



15th German-Italian Economic Forum

14th September 2021



DIGITAL

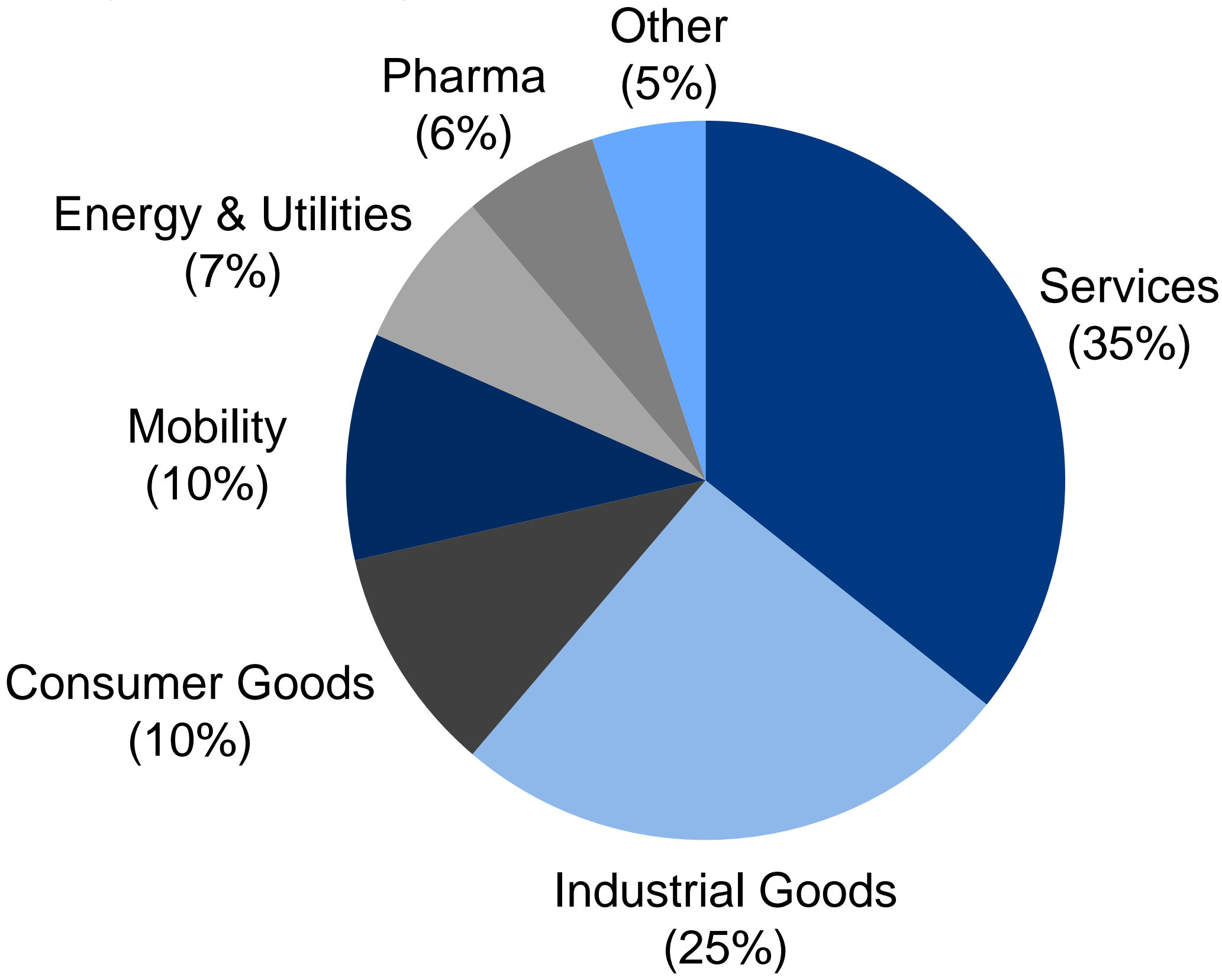
GREEN

How much value is generated for companies
by the set of Green Deal and
PNRR actions?

