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# Opportunità, requisiti e accorgimenti per le imprese

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# ABB: leader tecnologico all'avanguardia

## Cosa

(Offerta)

**Energia e Automazione**

## Per chi

(Clienti)

**Utility**

**Industria**

**Trasporti & infrastrutture**

## Dove

(Aree geografiche)

**A livello globale**

Asia, Medio Oriente e  
Africa

Americhe

Europa

Ricavi: ~\$34 mld

~100 Paesi

~147.000 dipendenti

# Mercati attrattivi: la rivoluzione nell'energia e nell'industria

## La Rivoluzione Energetica



## La Quarta Rivoluzione Industriale



Utility

Industria

Trasporti e Infrastrutture

# ABB Digital Strategy: Utility

Ridurre i tempi di installazione (-40%), i costi di manutenzione (-50%) e i tempi di interruzione del servizio (-50%)

## Digital operations

### Asset performance management



### Gestione del processo di manutenzione



### Sottostazione digitale automatizzata



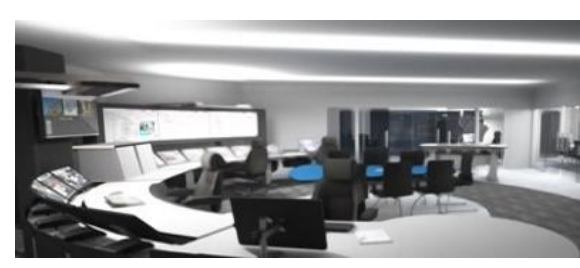
### Microgrids



### Gestione distribuita di risorse energetiche



### Monitoraggio e ottimizzazione da remoto



# ABB Digital Strategy: Industria

Migliorare la produttività (<200%), ridurre i consumi (<30%) e prolungare il ciclo di vita del prodotto (<30%)

## Digital operations

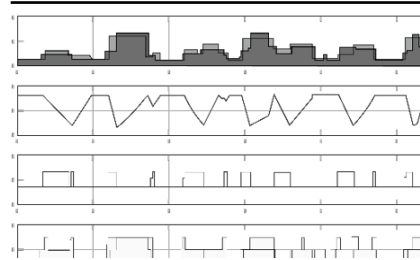
### Robot connessi



### Manufacturing execution systems (MES)



### Valutazione energetica



### Valutazione della cybersecurity



### Simulazione digitale dell'impiego del robot



### Monitoraggio della qualità dell'energia & demand-response



### Sistemi di controllo distribuiti



### Monitoraggio e ottimizzazione da remoto



# ABB Digital Strategy: Trasporti e Infrastrutture

Rilevare proattivamente i guasti (<90%), ridurre i costi di manutenzione (<20%) e i costi energetici (<5%)

## Digital operations

### Gestione dell'energia per mega-datacenter



### Ricarica per veicoli elettrici con cloud mng. Coord. Veicoli connessi demand/supply



### Ricarica ultra rapida di autobus elettrici



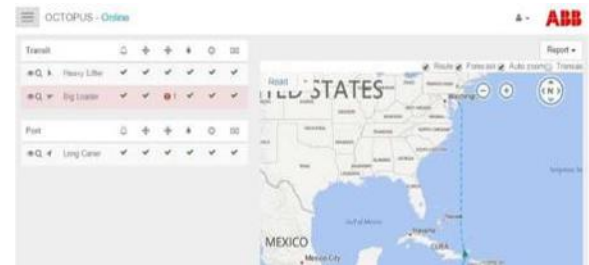
### Building & vessel automation



### Monitoraggio remoto per i sistemi elettrici delle navi



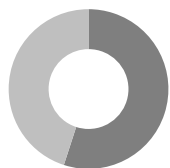
### Ottimizzazione della navigazione per le flotte



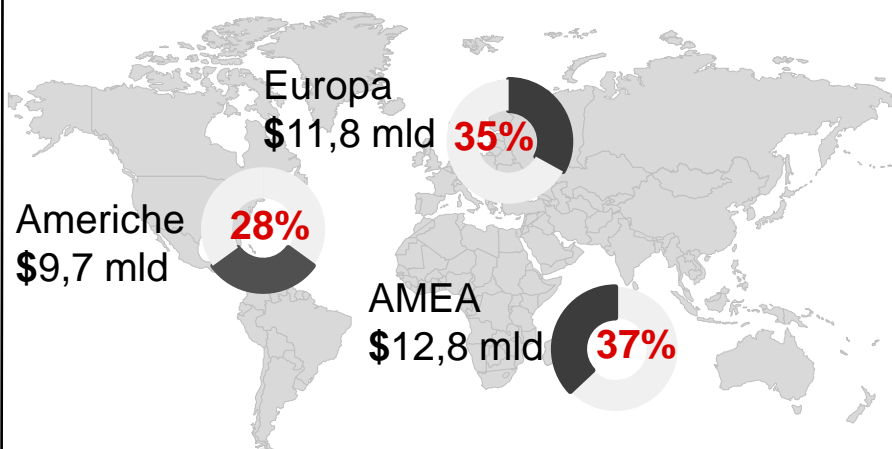
# Posizione strategica nei mercati attrattivi

