



The Vendor Management platform
for industrial equipment and services

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Overview of Italian expertise in Plant Engineering

*Seizing new business opportunities in the Oil&Gas sector with
Archirodon*

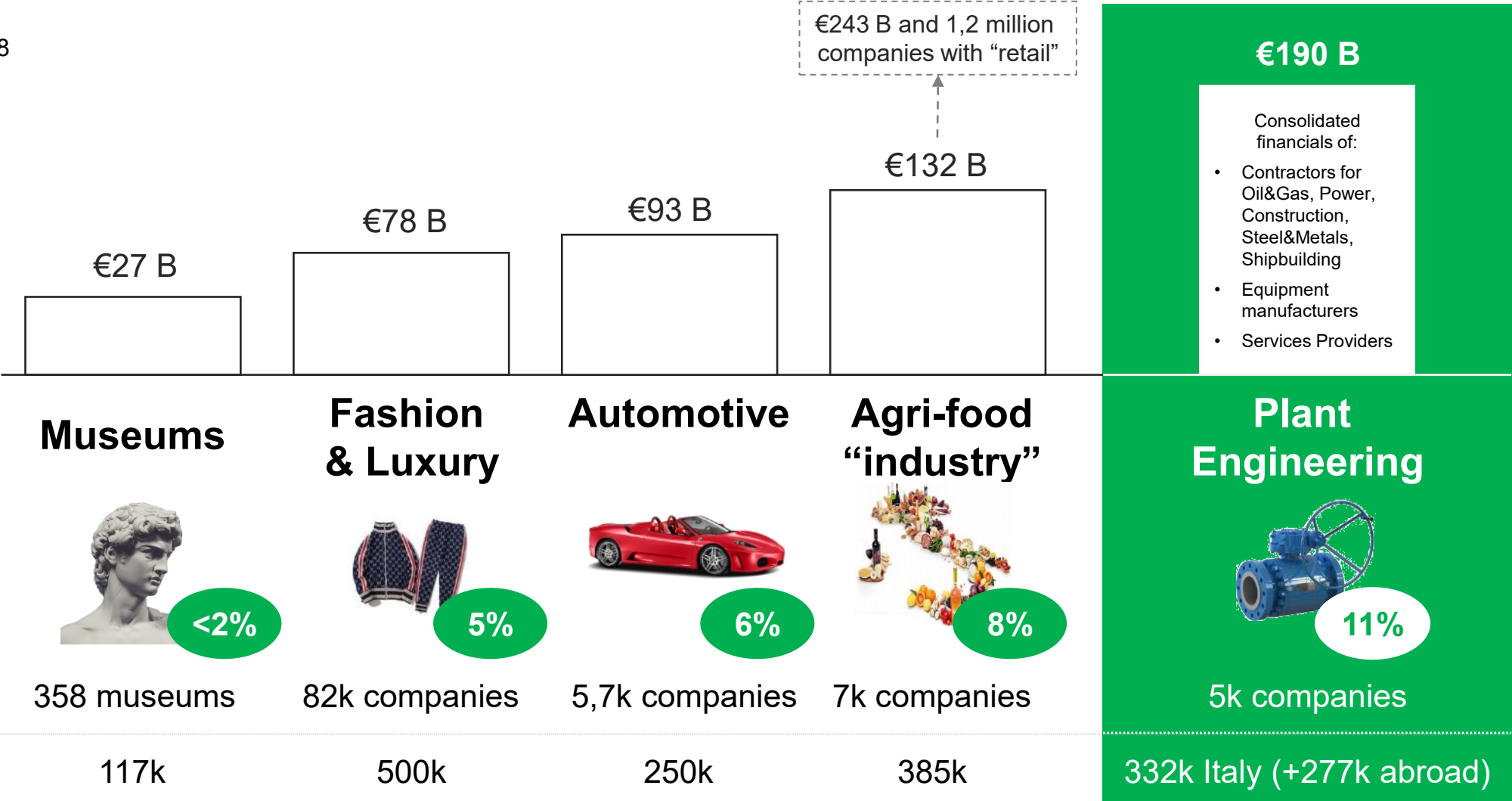
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July 5th, 2021

