

## Non-resident enterprises under Italian control

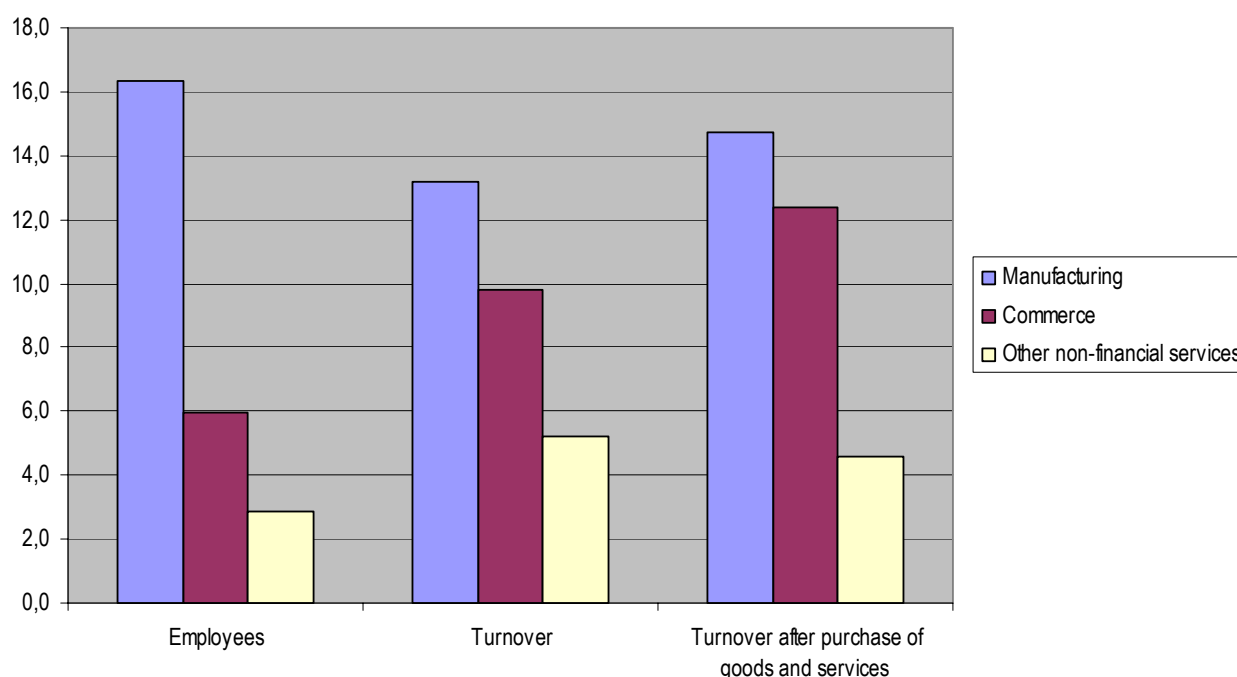
Year 2007

In 2007 there were some 20,050 non-resident enterprises under Italian control. They employed over 1.4 million people and recorded a turnover of about 389 billion euro (Table 1). In particular, Italian affiliates abroad operating in sectors other than financial intermediation employed over 1.2 million personnel and registered a turnover of 305 billion euro. Taking into account net turnover after the purchase of goods and services (an approximate aggregate estimate of value added worth created abroad), these enterprises (excluding those operating in the financial intermediation sector) achieved a result of 84.2 billion euro.

The number of Italian affiliates abroad is higher in the non-financial services sector (11,279 enterprises) than in the industrial sectors (7,843). However, industrial enterprises demonstrate greater economic importance with a turnover of about 182 billion euro (57 billion euro after the purchase of goods and services) with total employment standing at 838,000.