Un player veramente globale - team, cultura e presenza

## Suddivisione ricavi 2017



- Mercati maturi (54%)
- Mercati emergenti (46%)



## I nostri 200 top manager

- >3/4 provenienti da Paesi diversi da Svizzera e Svezia
- 27 nazionalità da 6 continenti
- 7 nazionalità nel Comitato Esecutivo

ABB ha un team globale unico con una presenza locale ovunque

# HVDC to enable transmission of hydropower in Central Asia



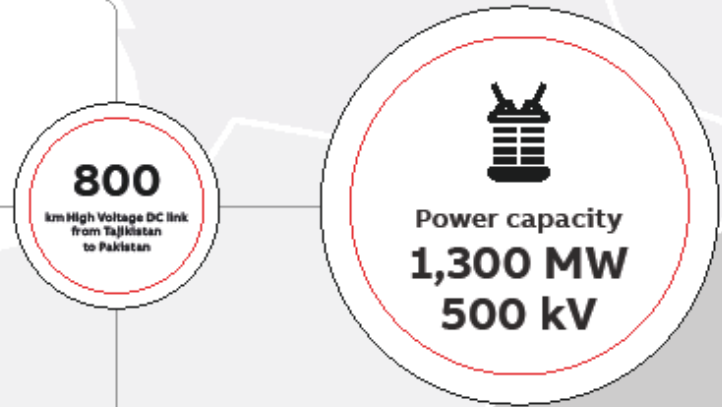
Facilitating electricity trade



Meeting the growing demand for electricity in Pakistan



Leveraging vast amounts of hydro power in Tajikistan



Sangtuda

Nowshera



# Kazakhstan: Country overview

- Largest and strongest performing economy in Central Asia
- Common borders with Russia, China, Uzbekistan, Kyrgyzstan and Turkmenistan
- Abundant supply of accessible mineral and fossil fuel resources (second largest uranium, chromium, lead, and zinc reserves, the third largest manganese reserves, the fifth largest copper reserves, and ranks in the top ten for coal, iron, oil and gold)
- Economy is heavily dependent on raw natural resources prices, with low processing industry
- Analysts estimate Kazakhstan's 2018 GDP to increase 3.9%. For 2019, forecast shows a 3,5% expansion.



Capital	<a href="#">Astana</a>
Largest city	<a href="#">Almaty</a>
Official languages	<ul style="list-style-type: none"> <li>• <a href="#">Kazakh (official state language)</a></li> <li>• Russian (using as official)</li> <li>• <a href="#">66.48% Kazakh</a></li> <li>• <a href="#">20.61% Russian</a></li> <li>• 12.91% others</li> </ul>
Ethnic groups(2016 <sup>[2]</sup> .)	Kazakh
<a href="#">Demonym</a>	Unitary dominant-party presidential republic
<a href="#">Government</a>	Nursultan Nazarbayev
• <a href="#">President</a>	<a href="#">Parliament</a>
Legislature	
<a href="#">Area</a>	
• Total	<a href="#">2,724,900 km2(1,052,100 sq mi) (9th)</a>
• Water (%)	1.7
<a href="#">Population</a>	
• 8 January 2017 estimate	18,050,488 <sup>[4]</sup> (64th)
• Density	<a href="#">6.49/km2 (16.8/sq mi) (227th)</a>
GDP (PPP)	2018 estimate vs 2015
• Total	\$497 billion vs \$440 billion
• Per capita	\$26,929 vs \$24,940 ↓
<a href="#">GDP (nominal)</a>	2018 estimate vs 2015
• Total	\$175 billion vs \$184 billion
• Per capita	\$9,495 vs \$10,434
<a href="#">Gini (2013)</a>	<a href="#">26.4</a>
	Low
<a href="#">HDI (2014)</a>	<a href="#">0.788</a>
	<a href="#">high · 56<sup>th</sup></a>
Currency	Tenge (₸) (KZT)
Time zone	West / East (UTC+5 / +6)