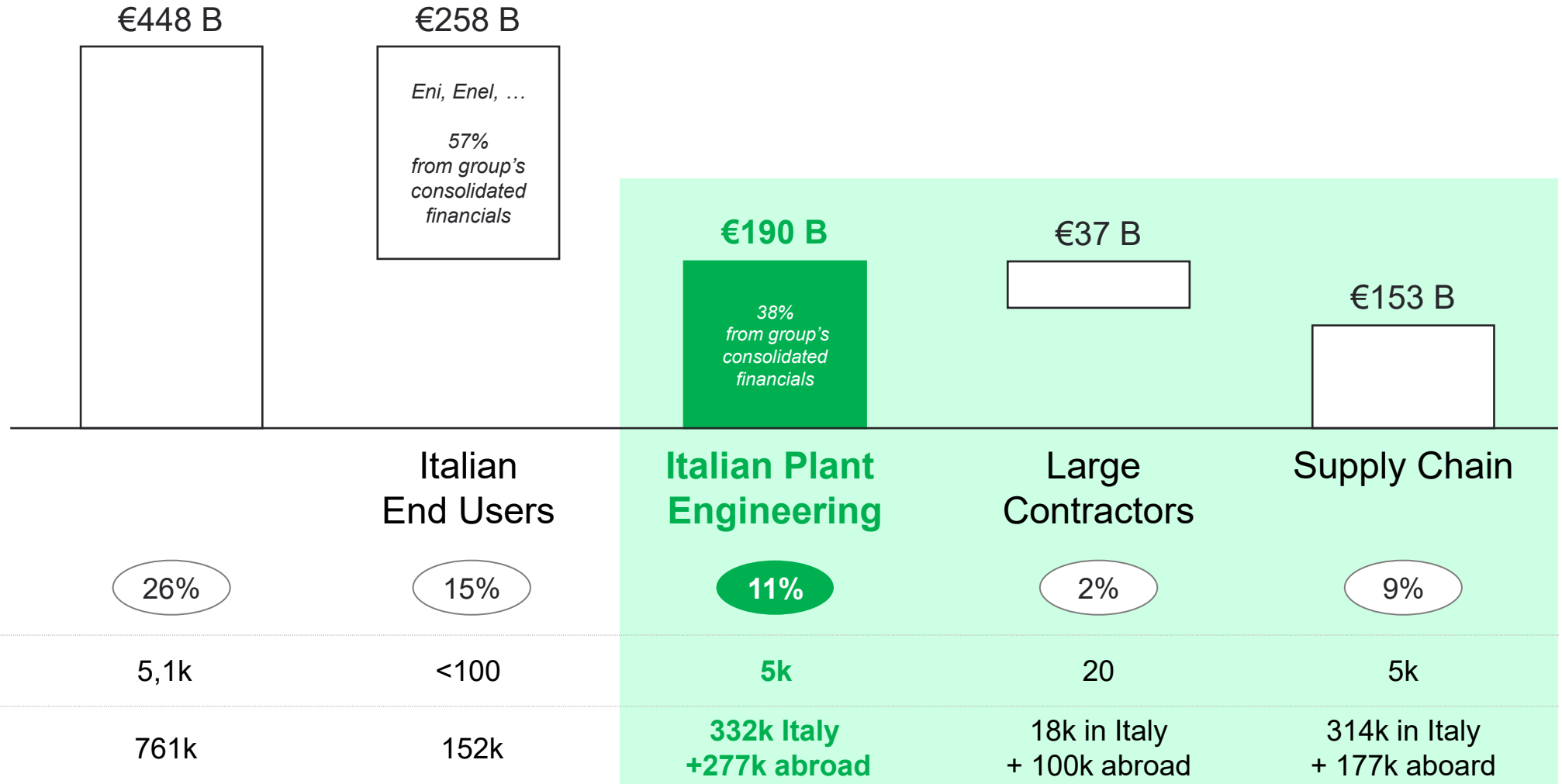
Plant Engineering is a leading value chain for what Italy is famous for