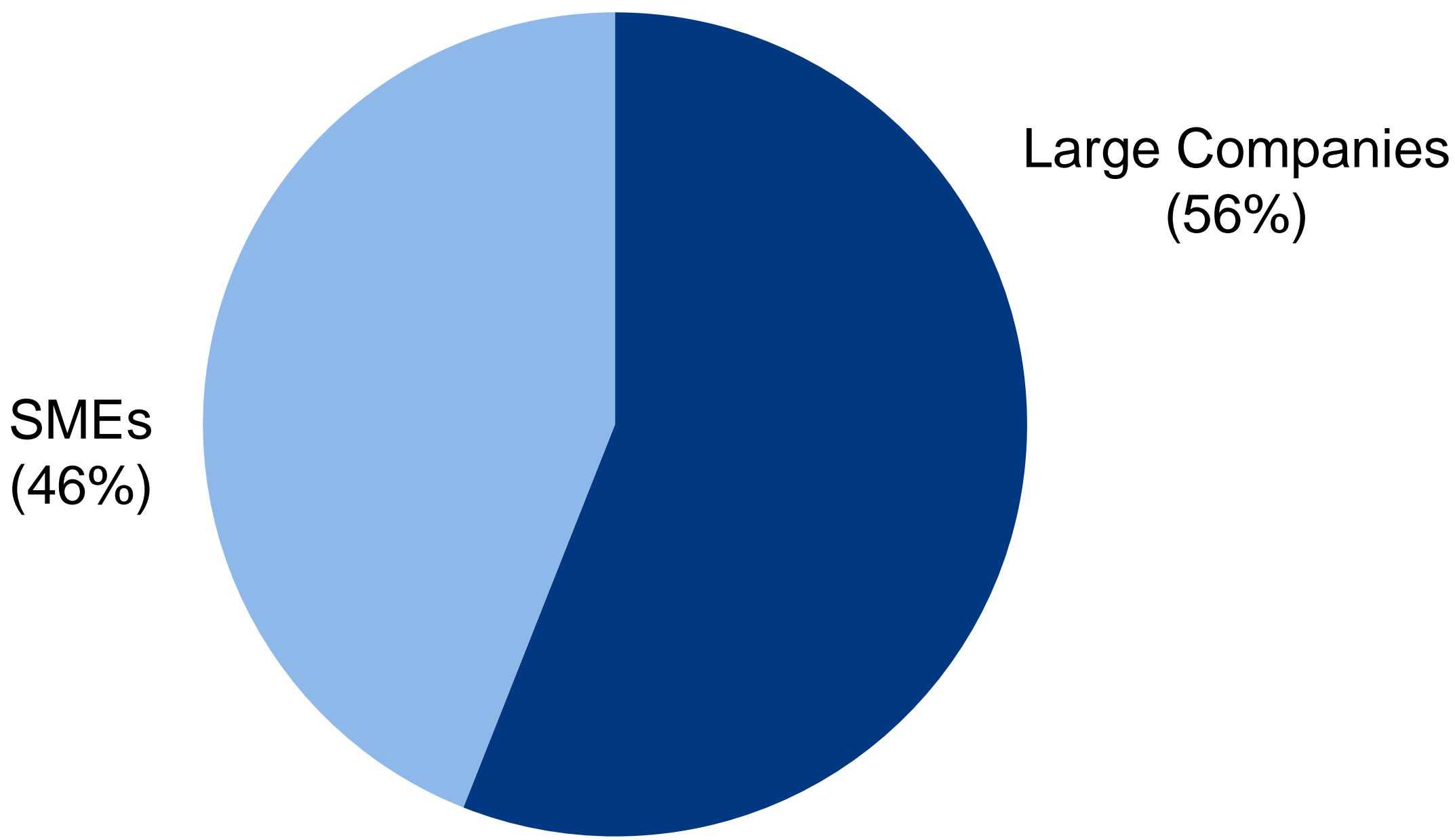
A Porsche Consulting Survey for AHK Italien

Sample description: 115 respondents

By Industry



By Size

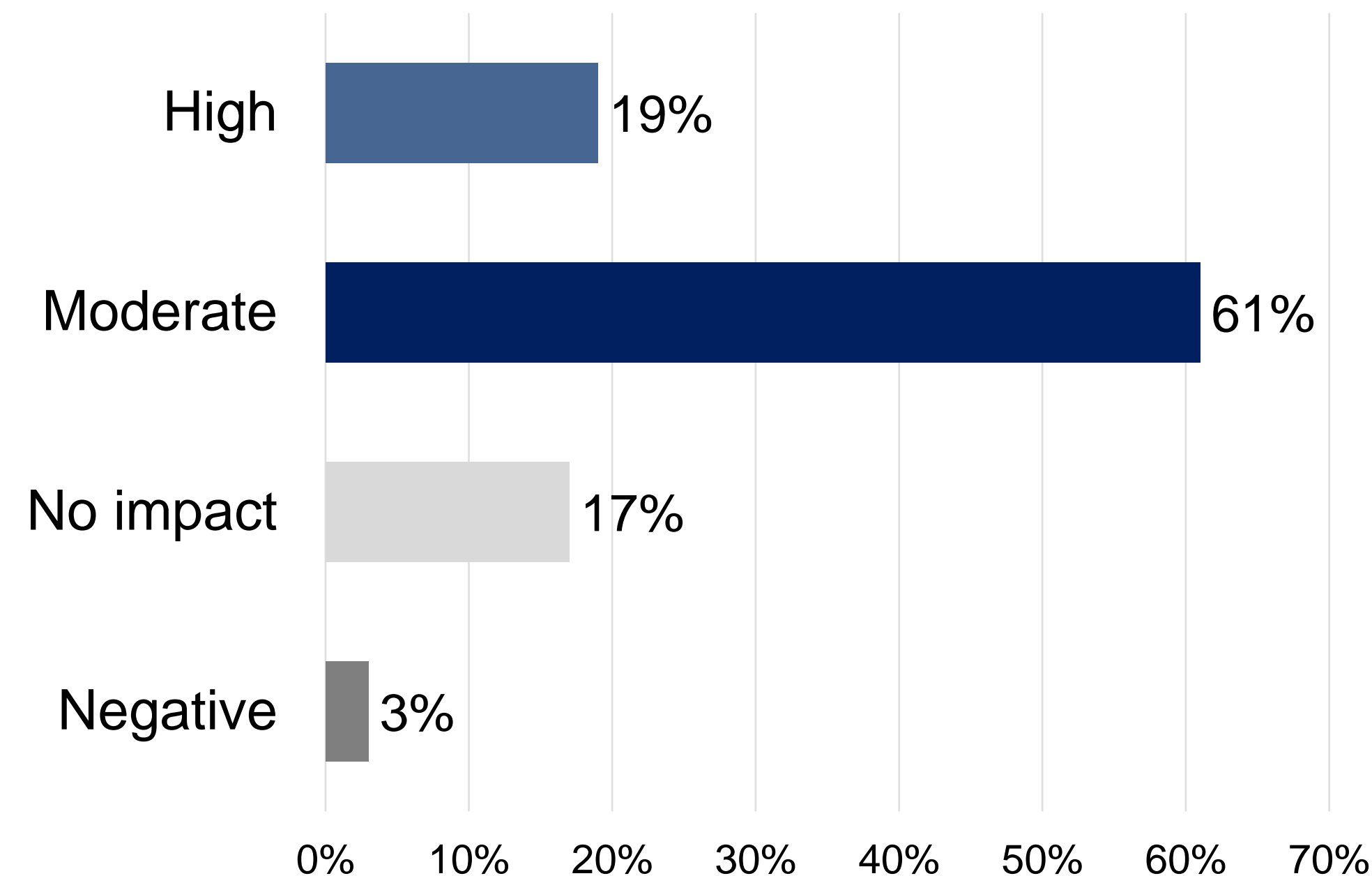


Note: SMEs = Revenue <50M€ | Large Companies = Revenue > 50M€

How much value is generated by innovating products with enviromental friendly technologies?