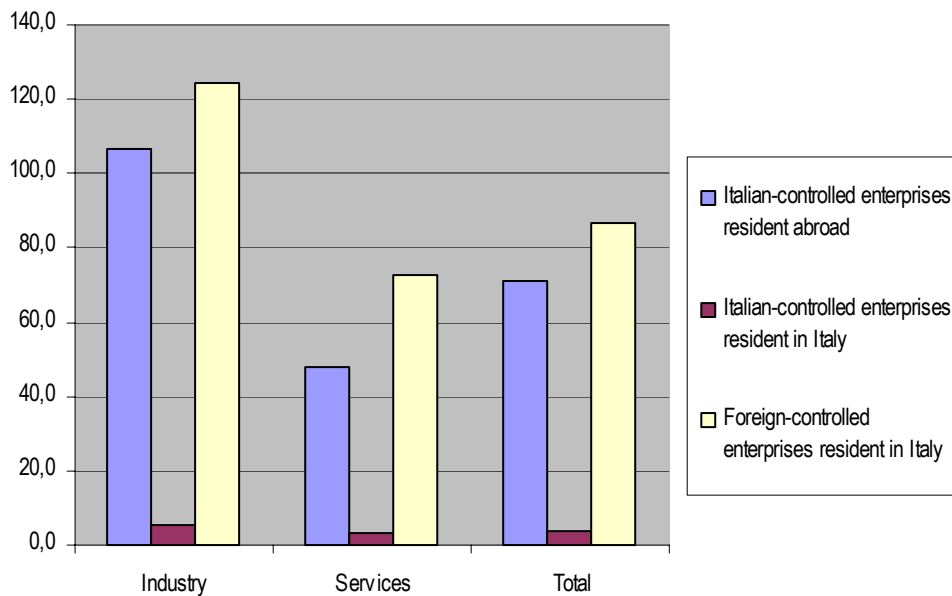
The degree of internationalisation of the Italian production system can be evaluated by comparing foreign and overall domestic turnover. For example, foreign turnover in the manufacturing sector (Figure 1) amounts to 13.2% of that generated in Italy, whereas employment figures rise to 16.3%. Lower percentages are recorded in commerce while internationalisation in other service sectors (except for financial services) is relatively low.

**Figure 1 – Non-resident enterprises under Italian control by main sectors of activity – Year 2007** (percentage proportion of the same economic aggregates of enterprises resident in Italy)



Italian-controlled enterprises abroad have an average size of 70.9 employees, much higher than that of enterprises resident in Italy and under Italian control (3.7 employees), and only slightly lower than that of enterprises under foreign control operating in Italy (86.6 employees) (Table 2).

**Figure 2 – Size of Italian-controlled enterprises resident abroad and of Italian- or foreign-controlled enterprises resident in Italy by macro-sector – Year 2007 (average number of employees per enterprise)**