Value of Production, 2018



5.000 companies representing 11% of Italian GDP

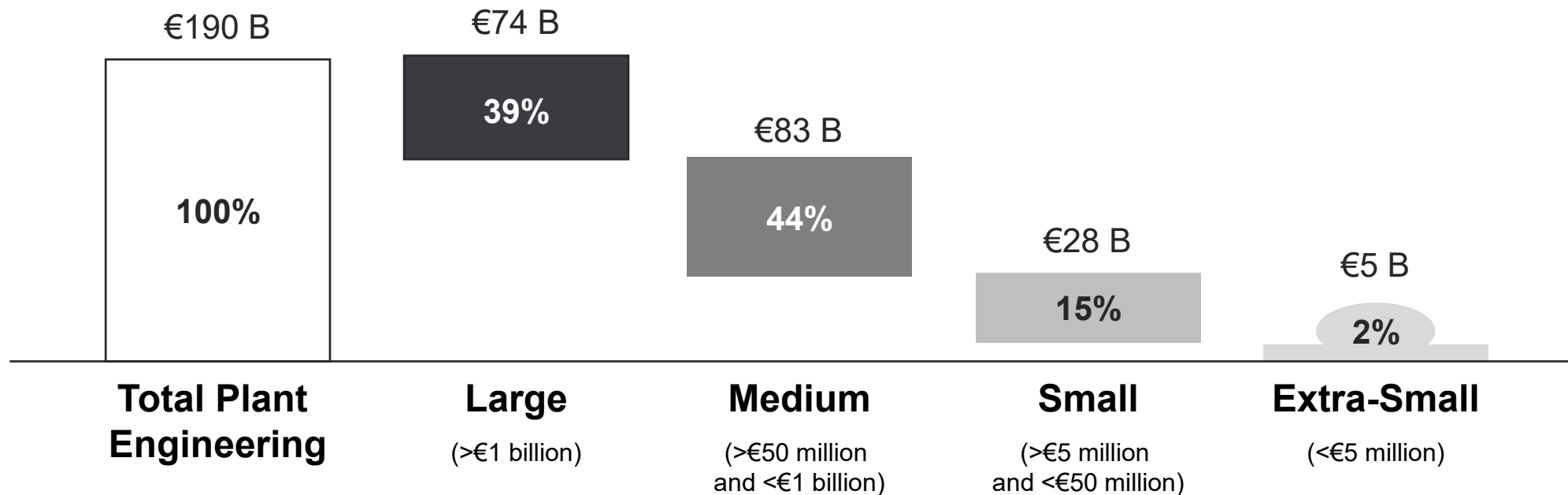
Value of Production, 2018



Fragmented value chain

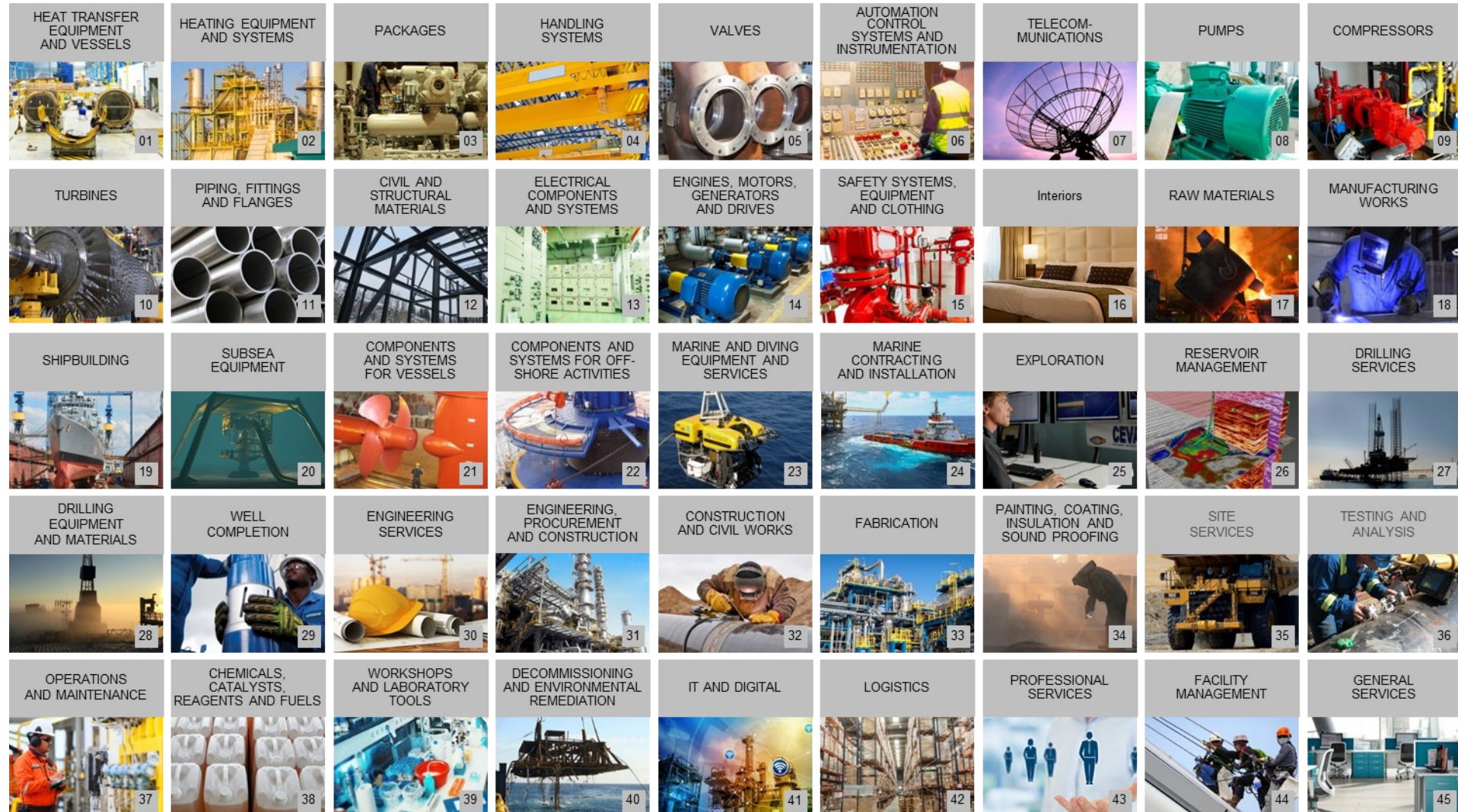
88% of companies are below €50 M revenues and deliver 17% of revenues