80% counts on revenue growth, 1 out of 5 higher than 5%

Impact on REVENUE | % of respondents

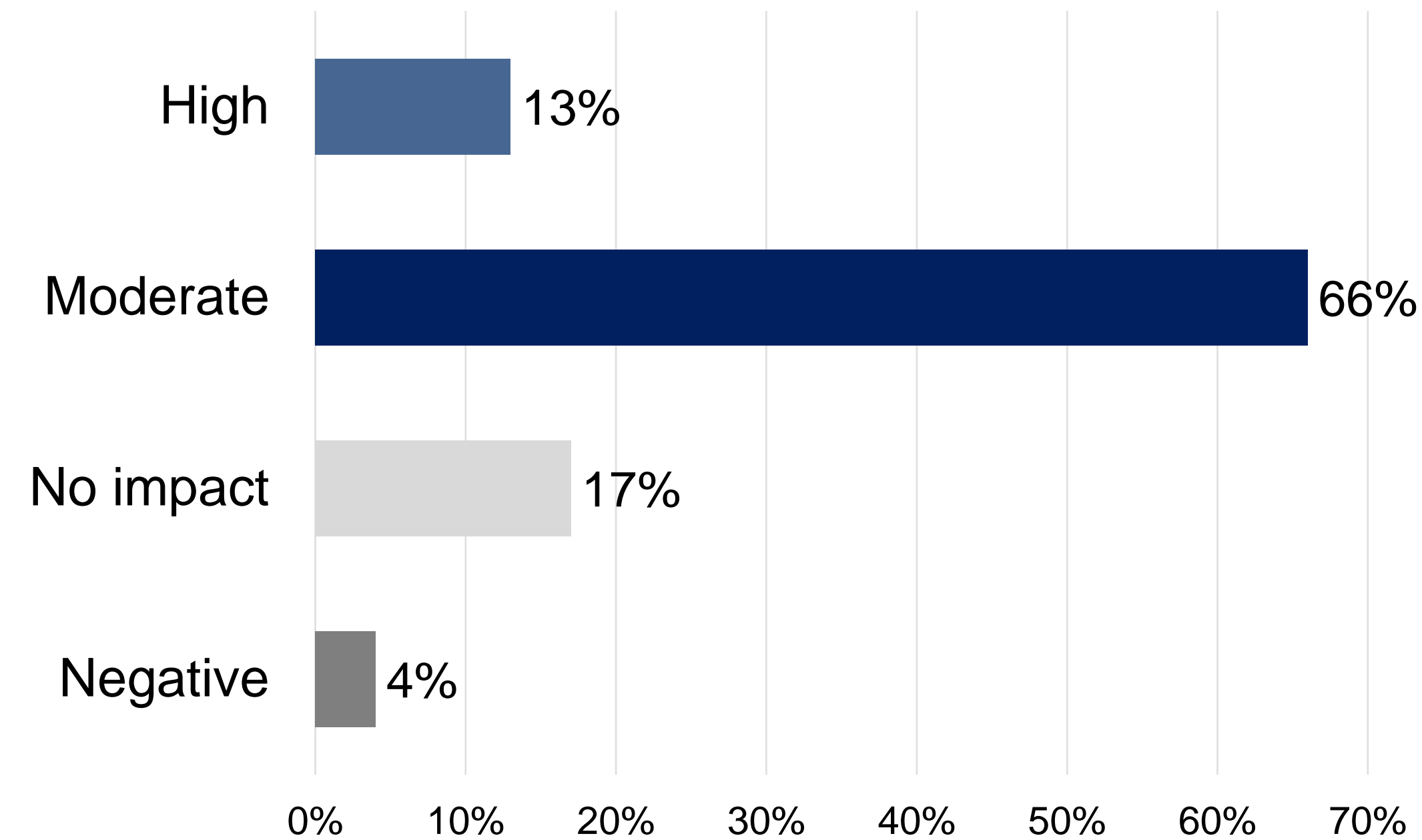


Note: Negative = from -10% to 0% (excl.) | No impact = 0% | Moderate = from 0% (excl.) to 5% | High > 5% (excl.)

How much value is generated by the innovation and digital industry?

