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25-27TH SEPTEMBER | VILLA ERBA | CERNOBBIO

MANUFACTURING: WHY INVEST IN ITALY

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ITALIAN TRADE AGENCY
ICE - Agenzia per la promozione all'estero e
l'internazionalizzazione delle imprese italiane



Ministero dello Sviluppo Economico

INVITALIA

INVESTMENT OPPORTUNITIES IN 11 ITALIAN REGIONS



AEROSPACE



HEALTHCARE



AGRIFOOD INDUSTRY



MACHINERY & MECHATRONICS



CHEMICAL INDUSTRY



MOBILITY INDUSTRY



FASHION, FURNITURE
AND HOME SYSTEM



RENEWABLE ENERGY
& GREEN INDUSTRY

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AEROSPACE

APULIA
LAZIO
LOMBARDY
PIEDMONT



APULIA

AEROSPACE

Infrastructures and connections

- 2 international airports (Bari and Brindisi), serving over 40 international destinations;
- 1 industrial cargo airport (Taranto-Grottaglie), recently adopted as a test-bed for remotely piloted aircraft and designated as the first spaceport in Italy for the development of sub-orbital flights
- 1 local airport (Foggia), with connections to Tremiti Islands
- 3 major ports: Taranto (container shipping; the 3rd largest commercial port in Italy for cargo traffic); Bari (passenger and container traffic); Brindisi (passenger traffic)
- Extensive road and railway networks, linking the region to major north-south corridors and high-speed rail network



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Industrial base

Apulia is a dynamic region of the South East of Italy where companies have been involved in the aeronautics sector since the 1930's. Today, Apulia plays a leading role in the aerospace industry in Italy and boasts a significant industrial concentration, with over 560 companies (MNEs, SMEs, start-ups), occupying over 7,550 employees, active throughout the region in various fields of R&D and manufacturing that make up the entire aerospace supply chain, from the production of aircraft components to space software.

Continuous investment in innovation, as well as in skills, have turned Apulia into a centre for excellence in aerospace, making it the only Italian region in which the following sector specializations co-exist: fixed-wing, rotating wing, aerospace software (Leonardo Group); production of sections of the fuselage and tail wing in carbon fibre for the Boeing 787 Dreamliner Project (Leonardo Group); propulsion (GE Avio Aero); design and assembly of aircraft components in titanium and carbon fibre (Dema Brindisi for Bombardier); Microsatellites and propulsion systems for space stations (Sitael); Design and production of ultra-light carbon fibre aircraft (Blackshape); R&D Centre for Additive Repairs (GE Avio Aero and Polytechnic University of Bari).

The aerospace industry is one of the most strategic sectors within the regional economy that has acquired a strong position in the international market in recent years thanks to its ability to strike up positive business relations with key players, contractors and OEMs, some of whom have chosen to invest in Apulia and contribute to the increasingly positive export performance (in 2018 the regional sector exports totalled 561,6 million euros, accounting for almost 10,2% of national exports).

In Apulia, there are two clusters involved in the aerospace sector and both of them actively seek to foster competitiveness and international business, stimulate and support research and training:

- DAP – Apulian Aerospace Business Cluster with over 70 associates (businesses and universities);
- DTA s.c.a r.l. - Apulian Aerospace Technological Cluster, a non-profit making consortium which brings together key industry players, universities, as well as public and private research centres active in Apulia.

Facts and Figures

- **566 companies active in aerospace sector (large companies and SMEs) with over 7.555 employees.**
- **Regional sector export in 2018 amounted to 561,6 million Euros.**

Main business sector specializations:

- **Design, construction and assembly of aircraft and their components**
- **Design, production and testing of structures in carbon-fibre composite materials, metals and ceramics**
- **Technologies for sensor and mechanical systems**
- **Quality control**
- **Aircraft interiors**
- **Intelligent engine, aeronautical & space systems**
- **Microsatellites**
- **Propulsion systems for space stations**
- **Space software**
- **Ultralight carbon fiber aircraft**
- **R&D centre for additive repairs**
- **Test, case and frames**
- **MRO**
- **Remote tracking**

R&D network

3 major Universities (Bari, Foggia, Salento) and 1 Polytechnic University (Bari), which offers a Degree course in Aerospace Systems Engineering.

Research centres:

National Research Council (CNR), present in Apulia with 6 research institutes, including

- NANOTEC – Institute of Nanotechnology
- CNR- IMM (specialized in Microelectronics and Microsystems)
- CNR-ISSIA (specialized in Intelligent Systems for Automation)

CETMA – Technologies design and materials European research centre

ENEA - Italian National Agency for New Technologies, Energy and Sustainable Economic Development

OPTEL - specialized in high technological microelectronic and mechatronic solutions

Incentives and funding

Regional Contract Programmes: regional grants scheme supporting business innovation and investment projects for existing companies or for new companies to be located in the region, with investment budgets falling within the range between 5 million and 100 million Euros;

Integrated Incentives Packages (PIA): regional grants scheme supporting business innovation and investment projects for existing SMEs or new ones to be set-up in the region, with investment budgets falling within the range between 1 million and 40 million Euros;

Tecnonidi: regional grants initiative which supports investments projects for innovative start-ups and SMEs, with a high-technology content aimed at introducing new products, services and/or business solutions, with investment budgets falling within the range between 25,000 and 350,000 Euros.

Sites and buildings

2 Business Incubators located in Puglia Sviluppo's premises in Modugno (BA), suitable for service industry and digital start-ups and Casarano (LE), suitable for research and manufacturing activities.

DTA-Apulia Aerospace Technological Cluster and DAP-Apulia Aerospace Business Cluster based in Mesagne (Brindisi).

Success story

- **Leonardo Group is a global high-tech aerospace, defence and security company. As a strategic risk sharing partner for the Boeing Company, Leonardo develops and manufactures a significant share of the airframe for Boeing's "787 Dreamliner" aircraft in composite materials. Leonardo Group chose to invest in Apulia to create its international center of excellence in the field of composite materials, by setting up two state-of-the-art manufacturing plants in the region to carry out production for the "787 Dreamliner" project: in Foggia, Leonardo converted an existing facility for the production of the aircraft's horizontal stabilizer; in Grottaglie, Leonardo made an important greenfield investment to set-up an innovative plant for**



the production of two central fuselage sections, using “one piece barrel” technology.

- Avio Aero is a GE Aviation business that designs, manufactures and maintains components and systems for civil and military aviation, which has made two significant investments in Apulia within the past 5 years. In November 2016, Avio Aero, together with the Polytechnic University of Bari, launched the first laboratory in Italy devoted to the development of repair procedures for aviation engine components using innovative technology based in laser systems. The components involved in the research will come from various engines, including the GE90, which drives the Boeing 777 and the GENx, used on the 787 and 747-8 Dreamliners. In addition, at the Avio Aero production facility in Brindisi, which is specialized in the assembly and maintenance of aviation engines, the company has invested in new technology for the production of components for the low pressure turbine for both versions of the GENx engines and has set up a new additive manufacturing area.
- SITAEL is a world leader in the design and construction of micro-satellites, which has invested in a greenfield research and manufacturing facility in the town of Mola di Bari. Among its various project activities, Sitael was selected by ESA to develop and built the ESEO (European Student Earth Orbiter) satellite which was successfully launched into orbit in December 2018 from the Vandenberg Airforce base in California (USA) and is intended to measure the levels of radiation present in the low Earth orbit and tests technologies for future ESA missions. Sitael, part of Angel Group, not only developed the satellite platform, performing systems integration and qualification, but also coordinated the teams involved in the ESEO mission project, representing ten European universities from eight ESA member States: Estonia, Germany, Hungary, Italy, Netherlands, Poland, Spain, UK.

All of these investment initiatives were supported by regional government funding.

Business opportunity

Grottaglie Airport Test bed: Italian Centre of Excellence for Remotely Piloted Aircraft System Trials

In the near future, both aircrafts with pilots on board and remotely piloted aircraft systems will be operating in the same airspace. This poses not only the need to develop new aircraft platforms and associated ground systems, but also to define new rules and develop new technologies and products for all forms of air traffic control and management, in order to operate safely in the sky.

In 2014, with the backing of the Italian Government, the Italian Civil Aviation Authority (ENAC) devised a plan to qualify the Grottaglie Airport, based near Taranto in the South-east of Italy, as an integrated platform (airport, controlled airspace, systems for control and performance measurement, technological and logistical services), which aims to address these problems by creating facilities for testing, developing and offering innovative services, products and solutions for the aerospace sector.

In particular, Grottaglie Airport, thanks to its infrastructure, favourable location and facilities, represents an important test bed for companies and institutions interested in:

- conducting simulations and test trials, on the ground and in-flight, for manned and unmanned aircraft systems;
- carrying out test trials for ATF&M (Air Traffic Flow & Management) systems for product and service development and certification;
- developing products and solutions for territory observation and data management.

More recently, the Italian Ministry of Transport also designates Grottaglie airport as Italy’s first and only spaceport, which, based on the project assigned to ENAC for completion, will be ready for operating suborbital flights in 2020.

Aeroporti di Puglia S.p.A. (AdP) which manages the regional airport network, has been carrying out significant investments in the Grottaglie Airport infrastructure and has created a range of solutions and services (hangars, office space, etc.) for companies interested in locating at the airport.

Based on a Memorandum of Understanding between the Apulian Technological Aerospace Cluster (DTA) and Aeroporti di Puglia SpA, for the creation of an international research hub at Grottaglie Airport, significant research and training activities are already underway with programmes involving RPAS/UAS simulation and testing, as well as cybersecurity.

To facilitate investments in Apulia and stimulate the growth and development of the Grottaglie Airport hub, the regional government has devised a wide range of flexible incentive schemes, available through the regional government agency Puglia Sviluppo.

LAZIO

AEROSPACE

Infrastructures and connections

- 2 International Airports (Fiumicino Leonardo Da Vinci, Ciampino)
- 3 commercial ports (Civitavecchia, Gaeta, Fiumicino)
- Main Highways: A1 Naples-Rome-Milan; A12 Roma-Civitavecchia; A24 Roma-L'Aquila.

Industrial base

Lazio is the second region of Italy for GDP, equal to about 11% of the national total, and is placed by Eurostat among the twenty most important regional economies of EU. LAZIO Aerospace Technology Cluster (DTA) was legitimated in 2004 by a Framework Agreement signed by



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Italy Ministry of Research and Lazio Region. In 2012, the DTA of Lazio was one of the founding partners of the National Italian Cluster for Aerospace Technology (CTNA).

Lazio hosts large groups of international excellence in electronics, sensors, avionics, components and innovative materials, "space" and satellite applications and services, but 85% of the business landscape is made up of SMEs subcontracting electronics, ICT, advanced materials and aeronautical and airport services. The numerous existing plants produce components for the Ariane and Vega launchers, satellites, radars and equipment for aircraft and helicopters.

Lazio is the only Italian region which hosts the whole aerospace value chain, a peculiarity that creates a competitive advantage at national and international level.

The sector demonstrates a great capacity for cross-fertilization towards downstream application markets, in order to generate demand for innovation along the SMEs value chain and to intercept potential resources from Public Procurement. The technological transversality is nurturing Lazio "Space Economy" to seize commercially exploitable opportunities in agriculture, telecom, cultural heritage, smart cities and healthcare market applications. In Lazio there are 9 airports: among these, Fiumicino and Rome Ciampino constitute, by volume of aircraft, passenger and freight movements, the main reference point for the entire national airport system.

Lazio aerospace sector plays a leading role also in European projects, such as: COSMO-SkyMed, one of the most advanced satellite systems in the world with many strategic applications for environment control and natural disasters' management, ESA Vega launcher, 65% of which built in the province of Rome.

Facts and figures

LAZIO Aerospace Technology Cluster

- 250 companies
- 23,500 employees
- 5 billion euro turnover
- 1.6 billion of exports
- 10 Research Centres
- 5 Universities

- 3,000 R&D Phd & specialists
- 6 Incubators, Accelerators Technology Parks

Main business sector specializations:

- Launchers (Vega, solid rocket motor for Ariane)
- EO, NAV & TLC SATELLITES
- Design & Assembling of payloads
- Micro nano sats constellations
- Applications
- GovSatcomm
- Space surveillance and tracking (SST)
- Manned and unmanned Space Exploration (incl. International Space Station)
- Ground Segment Control Centers
- Safety & Security
- Air Traffic Management
- Homeland / Cyber Security
- Aeronautical & stratospheric systems, interior design manufact.
- RPAS - UAV
- Sub systems and components:
- Propulsion (Guidance Navigation and Control, Attitude and Orbital Control Systems)
- Thermomechanical (incl. Environmental Control and Life Support)
- Electric power
- Avionics and electronic systems
- Optical / Electro-optical
- Software
- Structural components and mechanical equipment

Key enabling technologies

- Micro & Nano-electronics
- Photonics
- Advanced materials (composite, ultralight alloys, nano-structured materials)
- Advanced manufacturing technologies.

R&D network

Aerospace sector in Lazio is made up of world-renowned universities and research centres, large enterprises and production units of international corporations, as well as SMEs providing components, services and technical/industrial support. It covers all areas from research to planning, from design to manufacturing and services:

- 10 major research institutes/bodies headquarters:

ASI (Italian Space Agency), ENAV (National Air Traffic Control Service Provider) ENAC (the Authority of technical regulation, certification, supervision and control in the civil aviation sector in Italy), ESRIN (European Space Research Institute) headed by ESA (European Space Agency), CNR (National Research Council), INAF (National Institute of Astrophysics), INFN (National Institute of Nuclear Physics), ENEA (National Agency for New Technologies, Energy and Sustainable Economic Development), ISPRA (Higher Institute for Environmental Protection and Research), INGV (National Institute of Geophysics and Volcanology)

- 5 Universities with 4 Faculties of Engineering, 12 departments and 30 higher education university programmes
- 3,000 University Professors, Researchers and other specialists involved in aerospace R&D

Lazio environment is further enriched by the Competence Centre “Cyber 4.0”, focused on cyber security and led by Sapienza University, with 37 partners from industry and science.

Incentives and funding

Lazio Authorities support startups and enterprises in research, testing, business development, internationalization and international cooperation, also in the framework of the 2014-2020 ERDF Regional Operational Programme. Lazio Innova SpA is the “one-stop” Agency of Lazio Regional Government, which supports economic development, innovation and internationalization, and operates to the advantage of businesses and local public administration providing:

- incentives from regional, national and/or European resources;
- credit support and the issuance of guarantees;
- interventions in risk capital;
- services for the internationalization, promotion of business networks and regional excellence;
- services for the creation and development of business;
- measures for social inclusion.

More info available at: www.lazioinnova.it

Sites and buildings

Business Incubators, Accelerators and Technology Parks

- **ESABIC (Business Incubation Centre) Lazio** is a partnership among Lazio Region, ASI (Italian Space Agency) and ESA and it is part of Innovation and Ventures Office (TIA-AI) of the European Space Agency. ESABICs aims to inspire and work with entrepreneurs to turn space connected business ideas into commercial startup companies, applying space technologies, solutions and systems in everyday life. ESABIC Lazio offers an incubation program with integrated services for creating and developing business and support to finance and technology transfer.
- **Accelerators:** there are many public and private companies that offer incubation and business acceleration services in Lazio and host start-ups and SMEs that base their business on the exploitation of space technologies. Among these: Ketlab, Luiss EnLabs, Spin Over, INNOVA startup accelerator, Dock3 - The Startup Lab, TIM #WCap, The Business Factory, Vejo Park, Talent Garden, Roma Innovation Lab.
- **Lazio Technopole system:** Tecnopolo Tiburtino, east of Rome, characterized by production activities mainly in the ICT Electronics Telecommunications, Aerospace, Environment and Green Economy sectors, Research and Technological Transfer; Castel Romano Technopole, south of Rome, focused on R&D in New Materials, Life Sciences, the Environment and Green Economy and Science and Technology Park of Southern Lazio (PALMER).

Success story

Space Engineering is a frontrunner Italian space company, based in Lazio, with 30 years of experience in space technologies. Since April 2012 it is controlled by the leading space company Airbus Defence and Space, Space Systems. Space Engineering stands as a reliable partner for space agencies, satellite operators and leading companies in the space domain, with a significant amount of projects

worldwide. Space Engineering has an outstanding expertise in design, engineering, simulation, prototyping, integration, testing, for Space & Ground, owning a significant number of international patents on antennas, radars, scientific software and Digital Signal Processing.

Business opportunity

- **Proposer: G.A.U.S.S. Srl (Group of Astrodynamics for the Use of Space Systems)**
Project: Gauss activities for microsatellites
Web: www.gaussteam.com
- **Proposer: E.S.D. Srl**
Project 1: I.A.S- Intelligent Adaptive Structures
Project 2: R.E.H- Range Extended Hybrid
Web: www.esdsrl.eu
- **Proposer: Survey Lab Srl**
Project: I.MODI Implemented MONitoring System for Structural Displacement
Web: www.surveylab.info
- **Proposer: Smart Structures Solutions**
Project: I.O.T. Solutions to improve resilience of business-critical infrastructures
Web: www.smartstru.com
- **Proposer: Space Engineering SpA**
Project: JANUS 2.0
Web: www.space.it - www.airbus.com
- **Proposer: Miprons Srl**
Project: Miprons - Micro PROpulsion for Nano Satellites **Web: www.miprons.com**
- **Proposer: Virtualmind Aeromeccanica**
Project: Virtualmind Aeromeccanica Fly 360
Web: www.virtualmind.it



LOMBARDY

AEROSPACE

Infrastructures and connections

- 573 km of highways
- 900 km of national roads
- 11,000 km of provincial roads
- 1,680 km of railway network
- 4 International airports:
 - Milano Malpensa Airport, Varese - Ferno (54.5 km from Milan)
 - International Airport Il Caravaggio, Bergamo - Orio al Serio (60.4 km from Milan)
 - Enrico Forlanini Airport, Milano - Linate (9.7 km from Milan)



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- International Airport Gabriele D'Annunzio, Brescia - Montichiari (120.5 km from Milan)
- Distance by car from Milan to Paris (8h50min), Berlin (10h45min), Frankfurt (7h30min), Barcelona (10h)

Industrial base

- The Region offers all the technologies and skills of the entire supply chain required to build fixed and mobile-wing platforms and space frames: from the mechanical components, subsystems, to satellite, helicopter, and trainer aircraft integrators
- Prime contractors in Lombardy are Agusta Westland (helicopters); Alenia Aermacchi (trainer aircrafts); CGS Compagnia Generale per lo Spazio (satellites and scientific payloads); Selex Galileo (Avionics and radar); Thales Alenia Space (space)
- The excellences of the Lombardy Aerospace Cluster can be associated with these characteristics:
 - rotary wing aircraft and vertical flight: LTC point of excellence, the rotary wing sector (helicopters, convertiplanes)
 - fixed wing aircraft and training systems: the fixed wing sector goes from primary training with single engine propeller aircraft (with double piston engine and turbo-compressor) to basic training, up to the advanced-preoperative trainer
 - management of air traffic in the 'Avionic systems', 'Security and transport' and 'Defence' sectors
 - space, satellites and scientific payload: presence of important international companies, specialized in the production of scientific payloads and in small and medium class satellites
 - avionic apparatus and systems, fuel systems, electromechanical and hydraulic motor units, wireless communication systems produced by many specialized Lombard SMEs

Facts and figures

- **The productive system is composed by 220 companies**
- **More than 16,000 workers**
- **Total turnover worth more than € 6 billion**
- **A sector devoted to export, with a turnover of € 1.3**

billion coming from abroad

- 27% of the total export at national level is generated by Lombardy (increased by 9.4% in 2017)
- Presence of Lombardy Aerospace Cluster, that includes:
 - 6 universities/research centres
 - 2 other bodies

R&D network

- Attitude for innovation: around 12% of the companies' turnover is invested in R&D activities
- Numerous collaborations between the research world and companies, such as: AWPARC, a collaboration initiative between the Polytechnic of Milan and Agusta Westland dedicated to the study in specialized laboratories of specific flight technologies vertical
- In Lombardy there is the only European Joint Research Center (JRC) located in Italy at ISPRA, in the province of Varese. This center coordinates numerous community networks and researches coming from National institutions, universities, advanced industries in the member states of the European Union, as well as carrying out a vast set of independent researches using the skills of the best European scientists working directly in the center during specific research periods
- Scientific expertise in various technological fields: sensors, acoustics, ICT, materials, mechanical engineering, design and integration of complex systems, testing, RfID, remote sensing and earth observation, environmental monitoring, payloads and complex optical systems for satellite applications
- Strong research network thanks to the many Research Centers: INAF, CNR-IREA, AWPARC
- Lombardy Universities specialized in fields relevant to aerospace industry are: Politecnico of Milan, Bicocca University, University of Pavia, Carlo Cattaneo Liuc University
- The priority themes of technological development in this field are: space integrated systems and space systems, fixed and mobile wing integrated aeronautical systems, electro-mechanical systems and avionics, new technologies for production and infrastructures

Incentives and funding

Regione Lombardia supplies incentives for corporate investments and Start-ups. For example:

«AL VIA» Corporate Investments

- 5% to 15% non-repayable grant for capital expenditures in productive assets for a specific investment project
- Long-term financing from €50,000 to €2.85M at favorable rates, with a duration from 3 to 6 years
- Free financial guarantee to cover up to 70% of the financing
- The eligible projects must fall within one of these two categories: Company Development or Relaunch of Productive Areas
- The intervention is dedicated to companies: registered in the Italian Register of Companies with an operating office in Lombardy at the time of the supply of the contribution, active for at least 24 months

«Linea Innovazione» Incentives for Innovation Projects. The incentive consists of a subsidized-interest-rate loan and a capital contribution to support the interest payments (starting from a minimum of €300,000 up to a maximum of €7,000,000). The combination of the incentives can cover 100% of the total eligible cost of the project. The financial incentive is dedicated to MSMEs employing fewer than 3,000 people, which have the Headquarter in Lombardy and are planning to invest in a project which aims to innovate the process or the product of the business.

