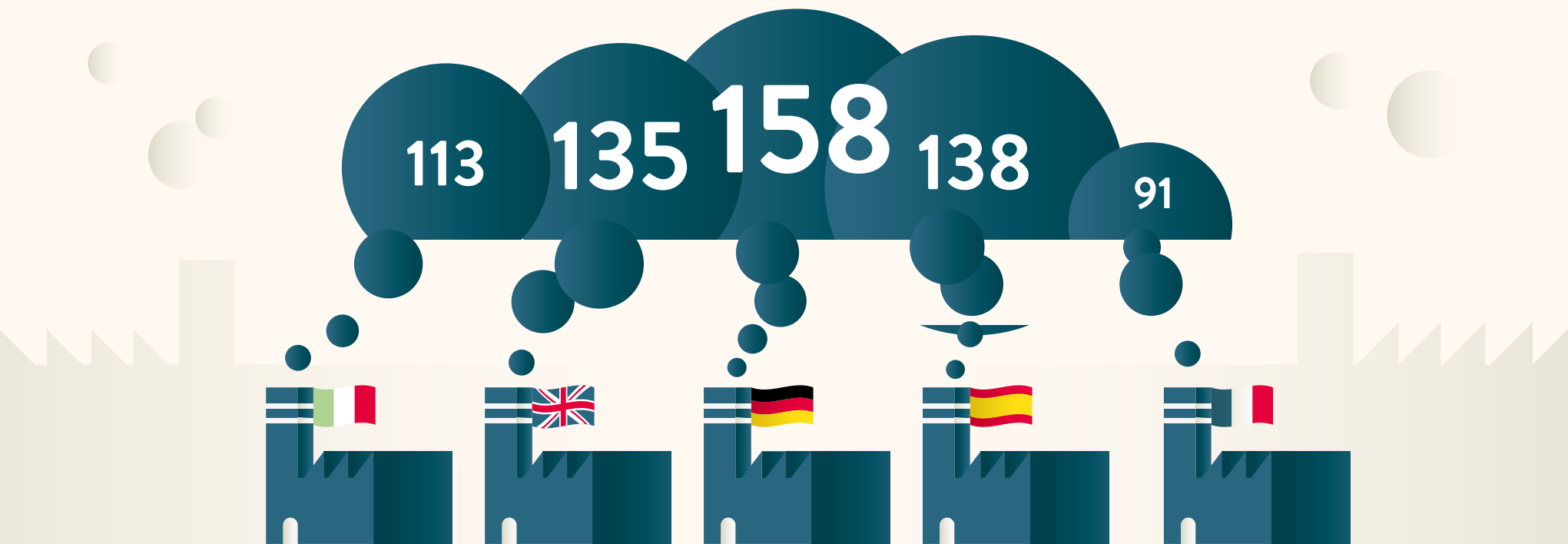


ITALY IS THE FIRST ONE IN THE SAILING INDUSTRY WITH A FIFTH OF THE GLOBAL EXPORT

Over a fifth of the international demand for yachting products is absorbed by the Made in Italy. This result makes Italian sailing industry the first in the world for market shares, with its main competitors that follow it from a distance: the US with 14.5% of the market and Germany with 11.4%. An absolute leadership, also linked to environmental performance (such as fuel efficiency and emission reduction), which becomes even clearer in the production of boats and pleasure yachts (with inboard engine) where over 2.4 billion-dollar exports give Italy a market share of 32,2%, higher than the share of the two main competitors: USA and Germany (26.2% in total).

07.

