



Camera di Commercio Italiana in Cina

中国意大利商会

China-Italy Chamber of Commerce

Beijing, 8th February 2021

Press Release

Subject: Presentation of the Business Survey Results 2020

Today, February 8th, 2021 the China-Italy Chamber of Commerce (CICC) releases the results of the III edition of CICC Business Survey.

Considering the difficulties posed by the COVID-19 pandemic globally, the aim of the publication is to acknowledge challenges and opportunities faced by the Sino-Italian business representatives and investigating the sentiment of the community about doing business in China

Developed by the CICC in collaboration with the International Business School Suzhou at Xi'an Jiaotong Liverpool University (IBSS, XJTLU), the survey is structured in five sections: company overview, strategic choices, financial performance, business environment and outlook. The analysis is based on both CICC Members' and Friends' participation, as for the first time the 2020 edition respondents include both Italian companies and Chinese ones.

CICC is honored to have the participation of H.E. the Ambassador of Italy in the P.R.C, Luca Ferrari, for opening remarks.

Following, the CICC Chairman Paolo Bazzoni presents the first part of the results.

The outcome of the publication is based on the feedbacks of 304 Members and Friends of CICC. The respondents well represent the Italian economic organisation with the 88% that identified themselves as small and mid-size enterprises (SMEs), while the 12% as big players. More than 60% had in China its global footprint for more than 10 years, while 23% between 4 and 10 years, and only 17% less than 3 years. When it comes to industry segments, China is still the manufacturing hub for Italian companies. Automotive, machinery, and other manufacturing segments account for 10%, 11% and 19% respectively, while it is also true that the Italian companies are equally divided between services and industrial products with services to business accounting for the 32%.

The second part is presented by Professor Roberto Donà, who introduces the survey's results. The main factors representing the reasons for respondents to operate in China are market access, robust economic growth, high demand of products and services from customers, while others like local incentives, and the possibility to attract local talents are on a downward trend.

Besides the COVID-19 pandemic, the Sino-Italian community is facing severe competitions from Chinese companies and non-Italian and non-Chinese companies as well as increasing labour costs. In the last 3 years, 83% of the respondents experienced an increase in labour cost with 16% having an increase of more than 10%, 29% between 6%-10%, and 25% of them between 4-5%. Also, the ongoing US-China Trade War remains another significant challenge as it creates uncertainty in the customer perspective.

2020 was a very challenging year in the terms of revenue forecast compared with 2019, around 80% of respondents forecasted a stable outlook for revenue in Mainland China and a decrease of 20% for Greater China.

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Companies showed satisfaction with the efforts made by Chinese government to ease the business environment in China especially in the reform of State-owned enterprises (SOEs) and the simplification of bureaucratic of procedures, and the survey also indicates that companies believe that the Made-in-China 2025 and Belt and Road Initiative (BRI) will help them increase revenues in China.

Despite the challenges, in terms of 2021 revenue forecast, the attitude of respondents is very optimistic. The vast majority (70%) of respondents foresees a positive trend in the overall business scenario in the next 5 years while 18% stays neutral. This includes industries that rank top 5: services to consumers, machinery, trading, automotive, and other manufacturing companies.

In terms of future potential of the Chinese market, most of the companies said “yes” to planning further investments in the next 5-year plan (2021 - 2025) and 48% respondents gave feedbacks of already planned and ongoing further investment projects.

Results of the survey are then discussed by the following panelists: CICC Vice Chairman Matteo Tanti, CICC Board Member (Chongqing) Gianluca Luisi, CICC Vice Chairman (Guangzhou) Massimiliano Guelfo, CICC Vice Chairman (Shanghai) Valtero Canepa and CICC Board Member (Suzhou) Riccardo Campanile.

The panel discussion is followed by a Q&A session, moderated by Prof. Roberto Donà, providing an opportunity of discussion to the Sino-Italian business community.

The host of the event is CICC Secretary General, Giulia Gallarati.

The event is held both online on the Zoom platform and offline at CICC offices (Beijing, Chongqing, Guangzhou, Shanghai) with the participation of more than 70 representatives of the Sino-Italian business community.

The China-Italy Chamber of Commerce (CICC) is the only business organisation recognised by both the Italian Government (Ministry of Economic Development, MiSE) and People's Republic of China (Ministry of Civil Affairs, MoCA) that aims to boost the internationalisation of Italian business and to promote the “Made in Italy” in the PRC.

Established in 1991, CICC has now offices in Beijing, Chongqing, Guangzhou, Shanghai and Suzhou. The CICC Members (almost 550 in 2020) represent the Italian business community such as public-invested and multinational corporations, small and medium-sized enterprises (both manufacturing and commercial), service companies etc.