Thanks to the ERDF - European Regional Development Fund, Regione Lombardia allocated in the 2014 – 2020 program period 36% of the fund (€349.2 M) to strengthen the research sector, foster technological development, and innovation. In the same way, 30% of the fund (€294.6 M) is allocated to promote the competitiveness of SMEs and improve access to loans. Thanks also to the European Bank of Investment, who has allocated € 50,000,000 to financing the project, in collaboration with Finlombarda (operational partner)

Sites and buildings

- AttrACT website www.attractlombardy.it gives access to more than 100 investment opportunities (greenfield and brownfield opportunities), located in 55 Municipalities, mapped out through the AttrACT Programme. A variety of sites ranging from the office building to the industrial facility. This initiative, promoted by Regione Lombardia together with Unioncamere Lombardia, is a unique experimentation in Italy for the promotion of the investment opportunities located in Lombardy.
- Within The Italian Scientific and Technological Parks Network:
 - KILOMETRO ROSSO (Bergamo – BG)
 - BERGAMO SVILUPPO (Bergamo – BG)

Success story

OHB ITALIA SPA

OHB Italia SpA is a subsidiary of the German Bremen-based aerospace and technology group OHB SE. This listed space and technology group OHB SE currently employs around 2,400 people and has consolidated revenues of € 860 M in 2017.

OHB Italia SpA is a leading company in Italy in the field of space systems design, development and integration. Founded in 1981, OHB Italia has its headquarters in Milan. Recently the group inaugurated a new Integration and Manufacturing Facility in clean environment adjacent to the headquarter building in Milan. This new facility is operational since June 2018 and will increase OHB Italia capacity in space system production, in particular for satellite integration.

OHB Italia SpA is also a member part of the Lombardy Aerospace Cluster.

Business opportunity

The AttrACT Program is a unique innovative program in Italy: it brings together investors, investment opportunities and local Municipalities thanks to a dedicated online platform, www.attractlombardy.it.

AttrACT aims at:

- developing the regional offering
- promoting opportunities for investment
- bringing together the main territorial stakeholders

More than 100 “ready to use” investment opportunities, representing all the 12 provinces of Lombardy and pertaining to 4 key segments: Industry, Logistics, Offices and Tourism. The Program has mapped both publicly- and privately-owned areas.

AttrACT sees the direct engagement of the Lombardy Municipalities involved in the Program that are called to identify local investment opportunities (greenfield and brownfield) in their area, made it available to investors, and simultaneously made commitments to simply administrative processes, offer economic and tax incentives and offer qualified assistance service.

Commitments can vary according to the Municipality:

- Simplification of administrative processes such as:
 - Adopting the Action Plan by the city council in less than 90 days from the request
 - Delivering a Planning Permission in less than 60 days from the request
 - Dedicating a portal or an on line “front office” service where investors can find all useful information
- Economic and Tax incentivisation such as:
 - Declaring in advance all urban planning and construction expenses without additional expenses
 - Offering reduction or exemption of IMU, TASI, e/ or TARI according to the Municipality
 - Reducing the primary and secondary land development expenses by at least 20%
- Promotion:
 - Making available a support team that coordinates the work, facilitates the relationships and encourages collaboration
 - Providing preliminary consulting services and support to companies in the presentation and implementation of their projects, with the issuance of written opinions if requested in the proposal
 - AttrACT, where to invest in Lombardy.



PIEDMONT

AEROSPACE

Infrastructures and connections

- Piemonte is located at the intersection of the two main axes Lisbon-Kiev European Corridor and Genova-Rotterdam Corridor 24;
- The region is a strategic point for goods distribution in Europe with 3 logistics platforms – S.I.T.O. (Torino), C.I.M. (Novara), Interporto Rivalta Scrivia (Tortona) – and a network of about 1,000 km of motorways and 2,000 km of railways. Its position bordering Liguria makes it the ideal rear logistics service location for the port of Genoa (150 km from Torino).
- Torino International airport: 30 minutes from the city center.
- Milan-Malpensa intercontinental airport: 1h from Torino.



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Industrial base

In Piemonte, the aerospace sector is one of the productive and scientific excellences, confirming the regional vocation for technological innovation. Moreover, the technical-productive specialization of the companies, both in manufacturing and technical services, makes the local aerospace sector highly competitive on international markets. Alongside, the region boasts a distinctive learning and academic environment that contributes to the training and growth of technical and managerial capabilities of qualified human resources appreciated all over the world.

The Piemonte aerospace scenario is further enriched by the presence of Torino Piemonte Aerospace District, the Italian Institute of Technology's (IIT), the Centre for Space Human Robotics (CSHR), a spin-off from the Politecnico di Torino, and and by the core of Italy's Space industry together with some international key players

Facts and figures

Piemonte has the highest concentration of Italian aerospace companies.

The region offers a complete pipeline of skills and qualifications, high-level manufacturing, processes and service companies, cooperation with universities and the R&D network, unique products and engineering know-how, educational & training system and an organized and complete supply chain.

Aerospace industry:

- 280 SMEs;
- 14,800 employees;
- € 3.9 bn turnover;
- 17% of national exports;
- 26% of exports directed to USA;
- 22% of exports directed to Germany.

International key players: Leonardo, Avio Aero, Collins Aerospace, Thales Alenia Space, ALTEC.

Aeronautics: Piemonte played and still plays a key role in many international programmes:

777 and 787 Dreamliner, Airbus A321, 500/600, A380, and A 320 NEO, Falcon 2000 and EX, Eurofighter Typhoon, C27J, ATR42, NH90, EH101 and AM400. **Space field:** Piemonte is involved in a prime contractor role in international pro-

grammes such as the International Space Station (more than 50% of its pressurized modules are being developed here), ExoMars, Euclid, Bepi-Colombo, IXV and Space Rider, Ariane 5, Ar-goMoon and many others.

Technological trends:

- **Advanced materials**
- **Low emission aeroengine design**
- **High power transmission systems**
- **Additive technologies**
- **Advanced space robotics**
- **Technologies for space habitation**
- **Advanced satellite design**
- **New solutions for reusable vehicles**

Piemonte aerospace district:

Piemonte Aerospace District was established with the aim to support and strengthen the excellence of the regional aerospace sector through the creation of a network of large companies, SMEs, research system and institutional subjects.

So far the Association has gathered 51 members: public authorities, universities and research centers, trade associations and above all enterprises, both local SMEs and large globally operating companies with a significant presence in Piemonte, such as Leonardo, Avio Aero, Thales Alenia Space Italy, Mecaer and US Collins.

The Association has a governing body composed of 15 representatives and it covers various areas of action through the activation of specific working groups: R&D long-term strategic vision and technological development trajectories, supply chain, marketing & internationalization, education & training.

• R&D network

Recent data confirm that Piemonte is a leading Italian region in R&D. Companies expenditure in R&D: 1.42% of GDP (national average of 0.65%), with a number of workers in R&D of 6.2 per 1,000 inhabitants (national average of 4.0) and an increasing IP impact, with a number of 137.6 patents registered per million inhabitants (national average of 83.6) (Source: Istat 2017).

- 200 private and public R&D centres, 4 Science & Technology Parks;
- 1st Italian region in terms of private investment in

R&D;

- 3rd Italian region for hi-tech patents.

Incentives and funding

Regione Piemonte has allocated € 1 bn to promote the growth and competitiveness of the whole territory.

The subsidy system in Piemonte focuses on both the start up of new initiatives and on the development of existing companies. Subsidies to companies can take the form of soft loans, non-repayable grants or free-of-charge guarantee support (in compliance with the European regulation on state aid) and can vary according to the type of beneficiary, the kind of investment and the nature of expenses.

A special focus should be dedicated to grants provided for R&D activities:

- Regional investment contract, for R&D initiatives related to new investments in R&D centers, plants or service centers;
- Sector Technological Platforms, for cooperative R&D projects focused on four key topics, among which there is Space Economy (with a dedicated budget of 15 million euros) as Piemonte Region has signed the Multiregional Cooperation Program in the framework of National Space Economy plan.

Piemonte Agency:

Piemonte Agency is the one-stop-shop to get in touch with the regional economic community.

The agency provides a complete range of free services to foreign companies:

- wishing to locate in Piemonte
- searching for suppliers and partners

Piemonte Agency guarantees complete assistance to foreign companies willing to invest in Piemonte. The agency can advise on every aspect of starting and running a business in Piemonte, providing assistance at every stage of the project.

Piemonte Agency manages Piemonte Aerospace, a special project promoted by Regione Piemonte, financed by ERDF – European Regional Development Fund. It provides international players with a preferential channel to meet and start business with top class aerospace selected enterprises based in Piemonte. For more information: aerospace@centroestero.org, www.centroestero.org/en/key-sectors/aerospazio.html

Sites and buildings

Piemonte Aerospace is a special project promoted by Regione Piemonte, financed by ERDF – European Regional Development Fund and managed by Piemonte Agency, providing international players a free preferential channel to meet and start business with top class aerospace selected enterprises based in Piedmont. The Team makes an assessment of buyers' needs and technicians' requirements from all over the world and provides them with:

- top class skills and unique manufacturing know-how
- capable suppliers who can deliver on time high-quality parts/products at competitive prices
- technological qualified and competitive supply chains sharing commercial objectives, target clients and strategies
- technical working groups where local enterprises and foreign companies work together

The project Team's assistance is supply chain focused and completely free of charge.

For more information: aerospace@centroestero.org,
www.centroestero.org/en/key-sectors/aerspazio.html

Success story

Success stories in the framework of new space economy: New space economy involves a new vision of space opportunities, including the progressive transition from upstream to downstream business models and the increase of private investments: space is becoming more and more a commercial business.

Piemonte has a leading role in the pathway to open a commercial space ecosystem, following the modern vision of “democratization of space”, meaning giving open access to space for everyone.

The first ever commercial airlock that will operate on the International Space Station - ISS will leave from Torino: It is called Bishop and it represents the first step towards a new economy for scientific research, technological development as well as human and goods transport. It will enable additional capability to the International Space Station, giving the opportunity to connect more payloads.

The new module is the result of the collaboration between the Texan company Nano-Racks, Thales Alenia Space - which developed 50% of the housing modules of the ISS in

the region - ALTEC and by a pool of Piemonte companies: this partnership was created to take full advantage of the commercial opportunities of space exploration and in-orbit-services.

Piemonte production chain is a fundamental advantage as confirmed by the decision of NanoRacks to settle its European headquarters in Torino in October 2018, where the company will concentrate on the use of microgravity of space for advances in the fields of life sciences, biopharma and agriculture.

Also thanks to Piemonte dynamic ecosystem in the fields of new space economy, Tyvak International established in 2015, as the first international subsidiary of the American Group Terran Orbital Corporation, a company that specializes in nanosatellite design and manufacturing, as well as mission operation, which also includes Tyvak Nano-satellites System.

Politecnico di Torino and its incubator I3P have provided great support to the activities of the company, which is unceasingly growing.



AGRIFOOD INDUSTRY

CALABRIA
FRIULI VENEZIA GIULIA
LOMBARDY
TRENTINO
TUSCANY



CALABRIA

AGRIFOOD

Infrastructures and connections

- 3 International airports (Lamezia Terme, Reggio Calabria e Crotona)
- 4 commercial ports (Gioia Tauro, Corigliano Calabro, Vibo Valentia and Crotona)
- Main Highways: A2 – Mediterranean Motorway (Salerno-RC)
- 4:00 h from Lamezia Terme to Casablanca (Morocco)
- 3:15 h from Lamezia Terme to Frankfurt (Germany)
- 3:00 h from Lamezia Terme to London (UK)



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Industrial base

Industrial specialization:

- processing of agricultural products (tomatoes, chili peppers, pepperoni, vegetables, potatoes, mushrooms, etc.)
- processing of meat and sausages
- liquor production
- liquorice processing
- product quality control

Among the main companies: Vegitalia spa (Processing, refrigeration and sale of Mediterranean vegetables) subsidiary of the Japanese multinational Kagome Group; Callipo (tuna and seafood products); Caffè Aiello; Liquirizia Amarelli

Facts and figures

- Approximately 2,600 companies and over 9,500 employees in the food and beverage sector
- Export: 179 mln € (Manufacture of food products, beverages and tobacco products; Agriculture, forestry and fishing)
- Favourable geographical position in the centre of the Mediterranean Sea
- Particular climate conditions are the rich leading sources for agriculture
- Calabria is the center of the most important horticultural and fruit producing regions of south Italy It stands in the middle between: Sicilia, Puglia, Campania, Basilicata
- The agricultural areas are located at different altitudes (plain, hills, plateau over 1,000 meters)
- Strong synergy among the 3 regional universities, the research centers and the companies
- Availability of highly qualified work force
- Wide range of incentive schemes with the maximum level of aid intensity available through the EU
- Strengthening competitiveness and sustainability of supply chains
- Food safety and authentication of food products for the fight against counterfeiting
- Product / process innovation in the food industry, including the utilization of waste and functional foods

R&D network

- Mediterranean University of Reggio Calabria– Department of Agriculture – Agricultural Sciences and Technologies, Food Sciences and Technologies
- University of Calabria in Cosenza - Faculty of Pharmacy and Nutrition and Health Sciences
- The Terina Mediterranean Foundation - a centre of excellence devoted, among other activities, to research and knowledge of the agro-food industry via a network of relationships with Italian and foreign universities

Know-how:

- Center for the Testing of new services and products for the safety of agri-food production “TERINA”: Enhancement of typical and biological brands of Calabria
- “Alchemy” integrated service and innovation center: Platform for the development of advanced diagnostics
- Research Infrastructure For And Foods And Nutraceuticals “- Food @ Life: Food Quality and Safety, nutrigenomics; nutraceutical; Technological transfer and enhancement of knowledge
- CREA – Council for Agricultural Research and Economic Analysis Agricultural Research unit for forestry in the Mediterranean environment (SAM). It focuses on silviculture in Mediterranean woods of natural or artificial origin, and its main areas of activity are multifunctional sustainable forest management and restoration of forest biocoenosis after wildfire, especially as regards biodiversity in forest ecosystems and adaptation of forests to climate change.

Incentives and funding

- Zes - Special economic zones - recipient areas of important tax benefits and administrative simplifications
- Regione Calabria call for tenders - Negotiated procedure implementing the PRIR - Action 1.5.1 – POR Calabria FESR 2014-2020
- Regione Calabria Strategic Guideline for internationalization and foreign investment 2017/2020 - POR Calabria 2017 2020 – PAC 2017 2020
- Strategic Project “Calabraiimpresa.eu”: DGR n. 304/2016

Sites and buildings

Availability of industrial sites and buildings in the following areas: Reggio Calabria: Industrial Area of Gioia Tauro - Rossano - San Ferdinando; Industrial Area of Campo Calabro - Reggio Calabria - Villa San Giovanni; Vibo Valentia: Industrial Area of Porto Salvo; Industrial Area of Aeroporto; Crotona: Industrial Area of Crotona; Cosenza: Industrial Area of Schiavonea of Corigliano Calabro; Industrial Area of Piano Lago of Mangone e Figline Vegliaturo; Industrial Area of Follone of San Marco Argentano; Industrial Area of Sant'Irene of Rossano; Industrial Area of Bisignano; Industrial Area of Cammarata of Castrovillari; Industrial Area of Rocca Imperiale; Industrial Area of Montalto Uffugo; Catanzaro: Industrial Area of Lamezia Terme.



Success story

Vegitalia S.p.A. was founded in 2003 and is located in SAN MARCO ARGENTANO (CS). The Company's line of business includes providing mixed fruits and vegetables, and various other vegetable dishes. Vegitalia serves the food industry. Frozen Foods - Products: Grilled Vegetables – rehydrated cereals and pulses – ready meals. Strong points: Customers satisfaction; availability and feasibility to achieve customers requirements; agricultural traceability; guaranteed raw material, of prime quality and full traceability, from field to fork. Agronomy personnel controls the whole agricultural process; Innovative industrial process; Innovative production methods; technologically advanced, gained through long experience of frozen foods processing; Training of human resources: all Vegitalia personnel are strongly motivated by the desire to improve and give total contribute to Vegitalia growth to achieve Total Quality Products.

Fattoria della Piana is a cooperative of breeders from Calabria who collect and transform milk coming from members ranch. It's located on Aspromonte a multi portal in the plains of Gioia Tauro and the area of Crotona. This productive reality was founded in 1936 and has grown to become one of the largest in Calabria in the agrifood sector. Currently the company's activities cover the entire agrifood chain: 900 cattle are bred at the business center; 20,000 litres of sheep bovine and buffalo milk coming from the members ranches are processed in its modern milking parlor each day and distributed throughout Calabria. The cooperative directly attends to the cultivation of forage for the ranches as well as the citrus orchards for the production of clementines for the domestic market. Main products: fresh high-quality products, mozzarella cheese made from cows and buffalo milk, ricotta cheese made from sheep's milk and mixed milk; caciocavallo cheese and pecorino cheese (first producer in Calabria). The farms products are delivered in Italy and sent to the United States, Canada, Japan and Europe.

