



UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION

Expert Group Meeting on the Promotion of SME Export Consortia

Olbia, Italy, 22-24 September 2005

COUNTRY PAPER ITALY

Gilles Galtieri, UNIDO Export Consortia Analyst
Supervised by: Lorenzo Papi, FEDEREXPORT Technical Secretary



The opinions, figures and estimates set forth are the responsibility of the authors and should not necessarily be considered as reflecting the views or carrying endorsement of UNIDO. The designations “developed” and “developing” economies are intended for statistical convenience and do not necessarily express a judgment about the stage reached by a particular country or area in the development process. Mention of firm names or commercial products does not imply endorsement by UNIDO.

This document has not been formally edited.

A. INFORMATION ON THE COUNTRY'S EXPERIENCE

A.1 Country policy to promote exports

Italy has several organizations, public and private, national and local, which deal with export promotion. The main ones are:

The Ministry of Productive Activities – Internationalization Department

The mandate of this agency is foreign trade and internationalisation of the Italian economic system. This covers:

- a) Foreign trade policies, rules and regulations of trade with third countries, development, negotiation and management of bilateral and multilateral agreements;
- b) Relations with economic and financial international organisations and with multilateral organisations;
- c) Assistance to the Foreign Affairs Ministry in the areas of international cooperation and development aid;
- d) Coordination of the foreign trade policies of other organisations;
- e) Relations with public and private organisations dealing with export promotions;
- f) Incentives and subsidies for internationalisation projects;
- g) Supervision of ICE (Italian Institute for Foreign Trade); supervision of export credit and export credit insurance;
- i) Foreign investments in Italy;
- j) Acting as shareholder in public or public-private companies dealing with internationalisation;
- k) Issuing import and export authorisations;
- l) Representing the interests of Italian exporters abroad;
- m) Promotion of vocational training of the organisation dealing with enterprise internationalisation.

Every year the Ministry establishes export promotion strategy guidelines, taking account of the suggestions of the main agencies involved in internationalisation: ICE, the Foreign Affairs Ministry (through the embassies), the Chambers of Commerce, business associations, national and local development agencies, etc. The guidelines for 2005 cover:

- Promotion of joint projects and joint financing among the national organisations dealing with internationalisation;
- Promotion of SME clusters (consortia, networks, etc.);
- Cooperation between universities and enterprises on R&D.

The Italian Institute for Foreign Trade (ICE, Istituto nazionale per il Commercio Estero)

This is the Italian government agency entrusted with the promotion of trade, business opportunities and industrial co-operation between Italian and foreign companies. It supports the internationalisation of Italian firms and the consolidation of their position in foreign markets. ICE has 100 branch offices in over 80 countries in the world. Its activities are financed by the Ministry of Productive Activities, which establishes directives and has a supervisory role, and the companies using its advice, information and assistance.

ICE's main activities are promotion, information, multilateral cooperation and training. Promotion takes the form of international fairs, missions of exporters, exhibitions, congresses, information

and other initiatives under the Public Promotion Programme. ICE explores new business opportunities and helps companies to enter different markets, improves the image of the 'Made in Italy' brand and promotes industrial co-operation and foreign investments in Italy. The institute therefore acts as a guide for the strategies to be adopted in the approach to foreign markets, meeting the manifold requirements of individual companies.

The Ministry of Productive Activities has entrusted ICE with the management of a new incentive for joint projects of SMEs groups (clusters, consortia, etc.) in the areas of promotion, trade and/or physical infrastructure (such as warehouses or showrooms) abroad.

SIMEST

SIMEST, a limited company, is controlled by the Ministry for Productive Activities but also has private shareholders (banks, business associations and Chambers of Commerce). It was established in 1991 with the aim of promoting Italian investments abroad, providing them with financial, technical and legal assistance and participating directly in joint ventures. SIMEST now also manages several of the national incentives for: market penetration projects, export credit support and support for the participation in international tenders.

Other organisations that deal with export promotion are the Chambers of Commerce, the Italian Chambers of Commerce abroad acknowledged by the Ministry of Productive Activities, the regions (mainly through EU funds), regional development agencies, industrial and other enterprise organisations such as Confindustria, CNA and Confartigianato, etc. The latter's main activities are participation in international fairs, trade missions and business meetings, most of which are organized with the cooperation and/or the financial support of public organisations.

Most of the national funding schemes provide loans at subsidized interest rates. Grants for export promotion activities are only available for SME clusters, with a focus on export consortia – see Section A.2.

Italy's main exports and their destination

Tables 1 and 2 provide an overview of Italian foreign trade. The main manufactured exports are personal care goods, home care goods and machinery, each of which makes a comparable contribution to exports. The machinery sector, however, is the most dynamic among these. The other EU countries are by far the most important trading partners.

Table 1: Italy's main manufactured exports (2004)

SECTOR	SHARE IN TOTAL ITALIAN EXPORTS%	CHANGE % (2003/2004)
Food and beverages	5,5	4,2
Personal care goods (jewellery and goldsmith products, leather good products, textiles and wearing apparels, etc.)	15,8	- 1,1
Home care goods (furniture and accessories, ceramic tiles, furniture and accessories, ceramic tiles, etc.)	13,6	4,5

Machinery	17,9	8,3
TOTAL 'MADE IN ITALY' ¹	52,8	4,0
TOTAL EXPORTS	100,0	6,1

Source ICE - ISTAT

Table 2: Italian foreign trade by area (€ million)

	EXPORTS			IMPORTS			BALANCE	
	2004	Share %	Change(%) 2003-2004	2004	Share %	Change(%) 2003-2004	2003	2004
EU (25)	166.235	59,2	3,8	169.136	59,9	4,7	- 1.417	- 2.901
Other European Countries	34.921	12,4	17,0	34.626	12,3	9,6	- 1.750	294
Northern Africa	7.150	2,5	7,9	14.856	5,3	14,6	- 6.340	- 7.706
Other African Countries	3.304	1,2	5,2	4.315	1,5	10,4	- 767	1.011
Northern America	24.798	8,8	1,7	11.335	4,0	1,6	12.868	13.463
Central and Southern America	8.274	2,9	14,4	7.148	2,5	15,3	1.034	1.125
Middle East	10.537	3,8	10,1	8.575	3,0	15,4	2.146	1.962
Central and Southern Asia	2.396	0,9	23,0	3.840	1,4	22,1	- 1.197	1.445
Eastern Asia	18.853	6,7	5,6	26.703	9,5	16,3	- 5.112	7.850
Oceania	3.015	1,1	10,4	1.431	0,5	0,7	1.289	1.584
WORLD	280.692	100,0	6,10	282.205	100,0	7,30	1.618	- 1.513

