

## E-MOBILITY REVOLUTION. IMPACT ON INDUSTRIES AND THE COUNTRY: AN AGENDA FOR ITALY

- *Tomorrow, Sunday, September 3<sup>rd</sup>, 2017, the analysis and proposals of the e-Mobility Revolution study will be presented at the Forum The European House – Ambrosetti. The study was carried out in collaboration with Enel and its results were disclosed today at a press conference*
- *Electric mobility as an industrial opportunity for the country: the extended e-mobility industry includes around 160,000 companies and employs 823,000 people in Italy, with up to 300 billion euros in revenues expected by 2030.*

**Cernobbio, September 2<sup>nd</sup>, 2017** - Electric mobility is a growth opportunity for Italy. To better understand the dynamics of this revolution and the opportunities it can create in industry and employment, **The European House - Ambrosetti**, in collaboration with Enel, conducted a study designed to be a tool for the private sector and public administration.

The conclusions of the study were revealed today at the Forum Ambrosetti in a press conference attended by **Maria Chiara Carozza**, member of the III Commission “Foreign and Community Affairs Committee” of the Chamber of Deputies, **Valerio De Molli**, Managing Partner of The European House - Ambrosetti, **Francesco Starace**, Enel's Chief Executive Officer, **Francesco Venturini**, Director of Global e-Solutions at Enel, and the Chairman of Enel, **Patrizia Grieco**.

The study - which will be presented tomorrow, the closing day of the Forum Ambrosetti – found that between 2005 and 2016 the number of electric and plug-in hybrid cars grew at an average annual rate of **94%** in terms of the overall fleet (exceeding 2 million units in 2016) and **72%** in terms of new registrations. **China** dominates world electric mobility in absolute terms, with almost 649,000 electric vehicles circulating in 2016, while Norway is the best performer in terms of electric vehicle penetration, with a market share of total cars in circulation of **5.11%**.

Italy is also involved in the “e-Mobility Revolution”: although the road towards the country's electricity transition is still very long, the number of electric car registrations increased at a compound average annual rate of **41%** between 2005 and 2016. Significant growth was also registered in the size of the overall fleet of electric cars, with **9,820** vehicles circulating in 2016 (**+60%** over the previous year).

To guide the country's transition to e-Mobility, it is important to understand Italy's starting point. That is why **The European House - Ambrosetti** has developed an innovative monitoring tool, the **Electric Transport Index (ITE)**, which can be used to measure the relative performance of the 20 Italian regions (ITE<sup>R</sup>) and 14 Italian metropolitan cities (ITE<sup>M</sup>) in the electric mobility field.

Among Italian regions, **Tuscany** ranks first with a score of 6.5 out of a maximum of 10, followed by Lombardy and Emilia Romagna. In the ranking of the metropolitan cities, **Florence** sits at the top with an overall score of 8.1, followed by **Milan** (6.4) and **Rome** (6.0 points). All the territories of southern Italy, with the exception of Puglia, are at the bottom of the rankings, thus underscoring the broad potential for the development of e-Mobility in these areas.

Electrification of transport systems is an **important opportunity for the industry and for the modernisation** of the country. To gauge the potential impact of e-Mobility on **industry**, for the first time in Italy the European House - Ambrosetti has mapped the **extended value chain of e-Mobility**, providing a basis for understanding the various manufacturing and service activities that are activated by the electric transport industry. The employment numbers are noteworthy, with around **160,000 companies** and **823,000 people** involved.

In addition, a number of growth scenarios for electric cars and charging infrastructure were developed. Considering the electric car market alone and the revenues that can be generated at each stage of the value chain (vehicles, charging infrastructure, ICT services, recycling and second life), it was estimated that, in the various growth scenarios, the market could generate total cumulative revenues of between **24 and 100 billion euros by 2025** and **between 68 and 303 billion euros by 2030**.

To successfully harness the e-Mobility Revolution, Italy must first develop a **medium/long-term vision**, as other major countries have done, and adopt national policies to support demand, the industry (first and foremost encouraging research) and the charging infrastructure.

The analysis and proposals of The European House - Ambrosetti collected in the "e-Mobility Revolution" study will be presented on September 3<sup>rd</sup> at the 43<sup>rd</sup> edition of the Villa d'Este Forum in Cernobbio by the spokesperson of the initiative, **Maria Chiara Carrozza**, member of the III Commission "Foreign and Community Affairs Committee" of the Chamber of Deputies and Full Professor of Industrial Bioengineering at the Scuola Superiore Sant'Anna of Pisa.

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**The European House – Ambrosetti** is a group of some 200 professionals, operating since 1965, which has grown significantly over the years, thanks also to the contributions of many of its Partners, developing numerous activities in Italy, Europe and the rest of the world.

The Group has five offices in Italy and others abroad, as well as additional partnerships around the world. Its distinguishing feature is its ability to provide support to companies in the integrated and synergic management of the four critical aspects of value-creating processes: Seeing, Planning, Achieving and Optimising.

For over 50 years we have been working alongside Italian businesses and each year we provide consulting to about 400 clients, producing more than 20 strategic scenarios and studies aimed at Italian and European institutions and companies, and around 30 governance pacts for family-run businesses. In addition, each year about 2,000 Italian and international experts are involved in the 300 events we organise for the over 10,000 managers we follow in their personal and professional paths to growth.

The Group boasts an invaluable international network of contacts on the highest level in the sectors in which it operates, including representatives of the main multinational institutions and of individual countries.

For the fourth consecutive year, The European House - Ambrosetti was nominated the No. 1 private Italian think tank, ranking in the European top 10 and in the World top 100 independent think tanks out of 6,846 think tanks globally, in the 2016 Global Go To Think Tanks Report of the University of Pennsylvania.

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