FRIULI VENEZIA GIULIA

AGRIFOOD

Infrastructures and connections

- Airports: Venice Marco Polo Airport, Treviso A. Canova Airport and Trieste Airport Friuli Venezia Giulia are 30/60 minutes driving from regional main towns
- Main Highways: E70-A4 Turin-Milan-Trieste, A23 Palmanova-Tarvisio, A28 Portogruaro-Conegliano
- Railway: Connections from Udine and Trieste railway stations to Milan, Rome, Turin and Venice
- Maritime connections: Trieste, Monfalcone and Por-



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to Nogaro commercial ports

- Interports: Cervignano, Gorizia, Pordenone and Trieste
- Broadband:ERMES, with its 2,600 km of cables, 260,000 km of optical fiber, 1,679 km of backbone infrastructure and 720 km of cable infrastructure in the 86 industrial areas, is the wider broadband geographic area in Italy

Industrial base

The agri-food sector is one of the most significant segments of the Italian and regional economy for its size and strategic value. Its internal structure, in groups of very different sizes and characteristics, include: bakery and flour production, meat and other food production, meat processing and preservation, dairy products supply chain, production of wines from grapes, beer production, distillation, grinding and blending of spirits. Main companies are: Roncadin SpA, Quality Food Group SpA (bakery and flour products); Principe di San Daniele SpA, Morgante Srl (meat and meat products); Latterie Friulane-Parmalat SpA (dairy products supply chain); Illycaffè SpA, Birra Castello, Jermann di Silvio Jermann Srl, Nonino Distillatori, Balsameria Midolini (wines and beverages). Agri-food Regional "Intelligent specialisation strategy" development trajectories are: Integration of innovation interventions on the agri-food chains, to create value for the consumer; integration of the concepts of circularity and sustainability in the agricultural and food economy of the regional territory; value development through the constant integration of information throughout the agricultural and food chain.

Facts and figures

AGRIFOOD FVG CLUSTER

Export: 765.64 mln €

Enterprises: 1,152

Employees: 8,306

Foreign companies: 26

FOOD INDUSTRY FOCUS

- Bakery and flour production
- Meat production
- Meat processing and preservation

- Dairy products supply chain
- Wine production
- Beer production

R&D network

The main R&D players are: Università degli Studi di Udine – Department of agri-food, environmental and animal sciences (DI4A); Università degli Studi di Trieste – Department of chemical and pharmaceutical sciences and Department of life sciences; Istituto Zooprofilattico delle Venezie, for scientific research in the fields of veterinary medicine and food safety; CREA (Consiglio per la Ricerca in Agricoltura e l'Analisi dell'Economia Agraria); ERSA FVG (Agenzia Regionale per lo Sviluppo Rurale); Area Science Park. IP4FVG - Industry Platform 4 FVG, Friuli Venezia Giulia digital innovation hub, supports SMEs in the industrial manufacturing digital transformation and promotes technological updating in the sector also through training, living labs and specialised services.

Agri-food Cluster Development Agency and Bio-economy, cooperates with the regional departments of Friuli Venezia Giulia as a competent technical entity on the European Platforms S3 AgriFood and Industrial Modernization, in managing the regional quadruple helix. At national level, it participates in the AgriFood Cluster (CLAN), the Cluster for Green Chemistry (Spring) and the Blue Italian Growth Cluster (BIG).

In addition, the Agency clusters and maps the value chains to facilitate their aggregation on mutual strategies and objectives and organizes training activities dedicated to the agri-food sector.

Incentives and funding

Friuli Venezia Giulia Region has several types of incentives and funding. Regional taxes reduction can be applied to companies which meet specific criteria; public grants can be awarded to support the creation of new enterprises and implement RDI projects. There are also incentives to support competitiveness of SMEs and measures to finance innovation technology investments. Different kinds of regional subsidised loans can be granted to support investments and business development.

Sites and buildings

- Consorzio Carnia Industrial Park, Amaro industrial area: lots 42,648 square meters
- Consorzio di sviluppo economico locale del Friuli (Friuli local economic development consortium), San Giorgio di Nogaro industrial area.

Success story

In 2015, the French group Bouvard Italia SpA acquired 70% of Euro Cakes spa, a leading company in baked goods. The company produces and distributes traditional, ethnic (Kosher), organic and refrigerated panispagna snacks, which are distributed under their own brand, but above all, under the customer's private brand name (main distribution chains and large industrial groups).

Business opportunity

FREEste is an opportunity promoted by Interporto di Trieste S.p.A. (www.interportotrieste.it).

Situated only 10 km from the Port of Trieste, the free area of FREEste has 72,000 SQM of logistic warehouses and the possibility of building new infrastructures up to 60,000 SQM and refrigerated warehouses up to 2,000 SQM. The 100,000 SQM outdoor area has railway connections (work in progress) for empty container depot and intermodal services. Since 2019, industrial activities (like processing and storing goods) can be managed customs free within the International Free Trade Zone of Trieste. GOFOODLOG opportunity is promoted by Autoporto di Gorizia SDAG S.p.a., which, on behalf of Gorizia municipality, manages the freight terminals on the border between Italy and Slovenia (www.sdag.it).

The freight terminal system is situated at the meeting point of different routes from and to central Europe, near the Northern Adriatic ports and Ronchi dei Legionari airport. Through the A34 highway, it is connected northbound to Austria and Bavaria, and westbound to Venice, Milan and Bologna; plus, the H4 Razdrto-Vrtojba freeway connects it to the traffic routes to Ljubljana.

SDAG logistic centre consists of the freight terminal and the S. Andrea frontier station area, it is 600.000 SQM wide and is fully equipped to offer a complete range of transport and logistics services, such as goods storage, customs clearan-



ce procedures, parking and many other services, many of which for free, so to make customers' stay comfortable.

GOFOODLOG (www.gofoodlog.com) is the new food logistic hub within Autoporto di Gorizia, which offers to companies willing to locate in Friuli Venezia Giulia, advanced services for the shipping and logistic of their goods. Companies can boost their performance while making their products more competitive on a wider geographic scale. The best shipping solution is always chosen in order to ensure the higher service quality while saving money.

Situated in Gorizia, GOFOODLOG benefits from being located in a strategic position for Central Europe. The territory is rich in resources and connections and this gives advanced logistic solutions to its partners. The ICT and software infrastructures are very effective in flow management and lots traceability.

Storage facilities have been studied to suit different needs of size and temperature for dry, fresh or frozen food and include:

- 11 cold rooms having different areas (from 190 to 650 SQM) for a total area of 4,400 square meters and total volume of 28,700 cubic meters for more than 3,500 pallets
- 6 multi-temperature cold rooms (positive and negative temperature)
- 5 low-temperature cold rooms (till -25°C)
- 2 pre-cold rooms and one ammonia refrigerator

There are many food companies within 50 kilometres: from prosciutto, (Principe, Wolf), to coffee (Illy), wine (La Delizia, Cantina Rauscedo), dairy and fish (Friulpesca).



LOMBARDY

AGRIFOOD INDUSTRY

Infrastructures and connections

- 573 km of highways
- 900 km of national roads
- 11,000 km of provincial roads
- 1,680 km of railway network
- 4 International airports:
 - Milano Malpensa Airport, Varese - Ferno (54.5 km from Milan)
 - International Airport Il Caravaggio, Bergamo - Orio al Serio (60.4 km from Milan)
 - Enrico Forlanini Airport, Milano - Linate (9.7 km from Milan)



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- International Airport Gabriele D'Annunzio, Brescia - Montichiari (120.5 km from Milan)
- Distance by car from Milan to Paris (8h50min), Berlin (10h45min), Frankfurt (7h30min), Barcelona (10h)

Industrial base

- The AGRIFOOD production system is the most important at Italian level and is one of the most important in the European context
- The strengths of the Lombard food industry are: the wide range of quality products at the top of international markets, a strong link with the territory and its cultural heritage and high safety standards
- At European level, Lombardy ranks in the 1° positions along with the Bavaria, Normandy and Austria in the cereal supply chain and in animal production, with productive sectors of the dairy and meat sectors
- Lombardy stands out at European level for some niche productions, closely related to the territory, like rice, and qualitatively high, as shown by the numerous PDOs and PGIs
- Increasing attention to biological agriculture: total surface dedicated to these productions rose by 26% in 2016
- The Excellences of Lombardy Hi-Tech Agro-food Cluster is characterized by strong competencies in the production, processing and distribution sectors that make the agro-food supply chain sustainable and competitive. The Cluster devotes a high attention to product quality, food safety, availability and defense of foodstuffs, thanks to a high level of regulation and technology transfer. Moreover, there is a good synergy between production chain players: a collaboration context that encourages exchange of knowledge and technologies as part of the production supply chain. Finally, the cluster shows to have a high level of integrated competencies: areas of competence, production systems and technological domains of excellence that allow for sharing technological and organic agro-food knowledge of international importance
- The main research priority themes are: sustainable and competitive agri-food supply chain, individual well-being (for instance new solutions for healthy ageing through systems, food, supplements and nutraceuticals), food safety and security to ensure food

security, availability, and protection

Facts and figures

- **1st region in Italy for agricultural production**
- **approximately 70,000 production sites, involving about 245,000 workers**
- **5,937 companies in the food and beverage sector, equal to 5.7% of companies regional manufacturing**
- **Exports are one sixth of the national total of the sector**
- **74 foreign companies working in the field of agrifood industry are located in Lombardy employing more than 18,900 people**
- **16.4% of the national agri-food system**
- **The food service sector increased by 7.2% over the period 2012-2017, and now is the biggest at national level**
- **Presence of Lombardy Hi-Tech Agro-food Cluster that includes:**
 - **27 firms**
 - **20 universities\research centres**
 - **2 other bodies**

R&D network

Scientific expertise in the agri-food field is contributed by: University of Pavia, Politecnico of Milan, Bicocca University of Milan and the University of Brescia

Within Lombardy Hi-Tech Agro-food Cluster:

PARCO TECNOLOGICO PADANO (PTP), a research centre for agri-food biotechnology located in Lodi. PTP also houses the Experimental Animal Disease Prevention Institute, the "Lazzaro Spallanzani" Institute, the CNR - IBBA and ITB, CRA - Vercelli, the Faculty of Agriculture (6 departments) - University of Milan, Faculty of Agriculture (1 department) - Catholic University of Milan, ISU - Institute for University Services, the Large Animals Hospital - University of Milan, and the Experimental Livestock Teaching Centre

Incentives and funding

Regione Lombardia supplies incentives for corporate investments and Start-ups. For example:

AL VIA» Corporate Investments

- 5% to 15% non-repayable grant for capital expendi-

tures in productive assets for a specific investment project

- Long-term financing from €50,000 to €2.85M at favorable rates, with a duration from 3 to 6 years
- Free financial guarantee to cover up to 70% of the financing
- The eligible projects must fall within one of these two categories: Company Development or Relaunch of Productive Areas
- The intervention is dedicated to companies: registered in the Italian Register of Companies with an operating office in Lombardy at the time of the supply of the contribution, active for at least 24 months

«Linea Innovazione» Incentives for Innovation Projects.

The incentive consists of a subsidized-interest-rate loan and a capital contribution to support the interest payments (starting from a minimum of €300,000 up to a maximum of €7,000,000).

The combination of the incentives can cover 100% of the total eligible cost of the project.

The financial incentive is dedicated to MSMEs employing fewer than 3,000 people, which have the Headquarter in Lombardy and are planning to invest in a project which aims to innovate the process or the product of the business.

Thanks to the ERDF - European Regional Development Fund, Regione Lombardia allocated in the 2014 – 2020 program period 36% of the fund (€349.2 M) to strengthen the research sector, foster technological development, and innovation. In the same way, 30% of the fund (€294.6 M) is allocated to promote the competitiveness of SMEs and improve access to loans.

Thanks also to the European Bank of Investment, who has allocated € 50,000,000 to financing the project, in collaboration with Finlombarda (operational partner).

Sites and buildings

- AttrACT website www.attractlombardy.it gives access to more than 100 investment opportunities (greenfield and brownfield opportunities), located in 55 Municipalities, mapped out through the AttrACT Programme. A variety of sites ranging from the office building to the industrial facility. This initiative, promoted by Regione Lombardia together with Union

camere Lombardia, is a unique experimentation in Italy for the promotion of the investment opportunities located in Lombardy.

- Within Lombardy Hi-Tech Agro-food Cluster: PARCO TECNOLOGICO PADANO (Lodi - LO) Within The Italian Scientific and Technological Parks Network:
- KILOMETRO ROSSO (Bergamo – BG)
- BERGAMO SVILUPPO (Bergamo – BG)
- “MIND” (Milano Innovation District) a world-leading science, technology and innovation park, a business friendly “innovation ecosystem” for domestic and international players, a “catalyst” for sustainable socio-economic growth, a new vibrant community fully integrated with the city centre of Milan. Located just a few miles North-West of the city centre, which hosted the six-month Universal Exposition in 2015.

Success story

WHIRLPOOL EMEA

Whirlpool Corporation is the world leading major home appliance company with 92,000 employees and 70 manufacturing and technology research centers throughout the world. In 2017, the company has been able to achieve \$21 billion in sales.

The American multinational company is also based in Italy, where Whirlpool EMEA produces more than 6 million household appliances, employing 6,000 people in 6 different factories.

In the Lombardy, the European headquarter of Whirlpool is located near Milano (in the Municipality of Pero).

Whirlpool R&D is partner of the Lombardy Hi-Tech Agro-food Cluster. The company carries out research activities, in particular, focuses on the thematic areas of food processing, connectivity, radiofrequency, materials and nanotechnologies. It plans to invest € 500 M over 4 years in the R&D department.

Whirlpool EMEA is also part of the awarded companies in the contest Best Workplaces Italia 2018.

Business opportunity

The AttrACT Program is a unique innovative program in Italy: it brings together investors, investment opportunities and local Municipalities thanks to a dedicated online platform, www.attractlombardy.it.

AttrACT aims at:

- developing the regional offering
- promoting opportunities for investment
- bringing together the main territorial stakeholders

More than 100 “ready to use” investment opportunities, representing all the 12 provinces of Lombardy and pertaining to 4 key segments: Industry, Logistics, Offices and Tourism. The Program has mapped both publicly- and privately-owned areas.

AttrACT sees the direct engagement of the Lombardy Municipalities involved in the Program that are called to identify local investment opportunities (greenfield and brownfield) in their area, made it available to investors, and simultaneously made commitments to simplify administrative processes, offer economic and tax incentives and offer qualified assistance service.

Commitments can vary according to the Municipality:

- Simplification of administrative processes such as:
 - Adopting the Action Plan by the city council in less than 90 days from the request
 - Delivering a Planning Permission in less than 60 days from the request
 - Dedicating a portal or an on line “front office” service where investors can find all useful information
- Economic and Tax incentivisation such as:
 - Declaring in advance all urban planning and construction expenses without additional expenses
 - Offering reduction or exemption of IMU, TASI, e/or TARI according to the Municipality
 - Reducing the primary and secondary land development expenses by at least 20%
- Promotion:
 - Making available a support team that coordinates the work, facilitates the relationships and encourages collaboration
 - Providing preliminary consulting services and support to companies in the presentation and implementation of their projects, with the issuance of written opinions if requested in the proposal

AttrACT, where to invest in Lombardy.



TRENTINO

AGRIFOOD

Infrastructures and connections

- Airports: 45 minutes from Verona airport (Catullo)
- Main Highway: A22 Brennero-Modena
- Railway that connects North East of Italy with Austria and Germany
- Brenner Basistunnel in construction
- Interporto of Trento
- Broadband with more than 1,100km of optical fiber
- Proximity to key European countries (Switzerland, Germany, Austria)
- Within 2-3 hours flight from major European cities



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Industrial base

Industrial Know-how: Agriculture, production of fruit, small fruits and derivatives, bakery and flour products, dairy products, meat, viticulture, beverage.

Main companies:

Melinda, Felicetti, Dr. Shär, Menz&Gasser, Bertagni, Sant'Orsola, Latte Trento, Trentingrana, Astro, Bauer, Ferrari, Cavit, Cantine Mezzocorona.

More than 8,000 farms, 95 wineries.

Facts and figures

AGRIFOOD CLUSTER

Cluster Export: 700 mil €

8,000 Farm companies

Value of production: 1,120 mil €

Edmund Mach Foundation: R&D centre dedicated to agrifood sector with 1,000 students, 260 researchers, 150 technicians

International research projects

MAIN AGRIFOOD INDUSTRY PRODUCTIONS:

- Apple
- Small fruits
- Viticulture
- Hydroponic agriculture
- Fish farming

R&D network

Research Centers: Edmund Mach

Foundation - FEM (agrifood, genomics, environment), Bruno Kessler Foundation (ICT, microsystems, smart materials), Trento University.

Labs: Sensory laboratory, Chemical and microbiological analysis laboratory, Entomology laboratory, C3A – Center Agriculture Food Environment.

Know-how:

- Applied genomics and biology of fruit crop
- ICT for Agrifood
- Food quality and nutrition
- Computational Biology
- Plant Pathology and Microbiology

Incentives and funding

- Up to 80% local grant on R&D project
- Up to 70% local grant on internationalization
- Up to 60% local grant for researchers hiring
- Up to 50% local grant on innovation
- Yearly calls for tender for agriculture investments

Sites and buildings

147,000 ha agriculture fields (9,000 out of the total amount ha are dedicated to biological cultivation) – 24% of the territory.

B.I.C. Trentino Sviluppo: 6 Business Innovation Centre in the province of Trento.

Formulas: pre-incubation (Start Ups), incubation (SME), technology park (others).

Spaces: 1 million sqm of productive spaces, 120 areas and productive assets owned by Trentino Sviluppo.

Success story

FELICETTI, the highest pasta factory in Italy (about 1,000 meters above sea level), has chosen to invest 25 million euros in a second production plant in Trentino. The Agency Trentino Sviluppo and the Province of Trento will provide a portion of productive area to set up the plant. Pastificio Felicetti produces today 700 quintals of pasta per day, using

four different lines and 40 different raw materials. The keys to success of its products are: highly qualified personnel, pure mountain air and spring water, without chlorine. With an annual turnover that exceeds 35 million euros, it exports 70% of production and has 60 employees. With the new plant, the number of employees will increase to 90, with positive prospects for growth in organic products.