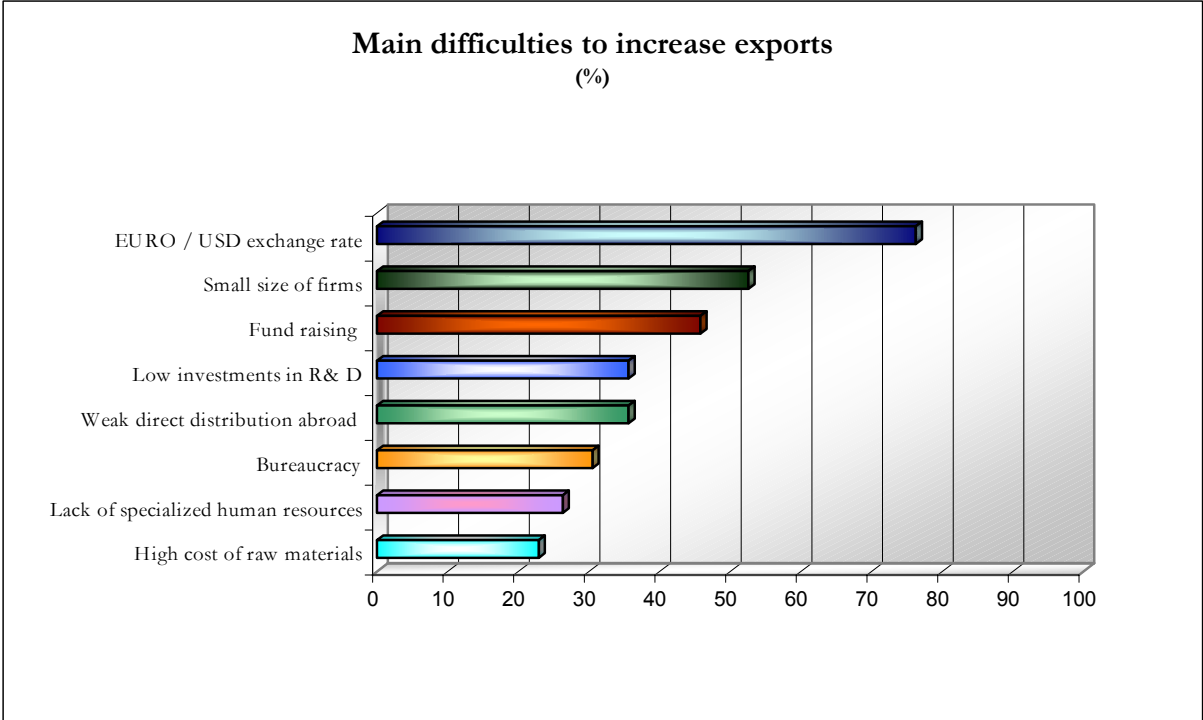
Source ICE - ISTAT

Main obstacles to export increase

Figure 1 is based on the results of annual survey on consortia that FEDEREXPORT held among its members, consortia associated to CNA, the National Confederation for the Craft Sector and Small and Medium Enterprise, and some independent consortia.

¹ The term *Made in Italy* refers to all products that represent Italian style, culture and technical know-how.

Figure 1



A.2 Legal and incentive framework

In Italy, support for consortia from national and local governments has given a considerable impetus to the proliferation of consortia. However, during the early phases of consortia development, public intervention played only a marginal role. The early creation of Italian consortia can mainly be attributed to the initiative of firms.

Italy is the country with the most developed legal framework for promoting consortia. In 1974, an amendment was made to the Civil Code to recognize consortia as a legal entity. In 1989, Law 83/89 was passed which governs the formation, operation and funding of export consortia and is implemented by the Ministry of Productive Activities. In 2000, Law 83/89 was altered to transfer the authority for regional consortia to the respective regions, and Figure 2 shows that the regions now provide most of the funding (data refer to 2004). For multi-regional consortia authority has remained with the Ministry of Productive Activities.

Law 83/89 establishes public funding for export consortia of eight or more SMEs (five or more for consortia operating in Southern Italy and for consortia of craft companies). To be eligible for subsidies, the consortia themselves must not have a profit motive. The law provides for a range of annual subsidies – see Table 3. Furthermore, consortia are eligible for several tax reductions and exemptions. The amount of the subsidy granted in a particular year is calculated on the basis of expenses incurred in the previous year. To avoid fraud, cost statements (for annual expenses over €155,000), must be certified by an independent accountant. Consortia wishing to obtain subsidies must restrict their activities to exporting their members' products and/or to undertaking promotional activities for that purpose. They may, however, import raw materials and semi-finished goods to be used as inputs for their members' production. The same subsidies provided by law 83/89 are provided by law 394/81 (art. 10) for agro-food and tourism consortia. According to FEDEREXPORT, the funds granted in practice average no more than 25-30% of consortia expenses.