Value of Production, 2018



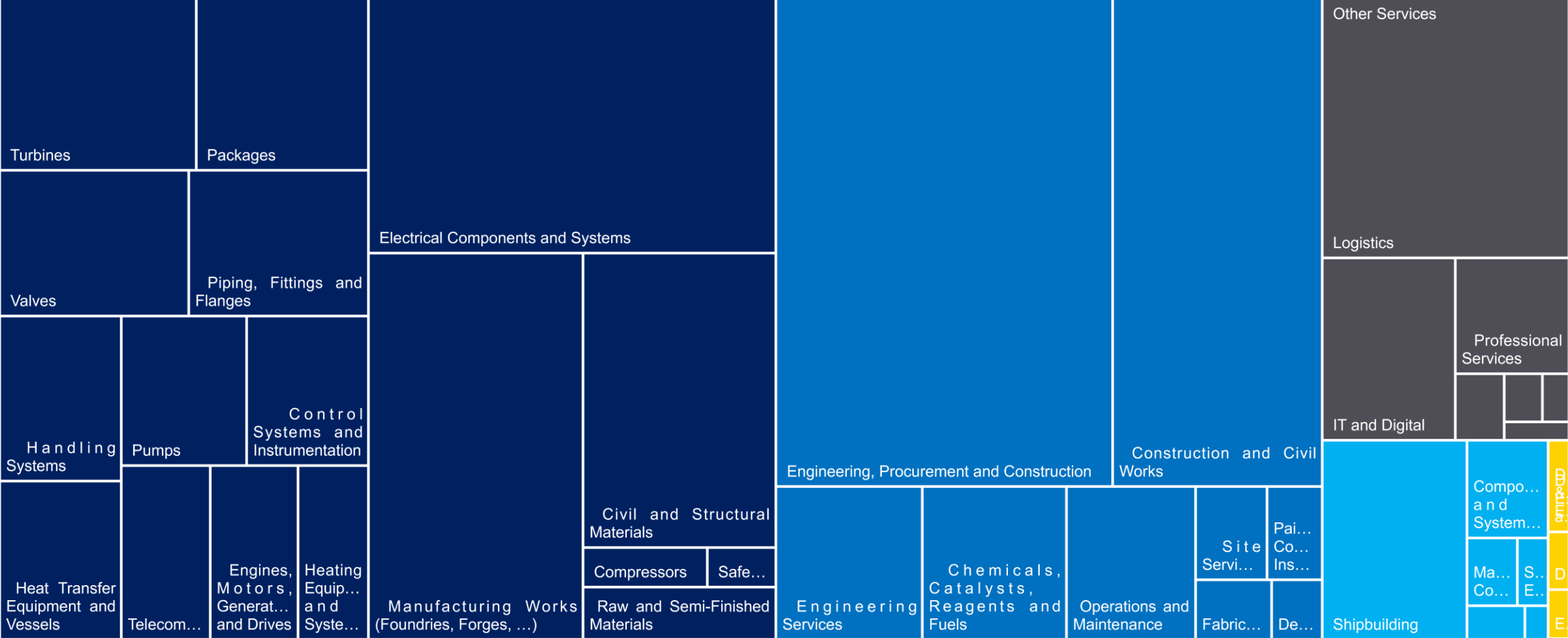
	Total Plant Engineering	Large (>€1 billion)	Medium (>€50 million and <€1 billion)	Small (>€5 million and <€50 million)	Extra-Small (<€5 million)
# employees (group level)	609k	206k	258k	115k	30k
# companies	4.947	23	526	1.750	2.648
% companies	100%	1%	11%	35%	53%

Covering all needs across 2.500 categories of supply



Any type of supply in Plant Engineering

Split by Group of supply of the Value of Production (2018) of the 4.970 Italian companies operating in the Plant Engineering industry