# ABB's footprint in Kazakhstan and Central Asia

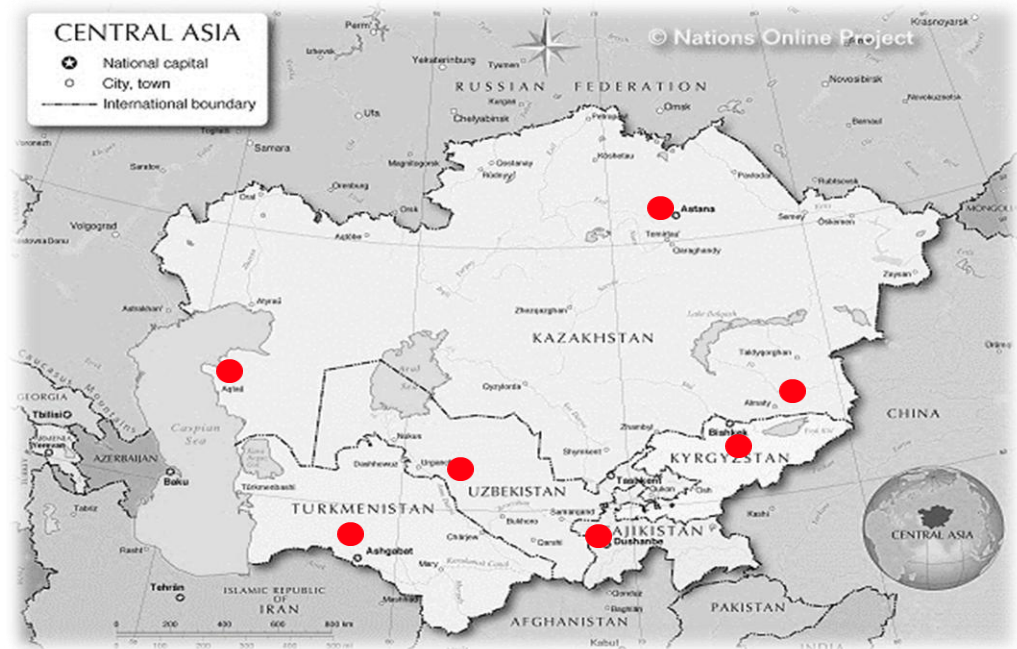
## Representations in countries

**70+** employees

**Representative offices** in Kazakhstan:

- Astana
- Aktau
- Atyrau

**Partners** throughout Central Asia



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# How ABB Kazakhstan is organized

Our solutions for different industries

## Oil and Gas



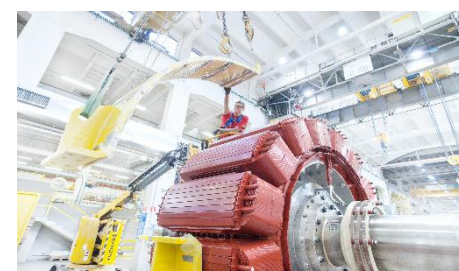
... we can raise the productivity and efficiency of the entire oil and gas value chain

## Metal and Mining



...we help to optimize power and productivity resulting in increased availability and lower lifetime investment costs