Figure 2

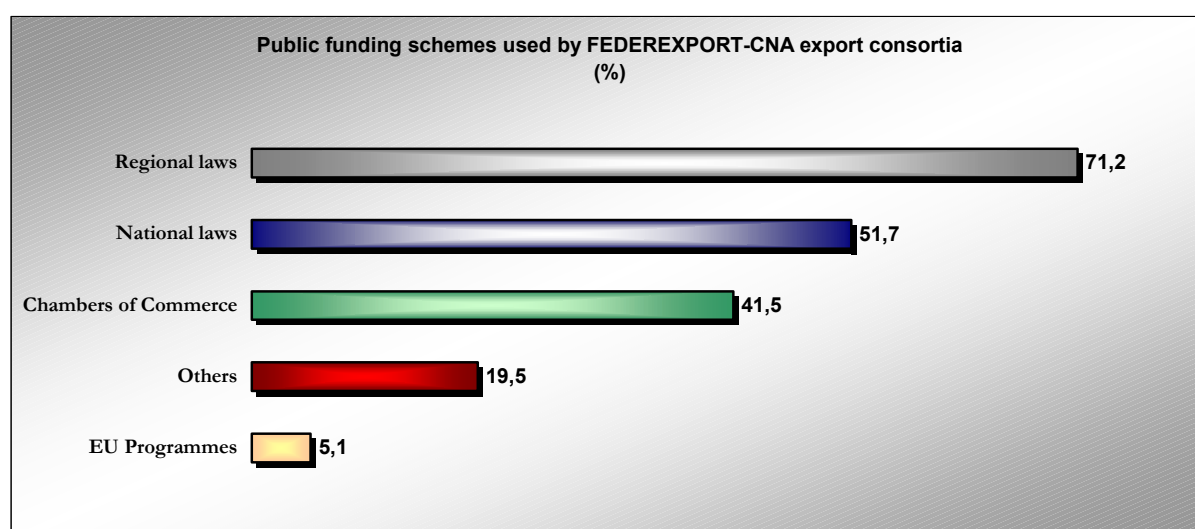


Table 3: Law No 83/1989 on export consortia

FORMATION ² AND OPERATION (Statute)		FUNDING (Subsidy)	
Corporate fund	This is a fund for third-party guarantee, made up of compulsory payments by the associated companies.	Amount	Up to 40% of the annual promotional expenses (up to 60% for export consortia in Southern Italy and up to 70% for consortia in the first five years of activity).
Corporate share	Not more than 20% of the corporate fund and at least € 1,291.	Maximum annual subsidies	- Consortia with < 25 members: € 77,000 - Consortia with 25-74 members: € 103,000 - Consortia with > 74 members: € 155,000
General meeting	Constituted by all members who have met their financial obligations towards the consortium. Each member has the right to one vote. The meeting is convened and chaired by the consortium's President. It can be convened for an Ordinary Meeting (e.g. to approve the consortium's financial statements, appoint the Board of Directors, determine membership fees and to give general directives) or for an Extraordinary Meeting (e.g. to alter the statute, admit or exclude members, deliberate on the extension or anticipated dissolution of the consortium, etc.).	Eligible expenses	- Promotional programmes: travels and missions, participation in fairs, market surveys, advertising and public relations, translation and interpretation, export-related training activities, etc. - General expenses (personnel, telephone, mailing, etc.): up to 20% of the promotional programmes.
President	Typically from one of the member firms. His task is to represent the group and to ensure the conformity of the operations with the interests of the consortium. He is designated by the Board of Directors. The President holds office for three years, but may be re-elected. He convenes and presides over the General Meeting and the Board of Directors. He hires the consortium's staff and nominates a possible Executive Director who is, in turn, confirmed by the Board.	Method of application	- Presentation of the promotional programme for the following year (typically in October) - Presentation of report on the promotional expenses (typically in April) of the previous year and application for payment
Board of Directors	Manages the consortium. Members (no specific number) are appointed by the Ordinary Meeting. Directors typically hold office for two years and may be re-elected. They may or may not be entitled to a salary. An Executive Director may or may not be a member of the Board of Directors or may participate without having the right to vote. From among its members, the Board may designate the President of the consortium as well as Vice Presidents. The Board of Directors is convened when the President or the majority of members judges it necessary.	Responsible authorities	Ministry of Productive Activities, Internationalization Department: for multi-regional consortia and for regional consortia operating in Sicily and Valle d'Aosta. Other regional consortia come under the responsibility of the regional bodies, which can apply L.83/89 or similar regional laws.
Board of Auditors	An optional body that oversees the consortium's accounting. If the creation of a Board of Auditors is foreseen, the number of members is specified in the Statute. Many consortia simply outsource the auditing of accounts.		

² Minimum number of associated SMEs: 8 (5 for consortia operating in Southern Italy, consortia of craft companies, consortia of companies in the textile/clothing industry and operating in specific product sectors - velvet for furniture, velvet for clothing, cotton yarns, denim fabrics)

A.3 Role of support institutions

FEDEREXPORT

The Italian Federation of Export Consortia is a national association of export consortia. Founded in 1974, it currently represents 110 consortia with a total of about 4,000 firms operating in all business sectors. The Federation also includes two hotel associations, which together group 1,700 hotel chains and individual hotels. Federexport is the consortia's representative in contacts with the institutions promoting Italian firms: the Italian National Institute for Foreign Trade (ICE), the Ministry of Productive Activities, the Ministry of Foreign Affairs, regional governments and Chambers of Commerce, both in Italy and abroad. Through its lobbying activities, Federexport was able to achieve the recognition of consortia as a specific legal entity in the Civil Code.

In addition to coordinating its members' activities, Federexport promotes the consortium model in other countries, provides tax and legal advice to consortia and directly promotes the exports of its member SMEs through trade delegations, market surveys and conferences. Furthermore, Federexport has negotiated credit lines from major banks to finance the sale of its members' goods and services to Central Europe, Mediterranean countries and Latin America. To publicize the work of consortia to a wider audience, to further inter-consortia cooperation and to speed up the flow of information between the consortia and the group of member firms, Federexport has produced a computerized network and created a website (www.federexportonline.it).

In recent years, especially after the transfer of the authority for regional consortia to the respective regions, regional export Consortia federations, belonging to the FEDEREXPORT network, were created in Lombardy, Veneto, Piemonte, Calabria and Sicily. FEDEREXPORT Umbria and Emilia Romagna should be soon established.

Other support institutions

CNA has an Internationalisation Department that also deals with export consortia promotion. 30 consortia are associated to CNA, 6 of which are also associated to FEDEREXPORT. The Italian Confederation of Small and Medium-sized Industries (CONFAPI), CONFARTIGIANATO (the other Italian confederation of craft firms) and other, minor organizations together represent about 40 consortia (about 10 of which are also associated to FEDEREXPORT). The reason why some export consortia are associated to other organisations than FEDEREXPORT is that they belong to specific representatives bodies, such as those for crafts. While some of them are also associated to FEDEREXPORT, most prefer only one membership, for economic reasons.