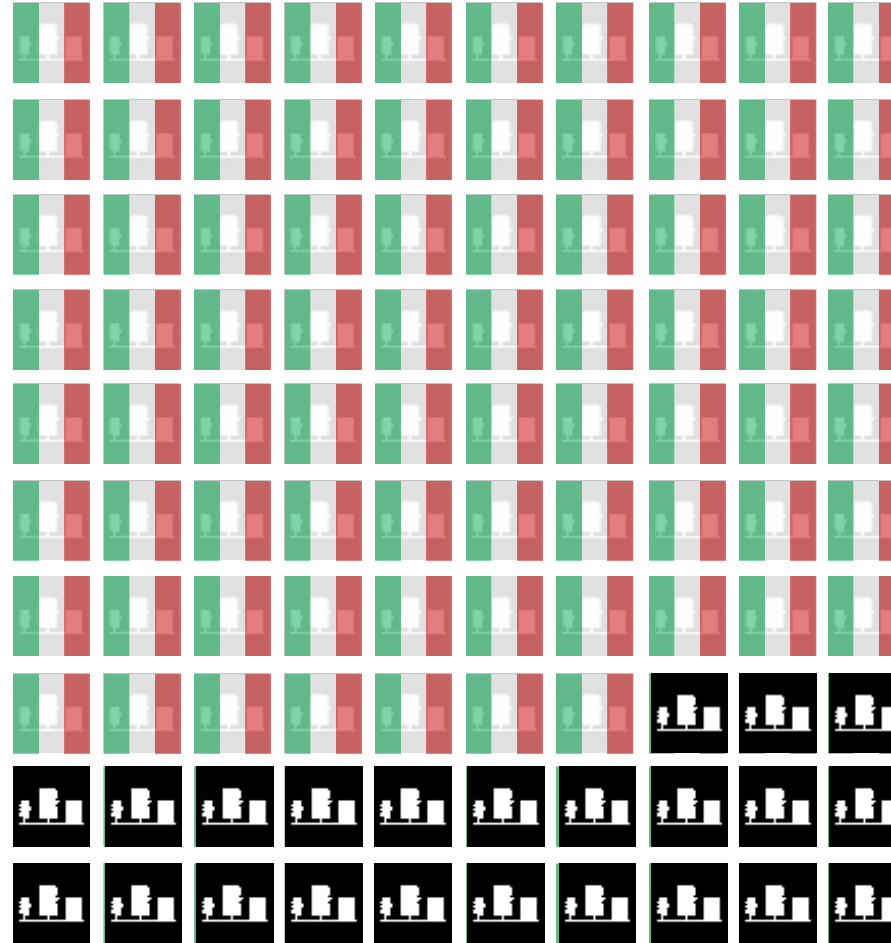


Equipment (49%)

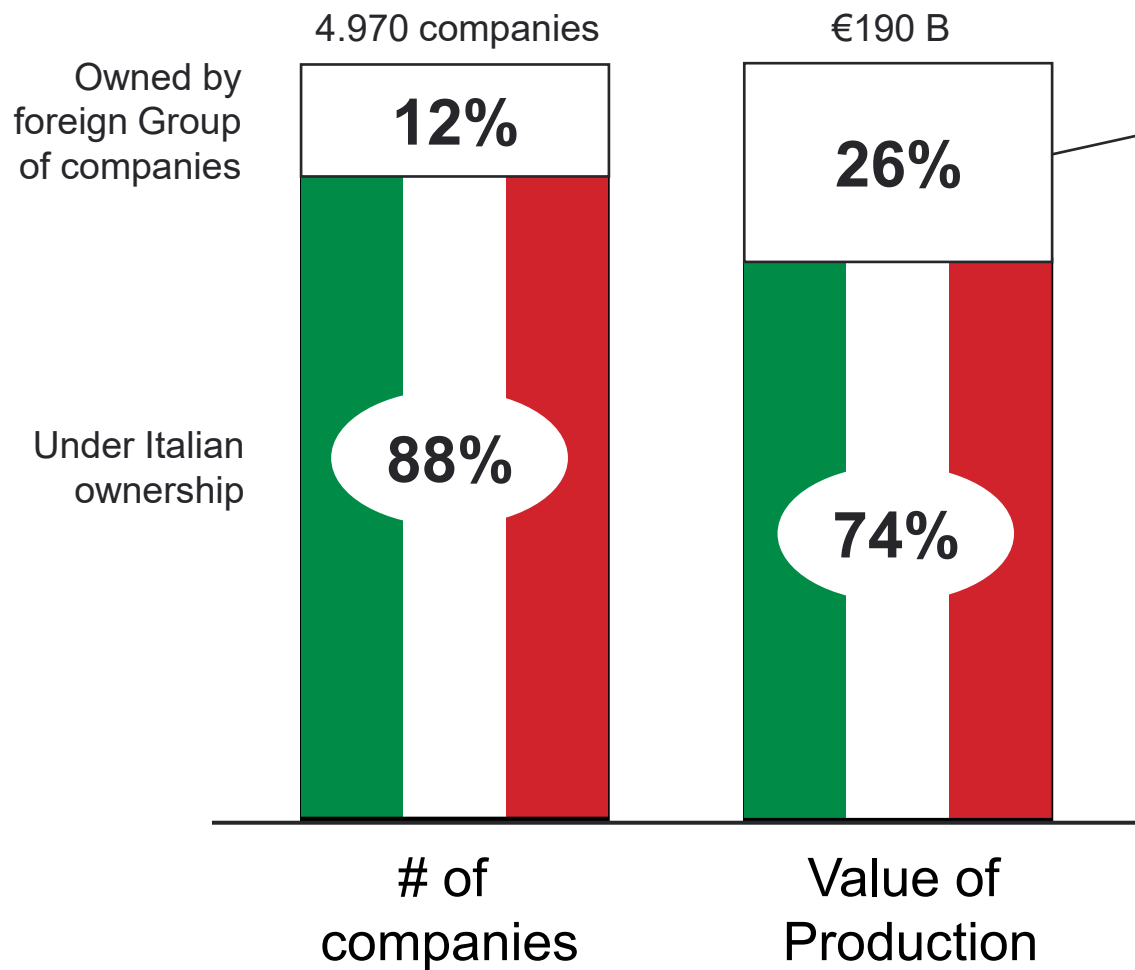
Contracting & Site-related Services (35%)