Major exporting countries of the shipbuilding industry, 2014 (percentages of total global exports in the sector)

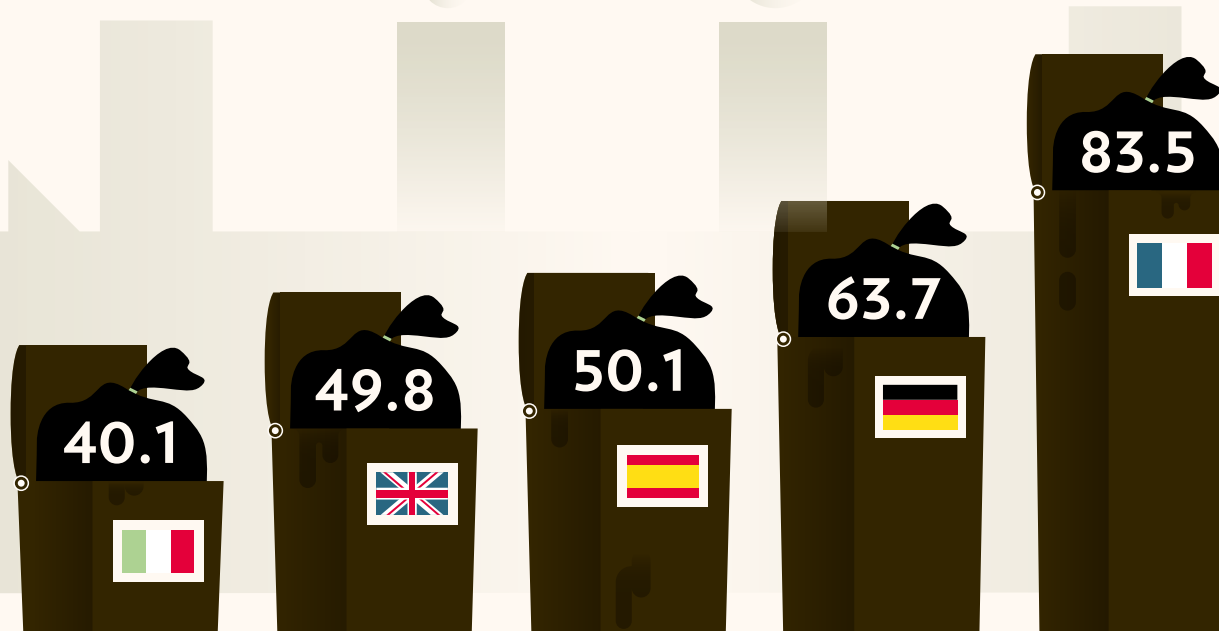


THE ITALIAN PRODUCTION SYSTEM IS AT THE CUTTING EDGE IN EUROPE FOR CONSUMPTION EFFICIENCY AND EMISSION REDUCTION

The Italian production model is among the most innovative and efficient systems in the environmental field. Starting from energy consumption and polluting emissions: with 15 tons of oil equivalent per million euro produced, among the big European players, only the United Kingdom (12 t) - where finance and services, however, play a very important role - does better than Italy, which is instead a manufacturing country. It is placed ahead of France (16), Spain and Germany (18). And with 113 tons of CO₂ per million euro, it is placed second behind France (91 t), doing better than the United Kingdom (135), Spain (138) and Germany (158).

08.