A.4 Number and typology of operational export consortia

Until 2000 (before the 'regionalization' of Law 83/89), the main source for data on export consortia was the Ministry of Foreign Trade (now a Department of the Ministry for Productive Activities), because almost all consortia applied every year for the L. 83/89 subsidies. It is now quite difficult to obtain this information: the 18 regions that directly manage the subsidies in different ways and applications are made at different times of the year.

The figures in this section are based on information from FEDEREXPORT, CNA, etc. For independent consortia the Chambers of Commerce (where every firm must be registered) are a source of information, but the consortia may be registered as international marketing service firms, market survey service firms, etc. FEDEREXPORT intends to survey all Italian export

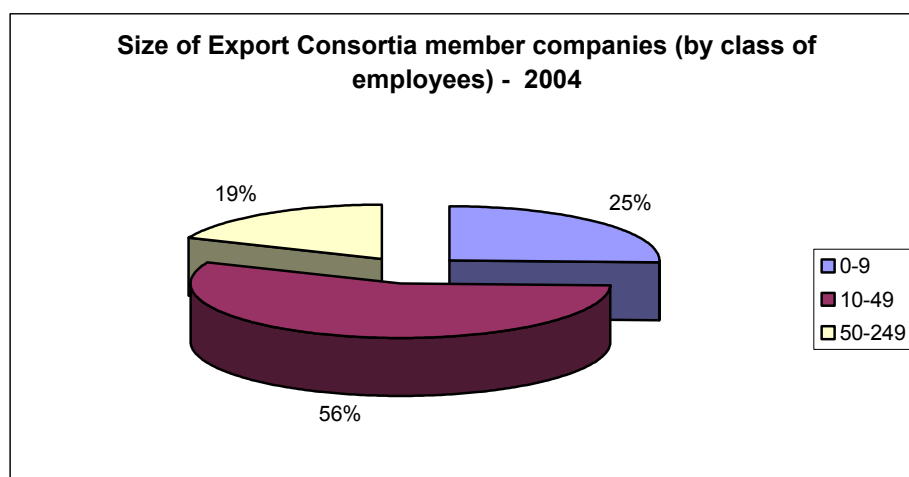
consortia at the end of this year, with the cooperation of regional bodies, employers organisations, Chambers of Commerce, etc.

Export consortia accounted for 5.4% of Italian exports in 2004 and their exports grew by 8,8% in that year (2003: 6,1%). The share of exports in members' global turnover was 46,4% (up from 45,3% in 2003).

The total number of export consortia (almost all of them are promotional consortia) is estimated at about 410, of which 110 are members of FEDEREXPORT, 24 are members of CNA and about 25 are members of CONFARTIGIANATO/CONFAPI (consortia belonging to two federations have been excluded). There are about 250 independent consortia. The north of the country accounts for 57%% of the consortia, the centre for 28% and the south for 15%.

Most of firms that are members of export consortia have 10-49 employees, as Figure 3 shows, but there is also a sizeable number of smaller firms (although very small firms are less likely to operate in foreign markets); larger firms are more likely to be able to operate independently.³

Figure 3



The shift among types of consortia is shown in Figure 4. Initially, more multiple-sector consortia were created because co-operation was easier among entrepreneurs belonging to different product sectors, as these do not compete with one another. The change is due to the fact that members have learned to appreciate the greater efficiency of single-sector consortia. Figure 5 shows the relative importance of the various industries, Figure 6 the major services provided by the consortia, and Figure 7 the main markets targeted, with the relevant promotion activities.