79% expects to leverage digitization for a market share gain

Impact on MARKET SHARE | % of respondents

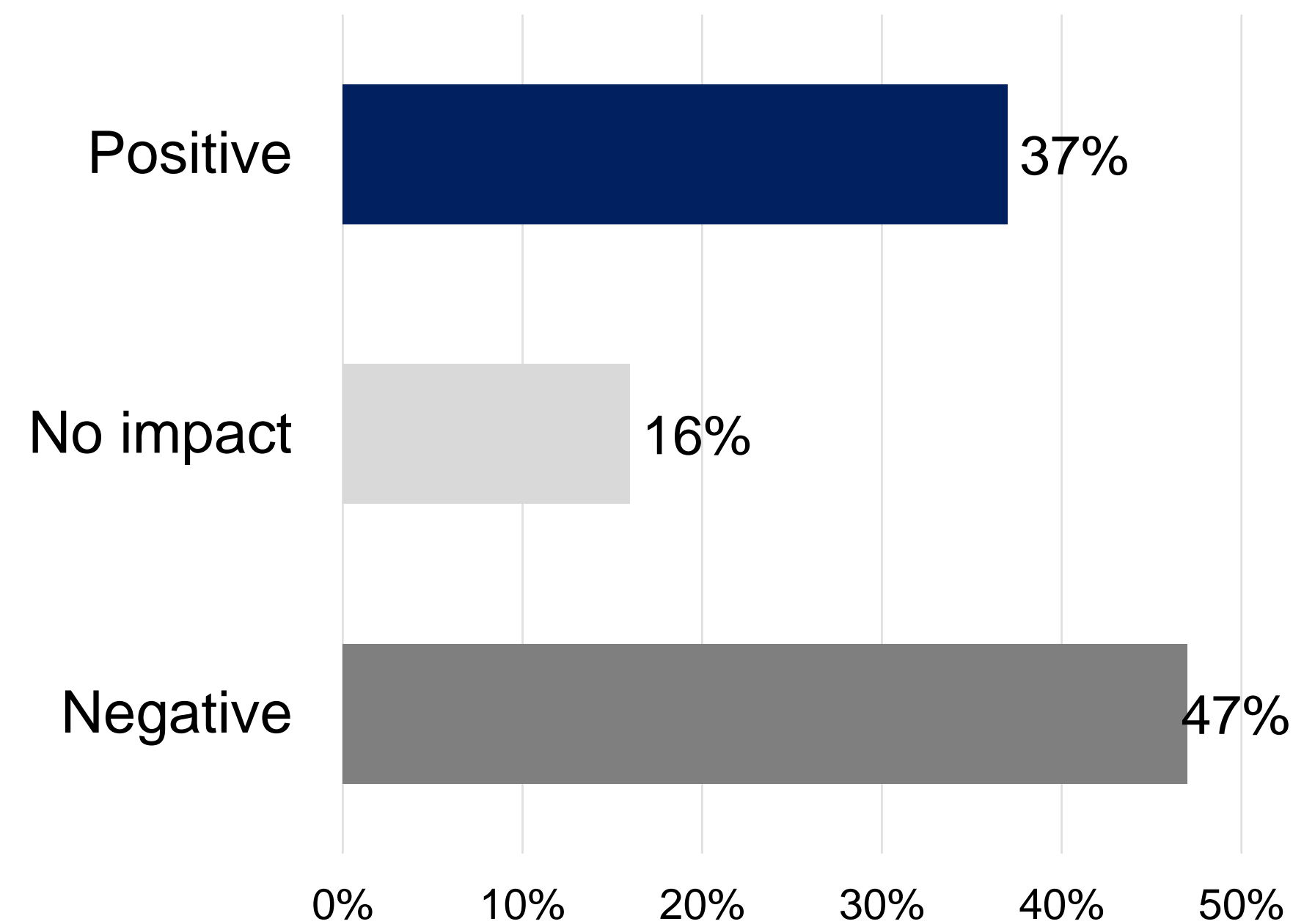


Note: Negative = from -10% to 0% (excl.) | No impact = 0% | Moderate = from 0% (excl.) to 5% | High > 5% (excl.)

How much value is generated by ensuring greater energy efficiency of buildings?

37% thinks that there will be a cost saving up to 10%

Impact on OPERATING COSTS | % of respondents



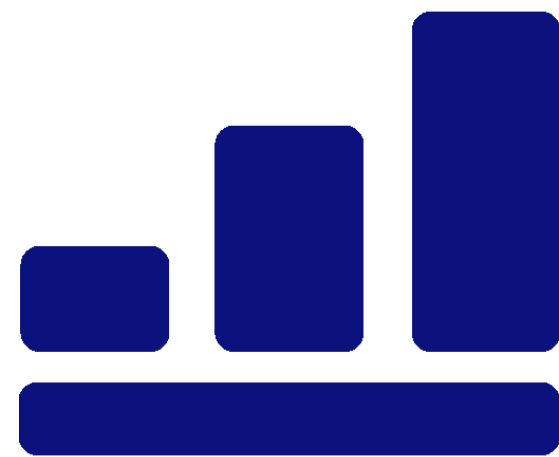
Note: Positive = from -10% to 0% (excl.) | No impact = 0% | Moderate = from +0% (excl.) to 10%

How much value is generated by decarbonizing production and energy processes

50% believes in increase of costs that will be offset by higher revenues

*Impact on
Avg. Growth*

REVENUE



+ 1.6 %

OPERATIONAL COSTS



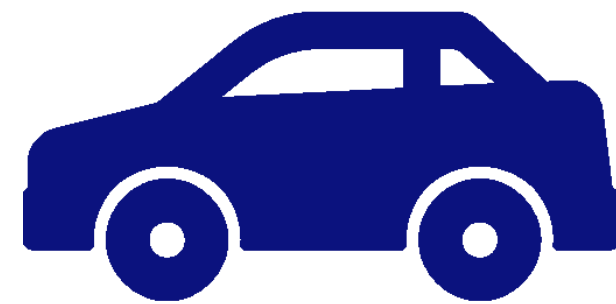
+ 0.9 %

How much value is generated by introducing cleaner, Cheaper and healthier forms of mobility

Several companies don't see any impact deriving from mobility

Data Concentration Index
NO impact on

MOBILITY (specific topic)



+ 1.6 %

AVERAGE (all topics)