Tons of CO₂ equivalent per million euro produced, 2012



TONS OF WASTE PER MILLION € PRODUCED

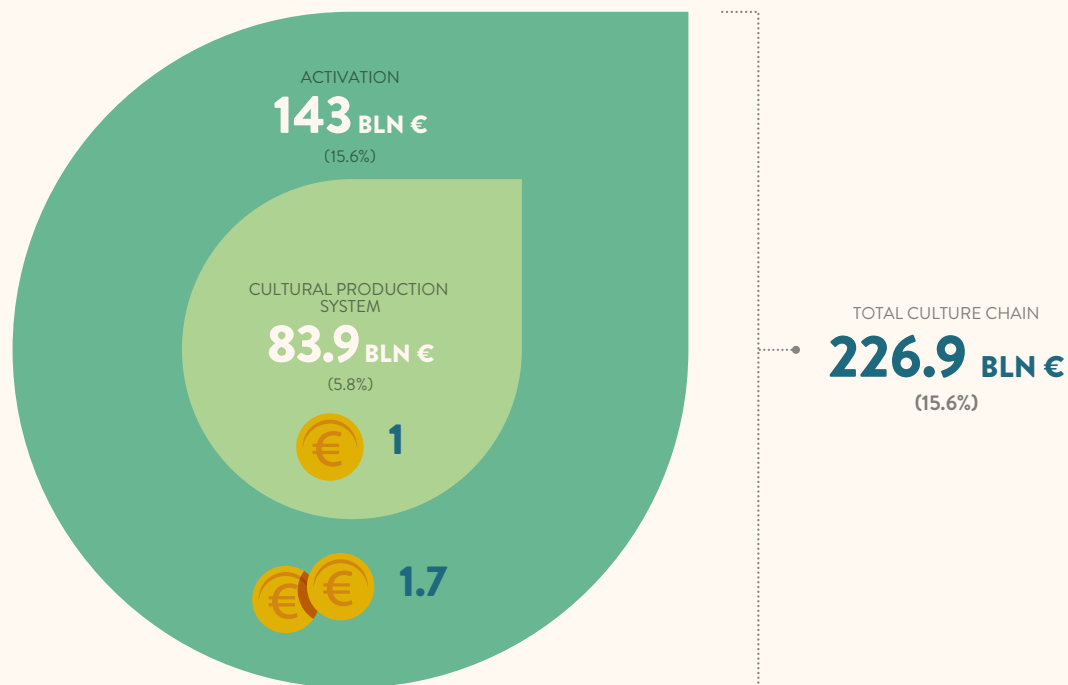
OUR COMPANIES ARE CHAMPIONS FOR WASTE REDUCTION AND CIRCULAR ECONOMY

Our country is the European champion for the reduction of waste in the production system, a leader in the recycling industry and standard-bearer of the circular economy. With 40.1 waste tons per million euro produced, Italy is far more efficient than the United Kingdom (49.8), Spain (50.1), Germany (63.7), France (83.5). In the face of a start in the industrial recovery of over 163 million tons of waste at the European level, Italy was able to recover 25 million, the highest absolute value among all countries in the world (23 in Germany). The saving for Italy is over 15 million tons equivalent of oil and about 55 million tons of CO₂ emissions. We are second only to Germany in terms of percentage of recycling and recovery of packaging waste, doing better than Spain, France and the United Kingdom.

09.

Tons of waste per million euro produced, 2013

EACH EURO PRODUCED BY CULTURE ACTIVATES ANOTHER **1,7** EURO ON AVERAGE IN THE REST OF ECONOMY. THE MULTIPLIER VARIES DEPENDING ON THE SECTOR.



CULTURE, BEAUTY AND CREATIVITY TO COMPETE

Italy owes 84 billion euro, namely 5.8% of the produced wealth, to the culture sector - 443,000 companies, 7.3% of the national total amount, employing 5.9% of the total workforce in Italy amounting to 1.4 million people.

This added value of 84 billion euro set in motion another 143 billion euro in the rest of the economy: 1.7 euro for each euro produced by culture. Thus, we reach 227 billion euro of added value made by the whole cultural sector, with tourism as the main beneficiary of this driving force.

Companies that have invested in creativity are more innovative: 63.5% of companies have introduced product innovations compared to 22.2% of companies that have not invested. It is no coincidence that among the top companies, 48.1% are operating in international markets, compared to 21.6% of the other companies.

10.

Added value of the cultural and creative sector (companies, institutions, non-profit).
Multiplier effect on the rest of the economy, 2014

FONDAZIONE SYMBOLA, ITALY IN 10 SELFIES. 2016

SOURCE | *Io sono cultura - l'Italia della qualità e della bellezza sfida la crisi*, Fondazione Symbola and Unioncamere



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