High complementarity

only 23% of companies compete in the same “family” of supply

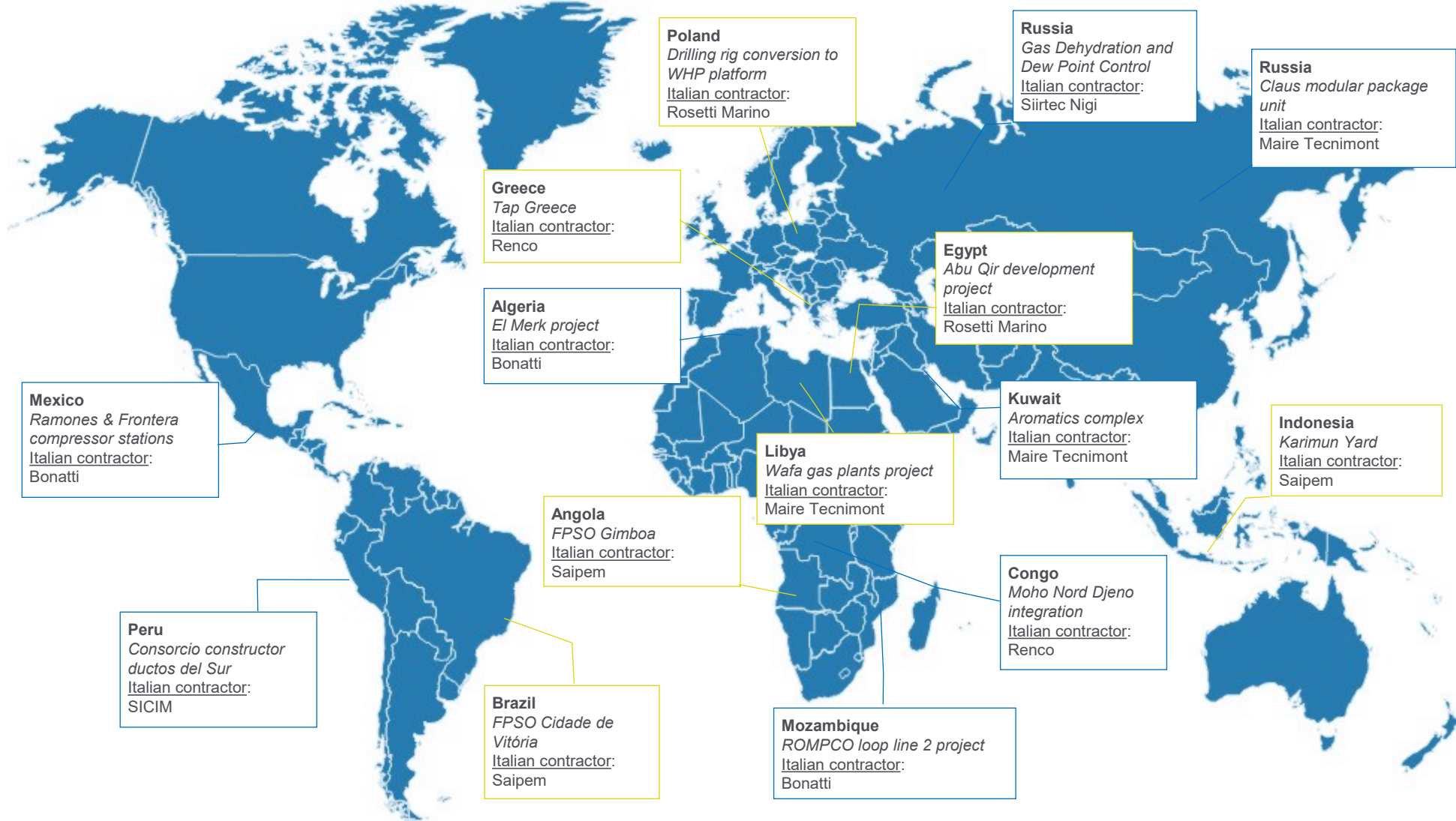


Decision-making is still largely Italian



	Germany	5,4%
	USA	5,1%
	Netherlands	3,1%
	Japan	2,3%
	UK	1,7%
	Luxembourg	1,7%
	Switzerland	1,6%
	France	1,6%
...		
	China	0,1%
	ROW	3,5%