+ 0.9 %

The potential of mobility ecosystem is underestimated

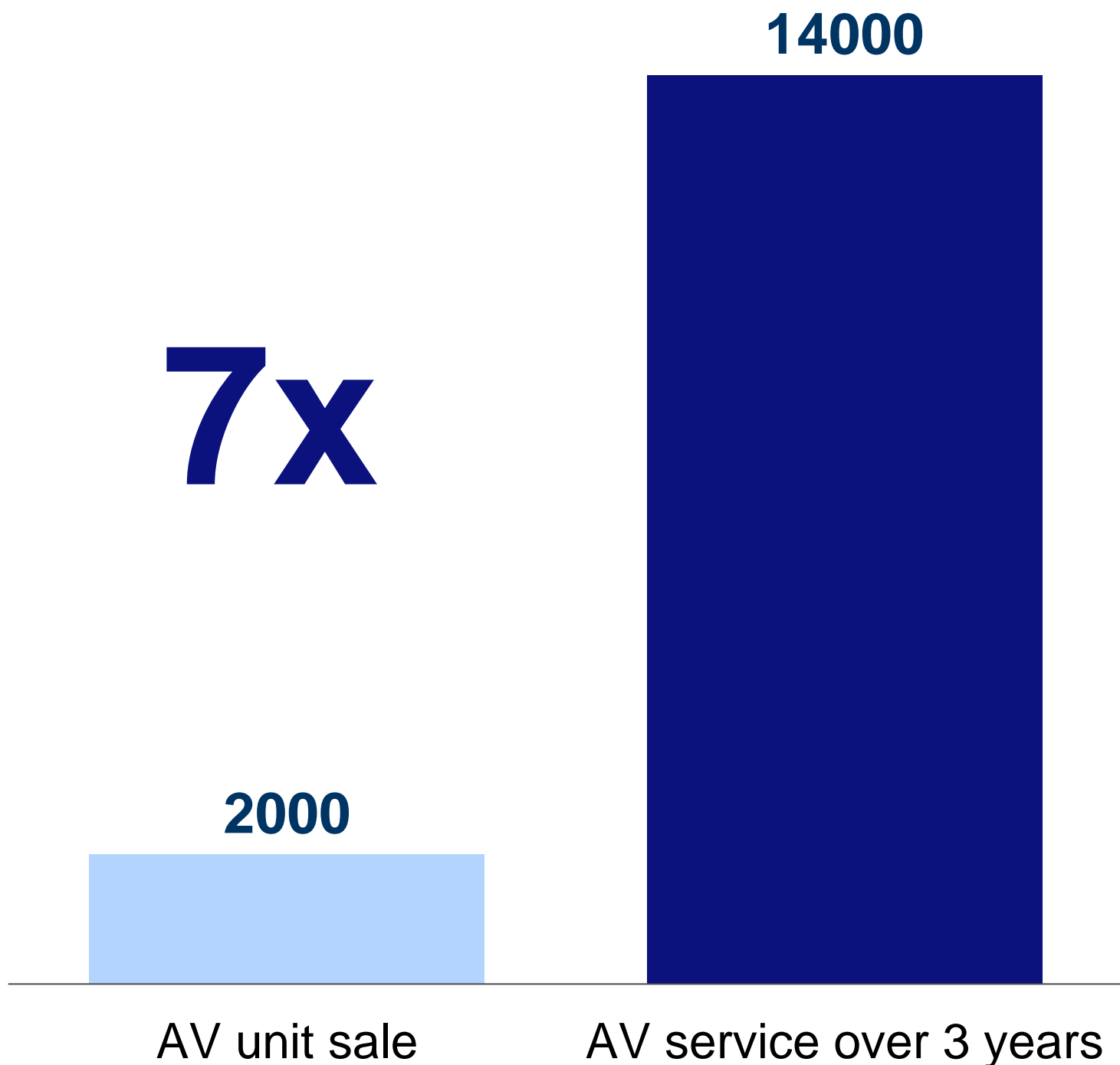
Goldman Sachs predicts

\$ 285

billion market

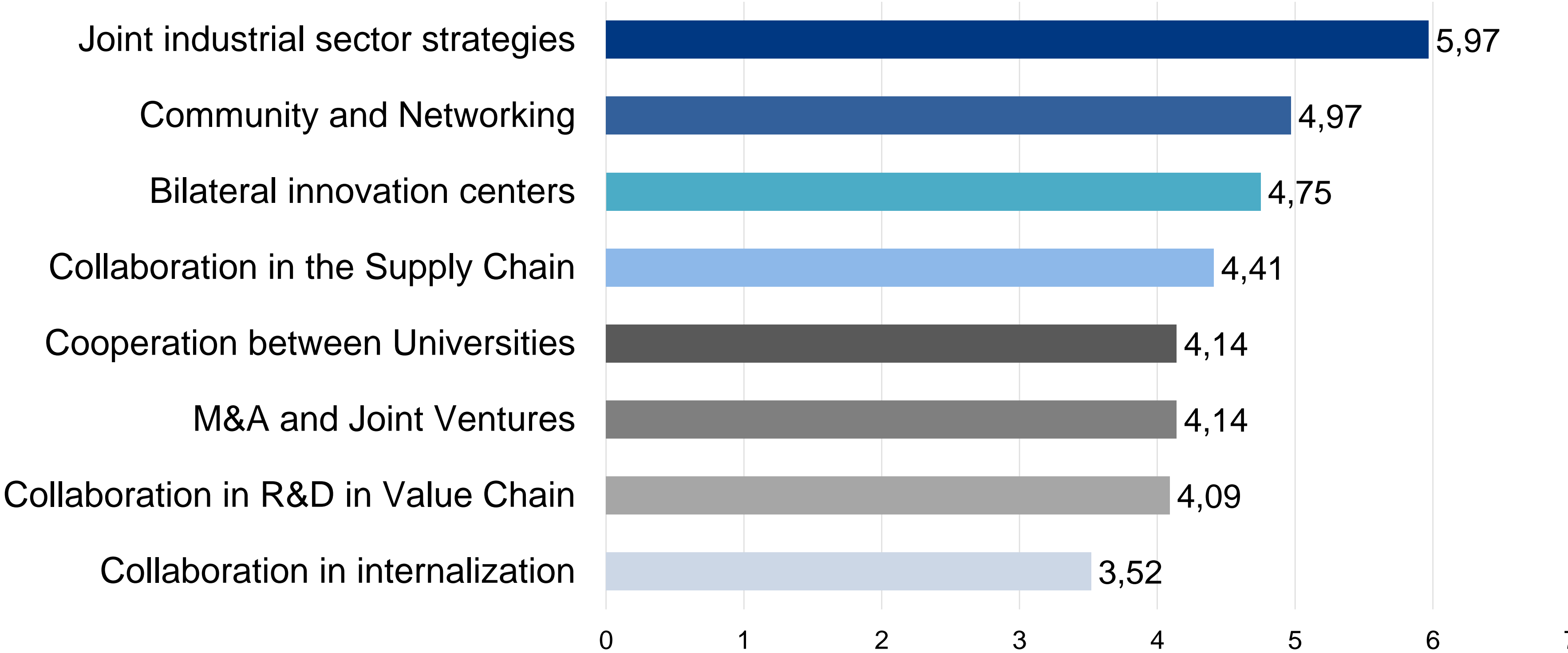
by 2030 around mobility ecosystem through additional content and services

Profit Potential in USD per vehicle



What enablers of the Italian-German ecosystem have a greater impact?