Business opportunity

- Trentino Sviluppo, in-house company of the local Government, has 6 BIC (Business Innovation Centre)
- We are looking for industrial investors in the following sectors: agrifood industry, technology for agrifood
- We provide: fully equipped spaces and infrastructures, support on technology transfer, technology partnership, supply chain development, HR selection, incentive selection
- Significant local incentives, efficient & reliable autonomous government, 1st in Italy for quality of life, supportive R&D environment, 0 local tax (for 5 years), a workforce you can count on





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TUSCANY

AGRIFOOD

Infrastructures and connections

- 2 integrated international airports (Florence and Pisa), serving over 50 international destinations
- 1:30h from Florence to Rome by high-speed train
- 1:40h from Florence to Milan by high-speed train
- Tuscany is crossed by:

the major Italian highway (A1) connecting Milan with Rome and Naples

the EU “Scandinavian-Mediterranean Core Network Corridor” linking the Baltic Sea with Southern Italy and Malta
1 main commercial port (Livorno) with direct links to the 10 major Mediterranean ports
3 main logistic parks (Livorno, Prato and Arezzo)



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Industrial base

- An origin land that ensures a strong connection between culture and territory
- Great tradition and high quality of products and raw material
- International leadership in some excellence products (such as extra virgin olive oils and wine – Chianti Classico, Brunello, but also SuperTuscans such as Sassicaia, Ornellaia, Tignanello, Paleo etc.)
- Tuscan Agrifood business model that strongly aims to respect the environment and to protect its territory
- Entire Supply Chain present within the region
- Integration with tourism and cultural heritage of Tuscany
- Technology Innovation (in the process and in the products) combined with tradition and culture
- Easy access to the European and national market
- High quality of life

Facts and figures

- **5,200 firms in Agrifood (2,200 food industries; 2,200 wine; 800 extra virgin olive oil)**
- **28 PDO and PGI EU products - 10.4% of Italian data**
- **460 traditional dishes of Tuscany - 10% of Italian data**
- **4,200 organic certificated companies (farms + manufacturers) - 10% of Italian organic farms**
- **Revenue: EUR 4.5 billion - 3.4% of Italian Agrifood turnover and 5% of Regional GDP**
- **23,000 employees (12,600 agrifood industries; 9,500 wine; 1,000 e.v.o) 6.4% of Italian employees in agrifood sector**
- **1.2% of total Tuscany's employees**
- **1.45 billion of export (=18% of Agrifood)**

R&D network

18 High Schools dedicated to Training for Restaurant Professions

14 High Schools dedicated to Agricultural Professions
University of Florence (Agricultural Department), Post Graduation Training:

- Master in “Management and Marketing of wine companies”
- PHD in “Sustainable management of agricultural resources, forestry and food”

- PHD in “Wine Economics and Rural Development” University of Pisa (Agricultural Department), Post Graduation Training:
- PHD in Agricultural Sciences, Food and Agro-Environmental

Incentives and funding

For detailed information please visit www.investintuscany.com/incentives

Related to the specific Business Opportunity (Spirulina) incentives up to 200 k non-refundable by Cosvig, a consortium of geothermal municipalities + specific guarantee of Fiditoscana.

Sites and buildings

Alta Val di Cecina, area of geothermal energy in Tuscany: 20 sites have been identified that are potentially suitable or adaptable to the production of spirulina algae.

Success story

- The American group Mc Cormick has invested heavily in Tuscany, through the acquisition of two important local companies, Drogheria & Alimentari in 2016 and Enrico Giotti Srl in 2017
- Bright Food (China) acquired SALOV (extra virgin olive oil)
- Main investments are focused on the wineries, some examples: Bulgheroni Group (Argentina) owns 7 wineries in Tuscany; Constellation Brands (USA) acquired Ruffino; EPI (Europeenne de Participations Industrielles SAS) owns Biondi Santi

Business opportunity

SPIRULINA ALGAE PRODUCTION IN TUSCANY

Greenfield Project

Investors: Financial or Industrial operating in agriculture or healthfood sector

Value of total Investment: > 2 million euro per hectare, with the possibility of incentives up to 200 k non-refundable by Cosvig, a consortium of geothermal municipalities + specific guarantee of Fiditoscana

Proposing Companies: ENEL GREEN POWER - UNIVERSITY OF FLORENCE - COSVIG

Description: the possibility of investing in Tuscany in the production of spirulina algae by exploiting the geothermal energy in which Tuscany is rich. Thanks to a collaboration between the University of Florence, Enel Green Power, the Renewable Energy District and 20 municipalities in the Alta Val di Cecina, 20 sites have been identified that are potentially suitable or adaptable to the production of spirulina algae. The project's strengths:

- the results of the University of Florence's experimentation have shown that spirulina algae and geothermal energy are a winning combination, reducing operating costs by about 30% and increasing production by about 20%;
- the possibility of producing spirulina seaweed of the highest quality and exploiting the globally recognised Tuscan brand as a synonym for quality, especially in agricultural terms;
- local institutions already coordinated in order to create an environment conducive to business development in this sector (convergence of banks, municipalities and the Tuscan region);
- Enel Green Power, an important economic player and sponsor of the project.



CHEMICAL INDUSTRY

LOMBARDY

LOMBARDY

CHEMICAL INDUSTRY

Infrastructures and connections

- 573 km of highways
- 900 km of national roads
- 11,000 km of provincial roads
- 1,680 km of railway network
- 4 International airports:
 - Milano Malpensa Airport, Varese - Ferno (54.5 km from Milan)
 - International Airport Il Caravaggio, Bergamo - Orio al Serio (60.4 km from Milan)
 - Enrico Forlanini Airport, Milano - Linate (9.7 km from Milan)



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- International Airport Gabriele D'Annunzio, Brescia - Montichiari (120.5 km from Milan)
- Distance by car from Milan to Paris (8h50min), Berlin (10h45min), Frankfurt (7h30min), Barcelona (10h)

Industrial base

- Lombardy is a reference point at Italian and European level
- Northern Italy accounts for about 78% of chemical employment. Lombardy, representing more than half of it, has a real vocation for chemicals: it is among the Top Five chemical regions in Europe in terms of number of companies
- Lombardy presents the highest index of specialization in the chemical sector (share of national employment)
- There is an important presence of industries that manufacture chemical products, artificial and synthetic fibers
- Lombardy is a high-value manufacturing region that is a rich end market for products made from renewable raw materials such as, for example, in the food, cosmetics, chemistry, pharmaceutical, animal feed and textile sectors
- Within Green Chemistry Cluster there is a strong focus on technologies in the following sectors: biorefineries, biomaterials, renewable fertilisers, catalysis and bioprocessing, which allow intense technology transfer

Facts and figures

- **2nd region at European level in terms of employees**
- **70,000 workers, 4.1 % of the total in the European Union**
- **1st region at Italian level, with 31% of companies and 42% of workers**
- **151 foreign companies working in the field of chemical industry are located in Lombardy employing more than 20,900 people**
- **In 2017 exports increased by 9.5 % and turnover rose by 20.1%**
- **Presence of Lombardy Green Chemistry Association that includes:**
 - **34 companies**
 - **11 universities/research centers**
 - **7 associations**

R&D network

Strong representation in the region of public and private research centers and universities such as:

- CNR – Consiglio Nazionale delle Ricerche – (Research project on Chemical sciences and materials technology)
- PTP – Science Park
- Innovhub – Stazioni Sperimentali per l'Industria – (Research project BIO&CO)
- Politecnico di Milano – (Research Department of chemistry, materials and chemical engineering “Giulio Natta”)
- Università degli Studi dell'Insubria
- Università degli Studi di Brescia
- Università degli Studi di Milano – (Research Department of chemistry)
- Università degli Studi di Milano Bicocca – (Studies department of sciences and chemical technologies)

Incentives and funding

Regione Lombardia supplies incentives for corporate investments and Start-ups. For example:

«AL VIA» Corporate Investments

- 5% to 15% non-repayable grant for capital expenditures in productive assets for a specific investment project
- Long-term financing from €50,000 to €2.85M at favorable rates, with a duration from 3 to 6 years
- Free financial guarantee to cover up to 70% of the financing
- The eligible projects must fall within one of these two categories: Company Development or Relaunch of Productive Areas
- The intervention is dedicated to companies: registered in the Italian Register of Companies with an operating office in Lombardy at the time of the supply of the contribution, active for at least 24 months

«Linea Innovazione» Incentives for Innovation Projects

The incentive consists of a subsidized-interest-rate loan and a capital contribution to support the interest payments (starting from a minimum of €300,000 up to a maximum of €7,000,000).

The combination of the incentives can cover 100% of the total eligible cost of the project.

The financial incentive is dedicated to MSMEs employing fewer than 3,000 people, which have the Headquarter in Lombardy and are planning to invest in a project which aims to innovate the process or the product of the business Thanks to the ERDF - European Regional Development Fund, Regione Lombardia allocated in the 2014 – 2020 program period 36% of the fund (€349.2 M) to strengthen the research sector, foster technological development, and innovation. In the same way, 30% of the fund (€294.6 M) is allocated to promote the competitiveness of SMEs and improve access to loans.

Thanks also to the European Bank of Investment, who has allocated € 50,000,000 to financing the project, in collaboration with Finlombarda (operational partner).

Sites and buildings

- AttrACT website www.attractlombardy.it gives access to more than 100 investment opportunities (greenfield and brownfield opportunities), located in 55 Municipalities, mapped out through the AttrACT Programme. A variety of sites ranging from the office building to the industrial facility. This initiative, promoted by Regione Lombardia together with Unioncamere Lombardia, is a unique experimentation in Italy for the promotion of the investment opportunities located in Lombardy.
- Within Green Chemistry Cluster: PARCO TECNOLOGICO PADANO (Lodi, LO)

Success story

BAYER GROUP

The Bayer Group based in Germany is nowadays present in 79 countries and employs about 100,000 people worldwide. Its 2017 world turnover is of € 35 billion with 4.5 billion invested in R&D.

Bayer is present in Italy under Bayer S.P.A with its headquarter in Milan and a delegation in Rome. The Italian reality is characterized by a turnover of € 1,029 million in 2017, above 2,000 employees and 3 production sites with the most advanced systems in the world. The production potential is based on three industrial sites, with headquarters in Garbagnate Milanese (MI), Segrate (MI) and Filago (BG). These industrial sites are international reference points for the most advanced productions capacities with the au-

tomation of processes, the use of cutting-edge technologies and constant innovation fueled by a policy of strong investments. Last year Bayer invested € 11 million in the production site of Garbagnate in the field of Industria 4.0.

Business opportunity

The AttrACT Program is a unique innovative program in Italy: it brings together investors, investment opportunities and local Municipalities thanks to a dedicated online platform, www.attractlombardy.it.

AttrACT aims at:

- developing the regional offering
- promoting opportunities for investment
- bringing together the main territorial stakeholders

More than 100 “ready to use” investment opportunities, representing all the 12 provinces of Lombardy and pertaining to 4 key segments: Industry, Logistics, Offices and Tourism. The Program has mapped both publicly- and privately-owned areas.

AttrACT sees the direct engagement of the Lombardy Municipalities involved in the Program that are called to identify local investment opportunities (greenfield and brownfield) in their area, made it available to investors, and simultaneously made commitments to simply administrative processes, offer economic and tax incentives and offer qualified assistance service.

Commitments can vary according to the Municipality:

- Simplification of administrative processes such as:
 - Adopting the Action Plan by the city council in less than 90 days from the request
 - Delivering a Planning Permission in less than 60 days from the request
 - Dedicating a portal or an on line “front office” service where investors can find all useful information
- Economic and Tax incentivisation such as:
 - Declaring in advance all urban planning and construction expenses without additional expenses
 - Offering reduction or exemption of IMU, TASI, e/or TARI according to the Municipality

- Reducing the primary and secondary land development expenses by at least 20%
- Promotion:
 - Making available a support team that coordinates the work, facilitates the relationships and encourages collaboration
 - Providing preliminary consulting services and support to companies in the presentation and implementation of their projects, with the issuance of written opinions if requested in the proposal

AttrACT, where to invest in Lombardy.





FASHION, FURNITURE AND HOME SYSTEM

**FRIULI VENEZIA GIULIA
MARCHE
TUSCANY**

FRIULI VENEZIA GIULIA

FURNITURE AND HOME SYSTEM

Infrastructures and connections

- Airports: Venice Marco Polo Airport, Treviso A. Ca-nova Airport and Trieste Airport Friuli Venezia Giulia are 30/60 minutes driving from regional main towns
- Main Highways: E70-A4 Turin-Milan-Trieste, A23 Palmanova-Tarvisio, A28 Portogruaro-Conegliano
- Railway: Connections from Udine and Trieste railway stations to Milan, Rome, Turin and Venice



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- Maritime connections: Trieste, Monfalcone and Porto Nogaro commercial ports
- Interports: Cervignano, Gorizia, Pordenone and Trieste
- Broadband:ERMES, with its 2,600 km of cables, 260,000 km of optical fiber, 1,679 km of backbone infrastructure and 720 km of cable infrastructure in the 86 industrial areas, is the wider broadband geographic area in Italy

Industrial base

Furniture and Home System Cluster includes every activity of design, production and sale of products in the home furniture sector. In Friuli Venezia Giulia, the wood-furnishing industry represents 90% of the entire home system and includes cutting and planing of wood, parquet, doors and windows, wooden packaging, furnishings, furniture, mattresses, carpets, sanitary, tiles, fashion and industrial design.

Region Friuli Venezia Giulia has identified the following growth trajectories for the Furniture and Home System production chain: Material technologies and innovative design; Buildings efficiency technologies and manufacturing processes; Home system digitalisation.

Among the main furniture companies in the region: Friul Intagli Industries SpA, Calligaris SpA, Snaidero Rino SpA, Valcucine SpA, Moroso SpA, Ilcam SpA.

Facts and figures

FURNITURE AND HOME SYSTEM CLUSTER

Cluster export: 1,607 mln €

Yearly turnover: 3.4 bln €

Enterprises: 2,493

Employees: 23,000

Foreign companies: 47

International research project:

ICAP (INTERREG V A Italia – Austria 2014-2020)

FURNISHING INDUSTRY FOCUS

- Wood sector
- Panels and intermediate products production
- Smart building
- Furniture
- Household systems and appliances

R&D network

The main R&D players are: University of Udine – departments of Engineering, Physics and Architecture; University of Trieste – departments of Engineering, Physics and Architecture; Scientific and Technological Parks: Parco scientifico e tecnologico Luigi Danieli, Udine; Polo tecnologico Pordenone; Area Science Park, Trieste; Consorzio Innova FVG; BIC Incubatori Srl; Lean Experience Factory; Catas SpA. IP4FVG - Industry Platform 4 FVG, Friuli Venezia Giulia digital innovation hub, supports SMEs in the industrial manufacturing digital transformation and promotes technological updating in the sector also through training, living labs and specialised services. Home-System Cluster elaborates initiatives for the development and management of the Cluster, in order to stimulate innovative activities through promotion, infrastructure and knowledge sharing. In addition, it provides services supporting companies innovative processes, and any form of aggregation, contributing to networks creation and collaboration among companies, institutions and other actors belonging to the cluster.

Incentives and funding

Friuli Venezia Giulia Region has several types of incentives and funding. Regional taxes reduction can be applied to companies which meet specific criteria; public grants can be awarded to support the creation of new enterprises and implement RDI projects. There are also incentives to support competitiveness of SMEs and measures to finance innovation technology investments. Different kinds of regional subsidised loans can be granted to support investments and business development.

Sites and buildings

Consorzio di sviluppo economico locale del Friuli (Local Economic Development Consortium), industrial area of Rivoli di Osoppo.

Success story

Born in 1923 and established in Manzano (Udine, Italy), Calligaris, with its wide range of tables, chairs and sofas is one of the world leaders in the quality furniture production and distribution. Distributed in 100 countries, Calligaris

currently boasts 3 brands (Calligaris, Connubia and Ditre), more than 620 sales points and 3 flagship stores worldwide. The company 2017 financial statement shows a turnover of about 140 million euros, with an increase of 7% compared to 2016 and an EBITDA of about 23 million euros. In August 2018, Alpha, a private equity group handling 2 billion euros, specialised in mid-cap operations in Europe, negotiated an agreement to take over the control of Calligaris which will keep holding a participation of 20% in the group. Alpha and the Calligaris want to strengthen the group's international leading position, through targeted acquisitions in the furniture sector and a further expansion in the reference market, by leveraging the benefits offered by the expertise built by Calligaris in its 95 years of history.

ILCAM was founded in 1959 and today is the world leading manufacturer of frontals for the furniture industry. From its headquarters in Cormons, Friuli Venezia Giulia, ILCAM drives a network of several STRATEGIC BUSINESS UNITS spread in the North East of Italy, Slovenia, Romania and in the USA, coordinated according to a diversification strategy and an integrated manufacturing logic, providing the broadest and most complete offer of industry-leading technologies and processes. Managing 8 different technologies for the production of frontals, the Company has today a large manufacturing capacity of more than 70,000 pieces per day. The wide range of products that can be sourced from ILCAM and a proactive, creative and innovative approach deliver a great deal of value to the customers, kitchen and furniture manufacturers in Europe and in the USA. In ILCAM a great effort has been made to integrate human and technological resources and the Company employs today more than a thousand people: craftsmanship, automation, and sophisticated planning and control systems, streamline company's operations. Endless innovation of product and processes and of organizational and managerial systems, along with high level of service, make ILCAM a leading company in the industry and the perfect partner not only for kitchen and furniture industries but also for companies working in the contract business.

MARCHE

WOOD FURNITURE AND HOUSING SYSTEM

Infrastructures and connections

- International Ancona Airport (Raffaello Sanzio) 30 minutes from the sector's district
- Port of Ancona: Commercial and Touristic – one of the most important of Adriatic Sea
- Main Highways: A14 Motorway and network of roads that crosses the whole territory



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Arch. Roberta Tarini - Marche Region – Integrated planning

– Trade – Cooperation and Internationalization Unit

- Railway lines connect South North and Trans Apennines
- Marche region Interport way of intermodal transport
- Broadband with more than 3,300 KM of optical fiber

Industrial base

- Presence of sectoral clusters: “Marche manufacturing” and “e-living”, a technological cluster of domotics
- Variety and complexity of production for different regional sectors, including the House System: technical and commercial furniture, kitchens, office, home furnishings in general, beds and mattresses, bent glass furniture, custom-made naval furniture, hardware, accessories and woodworking machinery, smart home automation systems and IoT applied to furniture
- High propensity to export of regional companies: 26% of production exported for a value of € 528 million
- Industry focus: product innovation, digitalisation, smart manufacturing (production processes and business models), smart home (living styles and consumption models), smart building, sustainability, circular economy, new materials, eco – design, nanotechnologies
- Leadership by attracting talents and designers
- International marketing platform

Facts and figures

2,500 companies, with a turnover of 2.5 billion euros

Workforce:

over 18,000 employees

Areas of specialization within the sector:

- **Kitchens**
- **Upholstery**
- **Office**
- **Glass furniture**

R&D network

- Presence of a Task Force for the furniture sector and of a management group involving public bodies, associations, companies, and COSMOB the Technological Innovation Center
- Main R&D players: SME Network, Marche Polytechnic University, University of Camerino, Centers of

- Technological Innovation
- Presence of BBF manufacturing hubs and high market potential
- Development of innovative technologies for the creation of an interoperable framework on which the various Home Automation devices converge in a perspective of integration of home automation services and design methodologies, for the creation of usable products and systems

Incentives and funding

The regional policies for promotion of settlements and investment provide incentives for investing that support businesses in the form of economic aid.

Moreover, there are specific incentives for the areas of economic crisis recognized at the national level and co-financed by the State and the Region in the form of grants, loans and guarantees.

Companies can also receive subsidized loans, other incentives and tax discounts by local authorities as a support to specific sectors or projects.

The regional government periodically issues Calls for companies that can receive financial support for the following types of activity:

- Smart specialization strategies
- Industrial R&D
- Innovation and competitiveness of the economic system
- Innovative Startups
- Training project
- Employment and social inclusion
- Industry 4.0 and Digital Transformation

These priorities have been declined, with European funds Por-Fesr 2014-2020, in a series of action which absorb resources for over 120 million euro.

Success story

Berloni Group - An important Taiwanese company - HCG, formerly a Berloni's distributor quoted on the Taipei Stock Exchange - believed in the possibility of reviving an historic Italian brand by participating in the joint venture that took over 50% of Berloni Group, specialized in the production of modular kitchens, with a company lease. An investment of 10 million euros for the acquisition of the

brand and of the main assets, in addition to the acceptance of some operating leases for further 8 million and the full commitment to support the recovery plans and related investments.