Over the years, Italian contractors have gained leadership in Oil&Gas projects worldwide, often with SACE support



10 strengths of the Italian Oil&Gas supply chain

- 1 **Full spectrum** of supplies - equipment and services
- 2 Proven **track record** across multiple technical specs, **globally**
- 3 Present in **all major Project Vendor Lists**
- 4 Flexibility in **execution** and respect of **tight delivery times**
- 5 **Quality** of sub-contractors and materials
- 6 Global **competitiveness**
- 7 Strong **Project Management**
- 8 Leading **technologies** and ability to **innovate**
- 9 **Resilient** → **Financial strength**, also in a post-COVID environment
- 10 A leader in **ESG Sustainability**

If you can't measure it, you can't improve it.



Sir William Thomson

Inventor of the Kelvin international
system of absolute temperature

INDUSTRY-SHARED and INDEPENDENT approach

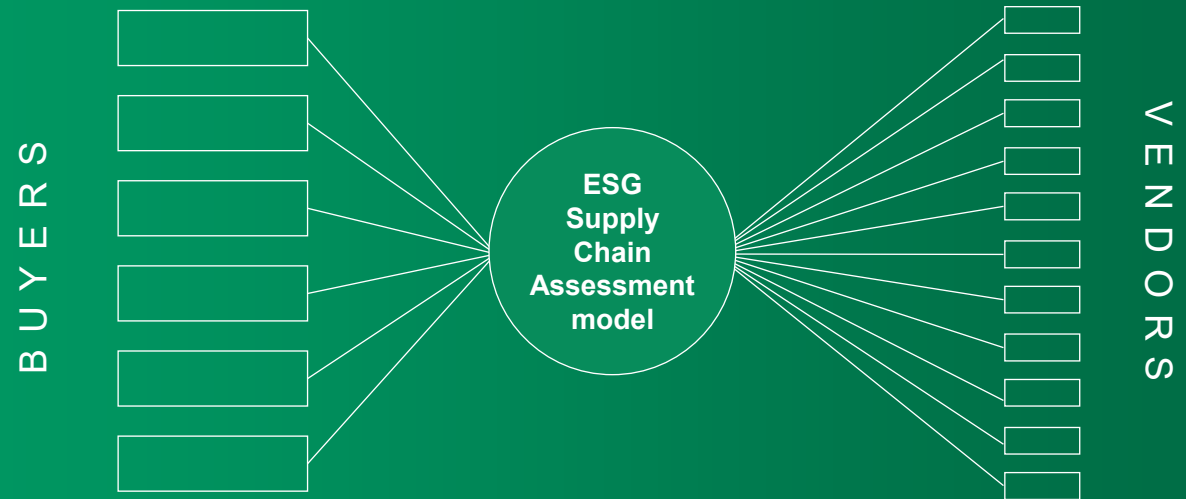
ESG SUSTAINABILITY ASSESSMENT WORKGROUP created in July 2019