A joint industrial strategy is a key factor for competitiveness



Note: Ranked from most to least significant according to respondents

Recommendations

Thinking in **ecosystems** (rather than as standalone companies) enables **new business models** at large scale, **customer retention** and higher **revenue growth**.

Sustainability is a key factor in this perspective, with few clear sustainable goals integrated at the heart of a company's strategy.

Bearing in mind that, for instance, nearly 50% of **consumers are willing to pay a premium for sustainable products** and that, at employee level, nearly **a third of young workers incorporates sustainability within career choices**.

Recommendations

- **Sustainability ensures success**
a green focus should be integrated in the business model
- **Transition has a cost, but brings benefits**
support and guidelines are needed, especially for SMEs
- **Innovation is the key for transition**
more cooperation in R&D and additional Italian-German synergies are needed

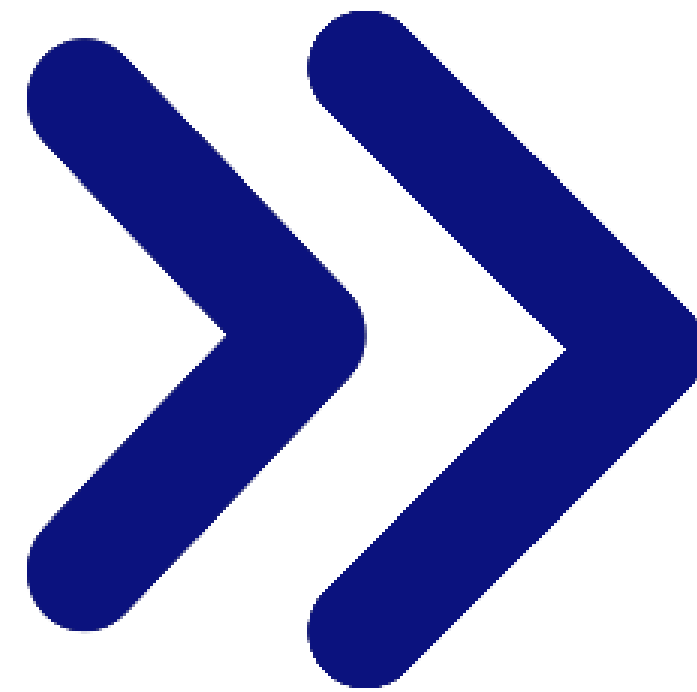


DIGITAL

Thinking beyond: digitization & automation

Common understanding

New technologies
will improve
company
performances



Our experience

Thinking in
ecosystems enables
new business models
at huge scale

Think in Ecosystems

It applies also to the industrial world

89%



... **customer retention** is achieved by ecosystems-driven businesses

