



ASSOMINERARIA

Equipment & Services

Sergio Polito

April 2016

Assomineraria - Organization

Assomineraria, the Italian Petroleum and Mining Industry Association, has been founded in 1917 and represents the interests of its **147** Associate Members.

Assomineraria is organized in three Sectors:

- Mining: **14** Companies.
- Hydrocarbons & Geothermal: **20** Oil & Gas Companies.
- Equipment & Services: **113** Companies.

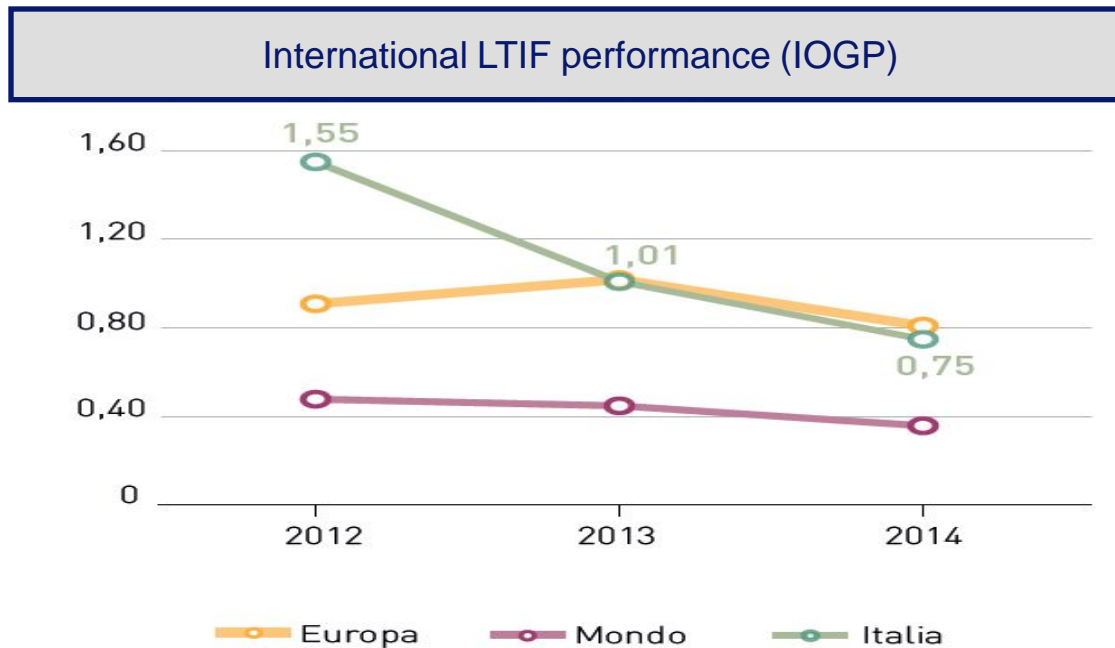
Mission

- Promote **excellence** and **know-how**
- Develop skills (**training**)
- Promote **international development** and **cooperation**
- Compliance with **HSE**
- **Sustainability** measures and **transparency**

Equipment & Services Companies



Italian O&G - High performance in HSE



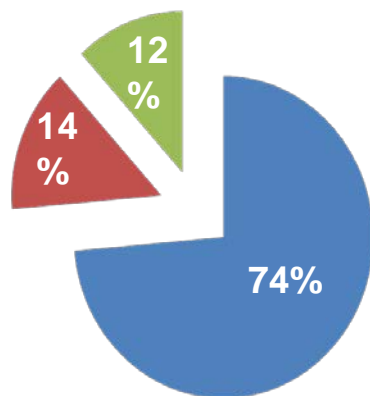
- Italian O&G registered excellent **HSE** performance, especially the low number of injuries.
- Italian O&G **LTIF** (Lost Time Injury Frequency) decreasing trend, among the best in the world.

Strengths of Equipment & Services Companies

- **Technological innovation** to compete in the global marketplace.
- **Local content policy:** promote the development of the local market in sustainable manner.
- **Development** of technology in Oil & Gas and in other segments like Green Energy.

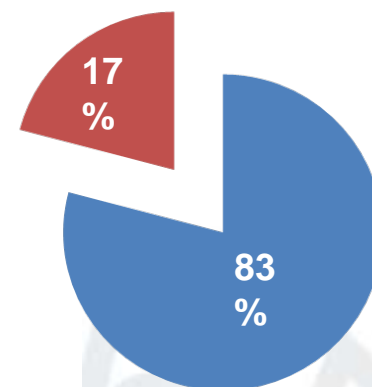
Equipment & Services in numbers (2015) - 1

COMPANY SIZE (%)



- Large enterprise >€50 million
- Mid-size enterprise €16-50 million
- Small business up to €15 million

OWNERSHIP (%)



- Italian-owned
- Foreign-owned

Equipment & Services in numbers (2015) - 2

- **TURNOVER** ~ **€18 billion**
- **EMPLOYED** ~ **90,000**
- Overall Exports of Italian Equipment and Services, including Oil&Gas, is estimated between €95 and €115 billion per year.

Equipment & Services for training: ASSOIL School

- **ASSOIL School** training abroad for the development of local resources:
 - agreement with the University in Maputo (Mozambique) and possibility of a training center in Pemba;
 - partnership agreement with Iranian Association SIPIEM;
 - development of a project related to Mediterranean natural gas hub.

- **ASSOIL School in numbers (since 2011)**
 - **39** course types
 - **192** course editions
 - **2174** people trained
 - Success rate: **55%** of unemployed people attending a course

O&G: two interconnected chains of Italian enterprises (2015)

Plant types

867 production wells
119 offshore platforms
91 treatment plants
14 storage facilities

Investment

~ **€1.2** billion

R&D

€300 million

Hydrocarbon production

- Oil: **5.5** Mtoe = **110,000** bbl/d
- Gas: **5.6** Mtoe = **6.9b** m³

Total Employment ~ 114.000 Jobs

~ **10,000** jobs
Italian projects

~ **19,000** jobs
ancillary activities
to Italian projects

85,000 jobs
E&S
for exports



ASSOMINERARIA

Thanks for the attention