In addition to a substantial investment, the revamping project has safeguarded the brand in Italy and around the world, protecting then professionalism and respecting the company's history, thus seeking to integrate and enhance national production skills - direct and indirect - to be further improved thanks to the strong union between tradition and innovation, as result of important projects for product development, logistics and communication in close relationship with the Taiwanese partners. Research and development will remain concentrated in Pesaro, where the brand was born in the 1960s.

Since 2016 Arxit has chosen Berloni for the development of its digital strategy.

Arxit, a company specialized in the creation of digital solutions, through its own division that ensures the development of innovative business processes for companies, has launched the new "Berloni Digital" business strategy. The historic brand of kitchens aims to promote digital services for contact points and customer and post-sales services.

Business opportunity

Within the Marche Region there is an important Italian furniture district, characterized by over 2,500 companies, mostly small and medium sized ones, able to guarantee the realization of a wide range of furniture production for the different areas of the house, with a strong specialization in kitchens, thanks to the presence of several leading companies on national and international markets (Scavolini, Lube, Ernestomeda, etc.). In order to support and complete the activities of the main supply chain, over the years other related production specializations have been developed, such as mechanical engineering (Biesse Group, etc.), glass processing (Fiam Italia, Vetrotec, etc.), as well as some commercial services. In this sense, the Marche region, also characterized by a propensity to internationalization that in recent years is constantly growing, is also characterized by the presence of the COSMOB Technology Center, in the forefront for technical support to companies, daily engaged in processes of innovation. The center specializes in research and testing for the mechanical, chemical and physical functionality of materials and products and

can rely on its own FabLab for rapid prototyping through modern digital manufacturing technologies. For years, the structure has been a pole of attraction for investments by local and foreign entities, such as those from countries like Brazil, Mexico, Turkey, etc. Its goal is primarily competitive growth. This purpose is pursued by focusing on a key factor such as the quality of products and processes, as well as by implementing innovative solutions through research and development. In this context, over the years many innovations have been developed in different fields:

- Personalized kitchen and home automation
- Design and eco-sustainable packaging
- Smart mattress
- High automation bed
- Wellness and functionality in the office
- Furniture for the elderly
- Materials and coatings for eco-sustainable and functional furniture (glass, cardboard)
- Smart doors and partition walls
- Furniture with sound absorption properties
- New shapes for bathroom furniture

COSMOB also has a great experience in the field of Indoor Air Quality and is developing two products that aim to have a significant impact on these problems.

On the one hand, in fact, COSMOB is developing an IoT product able to detect indoor pollution in its main components and to process this information by providing the user with useful actions to minimize pollution in confined environments or help him to improve his/her behaviour.

On the other hand, COSMOB is developing basic materials that can be used in completely biodegradable, environmentally friendly and zero-emission furnishing in confined spaces.

These products are part of an important potential market, linked to indoor pollution. Even by just considering China, the biggest market in the world, awareness on these issues is increasing: in Beijing, half of the new urban buildings will have to be certified as green buildings by 2020.

It is probable that we will soon decide whether to go to a restaurant rather than another one based on the best air quality, since proposing a clean environment will become a status symbol.





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TUSCANY

FASHION

Infrastructures and connections

- 2 integrated international airports (Florence and Pisa), serving over 50 international destinations
- 1:30h from Florence to Rome by high-speed train
- 1:40h from Florence to Milan by high-speed train

Tuscany is crossed by:

- the major Italian highway (A1) connecting Milan with Rome and Naples
- the EU “Scandinavian-Mediterranean Core Network Corridor” linking the Baltic Sea with Southern Italy and Malta

1 main commercial port (Livorno) with direct links to the 10 major Mediterranean ports

3 main logistic parks (Livorno, Prato and Arezzo)



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Industrial base

- Tuscany is one of the most specialized regions in Europe for the textile, clothing, leather and shoe industries. Tuscany has also a long tradition in goldsmith production
- Historical background: Tuscany gave birth to or has seen the growth of some of the biggest names of haut couture, such as Gucci, Ferragamo and Emilio Pucci, Enrico Coveri, the Bridge and most recently Prada, Roberto Cavalli, Stefano Ricci, Ermanno Scervino, Peuterey, Patrizia Pepe
- Availability of high-level skilled workforce, especially in the leather manufacturing
- The proximity to one of the most important tanning districts in the world, Santa Croce sull'Arno
- Easy accessibility to suppliers of Top-level segment, specialised in different phases of production process (especially in high level and luxury items)

Facts and figures

- **Main fashion specialization sectors: Textile, Clothing, Leather & tanning, Shoes**
- **Revenue: EUR 22.5 billion - 20% of Regional GDP**
- **121,000 employees (30,000 textile; 41,000 clothing; 27,000 leather & tanning; 23,000 shoes)**
- **8% of total Tuscany's employees**
- **8 billion € of export (=25% of Tuscan export)**
- **Tuscany produces 30% of Italian fashion exports**
- **Main export markets: France, Hong Kong, China, USA, Germany, UK, Spain, Japan**
- **Main luxury fashion brands produce its items in Tuscany (especially bags and leather accessories): Céline, Fendi, Dior, Bulgari, Montblanc, Chanel, Prada, Burberry, Gucci, Furla, Balenciaga, Ferragamo, Valentino, etc.**

R&D network

Tuscany, and especially its main city, Florence, is an internationally famous education centre specialized in the sectors in which the region better expresses its uniqueness: art and fashion. Main fashion schools:

- Polimoda
- IED – European Design Institute
- ASPI - Alta scuola Pelletteria di Scandicci

- MITA Made in Italy Tuscany Academy
- Istituto Marangoni

Incentives and funding

For detailed information please visit
www.investintuscany.com/incentives

Success story

- In April 2018 Gucci (Kering Group) inaugurated the ArtLab centre in the area of the former Matec in Scandicci, where 900 new employees will work at full capacity
- In June 2018 Prada inaugurated the new factory in Valvigna, near Arezzo (almost 70 M €) the worldwide centre of excellence for the group's leather goods; it is the largest production plant among the 21 owned,

with its 30,000 square metres of surface area and 785 employees

- In November 2018 Fendi announced an investment of 40 million euro in the municipality of Bagno a Ripoli, near Florence, where the maison of the LVMH group will build a new production plant for leather goods and accessories in the former Brunelleschi Furnace
- In July 2019 Chanel invested in the tannery "Samantha" in Ponte a Egola (Pisa), in the heart of the Santa Croce leather district, thus strengthening the upstream production chain.



HEALTHCARE

AOSTA VALLEY

APULIA

CALABRIA

FRIULI VENEZIA GIULIA

LAZIO

LOMBARDY

PIEDMONT

TRENTINO

TUSCANY

AOSTA VALLEY

LIFE SCIENCES

Infrastructures and connections

- 1 regional airport Corrado Gex (allows the operation to aircraft up to a maximum of 70/80 places).
- Highway: A5 linking Aosta with Turin and Milan
- Tunnel Mont Blanc: linking Aosta with France
- Tunnel Gran San Bernardo: linking Aosta with Switzerland
- 1:00 h from Aosta to Turin; 2:00 h from Aosta to Milan; 7:00 h from Aosta to Rome; 7:00 h from Aosta to Paris; 2:00 h from Aosta to Geneva



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Industrial base

Following are some of the numerous companies providing business opportunities in Aosta Valley: Engineering S.p.A. (data center), STMicroelectronics LTD (semiconductors), Thermoplay S.p.A. (hot runner systems for injection molding of plastics), Eltek S.p.A. (electromechanical components), Brabant Alucast LTD (magnesium and aluminum components), Podium advanced technologies LTD (electric drive systems), Mavel LTD (electric engine for high speed), Honestamp LTD (molds for thermoplastic), MDM LTD (bolts and screws), GPS Standard S.p.A. (security systems). Aosta Valley is autonomous in water. C.V.A S.p.A. produces and distributes hydroelectric power from a huge catchment area consisting of weirs and dams of significant magnitude.

Facts and figures

- **2 companies active in Life sciences, with 1,200 employees**
- **Genetics & Genomics - Bioinformatics, Big data analytics - Biotechnologies (Pharma & Medical Devices)**

R&D network

The Smart Specialization Strategy (RIS3) of the Aosta Valley identify 3 areas target for R&D, Mountain of Excellence, Intelligent Mountain and Sustainable Mountains, subject to reciprocal cross-fertilization actions, mainly through the use of KETs (ICTs, Nano-microelectronics and bio-technologies).

In the Region there is the headquarters of the University of Valle d'Aosta and a seat of the Polytechnic of Turin, as well as research centers, such as the Astronomical Observatory, the Safe Mountain Foundation, the Institute for agriculture.

Research is particularly active in biotechnology, information technology, electric mobility, land monitoring and the enhancement of cultural heritage.

Incentives and funding

The Aosta Valley is a Region in "special status" with wide legislative and administrative autonomy by which it can operate in an efficient and effective way so that entrepre-

neurs can interact with the public administration quickly and easily. Regional law 84/1993 supports research and development in industrial enterprises with grants with a maximum amount of € 500,000 for large companies, € 250,000 for medium-sized companies; € 125,000 for small companies. Regional law 14/2011 supports the growth of new innovative companies with grants with a maximum amount of € 150.000.

The regional financial company, Finaosta, can support the capitalization of companies.

Sites and buildings

The Region can make available to companies many industrial sites:

- technology park Espace Aosta, with lots and buildings of different sizes;
- technology park Ilssa Viola in Pont-Saint-Martin, with lots and buildings of different sizes;
- industrial area in Châtillon of 16,660 sqm;
- industrial area in Verrès of 16,042 sqm.

Success story

Podium advanced technologies LTD.

In 2011 a small group of graduates and PhDs from Polytechnic of Turin joined forces to create an innovative engineering firm, building upon their interests and passion for motorsport, cars and applied research on hybrid and electric mobility.

Podium Advanced Technologies offer a comprehensive set of services in automotive high performance development, covering conventional, hybrid and full electric powertrains, supported by a unique hands-on experience in all facets of international motorsports.

In 2019, the company has 30 employees and covers an area of 6,000 sqm. For the second year in a row, Financial Times recognizes Podium Advanced Technologies among Europe's fastest growing companies.

Business opportunity

The Aosta Valley Region is creating a research center supporting personalized, preventive and predictive medicine, on a scale appropriate to the size of Valle d'Aosta, to boost the region's research and health sector in an innovative way, implementing the specialization zones and techno-

logy transfer model set out in the Valle d'Aosta regional Research and innovation strategy for smart specialization for the period 2014/2020.

The main objective is to improve health, with particular reference to various neurodegenerative and oncological diseases. The research will also focus on building the genome profiles of samples of the population in order to establish a regional bioinformatics database.

The research activities are carried out by a partnership composed of research body and enterprises.

The project has available a total funding amount of 15,000,000 Euro for 5 years. The proposals presented in response to the call are being evaluated, the center will be fully operational on 1 January 2020.

The operation aims to establish technology transfer and create start-up and spin-off businesses. For example, it could be possible to support the creation of businesses which would focus their activity on identification of the diagnostic bio-markers which are needed for the development of new diagnostic kits which could be used by medical analysis laboratories, hospitals, clinics and care home.

We are looking for companies, start-ups or consolidated companies, which intend to establish in the Aosta Valley region to benefit from the transfer of technology from the research center, to be supported with regional incentives for research and development, which provides grants to companies.

We are looking for researchers in biotechnologies or information technologies who want to come to work in a cutting-edge scientific context and in an environmental and natural context of excellence.



REGIONE PUGLIA

APULIA

LIFE SCIENCES

Infrastructures and connections

- 2 international airports (Bari and Brindisi), serving over 40 international destinations
- 1 industrial cargo airport (Taranto-Grottaglie), recently adopted as a test-bed for remotely piloted aircraft and designated as the first spaceport in Italy for the development of sub-orbital flights
- 1 local airport (Foggia), with connections to Tremiti Islands
- 3 major ports: Taranto (container shipping; the 3rd largest commercial port in Italy for cargo traffic); Bari (passenger and container traffic); Brindisi (passenger traffic)
- Extensive road and railway networks, linking the re-



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gion to major north-south corridors and high-speed rail network 1 logistics Interport located in Bari

Industrial base

Apulia plays a leading role in the pharmaceutical sector in Italy and is one of the main regions for exports, thanks to the presence of multinational companies, including Sanofi e Merck which have located manufacturing plants and research facilities in the region.

The region has also gained recognition as a center of excellence for precision medicine, with the recent creation of the national Hub for precision medicine, TecnoMED, which carries out innovative research into tumors and neurodegenerative diseases, based on nanotechnologies.

Synergy between private and public research institutes aims at advancing research and encouraging the creation of local hi-tech businesses that can industrialize research results and bring patents to markets in areas such as biotechnology drugs, gene therapy, somatic cell therapy, tissue engineering, biomarkers, drug discovery and drug delivery, advanced diagnostics, bioinformatics.

H-BIO - Apulian Biotech Cluster (11 public and 25 private partners) is a key player in this area and brings together the interests and activities of both regional universities and research centers and private companies operating in the fields of healthcare and biotech-drugs, focusing on 4 strategic sectors: Personalized medicine; Advanced Therapy; Molecular and advanced diagnostics; New manufacturing processes.

Facts and figures

226 companies active in Life Sciences (including Sanofi and Merck), with over 1,650 employees.

The regional export of pharmaceuticals and chemicals in 2017 amounted to over 1.6 billion Euros.

- **Main business sector specializations:**
- **Advanced Pharmaceuticals**
- **Biomedical Devices**
- **Advanced Diagnostics**
- **ICT (Bioinformatics –Telemedicine- eHealth)**

- **Cosmetics**
- **Surgical and Medical Supplies**

R&D network

3 major Universities (Bari, Foggia, Salento) and 1 Polytechnic University (Bari)

3 specialised Hospital Research Institutes

- - IRCCS Istituto Tumori “Giovanni Paolo II” (specialised in cancer research)
- - IRCCS “Casa Sollievo della Sofferenza” (specialised in genetic diseases)
- - IRCCS “Saverio de Bellis” (specialised in molecular biology and degenerative diseases)
- 2 National Research Centres - National Research Council (CNR), present in Apulia with 6 research institutes, including NANOTEC – Institute of Nanotechnology which hosts TecnoMED
- - National Institute for Nuclear Physics (INFN) CVBF - Biological and Pharmacological Evaluation Consortium for research and product testing.
- C.A.R.S.O. Consortium for postdoc training in biomolecular and oncological research and treatment

Incentives and funding

Regional Contract Programmes: regional grants scheme supporting business innovation and investment projects for existing companies or for new companies to be located in the region, with investment budgets falling within the range between 5 million and 100 million Euros;

Integrated Incentives Packages (PIA): regional grants scheme supporting business innovation and investment projects for existing SMEs or new ones to be set-up in the region, with investment budgets falling within the range between 1 million and 40 million Euros;

Tecnonidi: regional grants initiative which supports investments projects for innovative start-ups and SMEs, with a high-technology content aimed at introducing new products, services and/or business solutions, with investment budgets falling within the range between 25,000 and 350,000 Euros.

Sites and buildings

2 Business Incubators located in Puglia Sviluppo’s premises in Modugno (BA), suitable for service industry and digital start-ups and Casarano (LE), suitable for research and manufacturing activities, offering competitive costs and 100Mbps ultrafast broadband. H BIO - Apulian Biotech Cluster based in the University of Bari.

Success story

- In 2018, Gelesis, a biotechnology company based in Apulia and co-founded by PureTech Health (an advanced, clinical-stage biopharmaceutical company from Boston - USA), developing first-in-class mechanotherapeutics to treat chronic diseases related to the gastrointestinal (GI) pathway, closed an international financing round, raising \$ 30 million of funding. The proceeds from the financing will be used to support commercial-stage manufacturing, product launch preparations, company operations, and clinical advancement of the Company’s pipeline of additional product candidates for gastrointestinal disorders, including Type 2 diabetes and non-alcoholic steatohepatitis/non-alcoholic fatty liver disease (NASH/NAFLD). On April 14th Gelesis announced that the United States Food and Drug Administration (FDA) has cleared the Company’s lead product candidate, PLE-NITY™ (G lesis100), as an aid in weight management in adults with a Body Mass Index (BMI) of 25–40 kg/m², when used in conjunction with diet and exercise.
- In 2017 the French multinational Sanofi, active in pharmaceutical sector decided to invest 6 million euros in the Brindisi plant, for the development of an industrial biotechnology project that aims to develop innovative technologies for the genetic improvement of the microorganisms and of the processes of fermentation extraction and purification of active ingredients.

Business opportunity

Apulia is an authentic and modern region which offers many advantages to potential investors and represents the ideal location for companies looking to invest in Europe, at the heart of the Mediterranean. The region is building a strong reputation as a hub for innovation thanks to the



REGIONE PUGLIA

work of its more than 415 private and public entities, including universities, business and technology clusters and laboratory networks start-ups, all of which are active in research and development. The Apulia regional government stands out for its commitment to investment in research and innovation, and is focused mainly on smart technologies and providing a significant boost to hi-tech sectors. Through Puglia Sviluppo, the regional development agency, potential investors in Apulia can access a raft of incentives, as well as assistance throughout the initial setting-up phase in identifying business locations, local business and research partners and so on. Overall, Apulia is an increasingly attractive business location thanks to its strategic geographic location, the availability of a young, skilled and efficient workforce, government aid and assistance making for competitive operational costs, a well developed and highly integrated ecosystem for scientific and technological R&D



CALABRIA

LIFE SCIENCES

Infrastructures and connections

- 3 International airports (Lamezia Terme, Reggio Calabria e Crotona)
- 4 commercial ports (Gioia Tauro, Corigliano Calabria, Vibo Valentia and Crotona)
- Main Highways: A2 – Mediterranean Motorway (Salerno-RC)
- 4:00 h from Lamezia Terme to Casablanca (Morocco)
- 3:15 h from Lamezia Terme to Frankfurt (Germany)
- 3:00 h from Lamezia Terme to London (UK)



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Industrial base

Life Sciences represent an area of research well rooted at regional level, interconnected to external networks but also to regional health care. A recent survey, conducted on 35 regional research departments and research centers, puts this area first in terms of the number of researchers working on life sciences and intercepted financing. Industrial Know-how: Medical devices, biomedical engineering, pharmaceutical and food supplements, molecular diagnostic applications, personalized medicine, computational modelling.

Facts and figures

BIOTECNOMED S.c.a.r.l., Innovation Pole for Life Sciences and Health in Calabria, characterized by:

- **14 Consortium Members (Universities, Large, Medium and Small Enterprises)**
- **50 Technological Partners**
- **150+ Human Resources**
- **20 Laboratories (>1,000 m²)**
- **12 R&D Projects**
- **1 Maker Space**
- **7 National and International Patents**
- **4 Areas of Applied Research (Regenerative Medicine, Advanced Diagnostics, Neuromotor rehabilitation, Nutraceuticals and Functional Food)**
- **More than 30 M€ raised in competitive national and international calls on Life Sciences and Biotechnology**

R&D network

- **Biotechnomed S.c.a.r.l.:** The Innovation Pole for Life Sciences and Health technologies in Calabria is a research and innovation organization, capable of attracting enterprises and startup companies, as well as public and private investments in South Italy.
- **Research Center on Neurosciences:** located within the University of Magna Graecia, is a research center devoted to leading edge research on neurodegenerative disorders by advanced imaging techniques.
- **Istituto S. Anna:** a private institution specialized in neurorehabilitation.
- **Marrelli Health:** a private group with multidisciplinary

interests in advanced dentistry and regenerative medicine.