³ FEDEREXPORT-CNA sample

Figure 4: The evolution of consortium types⁴

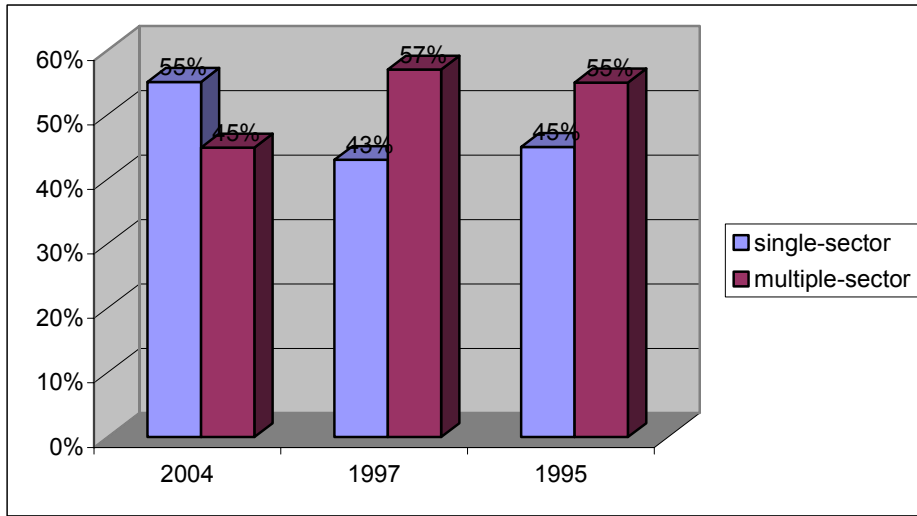
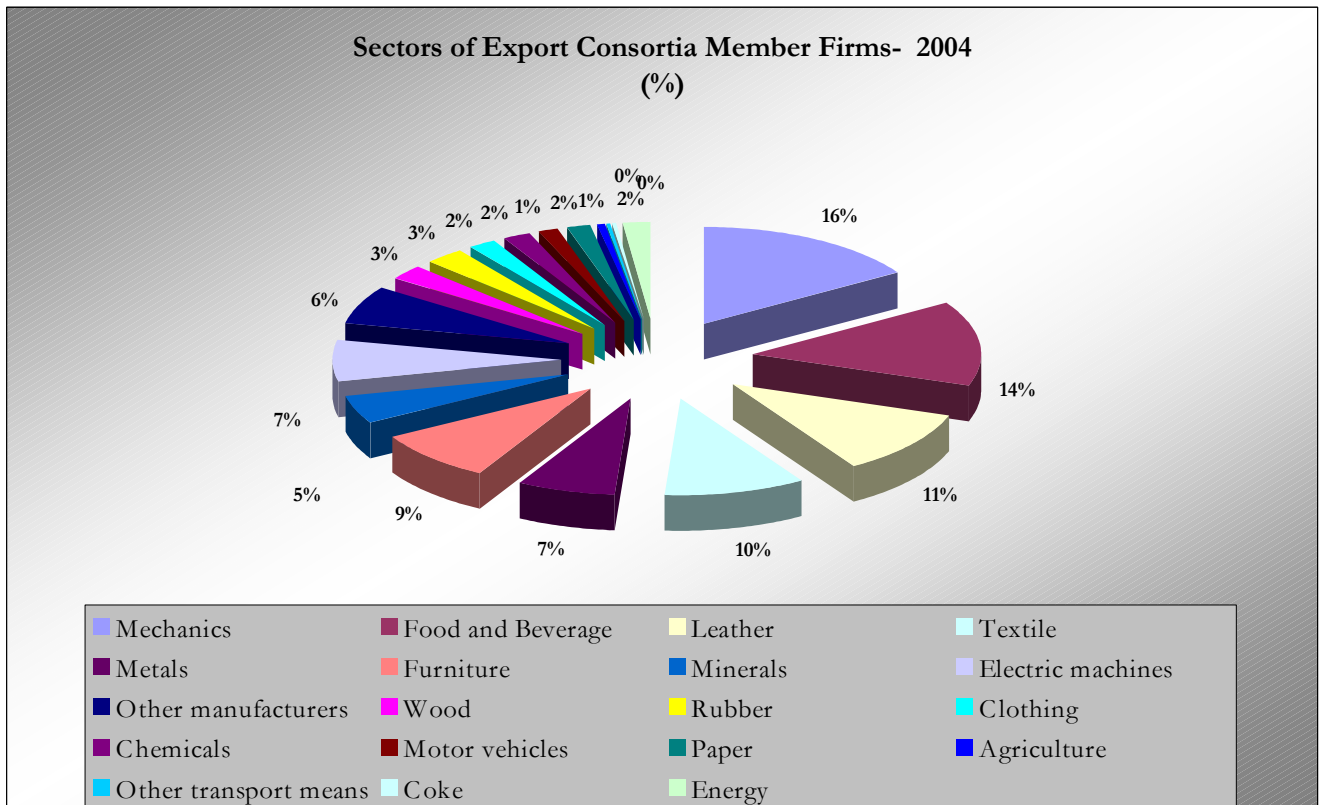


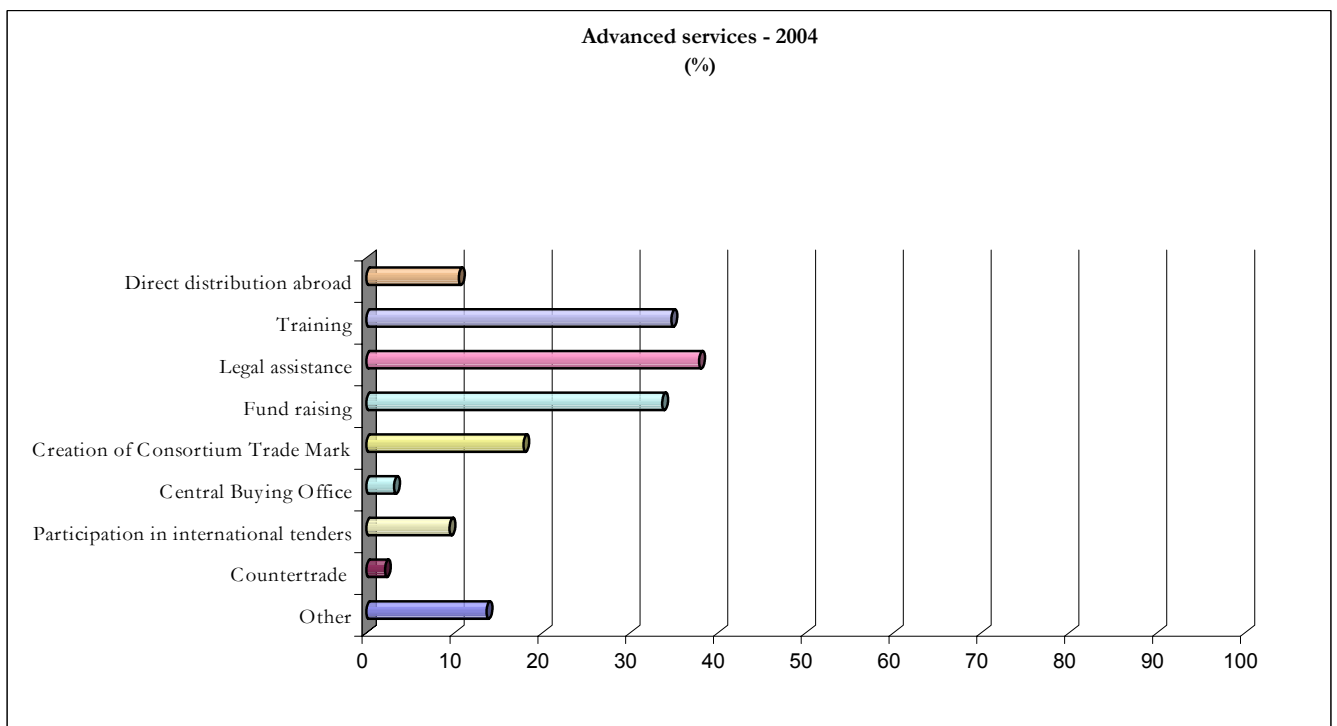
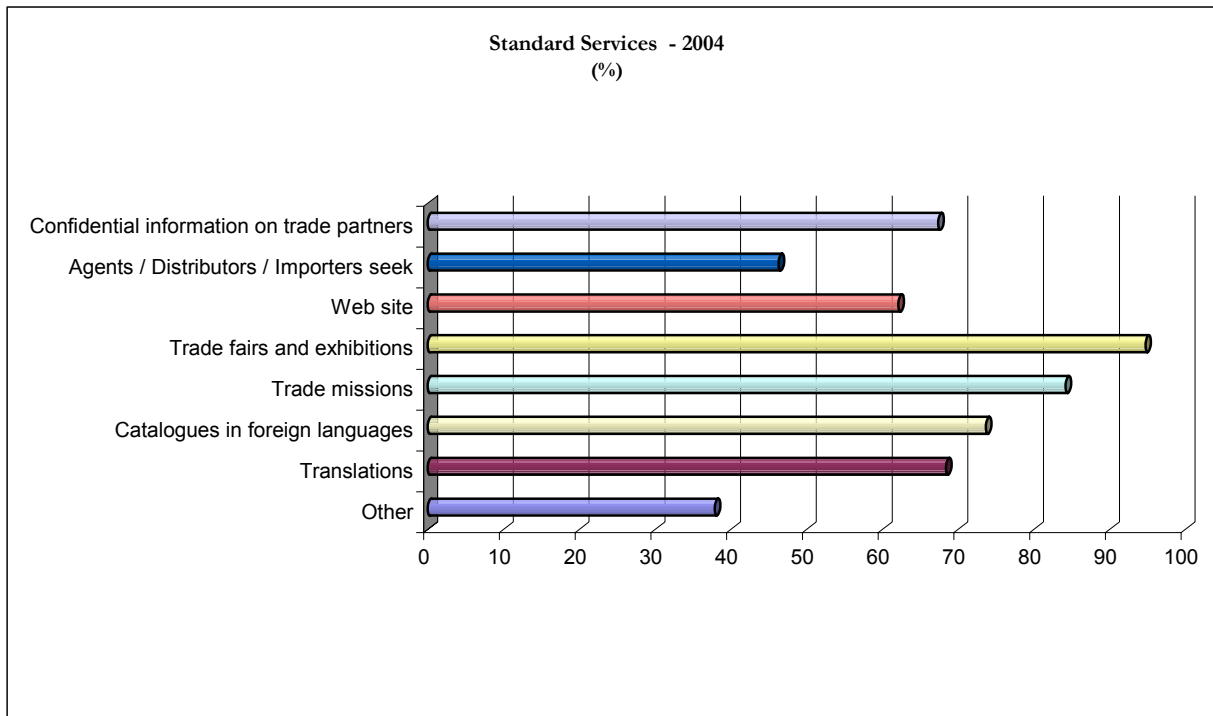
Figure 5⁵