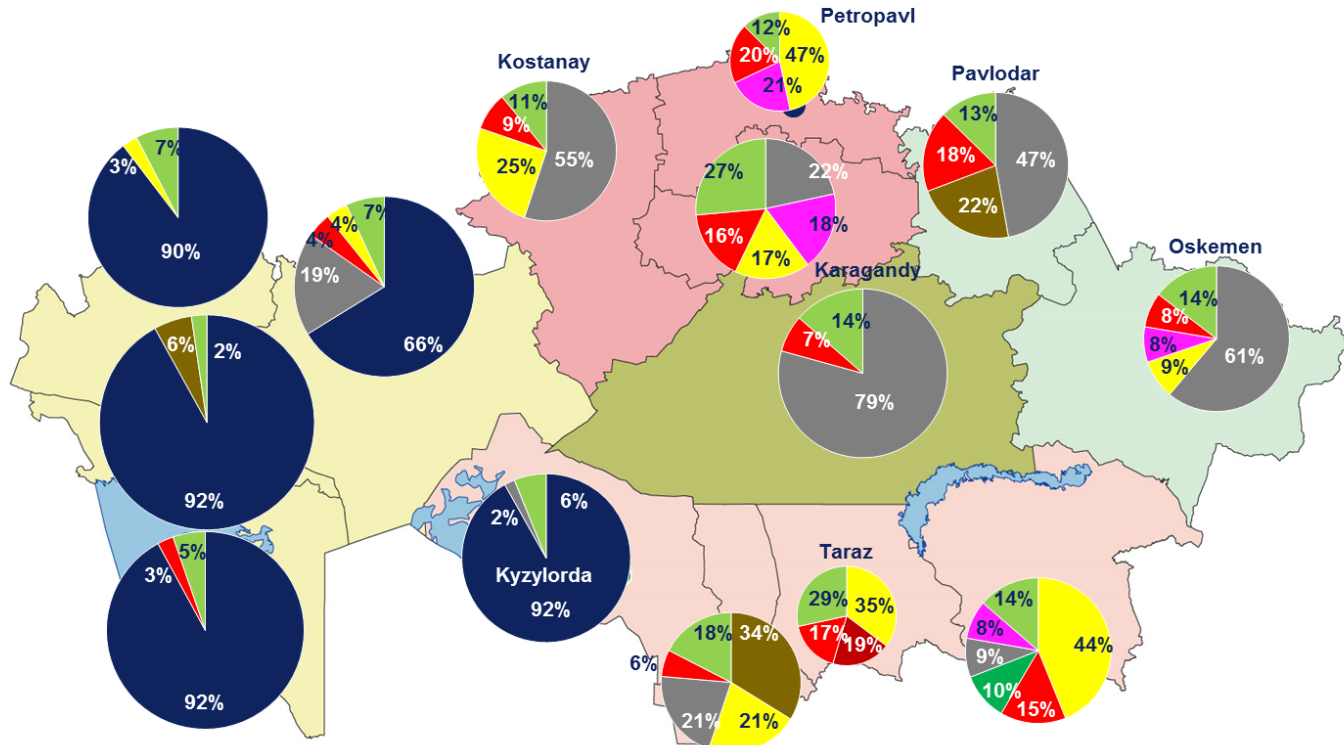
## Utilities and Generation



... we provide reliability of generation, transmission and distribution of electricity