To companies settled in China and those with on-going business within the Chinese market, the CICC offers informative, training and business networking opportunities. Besides, the CICC qualifies itself as a voicing platform for them to share topics of common interest. To companies interested in strengthening their business in China, the CICC offers consultancy, assistance, and marketing services. For more information please contact: communication@cameraitacina.com

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2021年2月8日，北京

新闻公告

主题：2020年商业调查结果报告

中国意大利商会（CICC）于本日报告了第三次 CICC 商业调查结果。

鉴于新冠疫情对全球带来的困难，本次调查结果之公布旨在明确意大利在华商界代表企业所面临的挑战与机会，并调查意大利商界在华营商的气氛。

本调查是由中国意大利商会与西交利物浦大学苏州国际商学院（IBSS,XJTLU）合作完成的。调查共由五部分构成：企业概况、战略选择、财务绩效、商业环境与未来展望。本次调查所作的分析是在商会会员企业参与的基础上完成的。本次调查的应答企业首次包括了意大利企业和中国企业。

意大利驻华大使方澜意先生为本次活动致开幕词，之后由中国意大利商会会长巴佐尼先生介绍调查结果的第一部分。第二部分则由西交利物浦大学苏州国际商学院教授罗伯特·多纳（董思敏）先生介绍。

本次调查的结果是根据 304 份商会成员与朋友的回馈得出的。调查问卷的回答较好地反映了意大利经济组织结构：其中 80%的应答方自认为是中小型企业（SME），另外 12%则属于大型企业。其中超过 60%的企业在中国的业务已经超过 10 年，只有 17%的企业在华业务少于 3 年。在行业分布上，中国仍然是意大利制造型企业的集中地。汽车、机械及其他制造型企业分别占到了 10%、11%和 19%，同时意大利在华企业在服务业和工业领域分布相当：服务性企业占到了 32%。

调查结果的第二部分则由罗伯特·多纳（董思敏）教授进行介绍。问卷应答企业在华经营的主要促成因素是市场的准入、强大的经济增长、顾客对产品和服务的高需求；而其他因素，如地方优惠、吸引本土人才的可能性等因素则处于下滑趋势。

除了面临新冠疫情，意大利在华商界还面临着来自中国企业、非意大利企业、非中国企业以及不断提高的劳动力成本所带来的多重挑战。最近 3 年，83%的问卷应答企业曾经历劳动成本的增长，其中 16%的增长超过 10%，29%的增长在 6%-10%之间，25%的增长则在 4%-5%之间。另外，中美贸易战依然是一项重大的刁展，因为它为消费者预期带来了不确定性。

就收入预测而言，各企业在 2020 年相比于在 2019 年所面临的挑战更大。80%的应答企业预测在中国大陆的收入相对稳定，而在整个大中华区则下降 20%。

各企业对中国政府致力于改革国有企业、简化行政程序、营造更便利的在华营商环境所作的努力表示满意。本次调查也显示，各企业相信“中国制造 2025”和“一带一路”倡议将有助于它们提高在华收入。

尽管挑战重重，在预测 2021 年的营收时，应答企业的态度是非常乐观的。大部分应答企业（70%）认为未来 5 年总体经济前景将沿着积极的趋势发展，而 18%的应答企业则保持中性态度。其中包括排行前 5 的行业：消费者服务、机械、贸易、汽车和其他制造业。

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关于中国市场的未来潜力，大部分应答企业都表示对未来 5 年（2021-2025）有投资计划；48%的应答企业表示已经有了投资计划或者正在进行投资项目。

本次调查报告活动最后以讨论会的方式闭幕。参与讨论者包括中国意大利商会副会长玛竇·谭特礼、中国意大利商会董事（重庆）詹卢卡·路以西、中国意大利商会副主席（广州）马西米利亚诺·贵尔福、中国意大利商会副主席（上海）瓦尔特罗·卡内帕及中国意大利商会董事（苏州）李卡尔多·坎帕尼乐，讨论会之后还有问答环节。

小组讨论之后，是问答环节，由罗伯特·多纳（董思敏）教授主持。与会者借此机会得以参与讨论。

本次会议主持人：中国意大利商会秘书长茱莉亚

本次调查报告活动同时通过线上的 Zoom 平台和线下的中国意大利商会分部（京、渝、穗、沪）办公室进行。有 70 位意大利在华商界代表参加了会议。

中国意大利商会（CICC）是唯一得到意大利政府（意大利经济发展部）和中国政府（中华人民共和国民政部）共同认可的意大利企业家和专业人士组成的协会，其宗旨是推动意大利企业在华的国际化、提升意大利制造在中国的知名度。

中国意大利商会于 1991 年成立于北京，现已在北京，重庆，广州，上海和苏州五个城市分设有联络办公室。

2019 年中国意大利商会的会员会员数量达到 450 个左右，其中涵盖意大利的主体实业（意大利国有控股和跨国企业），中小型制造和贸易型企业，咨询公司等。

中国意大利商会能够为已在中国落户的外资企业以及从事贸易活动的商贸人士提供信息服务、培训机会以及分享业务资讯，多年来的努力成果使得中国意大利商会成为一个有影响力的、聚焦于共同利益话题的权威性平台。此外，对于那些有兴趣扩大在华业务的意大利企业家和专业人士，中国意大利商会提供定位、宣传和推广等辅助性服务。

欲了解更多信息，请联系：communication@cameraitacina.com。

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