- Mediterranean University of Reggio Calabria
- University of Calabria in Cosenza

Incentives and funding

Wide range of incentive schemes with the maximum level of aid intensity available through the EU

Local grants are available for:

- R&D projects
- Internationalization
- Innovation
- Researchers hiring and training

Sites and buildings

Industrial sites and buildings are available in many industrial areas in Reggio Calabria, Vibo Valentia, Crotona, Cosenza and Catanzaro provinces.

Presence of the Innovation Pole of Health Technologies, managed by Biotechnomed, with 19 laboratories and 48 associated enterprises, providing research centers and enterprises with advanced services and facilities such as R&D services, Research services laboratories, Intellectual property, Hosting, Events and training, Maker space. (www.biotechnomed.it)

Success story

Linkverse, a company specialized in medical devices design, healthcare system integration, biomedical data management and artificial intelligence for life sciences has been recently hosted in the Innovation Pole Biotechnomed. With his very solid and experienced knowledge in Neurology, with a special focus on Dementia such as Alzheimer Disease (AD) and Parkinson Disease (PD), Multiple Sclerosis (MS) and much more, Linkverse is among the most competitive players in the field of artificial intelligence application in biomedicine.

Arcon is an Italian company born from an intuition of its founders about the mechanical functionality of the classic stethoscope. Since then ARCON has been proposing innovative solutions aimed at improving the properties of classical stethoscopes, in order to have a more effective preventive diagnosis, reduce the uncertainty on first

diagnosis and use the stethoscope in telemedicine and remote monitoring. The experience of the company management is based on an important training on business development. Performed at the Santa Clara University Business School (in California); in close contact with the Silicon Valley ecosystem; thanks to the prestigious Fulbright-BEST Scholarship.

Since 2018, ARCON has acquired an important partner and investor: ROCKSTART DH (vertical startup accelerator on Digital Health, based in the Netherlands). Thanks to them ARCON opened a second business development office in the Netherlands (Nijmegen).

Business opportunity

Biotechnomed offers, among others, the following business opportunities in specific areas of activity (Pharma & Medical Devices, Consulting Services, Life Sciences related activities) and investment types (R&D, industrial/technological partnership, funding).

Breathless - MicroRNAs as biomarkers for the diagnosis of lung diseases caused by exposure to environmental pollutants

- **Business proposal:** a screening method and RNA sequence for easy assessment of lung damage and working/living conditions
- **Target investor:** a licensee interested in acquiring an exclusive license for the exploitation of the invention OR a financial partner able to support us in developing a diagnostic kit. Alternatively, the patent could be sold to pharma companies.

μEMG – Tremor analyzer

- **Business proposal:** a low cost digital device for outpatient use + mobile app + (optional) web application. The analysis method can also be implemented to extend functions of classical EMG
- **Target investor:** licensee (annual fee+royalties%) or patent buyer

Uterine Cancer Detector (UCD)

- **Business proposal:** a new method and a diagnostic kit for the reliable detection of uterine cancer
- **Target Investor:** a licensee interested in acquiring an exclusive license for the exploitation of the invention OR a financial partner able to support us in developing a diagnostic kit. Alternatively, the patent could be sold to pharma companies.

FRIULI VENEZIA GIULIA

SMART HEALTH

Infrastructures and connections

- Airports: Venice Marco Polo Airport, Treviso A. Canova Airport and Trieste Airport Friuli Venezia Giulia are 30/60 minutes driving from regional main towns
- Main Highways: E70-A4 Turin-Milan-Trieste, A23 Palmanova-Tarvisio, A28 Portogruaro-Conegliano
- Railway: Connections from Udine and Trieste railway stations to Milan, Rome, Turin and Venice



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- Maritime connections: Trieste, Monfalcone and Porto Nogaro commercial ports
- Interports: Cervignano, Gorizia, Pordenone and Trieste.
- Broadband:ERMES, with its 2,600 km of cables, 260,000 km of optical fiber, 1,679 km of backbone infrastructure and 720 km of cable infrastructure in the 86 industrial areas, is the wider broadband geographic area in Italy

Industrial base

Bio-high-tech in Friuli Venezia Giulia consists of about 150 companies working in Smart Health within three closely related Bio fields: Bio-Med (including Living Environment Technologies), Bio-Tech and Bio-ICT.

Among the big companies, we can mention TBS Group (biomedical hospital devices corporation), Lima Corporate (one of the world leading companies in prosthetics), and Biofarma (working in nutraceutical). Average enterprises include ALIFAX and Insiel Mercato, while small and micro enterprises represent 90% of the whole field.

Facts and figures

SMART HEALTH CLUSTER

Export: 300-315 mln €

Turnover: 900 mln €

Enterprises: 150

Employees: 5,000

Foreign companies: 4

BIOHIGHTECH INDUSTRY FOCUS

- Biomedical
- In vivo and in vitro diagnostics
- Medical informatics and Bioinformatics
- Innovative Therapy
- Ambient Assisted Living

R&D network

Key players in research and innovation: 150 companies (MedTech and in-vivo diagnostics 30%, in vitro diagnostics 18%, Medical informatics 20%, Innovative therapies 17%, Ambient assisted living 15%); three Universities (Trieste, Udine, Sissa); two CNR (National Research Council of Italy) sites; five international research institu-

tes (ICGEB International Centre for Genetic Engineering and Biotechnology, Elettra Sincrotrone, LNCIB-Biotechnologies University Consortium National Laboratory; Italian Liver Foundation; Callerio Foundation for oncologic diseases); two IRCCS-Sanitary Research and Care Institutes (Burlo Garofolo in Trieste and CRO in Aviano, Pordenone); two academic medical center hospitals (Trieste and Udine, both certified by the Joint Commission International); four technology and science hubs, including AREA Science Park.

IP4FVG - Industry Platform 4 FVG, Friuli Venezia Giulia digital innovation hub, supports SMEs in the industrial manufacturing digital transformation and promotes technological updating in the sector also through training, living labs and specialised services.

The Burlo Garofolo Pediatric Institute is a children's hospital recognised as the best one in Italy for its research activity and 28th all over the world.

Know-how and specialisation in the following fields: in vivo diagnostics, prosthetics, regenerative medicine, bio-sensors and advanced microscopy, in vitro diagnostics and bio-pharmaceutics (bio-similar) with particular specialisation in cardiology, neurology, oncology, pediatrics, gynecology, genomics (Next Generation Sequency), nutraceutics, informatics, including all the IoT (Internet of Things) technologies (telecommunications, big data, informatics safety, cloud infrastructures for health, mobile technologies), all the HPC (High Performance Computing) technologies, hospital and welfare information technology, bio-images and bio-signals IT, telemedicine, remote assistance, smart home automation systems, wearable technologies, decision support systems.

CBM is the Smart Health Cluster of Friuli Venezia Giulia with a leading role in building relationships between all the actors in this field - entrepreneurs, researchers, clinicians, policy makers and people involved in finance and education. CBM is focused on internationalisation activity in order to increase its network with European countries (i.e. Bavaria, Austria, Poland, Balkan regions) and U.S., Cuba, Thailand, Australia and others.

Incentives and funding

Friuli Venezia Giulia has several types of incentives and funding: companies meeting specific criteria can benefit from regional taxes reduction; public

grants can be awarded to support the creation of new enterprises and implement RDI projects.

Other types of incentives to support competitiveness of SMEs and measures to finance innovation technology investments are provided. Different kinds of regional subsidised financing can be granted to support investments and business development.

Sites and buildings

Area Science Park – Science and Technology hub

BIC FVG S.r.l. – Enterprises incubator

Consorzio Innova FVG - Science and Technology hub

Friuli Innovazione – Research and Technology Transfer hub

Polo Tecnologico di Pordenone - Science and Technology hub

Port of Trieste Industrial area – This is the leading Italian port for total tonnage movement and railroad traffic, with almost 10,000 trains/years reaching the main European industrial destinations.

Fully operative Free zones in Trieste (unique in the EU context) offering warehousing, storing, examining, sorting, packing and repacking, manufacturing and industrial processing at convenient economic condition also for industrial processing of non-EU goods destined for EU and non-EU markets.

Success story

VivaBioCell was founded in 2007 as a spin-off of University of Udine, Italy. The company develops, manufactures and commercializes automated bioreactors to support advanced therapy medicinal products manufacturing for innovative and regenerative medicine therapies like autologous stem cell transplantation. Medical Devices are coherent to the “Good Manufacturing Practice – GMP in a box” concept.

These are “Closed Systems” that do not necessarily require to be located in a high sterility clean room environment. The mission is to make new medical treatments become affordable. Current applications include developing stem cell for the treatment of osteoarthritis and advanced cell and gene therapies, as the automated “GMP-in-a-Box” system will be used to develop next generation immune cells production in the treatment of cancer through natural killer cells. In 2015 VivaBioCell has been fully acquired by NantCell Inc, a subsidiary of NantWorks LLC group, based in Los Angeles (CA), USA.



Business opportunity

Proposer: Biovalley Investments spa

Investment type: Funding.

Description: streaMED.ai is a SaaS platform designed to support effective patient flow management in surgery units of public and private healthcare providers. Key advantages:

- The project aims at solving a problem experienced by surgery units for years, producing relevant cost savings with AI technology developed in collaboration with a specialized center of the University of Trieste.
- As of today, there are no comparable solutions available in terms of integration of technologies and clinical data management.
- The consortium of partners gathers skills, expertise, and technology acquired during 20 years of direct professional experience in developing middleware, connectivity and integration of clinical, laboratory and medical image data for hospital organization.
- In order to produce a deliverable prototype, an estimated investment of 900,000 euro is required to cover the development costs for the first three years. Based on current negotiations with two research hospitals, the team expects to receive from these institutions 300,000 euro in the 3 years; a portion of this funding will be received upfront to develop the prototype.
- The team looks for pure investors and/or commercial partners.



LAZIO

LIFE SCIENCES

Infrastructures and connections

- 2 International Airports (Fiumicino Leonardo Da Vinci, Ciampino)
- 3 commercial ports (Civitavecchia, Gaeta, Fiumicino)
- Main Highways: A1 Naples-Rome-Milan; A12 Roma-Civitavecchia; A24 Roma-L'Aquila.

Industrial base

- Lazio is Italy's 2nd most important and one of Europe's most important pharmaceutical industry hubs.
- Home of international players and highly innovative



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local SMEs operating in synergy with the important public research network.

- Main areas of specialisation and high added value production are: pharmaceutical innovative drugs, e-Health and medical devices production.

Facts and figures

- 300 companies
- 22,000 employees
- 8 billion euro exports (40% of regional exports)
- 45 Biotech companies (about 10% of the total in Italy)
- 25.96% contribution to biotech turnover
- 26 specialized research centres
- 10,000 researchers
- 7,468 graduates in life sciences per year
- High presence of public and private research infrastructures
- Innovation agreements: 200 M € for projects concerning R&D

R&D network

Presence of important industrial and multinational groups with their own R&D centers.

Some of the main national and international players: BSP Pharmaceutical, Sanofi Aventis, DPhar, SPL, Menarini and Alpha - Sigma.

Areas of specialisation:

Pharmaceutical: pre-clinical development of inhibitors for the treatment of solid cancers.

Medical devices: development of new optical systems for subcellular resolution retina analysis.

Sites and buildings

LAZIO INNOVA has a set of integrated tools for Innovation & Internationalization, coordinates a group of incubators of start-ups and has connections with the main Scientific and Technological Parks of Lazio. In the recent years, Lazio Region has seen a growth of incubators, accelerators and other startup related organization and projects.

Incentives and funding

LAZIO INNOVA, as an agency owned by the Lazio Region, operates to the advantage of businesses and local public administration in the provision of:

- incentives from regional, national and/or European resources;
- credit support and the issuance of guarantees;
- interventions in risk capital;
- services for the internationalization, promotion of business networks and regional excellence;
- services for the creation and development of business;
- measures for social inclusion.

More info available at:

www.lazioinnova.it – www.laziointernational.it

Success story

Tong Ren Tang Giomi Srl, the Italian-Chinese joint-venture
The Italian-Chinese company Tong Ren Tang Giomi S.r.l. is the joint venture established in Rome in 2018 between the GIOMI RSA and the Chinese group TONG REN TANG Chinese Medicine and represents the first experience in the healthcare sector of integration between traditional Chinese medicine and modern European medicine.

The TONG REN TANG is a company founded in 1669 by direct seal of the Emperor Yongzheng and was the exclusive supplier of the Chinese royal family for a good 188 years. Today it is a leading company on the Chinese market and listed on the Shanghai and Hong Kong stock exchanges.



The GIOMI Group, on the other hand, was founded in 1949 and today is a European healthcare group with a presence in Italy and Germany. It operates in the hospital, residential and home sectors, covering the entire health chain.

The common intent of the two business groups is to spread well-being through health-care methodologies that used to diverge in traditions and techniques. The Newco will not only promote traditional Chinese medicine products in the Italian and European markets, but is planning to open pharmacies, specialized parapharmacies, traditional Chinese medicine centers with a modern management organization, clinics and departments to accommodate the flow of patients in reserved spaces within the GIOMI group hospital facilities.
www.giomi.com

Business opportunity

- Proposer: Genechron SRL
Project: HTMark (Hepato-toxicity biomarker)
Info: www.genechron.com
- Proposer: Healthia Srl
Project: Happysalus
Info: www.healthia.it
- Proposer: Takis Biotech
Project: TK-NEO: a Cancer Vaccine targeting NeoAntigens
Info: www.takisbiotech.it
- Proposer: Kay Systems Italia Srl
Project: MRT-DSS: Molecular Radio Therapy-Decision Support System
Info: www.ksi.it
- Proposer: Menarini Biotech
Project: MenHub
Info: www.menarini-biotech.it
- Proposer: Evvivax
Project: Genevax: from Genes to Translational Vaccines
Info: www.evvivax.com
- Proposer: ACT Operations Research. European Brain Research Institute (EBRI) and the Italian National Research Council (CNR)
Project: MODIAG – Modeling for Diagnostic.
Info: www.act-operationsresearch.com

LOMBARDY

HEALTH INDUSTRY

Infrastructures and connections

- 573 km of highways
- 900 km of national roads
- 11,000 km of provincial roads
- 1,680 km of railway network
- 4 International airports:
 - Milano Malpensa Airport, Varese - Ferno (54.5 km from Milan)
 - International Airport Il Caravaggio, Bergamo - Orio al Serio (60.4 km from Milan)
 - Enrico Forlanini Airport, Milano - Linate (9.7 km from Milan)
 - International Airport Gabriele D'Annunzio, Brescia - Montichiari (120.5 km from Milan)



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- Distance by car from Milan to Paris (8h50min), Berlin (10h45min), Frankfurt (7h30min), Barcelona (10h)

Industrial base

The Health industry is strongly oriented to the future needs of society, becoming an important driver to create or recognize new emerging markets

In Lombardy Health Industry contains a very rich and varied system of competences, which includes the following themes:

- **Biotechnologies:** pure biotech companies research and development of based products exclusively on biotechnologies
- **Pharmaceuticals:** the pharmaceutical industry in Lombardy plays an important role for the well-being and quality of life. A role that combines the high propensity to research and to innovation with a significant manufacturing activity
- **Medical devices:** it includes all those medical technologies that make the difference in making a healthcare system at the forefront
- **Food:** related to foods with nutritional specificity for rehabilitation, nutraceuticals, etc
- **Creative industries:** related to disability, maintenance, and design reacquisition of psycho-physical faculties
- **Constructions** for equipped living and working environments and for individual well-being systems

The Pharma sector is the most advanced in terms of technology in Lombardy: companies invested mostly in the Internet of Things, 3d printing, robotics and artificial intelligence

The Biomedical enterprises are focused on biomedical devices for personal use, instrumental use, electro medical use and for early diagnostics

The priority themes of technological development are e-health, new diagnostic systems, drugs and innovative therapeutic policies, prevention, health monitoring, rehabilitation

The excellence of Lombardy Life Sciences Cluster is characterized by scientific and industrial competencies in the:

- **Biotechnology sector** applied to the health sector (red biotech)
- **GPET (Genomics, Proteomics and Enabling Technologies) sector**
- **Nano biotechnologies**

- Pharmaceutical sector and medical devices, with focus on personalized medicine (early diagnosis, rehabilitation devices and others) and mobile health services (telemedicine, remote health monitoring and interoperability platforms)

The Thematic Working Groups of Lombardy Life Sciences Cluster are: PHARMACEUTICALS (new drugs), MEDICAL DEVICES (for diagnosis and therapies), ICT FOR HEALTH, ADVANCED THERAPY (gene therapy, cell-based products, combined therapies), DIAGNOSTICS (in vivo, in vitro and device diagnostics), and NEUROINFLAMMATION (research of the pathogenetic mechanism related to neuroinflammation in neurological diseases)

Facts and figures

- **1st Italian region in terms of employees in the pharma sector, with more than 30,000 units (47.2% at national level), of whom 2,825 deals with R&D activities**
- **1st region in Italy for European funds obtained in the health sector (4th among European regions)**
- **With 28% of businesses and local units based in Lombardy (162 units), 23% of investments and 32% of the turnover, Lombardy is confirmed the first region of Italy for presence, commitment and results in Biotech**
- **816 biomedical enterprises (307 with more than 20 employees) and they employ 40% of the Italian workforce of this sector**
- **Presence of Lombardy Life Science Cluster that includes:**
 - **82 enterprises**
 - **24 Universities and Research bodies**
 - **20 Other bodies**
 - **6 Associations**

R&D network

- The R&D investments of Lombard enterprises in this sector accounts for roughly one third of the national total Lombardy counts the highest number of surgeries
- The research system consists of 6 Faculties of Medicine, 2 Departments of Bioengineering, 28 hospitals with university course premises, 288 Research centers with research activities in the health sector and 186 centers with research lines in non-food biotechnologies
- Public universities and Research centers involved in-

clude LIUC, the Catholic University, Bicocca University of Milan, the University of Milan, Vita Salute S. Raffaele as well as the CNR and the Politecnico of Milan

- Human Technopole (located at Expo Milano 2015 site), the new Italian research centre that will be an attractive hub for national and international talents at European and global level for biomedical research, genomics and for the future of medical science

Incentives and funding

Regione Lombardia supplies incentives for corporate investments and Start-ups. For example:

«AL VIA» Corporate Investments

- 5% to 15% non-repayable grant for capital expenditures in productive assets for a specific investment project
- Long-term financing from €50,000 to €2.85M at favorable rates, with a duration from 3 to 6 years
- Free financial guarantee to cover up to 70% of the financing
- The eligible projects must fall within one of these two categories: Company Development or Relaunch of Productive Areas
- The intervention is dedicated to companies: registered in the Italian Register of Companies with an operating office in Lombardy at the time of the supply of the contribution, active for at least 24 months

«Linea Innovazione» Incentives for Innovation Projects

The incentive consists of a subsidized-interest-rate loan and a capital contribution to support the interest payments (starting from a minimum of €300,000 up to a maximum of €7,000,000).

The combination of the incentives can cover 100% of the total eligible cost of the project.

The financial incentive is dedicated to MSMEs employing fewer than 3,000 people, which have the Headquarter in Lombardy and are planning to invest in a project which aims to innovate the process or the product of the business. Thanks to the ERDF - European Regional Development Fund, Regione Lombardia allocated in the 2014 – 2020 program period 36% of the fund (€349.2 M) to strengthen the research sector, foster technological development, and innovation. In the same way, 30% of the fund (€294.6 M) is allocated to promote the competitiveness of SMEs and improve access to loans.