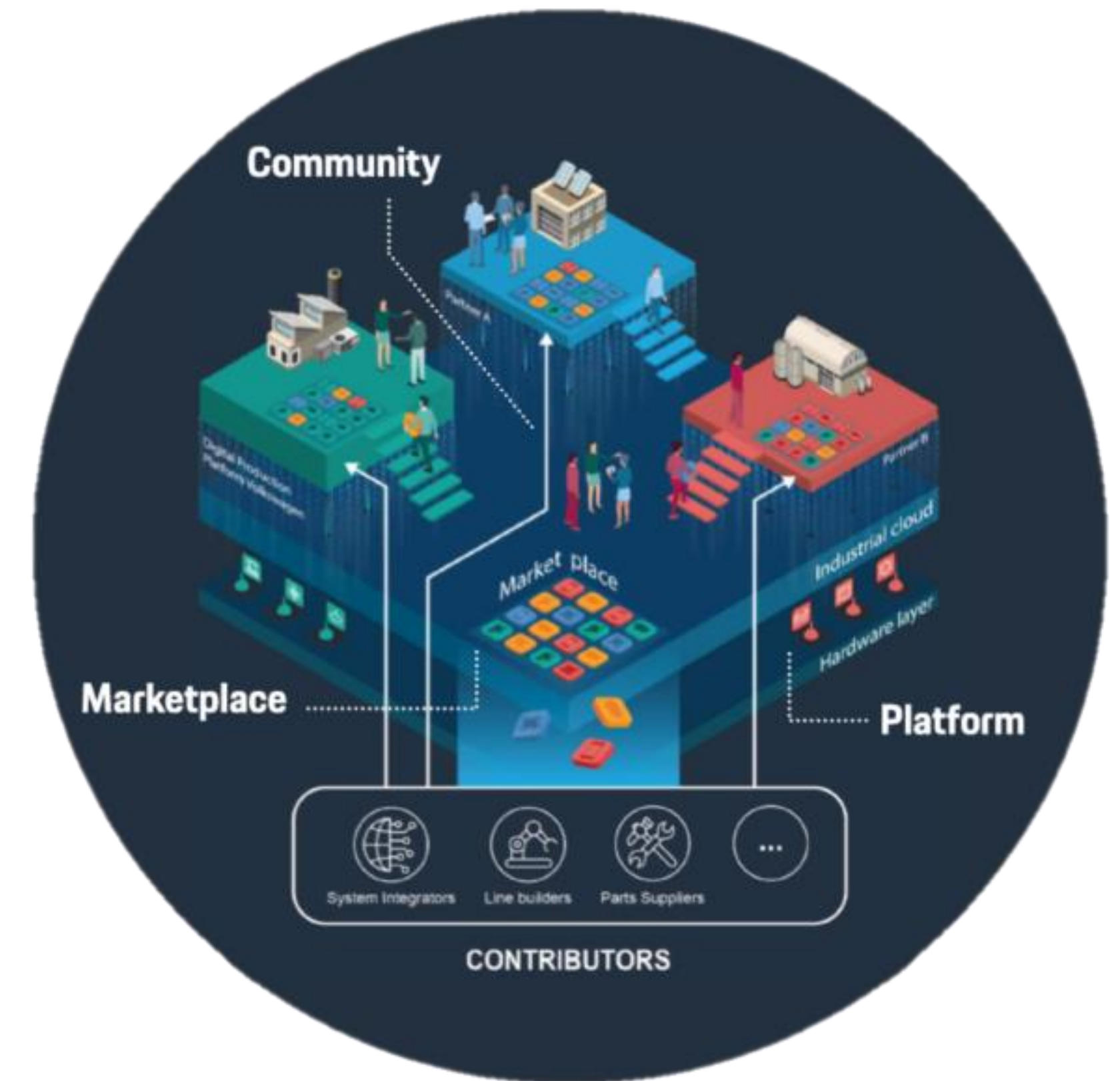
32%



... **higher revenue growth** and 27% higher profit margins of platform businesses



Ecosystems provide a superior customer experience & economically outperform standalone companies

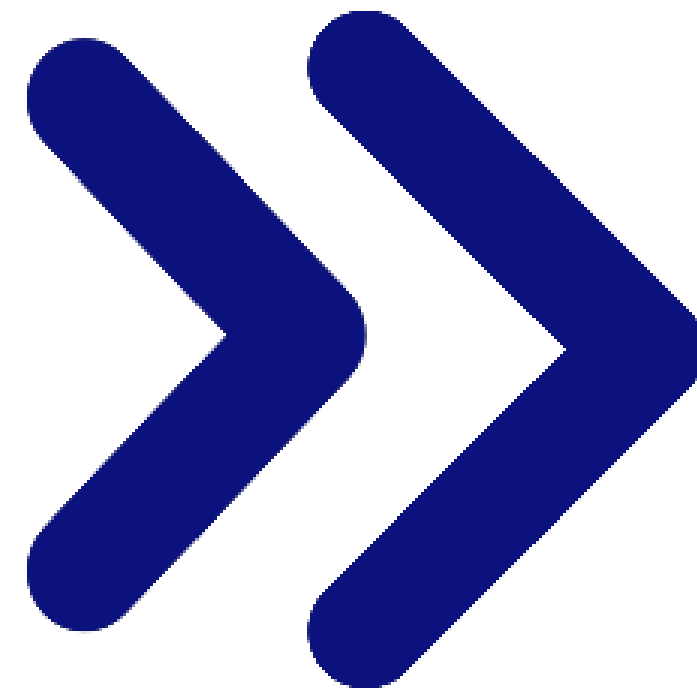


GREEN

Put humanity at the center

Common understanding

We have to consider the environmental impacts of our processes



Our experience

Put few sustainable goals at the center of your future strategy

Competitive Advantage

50%

of consumers would pay a premium for sustainable products

5%

outperformance of stocks with ESG scores in the top quintile

10%

and more of energy costs can be cut by sustainable practices

33%

of young workers incorporate sustainability within career choices

Italian and Germany Business Community influences several sustainability goals

Emissions

Contributes to 90% of CO2 emissions, with a decreasing trend (-16% in 10 years)

Occupation

Leveraging more than 67,8 million employees (35% of EU total), crucial to fight the post-COVID loss of jobs

Inclusion

The Gender Equality Index at work is 63,3% for Italy and 72,1% for Germany in 2020 showing a positive trend

Innovation

Both Italy and Germany SMEs are in the top European ranking of the European Innovation Scoreboard

Healthcare

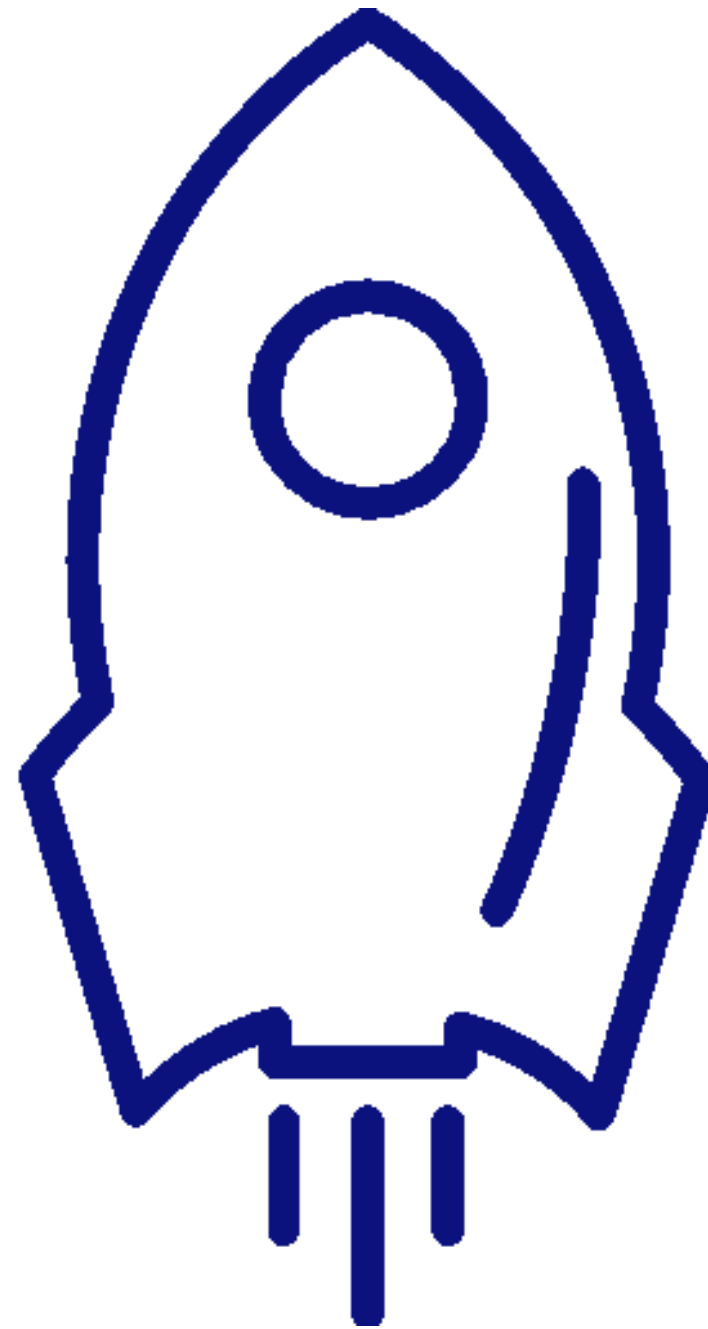
German and Italian pharma players invest 26% of the total European pharma research