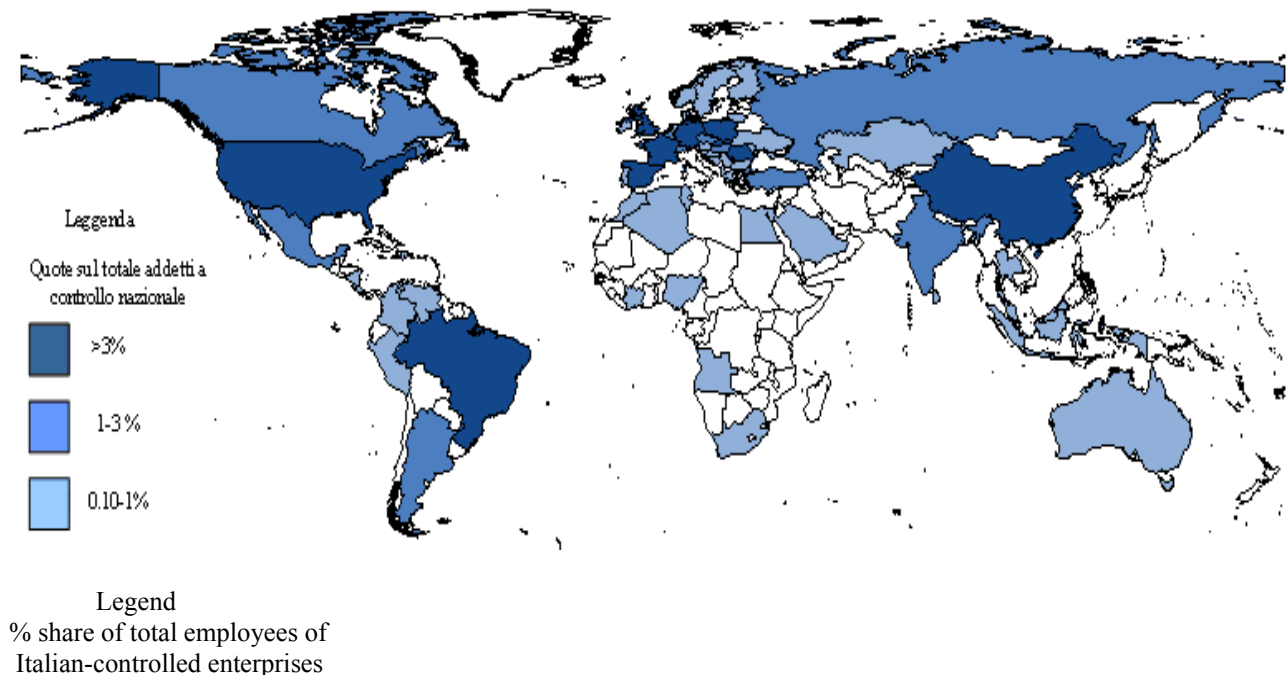
In terms of employee numbers, the main countries in which enterprises under Italian control are located (Chart 1) are: USA (1,621 affiliates totalling approximately 148,000 employees), Romania (3,925 enterprises with over 147,000 employees), Germany (1,404 affiliates with almost 117,000 employees) and France (1,658 enterprises with over 100,000 employees). There is also a significant Italian presence in Brazil (over 500 enterprises with more than 94,000 employees) and in China (792 affiliates with over 85,000 employees) (Chart 1).

**Chart 1 – Italian-controlled enterprises resident abroad by country – Year 2007**  
(list of the top 10 countries by number of employees of Italian-controlled enterprises)

COUNTRY OF RESIDENCE OF ITALIAN-CONTROLLED ENTERPRISES	Enterprises	Employees	% share of total turnover of Italian-controlled enterprises abroad
USA	1,621	147,803	8.4
Romania	3,925	147,542	1.7
Germany	1,404	116,875	15.8
France	1,658	100,719	12.6
Brazil	513	94,048	5.0
China	792	85,439	1.6
Poland	591	82,673	3.6
Spain	1,229	67,661	7.8
UK	924	55,810	6.3
Czech Republic	206	32,643	0.7

Italian-controlled industrial activities are distributed worldwide (Map chart 1). Italian-controlled industrial activities are mainly located in the USA, Brazil, China and in the EU-27 Member States. There is also a considerable Italian presence in other countries such as Russia, Argentina, India, Mexico as well as throughout South America, Asia and Africa.

Map chart 1 – International localisation of Italian-controlled industrial enterprises



There are 6,938 Italian affiliates outside the EU-27 which employ over 655,000 personnel and produce a turnover of 134.8 billion euro (Table 7 in Italian only). In particular, Italian industrial affiliates outside the EU-27 area generate a share of exports equivalent to 32.8% of turnover and to 43.4% of intra-group total exports. The unit labour costs of Italian-controlled manufacturing enterprises resident outside the EU-27 (Figure 6 in Italian only) vary considerably according to location: from over 40,000 euro per employee in the US and Canada to less than 10,000 euro in Mexico, Serbia, the Russian Federation, India and China.

A positive balance of 174,275 employees (Table 9 in Italian only) exists between Italian-controlled enterprises (resident in Italy or abroad) and enterprises resident in Italy (under Italian or foreign control). Differentials are significantly positive in industry (almost 356,000 employees) and negative in the service sector (over 181,000 employees). Interestingly, in-depth analysis reveals a major presence of Italian-controlled enterprises in Romania, which in 2007 amounted to 3,925 Italian affiliates employing over 147,000 personnel with a turnover of 6.4 billion euro and a significant presence in the traditional Italian production sectors (textiles, clothing, leather goods, footwear, furniture and sports equipment), as shown in Table 10 (in Italian only).

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