Thanks also to the European Bank of Investment, who has allocated € 50,000,000 to financing the project, in collaboration with Finlombarda (operational partner).

Sites and buildings

- AtTRACT website www.attractlombardy.it gives access to more than 100 investment opportunities (greenfield and brownfield opportunities), located in 55 Municipalities, mapped out through the AtTRACT Programme. A variety of sites ranging from the office building to the industrial facility. This initiative, promoted by Regione Lombardia together with Unioncamere Lombardia, is a unique experimentation in Italy for the promotion of the investment opportunities located in Lombardy
- Within the Lombardy Life Science Cluster: PARCO TECNOLOGICO PADANO (Lodi, LO)
- Within The Italian Scientific and Technological Parks Network:
 - POLO TECNOLOGICO DI PAVIA (Pavia, PV)
 - COMONEXT (Lomazzo, CO)
 - KILOMETRO ROSSO (Bergamo, BG)
 - BERGAMO SVILUPPO (Bergamo – BG)
- “MIND” (Milano Innovation District) a world-leading science, technology and innovation park, a business friendly “innovation ecosystem” for domestic and international players, a “catalyst” for sustainable socio-economic growth, a new vibrant community fully integrated with the city centre of Milan. Located just a few miles North-West of the city centre, which hosted the six-month Universal Exposition in 2015.

Success story

SANOFI ITALIA

SANOFI is a French global healthcare leader in the world. With more than 100,000 employees present in 100 countries, the company has 79 manufacturing sites in 36 different countries. In 2017, the sales reached € 35bn. SANOFI is one of the leading pharmaceutical company in Italy, where it has a strong industrial presence. The Italian subsidiary manufactures and markets drugs in all the group’s business areas.

SANOFI Italia has its headquarters in Milan and another branch in Modena. In Italy, there are 4 industrial plants of

SANOFI. A unit of clinical research (CSU- Clinical Study Unit) with 39 collaborators, dedicated to conduct clinical studies operates at SANOFI site in Milan.

The Lombardy site is an example of positive growth which has been going on for some time, thanks to an investment plan of € 19 M over the last three years enabling to expand the production capacity.

NOVARTIS FARMA

Novartis is a global healthcare company based in Switzerland working in the pharmaceutical sector. Second pharmaceutical multinational in the world by turnover. Novartis is present in Lombardy with Alcon Italia SpA in Milan and Novartis Farma SpA or Sandoz SpA in the province of Varese.

Novartis is planning to increase its investments in Italy. The group’s investments will be mainly allocate to R&D, collaborating with research centers and hospitals to carry out clinical trials, investing in data collection, training doctors and supply advanced drugs. In 2017 Novartis already invested € 61 M in Italy to do 224 studies involving 10,000 patients. In Italy the group planned to launch an investment of € 200 M in R&D in three years.

Business opportunity

AttrACT Program

The AttrACT Program is a unique innovative program in Italy: it brings together investors, investment opportunities and local Municipalities thanks to a dedicated online platform, www.attractlombardy.it.

AttrACT aims at:

- developing the regional offering
- promoting opportunities for investment
- bringing together the main territorial stakeholders

More than 100 “ready to use” investment opportunities, representing all the 12 provinces of Lombardy and pertaining to 4 key segments: Industry, Logistics, Offices and Tourism. The Program has mapped both publicly- and privately-owned areas.

AttrACT sees the direct engagement of the Lombardy Municipalities involved in the Program that are called to identify local investment opportunities (greenfield and brownfield) in their area, made it available to investors, and

simultaneously made commitments to simplify administrative processes, offer economic and tax incentives and offer qualified assistance service.

Commitments can vary according to the Municipality:

- Simplification of administrative processes such as:
 - Adopting the Action Plan by the city council in less than 90 days from the request
 - Delivering a Planning Permission in less than 60 days from the request
 - Dedicating a portal or an on line “front office” service where investors can find all useful information
- Economic and Tax incentivisation such as:
 - Declaring in advance all urban planning and construction expenses without additional expenses
 - Offering reduction or exemption of IMU, TASI, e/ or TARI according to the Municipality
 - Reducing the primary and secondary land development expenses by at least 20%
- Promotion:
 - Making available a support team that coordinates the work, facilitates the relationships and encourages collaboration
 - Providing preliminary consulting services and support to companies in the presentation and implementation of their projects, with the issuance of written opinions if requested in the proposal

AttrACT, where to invest in Lombardy.

MIND – Milano Innovation District

An innovation, culture and research based identity with international focus

The former Expo site will be transformed into a “Science, Knowledge and Innovation Park“: a hub open to the world, capable of attracting international excellences and promoting Italian technology and culture in an extraordinary location.

A science and technology park with outstanding architectural features, able to attract investment and generate economic benefits throughout the country with scientific, recreational, cultural, sports, residential, productive and tertiary functions.

MIND will become a new part of the city: a smart, sustainable, authentic, inclusive and safe community, able to attract talented people from around the world.

The three majors anchors of the project are:

- the new cross-disciplinary research infrastructure Human Technopole which will develop personalized approaches in the field of medicine and nutrition on cancer and neurodegenerative diseases using genomics, big data analysis and new diagnostics techniques
- University of Milan Campus: a modern scientific, education and research campus, aiming to the most advanced international standards for teaching, research and interaction with the private industry
- Galeazzi research and treatment hospital: gathering together the excellence in the orthopaedic field of IRCCS Galeazzi and the experience gained in the cardio-thoracovascular and bariatric field of the Istituto Clinico Sant’Ambrogio, to offer patients a great multi-specialized research hospital.

PIEDMONT

LIFE SCIENCES

Infrastructures and connections

- 1 International airport (Torino International Airport)
- 1:00h from Milano Malpensa Airport
- Crossed through the Mediterranean and Genova-Rotterdam EU railway
- Vicinity to the upper Tyrrhenian ports (Genova and Savona)
- 3 interconnected logistics hubs.



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Industrial base

Life sciences - specifically biotechnology, pharmaceuticals and medical devices – represent one of the most promising hi-tech industrial sectors in Piemonte.

More than 400 local companies+ 21 multinationals.

Sectors: Biotech, Pharmaceuticals, Food Supplements, Cosmetics, Disposable, Services & Techno Care, Digital Health, Hospitals, LABS, SPA & Fitness.

Facts and figures

- More than 400 companies operating in the life sciences field
- Over 250 companies specifically in the healthcare and medtech supply chain
- 347 thousand employees, equal to 20% of the national value.
- Almost 10k employees in 21 multinationals
- 4th Italian region with 52 companies in the biotechnology field
- 820 research groups of which 60% in healthcare and medtech fields scientific production
- 3 Public universities
- 3 Incubators: 2I3T, I3P, ENNE3
- 1 Science & Technology Park dedicated to biotechnology: Bioindustry Park Silvano Fumero
- 1 Innovation Cluster for biotechnology: BioPmed Among Piemonte's leading key
- Players: Advanced Accelerator Applications Srl (AAA) A Novartis company, Ephoran, Huvepharma, Ab Sciex, Agilent Technologies, Bracco Imaging, Merck, Sicor (Teva), Diasorin, Delpharm, Livanova, Olon, L'Oreal, ELi-techGroup, CID – Carbonstent & Implantable Devices, Sienna Biopharmaceuticals, Unicyte Fresenius, TrovaGene, im3d, Consort Medical, Horizon Discovery
- Regional Technological Platforms and Innovation Hubs
- 2 world class hospitals in Torino and Novara (to be built)
- Top public healthcare system: leader in Europe in Organic Transplantology, excellence in the Oncology and Cardiology.

R&D network

A network of research centres, multinational companies and SMEs, makes of Piemonte a cluster of innovation, education and technology transfer and the core of a robust, interlinked system active in pharmaceuticals, biotechnology, wellness and health massively supported by converging technologies. Piemonte ranks high in Europe as a strategic partner for cooperation, R&D and investments in the life sciences and converging technologies sector, making the region a powerful location for scientific and industrial partners and for new businesses to set up operations. The Regional Technological and Innovation Hubs are drivers of innovation and research programs involving the public system, big players and companies: successful results in terms of medical applications, diagnostics, medical sensor technology and automation.

Incentives and funding

- ROP ERDF 2014/2020: Action I.1B.2.2 Objectives: to foster research and development projects Fields of application – smart factory, bioeconomy, life sciences, space economy
- Regional Investment contract for big companies with a foreign shareholder or a controlling one
- ROP ERDF 2014/2020 Action III.3c.1.2 – Investment attraction through Financial Support. Ensuring Positive Effects on local SMEs for SMEs not active in Piemonte yet; local SMEs that have delocalized production, SMEs already operating in Piemonte that want to develop a functionally different type of investment
- Human Resources – High Level training and Research apprenticeship (ESF 2014-2020) for people aged from 18 to 29 including PhD and Academic Diploma of Research Training, research activities
- ROP ERDF 14/20 Axis I Action 1.1.b.41 - support to Startups development programs
- L.R. 34/04 - Objectives: to foster start-up, expansion and diversification of a productive local unit and process/ product innovation.
- Moreover, Piemonte Region in order to promote the public and private partnership in the framework of the New Teaching and Research Hospitals is preparing a new measure aiming to support new research

labs set up and R&D activities in the smart health field (about 60 mil €)

Sites and buildings

The Bioindustry Park is a driver for growth and a regional point of reference for business related to the life sciences and health, promoting and developing research in the biotechnology, healthcare and life science sector. The Park directly coordinates the fulfilment of investments and management of the technical equipment, supports the implementation of R&D projects in the on-site companies, encourages the development of start-ups and spin-offs; provides infrastructures as well as scientific and advanced services, such as technology transfer, patent support, tutoring of start-ups and spin-offs, project management and financial support.

Regione Piemonte and Municipality of Torino offer industrial areas and location solutions for high tech service companies willing to invest in Piemonte.

Success story

- **Regione Piemonte (Regional Government) has recently contributed to the successful installation of 3 companies in its territory. All these companies have benefited from the financial support of the ROP ERDF 2014/2020 Axis I Action 1.1b.1.1 - IR2 - Industrialization of Research Results.**
- **Huvepharma Italia Srl will start a new strategic project for a total of eligible expenses equal to € 10,896,740.00. In collaboration with the Department of Chemistry and Drug Science and Technology of the University of Turin, Huvepharma Italia Srl aims at identifying new alternative solvents characterized by greater sustainability. In the context of circular economy, the company will also implement a sludge and waste treatment for their re-use as fuel therefore minimizing its disposal. The project is expected to increase the company's competitiveness and consolidation in the API market as well as to offer employment opportunities for the local market.**
- **CID S.p.A, company of the Alvimedica group, will start a new strategic project for a total of € 6,000,000.00 in eligible expenses. The company aims at developing innovative stents that besides fulfilling the mechani-**

cal function can also slowly release a drug capable of preventing tissue proliferation, which tends to occlude the lumen of the blood vessel. The most important feature of this highly innovative stent is the possibility to use it in diabetic patients.

- Bracco Imaging S.p.A. will start a new strategic project for a total of € 10,000,000.00 in eligible expenses. The company will focus on the pre-clinical and phase 1 clinical development of a new contrast agent for magnetic resonance. The investment will increase the competences of the team currently working in the Unit based in Piemonte, fully in line with the industrial footprint of the company.

Business opportunity

Piemonte is implementing the future of medicine-related sciences. The cities of Torino and Novara will be the center of this innovative renovation thanks to their New Teaching and Research Hospitals that will position Piemonte's regional healthcare system, the medical-scientific research and life sciences and human health related sectors, among the international leaders. The New hospitals will be at the forefront of innovations in terms of design and interaction between the patient care, R&D and teaching. The two hospitals will also house the teaching and research activities of the respective University Faculty of Medicine. The hospitals will therefore be the opportunity to strengthen the cooperation with new and existing businesses, research and training centers aiming at creating value and distributing services.

In a few words to foster the cooperation between the public and the private sector. With this objective, Regione Piemonte is preparing a new measure aiming at supporting new research labs set up and R&D activities in the smart health field (about 60 mil €).



TRENTINO

LIFE SCIENCES

Infrastructures and connections

- International Airports: 45 minutes from Verona airport (Catullo)
- Main Highway: A22 Brennero-Modena
- Railway that connects North East of Italy with Austria and Germany
- Brenner Basistunnel in construction
- Interporto of Trento
- Broadband with more than 1,100km of optical fiber
- Proximity to key European countries (Switzerland, Germany, Austria)
- Within 2-3 hours flight from major European cities



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Industrial base

Industrial Know-how:

Medical devices, pharmaceutical and food supplements, diagnostic applications, biomedical engineering, biomolecular and microbiological investigation.

Main companies:

ePharma, Novartis-Sandoz, Biomat, Biodermol, Eurocoating, Novagenit, Corehab, OPT SurgiSystems, Bio4Dreams, GPI, Imagina Biotech, Alia therapeutics, Wondergene Sybilla biotech.

Facts and figures

HEALTHCARE & LIFE SCIENCES CLUSTER

- **Export: 106 million euros**
 - **40 companies**
 - **5th Region for turnover generated**
 - **20 million € invested for R&D by the Public Sector**
 - **11 million € for R&D on biology and bio-technology**
 - **1,5 million € for R&D on digital Healthcare**
- 400 researchers, 200 employees**

Foreign companies:

- **Novartis-Sandoz**
- **OPT SurgiSystems**
- **Specialization areas:**
- **Biology and Biotechnology**
- **Medical devices**
- **Rehabilitation**
- **eHealth**

R&D network

Research Centers: CIBIO, University of Trento (Department of Integrative Biology), Bruno Kessler Foundation (ICT, microsystems, smart materials), Edmund Mach Foundation (agrifood, genomics, environment).

Trentino Salute 4.0 is the first Competence Center in Italy focused on digital healthcare between the Healthcare Institution, FBK and the Autonomous Province of Trento.

Labs: LaBSSAH – Laboratory of Biomolecular Sequence and Structure Analysis for Health, CIBIO – Centre for Integrative Biology, Neuroinformatics Lab, Ausilia – Assisted Unit for Simulating Independent Living Activities, CimeC – Center for Computational and System Biology, Proton Therapy Center.

Know-how:

- Personalized medicine and eHealth devices
- Genetics and biomarkers
- Brain and neuronal
- Rehabilitation and accessibility

Incentives and funding

- Up to 80% local grant on R&D project
- Up to 70% local grant on internationalization
- Up to 60% local grant for researchers hiring
- Up to 50% local grant on innovation
- Private – Public equity financing up to 1.5 million €

Success story

- The Department CIBIO – at the University of Trento, created in 2009, with more than 300 researchers is an excellence that will pursue the task of creating a suitable environment for merging classical cellular and molecular biology approaches with the new powerful tools of systems and synthetic biology, and with the contribution of chemistry, physics, informatics, mathematics, and engineering in an integrative view of basic biological processes and of their derangement in disease.
- The last ten years have witnessed an unprecedented revolution in biology. The availability of complete and annotated genome sequences for many species and the increasing affordability of high-throughput approaches for the global monitoring of macromolecules in cells are providing the basis for the mechanistic understanding of living tissues, both in their physiology and in the determinants of their diseased state.
- In January 2018, Nature Biotechnology published an invention made in CIBIO “A highly specific SpCas9 variant is identified by in vivo screening in yeast”. A variant of CRISPR–Cas9 nucleases for genome editing that will allow scientists in performing different applications for therapeutic purposes.
- In 2019, the University of Trento license the use of the invention to a spin off company, Alia Therapeutics that is the first Italian company dedicated to the application of this disrupting technology.

Business opportunity

- Trentino Sviluppo, in-house company of the local Government, has 2 science park, 6 BIC (Business Innovation Centre)
- We provide: fully equipped spaces and infrastructures, support on technology transfer, technology partnership, supply chain development, HR selection, incentive selection
- INVEST IN TRENTO: significant local incentives, efficient and reliable autonomous government, #1 quality of life in Italy, supportive R&D environment, 0 local tax (for 5 years), a workforce you can count on
- Provide Equity through Trentino Invest.
- Provide support to innovation and technology transfer through HIT-Hub Innovazione Trentino.





invest in tuscany

TUSCANY

PHARMA

Infrastructures and connections

- 2 integrated international airports (Florence and Pisa), serving over 50 international destinations
- 1:30h from Florence to Rome by high-speed train
1:40h from Florence to Milan by high-speed train

Tuscany is crossed by:

the major Italian highway (A1) connecting Milan with Rome and Naples

the EU “Scandinavian-Mediterranean Core Network Corridor” linking the Baltic Sea with Southern Italy and Malta

- 1 main commercial port (Livorno) with direct links to the 10 major Mediterranean ports
- 3 main logistic parks (Livorno, Prato and Arezzo)



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Industrial base

Leading region in R&D: Tuscany is one of the world leading regions in terms of research in vaccines, oncology, cardiovascular, neurology, biorobotics & biomaterials (one of the most recent vaccines, anti-meningococcus B has been developed in Tuscany – Novartis – GSK)

First class public health system with high expertise in all the fields of medicine, operating with cutting edge procedures for clinical trials

Synergy between public and private research thanks to a well developed technology transfer model all around Tuscany:

- 4 business incubators for life sciences based companies
- Tuscany Life Sciences Cluster (that counts more than 300 affiliated companies, 19,000 employees, 823 patents)

Many international companies have set up their headquarters for Italy and Southern Europe in Tuscany (Eli Lilly, Kedrion...) and many international companies have set up in Tuscany local units for manufacturing products, organizing clinical studies with domestic partner (Biomérieux, Novartis – GSK)

Facts and figures

- 370 firms in Life Science (42 pharma, 80 biotech, 120 medical devices and 128 software&services)
- Turnover: EUR 8 billion
- 7.5% Regional GDP
- 19,000 employees (=1.2% of total Tuscany's employees)
- 2,000 employees in R&D activities
- 1.45 bln € export (=18% of LS Turnover)
- 3 Universities involved in LS R&D, with a total of 19,000 students in scientific fields

Main Research areas in Life Sciences in Tuscany

- Pharma (Advanced Therapy - Antibodies - Blood Factors - Growth Factors - Cytokines - Drug Development - Immunotherapies - Pharma production - Antitumor compounds - Development of anti-parasitic and anti-

- viral agents - Orphan diseases)
- **Software (Bioinformatics - Communication systems - eHealth - Telemedicine - Telematics - Telemetry - Image Analysis - IT infrastructures - Mobile App)**
- **Biotechnology (Genomic search for new diagnostics - Protein atom depth analysis)**

R&D network

3 major Universities (Florence, Siena and Pisa)
 2 Superior Graduate Schools (SSSA - Scuola Superiore Sant'Anna, SSNP – Scuola Normale di Pisa).
 Advanced Institutes (IMT - Institute for Advanced Studies of Lucca, SUM – Italian Institute of Human Sciences, in Florence)

3 National Research Centres

- National Institute for Nuclear Physics (INFN)
- National Institute for Astrophysics (INAF)
- National Research Center (CNR), present in Tuscany with 19 Institutes of Research

Incentives and funding

For detailed information please visit www.investintuscany.com/incentives

Sites and buildings

- 4 business incubators for life sciences based companies
- Tuscany Life Sciences Cluster (that counts more than 300 affiliated companies, 19,000 employees, 823 patents)

Success story

- In 2018 Yf Capital, a Chinese private equity fund co-founded by Jack Ma, acquired 100% of the ESAOTE group, a leader in the biomedical sector present in Florence with a plant that employs 220 workers
- In 2018 the Swiss multinational Lonza, active in the biopharmaceutical sector, has decided to invest in the Sienese startup Exosomics, which develops non-invasive liquid tests for the screening and diagnosis of cancers in the initial phase
- In 2017 The Swiss pharmaceutical group Skan has invested 6 million euros in the Sienese startup Pharma

Integration, which specializes in the development of fully robotic systems and production lines for filling syringes and bottles for vaccines and oncological products

Business opportunity

PHARMA AND MED TECH LOGISTIC AND DIGITAL HUB

Greenfield Project

Investors: Financial or Industrial operating in pharma sector
 Proposing Companies: 4 Pharma companies already operating in Tuscany

Description: the possibility of investing in a digital logistical platform to support the industries operating in the life sciences sector, which will make it possible to optimise the distribution chain of medicines produced in Tuscany, and more generally in central Italy. The investment is aimed at equipping an area of 125,000 square meters, half of which will be built, to build 21,000 square meters of warehouses, with temperature-controlled environments, suitable for the storage of pharmaceutical products, with 8 loading areas and as many intended for the shipment of goods, as well as about 6,000 square meters of offices.