Education

34% of Italian adults involved in education through companies, 425.800 German companies offer dual professional education

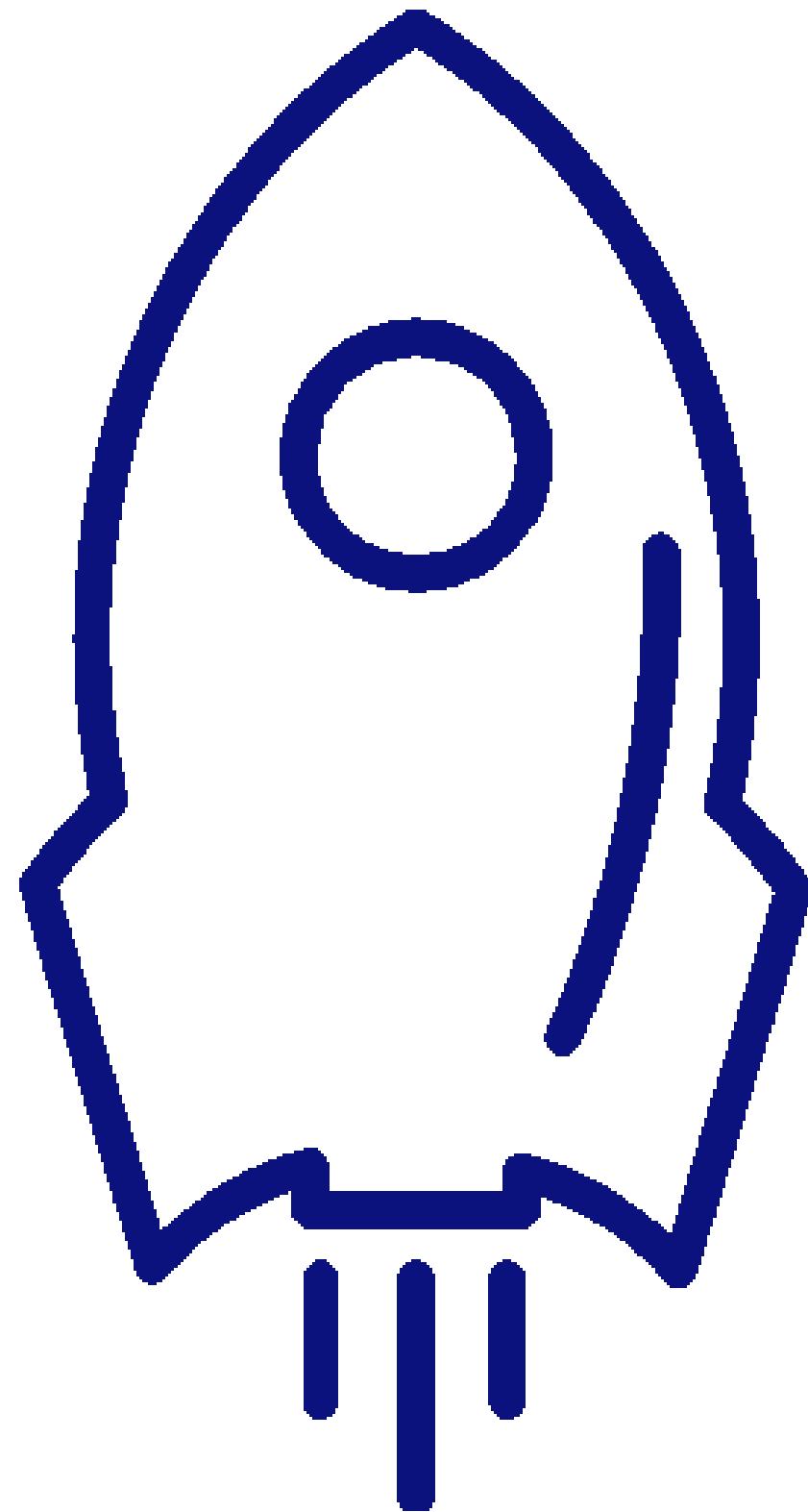
Create a bold vision

that leverages breakthrough technologies for profitable solutions that can radically improve the world



- **Take a Huge Challenge**
to make the world a radically better place
- **Leverage Technology**
as key enabler of a visionary solution
- **Generate Financial Impact**
as key enabler of a visionary solution

Let's rocket our recovery





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