⁴ FEDEREXPORT-CNA sample

⁵ FEDEREXPORT sample

Figure 6: Main services provided by export consortia to member firms⁶

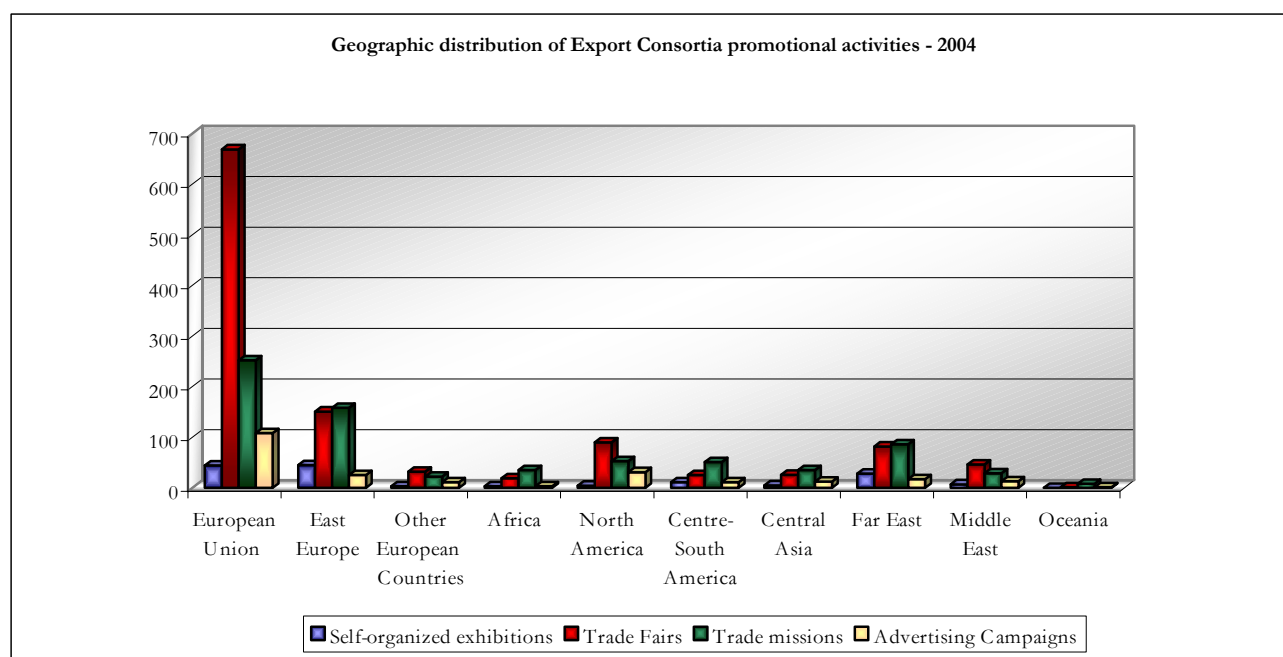


⁶ FEDEREXPORT sample

Figure 7: Main markets targeted and relevant promotional activities implemented by export consortia⁷

Artea	Self-organized exhibitions	%	Trade Fairs	%	Trade missions	%	Advertising Campaigns	%	TOTAL
Oceania	0	0,00	1	0,09	8	1,10	1	0,43	10
Middle East	7	4,67	46	4,03	29	3,98	13	5,60	95
Far East	28	18,67	82	7,19	86	11,80	17	7,33	213
Central Asia	5	3,33	26	2,28	35	4,80	12	5,17	78
Centre-South America	11	7,33	25	2,19	51	7,00	11	4,74	98
North America	4	2,67	90	7,89	53	7,27	31	13,36	178
Africa	3	2,00	19	1,67	35	4,80	3	1,29	60
Other European Countries	3	2,00	32	2,80	22	3,02	11	4,74	68
East Europe	45	30,00	151	13,23	158	21,67	25	10,78	379
European Union	44	29,33	669	58,63	252	34,57	108	46,55	1073
TOTAL	150	100,00	1141	100,00	729	100,00	232	100,00	2252
%	6,66		50,67		32,37		10,30		100