# Country Industry Map

O&G	F&B	C&P
M&M	P&P	P&G&W
Refining	Machinery	Other

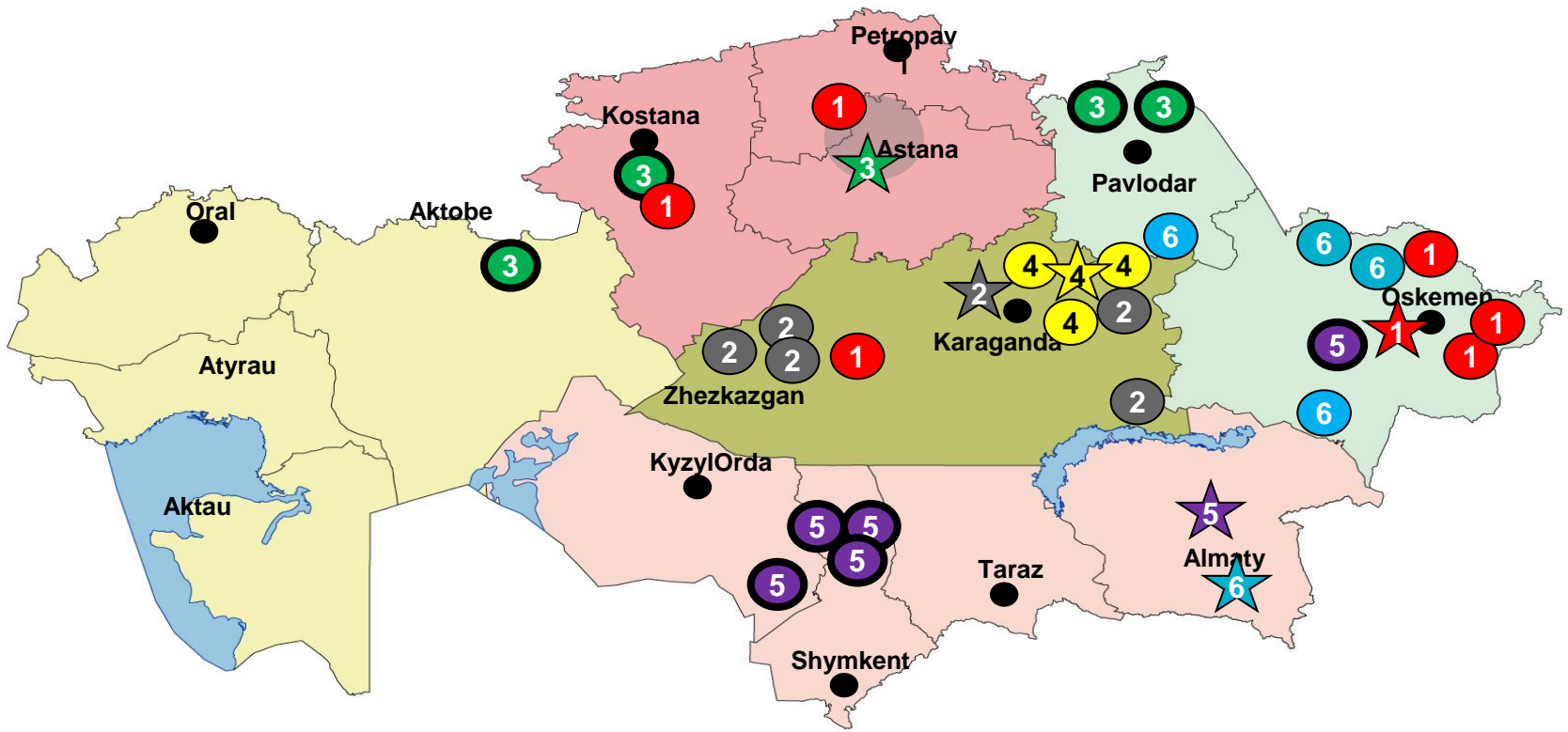


**O&G and M&M are the major industries in Kazakhstan.  
O&G is predominantly located in the western and M&M is in the central and eastern parts of the country**

# Key Industry Players

Site locations and Decision Making Centers

- 1 Kazzinc
- 2 Kazakhmys
- 3 ERG
- 4 ArcelorMittal
- 5 KazAtomProm
- 6 KazMinerals

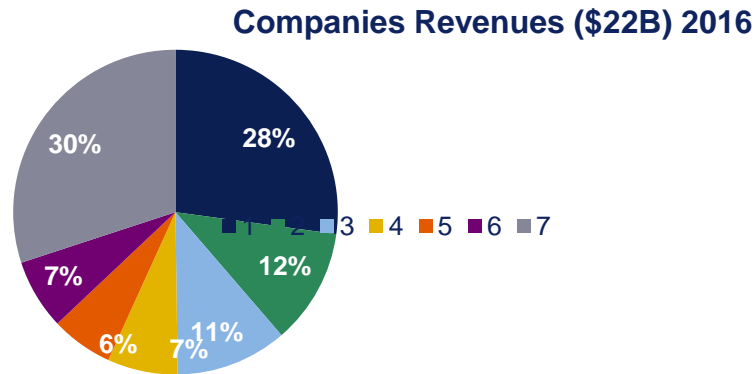


Many sites diversely distributed across the country

# Metals & Mining Players

## Overview

### Key Customers/Players (“Big 6”)



### Market Share

\* TMK; AltynAlmas; SBS Group; AO Varvarinskoye; Voskhod-Oriel; KazakhAltyn; YuzhPolyMetal; AO Yubileynoe; SAT & Company; ..... (about 50 companies in total)



### Business Summary

- M&M is **15-20%** of the country's gross domestic product and **19%** of the total industrial volume (2016)
- Focused on: Copper, Zinc, Alumina/Aluminium, Chrome, Gold, Steel, Uranium, Lead, Rare Metals
- Generally low level of rehabilitation and automation (except KazZinc and KazMinerals)
- **Important:** Most of “Big 6” are also owners of Power Plants and Grids

# Requisiti per poter competere con successo

## ➤ Essere presenti e visibili

- Investire nello sviluppo di competenze
- Comprendere quali sono i processi decisionali locali
- Sviluppare relazioni strette e trasparenti nei mercati target
- Accedere alle informazioni sui bandi di gara promossi dalle banche di sviluppo per i progetti BRI

## ➤ Differenziarsi

- Individuare con chiarezza la propria Value Proposition e i fattori differenzianti rispetto a concorrenti locali (per esempio nel digital)

## ➤ Accedere e garantire un accesso ai finanziamenti

- Creare consorzi di eccellenza tra PMI per poter accedere ai bandi di gara BRI
- Aiutare i clienti a trovare la strada corretta per accedere a strumenti di finanziamento

**ABB**