Partners



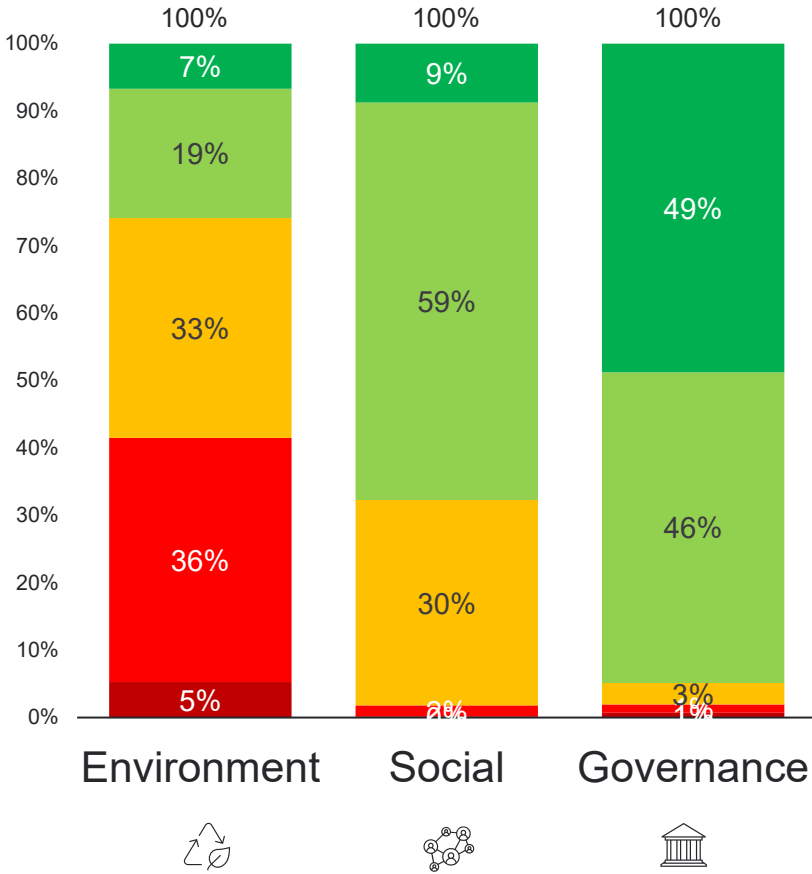
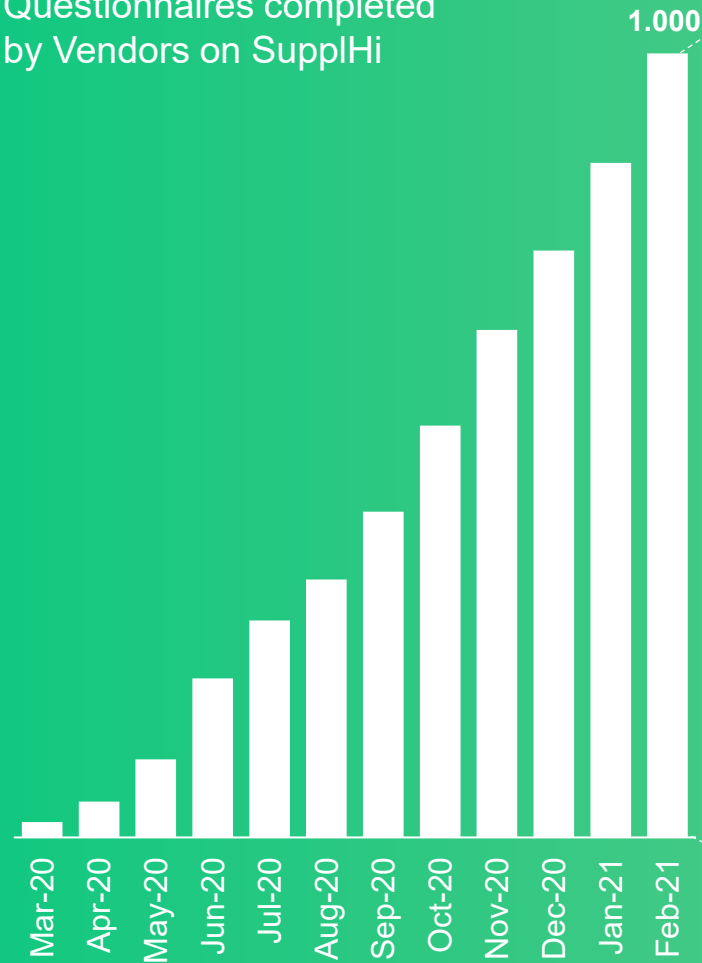
OPEN INNOVATION FOR A TRULY INDEPENDENT SUPPLY CHAIN ESG MODEL



- ✓ Independent & Transparent
- ✓ Industry-shared **Guideline**, specific for **Plant Engineering industries** and based on **international best practices**
- ✓ **Free-of-charge** for Vendors
- ✓ **Fully digital**, simple and **easy-to-use**

Strengths as well as improvement opportunities for the Italian Oil&Gas supply chain

Cumulative number of ESG Questionnaires completed by Vendors on SupplHi



+ 960 ESG improvement initiatives collected by Suppliers

Supply Chain priorities:

- Measurement of CO2 emissions also by SMEs
- Improve waste management and stimulate the Circular Economy at the industrial district level
- Adoption of advanced Certifications
- Adoption of Sustainable Procurement practices

SACE – in collaboration with SupplHi – digitally supports for the scouting of Italian Vendors in Plant Engineering



Through the SACE account, information on Italian Vendors:

- Categories of supply
- References
- Corporate structure
- Organization
- Locations, Resources, Spaces
- Contacts
- Capabilities:
 - Quality
 - HSE
 - Engineering
 - Procurement
 - Production
 - Project Management
 - Organization and HR
 - Sustainability
 - Site Activities, After Sale, Logistics
- Financials

Contact us



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