Figure 8



⁷ FEDEREXPORT-CNA sample

A.5 Main obstacles to the creation of export consortia and proposals for improvement

The Italian support institutions and the national legal and incentive framework are supportive, and are seen as a model in other countries. The existing tools should therefore continue to be used. More priority could be given to consortia and other forms of association in the many funding schemes for enterprises. Because of the large number of export consortia, a stricter selection of projects could be necessary to reduce the volume of funding applications. As consortia with a larger number of member firms show better performance (they can realize scale-economies), the minimum number of member firms could be raised by another 5 units.

The main problems hampering the creation of export consortia come from the firms themselves:

- Entrepreneurs often see other firms as potential competitors and not as potential partners;
- Export promotion does not lead to short-term results, and is therefore not considered a good investment;
- Consortium operations are not given enough attention (reluctance to appoint external directors and staff, discontinuous activities, etc.);
- Export consortia can be confused with other forms of association such as employers associations, specific sector associations, etc.
- Limited export activity: the geographic distribution of export consortia is directly related with regional export performance - SMEs in other areas often do not understand the importance of competitive alliances such as export consortia.

Table 8: Overview of consortia development issues and proposals for action

Issue	Proposed action
Role of support institutions and legal and incentive framework	Increase priority of consortia and other SMEs networks in all funding schemes related to internationalisation; better selection of export consortia projects; increase minimum number of member firms.
Competition among member companies	Consortia of firms with different products of one sector (for example food: cheese, pasta, olive oil) or with similar products which differ in terms of technical/qualitative characteristics and/or price.
Export promotion as a medium-long term investment	Intense information activity from support institutions is very important in this context. Workshops, training, presentation of positive case histories, etc., to raise awareness of export possibilities.
Operation of the consortium	
Confusion with other association forms	
Low export activity	

B. CASE STUDIES ON EXPORT CONSORTIA

		MEDEXPORT ITALIA	CEMB - Consorzio Export Monza e Brianza
Consortium profile, services and organisation	Sector	Chemical-pharmaceutical	Clothing, automotive accessories, building materials, hardware, textile, food industry, office furniture, domestic appliances, cosmetics, energy, machine tools, etc.
	Type	One-sector - promotional and sales	Multiple-sector - promotional
	1. Legal form and capital 2. Number of firms and their size 3. Year of incorporation	1. Export consortium; capital (consortium fund): € 15,493.68 2. 12 firms (6 with < 50 empl., 6 with 50-250 empl.) 3. 1991	1. Export consortium; capital (consortium fund): € 261,581 2. 198 firms (40 with 0-10 empl.; 108 with 11-50 empl.; 49 with 51-249 empl.) 3. 1980
	Organizational structure	<p><i>Human resources:</i></p> <ul style="list-style-type: none"> ▪ Chairman of the board ▪ General manager ▪ 3 full time secretaries ▪ 1 full time scientific consultant ▪ Several external consultants <p><i>Rented offices (external to member firms):</i> Headquarters: Rome Sales/promotion offices in Vietnam and Kazakhstan</p>	<p><i>Human resources:</i></p> <ul style="list-style-type: none"> ▪ President ▪ Director ▪ International trade fairs, trade missions, recruitment of agents, distributors, etc: 4 persons ▪ Administration: 2 persons ▪ Travel agents, marketing tools (brochures, leaflets, etc.), training, Intrastat statements (EU trade statistics): 1 person ▪ Secretaries: 2 <p><i>Rented offices (external to member firms):</i> Headquarters: Monza Promotion offices in (costs shared with local partners):</p> <ul style="list-style-type: none"> ▪ Romania ▪ Bulgaria ▪ Serbia ▪ Czech Republic ▪ Poland ▪ Slovak Republic ▪ Russia ▪ Lebanon ▪ Vietnam

Consortium profile, services and organisation	Consortium name	MEDEXPORT ITALIA	CEMB – Consorzio Export Monza e Brianza
	Main types of services	<p><i>Services for the promotion and sales of member firms' products:</i></p> <ul style="list-style-type: none"> ▪ Market survey and identification of distribution channels ▪ Pharmaceuticals registration with Health Ministry ▪ Preparation of registration files for foreign countries ▪ Organization of sales, shipments, receipts and payments ▪ Resolution of legal, customs, fiscal issues ▪ Organization of meetings with foreign delegations ▪ Organization of trade missions ▪ Participation in international exhibitions for the sector ▪ Scientific workshops ▪ Participation in international tenders 	<ul style="list-style-type: none"> ▪ International trade fairs ▪ Trade missions ▪ Importers/distributors/agent search ▪ Survey of specific markets ▪ Translation ▪ Preparation of marketing tools (brochures, catalogues, advertising) ▪ Language training ▪ Confidential trade information ▪ Export credit insurance ▪ Quality certification training ▪ Agreements with travel agencies, express couriers, shippers, car rental, petrol companies, etc. ▪ Legal assistance and international contracts ▪ INTRASTAT statements ▪ Export staff recruitment
	Main markets targeted	<ul style="list-style-type: none"> ▪ Central Asia (Kazakhstan- Azerbaijan) ▪ Northern Africa and Middle East (Libya, Iraq, Yemen) ▪ Far East (Vietnam, Myanmar) 	<ul style="list-style-type: none"> ▪ EU ▪ Far East ▪ Middle East ▪ Africa
	Yearly operational and promotional costs	<ul style="list-style-type: none"> ▪ Yearly operational costs (office rental, personnel, general costs): € 441,000 ▪ Yearly promotion costs (trips, market surveys, promotional material, trade missions, trade fairs. etc.): € 695,000 	<ul style="list-style-type: none"> ▪ Yearly operational costs: € 559,831 (personnel 94%, office rental 2%, general costs 4%) ▪ Yearly promotion costs: € 9,669,747 (business trips and missions 11%, trade fairs 45%, catalogues, advertising and other marketing services 44%)
	Funding of the consortium	<ul style="list-style-type: none"> ▪ Annual fee: € 25,000 per member company + variable fee according to each member's turnover ▪ Law 83/89 subsidies 	<ul style="list-style-type: none"> ▪ Member firms annual fees: about 30% ▪ Public support: about 70% (Lombardy regional subsidies: L. 35 B 2.3 - the regional law that rules the export consortia subsidies- and subsidies from Milan Chamber of Commerce)
	Cost of incorporation of the consortium	As limited companies	As limited companies

	Consortium name	MEDEXPORT ITALIA	CEMB - Consorzio Export Monza e Brianza
	History of the consortium	The promoters were a group of companies of the chemical-pharmaceutical sector and the general manager had already the opportunity to cooperate in a FARMINDUSTRIA (the Italian association of pharmaceutical industries) working group. They decided to extend their specific technical cooperation to export promotion.	The promoter was (and is) the Industrialists Association of Monza and Brianza. It was established, with 8 member firms, as a one-sector export consortium (furniture hardware and fittings). In 1988 it was transformed into a multiple-sector consortium promoting the exports of the main sectors of the Brianza area. Since that year the number of member companies has strongly increased.
History, evolution and challenges	Performance (main activities and results)	<p><i>Promotion activities (2004):</i></p> <p>International trade fairs: Middle East: 1 Trade missions: ▪ Other European Countries : 2 ▪ Central Asia: 4 ▪ Far East: 2 ▪ Middle East: 1</p> <p>Advertising campaigns: ▪ Central Asia: 5 ▪ Far East: 5</p> <p><i>Total turnover of member firms (2004): € 25.000.000</i> <i>Export share in total turnover of member firms (2004): 13% (+ 12%)</i></p> <p><i>Member firms export turnover distribution:</i> ▪ Central Asia: 10% ▪ Far East: 25% ▪ Middle East: 65%</p> <p>Main new markets: Iraq, Kazakhstan, Vietnam</p>	<p><i>Promotion activities (2004):</i></p> <p>International trade fairs: ▪ EU(25): 75 ▪ Eastern Europe : 5 ▪ Other European Countries : 11 ▪ Africa: 4 ▪ Northern America: 2 ▪ Southern America: 1 ▪ Central Asia: 1 ▪ Far East: 9 ▪ Middle East: 5</p> <p>Trade missions: ▪ EU(25): 7 ▪ Eastern Europe : 3 ▪ Africa: 2 ▪ South America: 1 ▪ Central Asia: 1 ▪ Far East: 4 ▪ Middle East: 2 ▪ Oceania: 1</p> <p><i>Total turnover of member firms (2004): € 870,000,000</i> <i>Export share in total turnover of member firms (2004): 51%</i></p> <p><i>Member firms' export turnover distribution:</i> ▪ EU(25): 48% ▪ Eastern Europe : 14% ▪ Other European Countries : 2% ▪ Africa: 3% ▪ North America: 9% ▪ South America: 4% ▪ Central Asia: 2% ▪ Far East: 9% ▪ Middle East: 8% ▪ Oceania: 1%</p>

History, evolution and challenges	Consortium name	MEDEXPORT ITALIA	CEMB - Consorzio Export Monza e Brianza																																		
	Main challenges ahead	Establishment of a new office in the Middle East																																			
	Changes in membership	During its first years of activity the consortium has attracted firms with 'generic' pharmaceutical products; new member firms are now requested to supply innovative products responding to the market trends of the target countries.	<p><i>Growth of number of member firms, 1980 to 2004</i></p> <table> <tr><td>1980-1988:</td><td>13</td></tr> <tr><td>1989:</td><td>61</td></tr> <tr><td>1990:</td><td>82</td></tr> <tr><td>1991:</td><td>99</td></tr> <tr><td>1992:</td><td>105</td></tr> <tr><td>1993:</td><td>109</td></tr> <tr><td>1994:</td><td>110</td></tr> <tr><td>1995:</td><td>120</td></tr> <tr><td>1996:</td><td>124</td></tr> <tr><td>1997:</td><td>127</td></tr> <tr><td>1998:</td><td>142</td></tr> <tr><td>1999:</td><td>157</td></tr> <tr><td>2000:</td><td>165</td></tr> <tr><td>2001:</td><td>183</td></tr> <tr><td>2002:</td><td>195</td></tr> <tr><td>2003:</td><td>197</td></tr> <tr><td>2004:</td><td>198</td></tr> </table>	1980-1988:	13	1989:	61	1990:	82	1991:	99	1992:	105	1993:	109	1994:	110	1995:	120	1996:	124	1997:	127	1998:	142	1999:	157	2000:	165	2001:	183	2002:	195	2003:	197	2004:	198
	1980-1988:	13																																			
1989:	61																																				
1990:	82																																				
1991:	99																																				
1992:	105																																				
1993:	109																																				
1994:	110																																				
1995:	120																																				
1996:	124																																				
1997:	127																																				
1998:	142																																				
1999:	157																																				
2000:	165																																				
2001:	183																																				
2002:	195																																				
2003:	197																																				
2004:	198																																				
Changes in type of services	The first services provided by the Consortium to member companies were the standard promotion services (trade fairs, missions, etc.) and the participation in international tenders (UNICEF, WHO, NGOs,) for the supply of pharmaceuticals. During the 14 years of activity, services were gradually widened to the present range.	The first services provided by the Consortium to member companies were the standard promotion services (trade fairs, missions, etc.). With the growth of the consortium during the '90s more services were added (see above)																																			

Sources:

- “A Guide to Export Consortia” – UNIDO-FEDEREXPORT
- FEDEREXPORT
- ICE
- ISTAT
- CNA
- MEDEXPORT ITALIA
- C.E.M.B. – CONSORZIO EXPORT MONZA & BRIANZA
- INFOIMPRESE
- Ministero della Attività Produttive
- SIMEST