It is a platform designed to have high expansion capacity, to serve any other interested companies in the many areas of life sciences, as new warehouses can be built for an additional 20,000 square meters of floor space.

The storage capacity, from a pre-feasibility analysis, is estimated at 38,000 initial pallet places, three quarters of which can hold temperatures between 15° and 25° and one quarter between 2° and 8°.

70% of stocks will be for raw materials and packaging, 30% for finished products, which will be handled at a rate of 52,000 pallets per year. 80% are destined for export and 20% for the domestic market.

M&A IN COMPANY OPERATING IN MEDICAL IMAGING AND ULTRASOUND TECHNOLOGIES

Brownfield Project

Investors: Financial or Industrial operating in pharma/medical device sector

Value of total Investment: to be defined

Proposing Companies: Local firm searching for strategic partnership

Core business: the company, born as a Spin-Off company



invest in tuscany

of the Italian National Research Council and University of Pisa, is specialized in Medical Imaging and Innovative Ultrasound Technologies. The company produces its Cardiovascular Suite, a CE marked medical device software for assessing early markers of cardiovascular risk. The company aims to design a next generation of biomedical ultrasound systems.

ASSETS:

Commercial distribution on the global market based on 14 distributors and 8 agents monitoring the system and focused on medical devices sales.

Synergies and collaborations with the Italian National Research Council CNR, the University of Pisa and several research institutes at global level.

Strong scientific references on the products usage validating the system.

The Cardiovascular Suite is CE marked and the company got the ISO 9001:2008 certification.

High market's recognition and high investments budget ratio.



MACHINERY AND MECHATRONICS

**AOSTA VALLEY
CALABRIA
EMILIA-ROMAGNA
FRIULI VENEZIA GIULIA
LOMBARDY
TRENTINO**

AOSTA VALLEY

MACHINERY AND EQUIPMENT

Infrastructures and connections

- 1 regional airport Corrado Gex (allows the operation to aircraft up to a maximum of 70/80 places).
- Highway: A5 linking Aosta with Turin and Milan
- Tunnel Mont Blanc: linking Aosta with France
- Tunnel Gran San Bernardo: linking Aosta with Switzerland
- distances: 1:00 h from Aosta to Turin; 2:00 h from Aosta to Milan; 7:00 h from Aosta to Rome; 7:00 h from Aosta to Paris; 2:00 h from Aosta to Geneva



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Industrial base

Following are some of the numerous companies providing business opportunities in Aosta Valley: Cogne Acciai Speciali S.p.A., that produces special steels, has about 1100 employees and, in addition, has other production plants in Switzerland (Cogne Stainless Bars), Mexico (Cogne Acciai Speciali Mexico), Brazil (Metalinox Cogne Aços Inoxidáveis Especiais) and China (Dong Guan Cogne Steel Products); STMicroelectronics LTD (semiconductors), Engineering S.p.A. (solution for digitalization in Finance, Government, E-health, Industry, Energy), Eltek S.p.A. (electromechanical components), Thermoplay S.p.A. (hot runner systems for injection molding of plastics), MDM LTD (special equipment for cold forming of metals), Podium advanced technologies LTD (electric drive systems), Mavel EDT LTD (electric motors), Grivel LTD (mountain equipment) and other innovative SMEs. Aosta Valley is autonomous in water: C.V.A S.p.A. produces and distributes hydroelectric power from a huge catchment area consisting of weirs and dams of significant magnitude.

Facts and figures

- **About 900 companies working in the sectors: metallurgical, components for electric vehicles, sensors, molding equipment, equipment for cold forming of metals.**
- **Large and medium companies are: Cogne acciai speciali S.p.A. Eltek S.p.A., Thermoplay S.p.A., MDM LTD, Podium advanced technologies LTD, Mavel EDT LT.**
- **In 2018 growth in regional exports at current prices continued, with an increase higher than the national average.**

R&D network

The Smart Specialization Strategy (RIS3) of the Aosta Valley identifies 3 target areas for R&D, Excellence Mountain, Intelligent Mountain and Sustainable Mountain, subject to reciprocal cross-fertilization actions, mainly through the use of KETs (ICTs, Nano-microelectronics and bio-technologies).

In the Region there is the headquarters of the University of Valle d'Aosta and a seat of the Polytechnic of Turin,

as well as research centers, such as the Astronomical Observatory, the Safe Mountain Foundation, the Institute for agriculture, the Italian Institute of Technology. Research is particularly active in biotechnology, information technology, electric mobility, land monitoring and enhancement of cultural heritage.

Incentives and funding

The Aosta Valley is a Region in “special status” with wide legislative and administrative autonomy by which it can operate in an efficient and effective way so that entrepreneurs can interact with the public administration quickly and easily.

Regional law 84/1993 supports research and development in industrial enterprises with grants with a maximum amount of € 500,000 for large companies, € 250,000 for medium-sized companies; € 125,000 for small companies. Regional law 14/2011 supports the growth of new innovative companies with grants with a maximum amount of € 150,000.

The regional financial company, Finaosta supports the capitalization of companies.

Sites and buildings

The Region can offer industrial sites available for companies:

- technology park Espace Aosta, with lots and buildings of different sizes;
- technology park Ilssa Viola in Pont-Saint-Martin, with lots and buildings of different sizes;
- industrial area in Châtillon of 16,660 sqm;
- industrial area in Verrès of 16,042 sqm

Success story

Podium advanced technologies LTD.

In 2011 a small group of graduates and PhDs from Polytechnic of Turin joined forces to create an innovative engineering firm, building upon their interests and passion for motorsport, cars and applied research on hybrid and electric mobility.

Podium Advanced Technologies offers a comprehensive set of services in automotive high performance development, covering conventional, hybrid and full electric powertrains, supported by a unique hands-on experience

in all facets of international motorsports

In 2019, the company has 30 employees and covers an area of 6,000 sqm. For the second year in a row, Financial Times recognizes Podium Advanced Technologies among Europe’s fastest growing companies.

Business opportunity

The Aosta Valley Region approved in 2016 the regional law n. 8, in order to increase the attractiveness and competitiveness of the economic system, contributing to the realization of the European strategy for smart, sustainable and inclusive growth. The Region promotes the strengthening, qualification, innovation and specialization of companies; enhances research and development projects, investments and technology transfer, as well as professional qualification and requalification projects for human resources; favors the influx of domestic and foreign investments in the regional territory.

The subsidies provided by the law to companies which settle in Aosta Valley are the following:

- aid for research and development – maximum grant for each company 9 million euro;
- aid for investment – maximum grant for each company 1 million euro;
- aid for environmental protection – maximum grant for each company 1 million euro;
- aid for energy efficiency and energy production from renewable sources – maximum grant for each company 1 million euro;
- aid for training – maximum grant for each company 2 million euro;
- aid employment of disadvantaged people – maximum grant for each company 1 million euro.



CALABRIA

METALWORKING

Infrastructures and connections

3 International airports (Lamezia Terme, Reggio Calabria e Crotona)

4 commercial ports (Gioia Tauro, Corigliano Calabro, Vibo Valentia and Crotona)

Main Highways: A2 – Mediterranean Motorway (Salerno-RC)

4:00 h from Lamezia Terme to Casablanca (Morocco)

3:15 h from Lamezia Terme to Frankfurt (Germany)

3:00 h from Lamezia Terme to London (UK)



Contact Info:

Regione Calabria

Presidency Department - Internationalization Office

www.regione.calabria.it/website/organizzazione/dipartimento2/subsite/internazionalizzazione/

sprintcalabria@regione.calabria.it

T: +39 0961/856322

Industrial base

- Industrial specialization:
- Metalworking and production of metal objects
- Production of machinery and plants
- Production of metallic carpentry

Main companies: Hitachi Rail Trade, General Electric Oli&Gas.

Facts and figures

- **1,370 companies - Metallurgy and Manufacture of Metal Products**
- **4,669 employees of active companies (average annual values 2017) - Metallurgy and manufacture of metal products (excluding machinery and equipment)**
- **Favourable geographical position in the centre of the Mediterranean Sea**
- **Strong synergy among the 3 regional universities, the research centers and the companies**
- **Availability of highly qualified work force**
- **Wide range of incentive schemes with the maximum level of aid intensity available through the EU**
- **ZES - Special economic zones - recipient areas of important tax benefits and administrative simplifications**

R&D network

- The NEW MATERIAL Innovation Center, managed by the Calabria Science and Technology Park - CALPARK, is a specialized intermediary for research and innovation between the Calabrian production system and the research system. The Innovation Center has activated a focus on building materials and technologies. The Center supplies specialized technical-scientific services in three macro-areas: innovative materials and technologies for the building industry, innovation in materials and production processes of SMEs, micro and nano structured materials.
- University of Calabria in Cosenza - Faculty of engineering.
- Mediterranean University of Reggio Calabria – Faculty of engineering - Department of Civil, Energy, Environmental and Material Engineering (DICEAM)

Incentives and funding

Wide range of incentive schemes with the maximum level of aid intensity available through the EU, among which:

- ZES - Special economic zones - recipient areas of important tax benefits and administrative simplifications
- Regione Calabria call for tenders - Negotiated procedure implementing the PRIR - Action 1.5.1 – POR Calabria FESR 2014-2020
- Regione Calabria Strategic Guideline for internationalization and foreign investment 2017/2020 - POR Calabria 2017 2020 – PAC 2017 2020

Strategic Project “Calabriaimpresa.eu”: DGR n. 304/2016

Sites and buildings

Availability of industrial sites and buildings in the following areas: Reggio Calabria: Industrial Area of Gioia Tauro - Rosarno - San Ferdinando; Industrial Area of Campo Calabro - Reggio Calabria - Villa San Giovanni; Vibo Valentia: Industrial Area of Porto Salvo; Industrial Area of Aeroporto; Crotone: Industrial Area of Crotone; Cosenza: Industrial Area of Schiavonea of Corigliano Calabro; Industrial Area of Piano Lago of Mangone e Figline Vegliaturo; Industrial Area of Follone of San Marco Argentano;

Industrial Area of Sant'Irene of Rossano; Industrial Area of Bisignano; Industrial Area of Cammarata of Castrovillari; Industrial Area of Rocca Imperiale; Industrial Area of Montalto Uffugo; Catanzaro: Industrial Area of Lamezia Terme.

Success story

HITACHI RAIL ITALY

Hitachi Rail Italy is one of the most important railway manufacturers in Europe. In November 2015 it was incorporated by Hitachi Rail Europe. It is the result of the merger of two Italian companies of long tradition Ansaldo Trasporti and Breda Costruzioni Ferroviarie, which in 160 years of activity have made the history of urban mobility and rail transport.

The products of Hitachi Rail Italy range from High Speed, with the ETR1000, to urban transport with tramways, metros, traditional and driverless, to the regional trains Caravaggio and TSR. Hitachi Rail SpA is specialized in the manufacture of technologically advanced rolling stock.

In March 2019, Hitachi Rail Italy signed a new Development Contract for the digital transformation of its Italian plants, including the one in Reggio Calabria.

(http://italy.hitachirail.com/en/about-us_288.html)



EMILIA-ROMAGNA

ADVANCED MECHANICAL ENGINEERING

Infrastructures and connections

- 3 international airports: Bologna (the main regional hub) Parma and Rimini
- 7 main freight villages/intermodal terminals. Main freight villages are in Bologna and Parma (CEPIM). Important hubs are located in Piacenza, Villa Selva



Contact info

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 Paola Maccani (head); Sabino Alvino

- (Forlì), Ravenna, Bologna S. Donato
- 1 commercial port (Ravenna) and a regional system of fluvial ports and regional connection to all the main ports along the Adriatic and Tyrrhenian coast
- Main Highways from Bologna, Modena and Parma: A1 Naples - Milan; A14 Bologna - Bari (Adriatic); A22 from Brenner; A15 Parma - La Spezia; A13 Padua - Venice
- High-speed trains connect the region with major cities: from Bologna to: Turin - 2:27h, Milan - 1:00h, Florence - 0:34h, Rome - 1:54h, Naples - 3:15h
- 96.2% of the regional companies have broadband connection (2017 - Istat, Eurostat).

Industrial base

Emilia-Romagna has a strong manufacturing sector (25.1% of total employees, being 18.4% the Italian average and 15.4% the European one - Eurostat 2018) made up of top companies and highly specialized SMEs leaders in their respective niches.

The regional companies are particularly innovative, exploiting the set of measures provided by the "Industry 4.0 National Plan" and by specific regional measures, thanks to cutting-edge skills and industrial research, supported by the regional RGD network and universities and training institutes.

The Advanced Mechanical Engineering cluster is spread all over the region and supports all the other regional key sectors, especially Agrifood (e.g. agricultural machineries, food packaging); Housing (e.g. machinery for building and ceramics), Health Care (e.g. electro-medical equipment, packaging), Fashion, Culture and Creativity. The main specializations and outstanding niches of the mechanical cluster are:

- sports cars and motorbikes, with famous brands (e.g. Ferrari, Lamborghini, Ducati, Maserati, Dallara, Pagani) and high level suppliers (e.g.: AVL, HPE Coxa, Magneti Marelli)
- packaging machinery/solutions (e.g. IMA, GD, Sacmi, Marchesini, Ocme, Tetra Pak)
- industrial automation (e.g. Bonfiglioli, Rossi, Elettric80, Sir)
- hydraulics, turbines and pumps (e.g. Interpump)
- machinery, equipment and gears for food industry, ceramics, constructions, wood, energy production, electromedical as well as measuring, checking and

surveying instruments (e.g. Cefla, Kohler, ArgoTractors, Termal Group, Beghelli, Marposs, Metalcastello, Smeg, SCM group, GVS, Bellco)

- other excellences such as boating (e.g. Ferretti) and wellness (e.g. Technogym)

Examples of top regional companies in other sectors: Parmigiano Reggiano, Granarolo, Barilla, Consorzio Di Parma (agrifood industry); Yoox, Piquadro, Max Mara (fashion); Marazzi, Florim, Fiandre (ceramics/tiles); Chiesi, Gambro (pharmaceutical).

Facts and figures

Mechanical Engineering is the regional main cluster, cross-cutting all the regional industry, with high level of technological innovation and strongly oriented towards Industry 4.0.

MECHANICAL ENGINEERING IN EMILIA-ROMAGNA

EMPLOYEES: 311,877

LOCAL UNITS: 43,783
(2015, Istat-Asia)

EXPORT: 34.1 billion Euro

- **16% of the national cluster**
- **53.8% of the total regional export**
- **regional exports of the cluster are twice the imports** (2018, Istat – Coeweb)

TURNOVER

Over 70 billion euro (Istat – 2015)

MECHATRONICS AND AUTOMOTIVE in S3 SMART SPECIALIZATION STRATEGY

1,414 projects financed by regional policies from 2014 to May 2019, providing 295 million euro of incentives (on 871 million of total investments), involving 674 new researchers.

UNIVERSITY AND TRAINING

- **86 university programmes, 37 doctoral programmes and 26 master's degree programmes concerning Industry 4.0**
- **Degree courses in engineering are available in all the 5 public regional universities (Bologna, Modena and Reggio Emilia, Ferrara, Parma, Piacenza)**
- **MUNER, the Motorvehicle University of Emilia-Romagna provides 2 international and inter-university master degree programmes.**

FOREIGN INVESTMENTS

About 400 enterprises in the mechanical cluster are controlled by foreign companies, coming mainly from Western Europe, USA and Asia.

Among the foreign investors we find: Amada, AVL, Dana, Dover, FEV, Eon Reality, Gea, Guillin, Lovol Arbos, Manitou, Segula, Siemens, TetraPak, Toyota, Volkswagen Weichai/Ferretti.

INTERNATIONAL TRADE FAIRS

About 17 exhibitions related to the cluster (e.g. EIMA, Autopromotec, MECSPE, Cibus Tec, SPS-IPC-DRIVES).

R&D network

- Emilia-Romagna is one of the European regions with the highest proportion of R&D expenditure per inhabitant (679 euro in 2016 while European average is 599). There are 37,428 employees in R&D sectors.
- The research laboratories of the Mechanics and Materials Thematic Platform in the High Technology Regional Network (HTN) are specialized in strategic technological areas such as nanotechnology, mechatronics, materials technology, automation, robotics, etc. The overall HTN network consists of almost 90 Industrial Research Laboratories and Innovation Centres. The other thematic platforms are: Agrifood, Construction, Energy and Environment, ICT and Design, Life Science. See also: www.retealtatecnologia.it/en/offer-network.
- The "Clust-ER Mechatronics and Motoristics" is a community of public and private actors, including research centres, companies and training institutes.
- Industry 4.0: skills and technologies are available for advanced manufacturing solutions, digital manufacturing, smart supply chain, etc. in the overall regional research offer (see also: www.aster.it/en/publications/industry-40-emilia-romagna-region). The universities provide 86 degree programmes, 37 doctoral programmes and 26 master degree programmes concerning Industry 4.0.
- Bi-Rex (Big Data Research Excellence) is a top national Competence Center aimed at creating a critical mass in the Big Data innovation involving about 50 stakeholders (universities, research system and private entities). The Competence Center will be in-

tegrated in the Big Data Technopole – Bologna Hub that will also include ECMWF (with the European data centre for weather forecasts), Cineca, INFN and many others.

Incentives and funding

There are many great opportunities to get financial incentives in Emilia-Romagna, especially to set up a research lab (infrastructure) and/or to realize R&D projects, and also through a combination of regional and national instruments.

The Regional Law for the Promotion of Investments (n.14/2014) - See also "Business opportunity"

- The law provides incentives and facilitation for businesses investing in Emilia-Romagna. The "Agreement for the Settlement and Development of the Enterprises" is the main tool provided by the law to develop programmes aimed to foster new employment and innovation. It has to be signed by the Regional Government, the investor, local bodies and other stakeholders involved, and binds these parties.
- The Regional government periodically publishes Calls for companies that can receive financial support for innovative investment programmes (see "Business Opportunity"). Categories of aid provided by the call are the following: Research and development (this category is mandatory to be eligible for the call), Research Facilities, Environmental Protection, Training Projects, Hiring and Employment of disadvantaged/disabled workers, Innovation and Advisory services for SMEs, Productive investment in assisted areas and/or by SMEs.
- The three calls for proposals of the Regional Law for the Promotion of Investments have financed 33 companies providing 75 million of incentives and creating over 1,700 additional jobs.
- European funds 2014-2020, along with national co-financing, will allocate to Emilia-Romagna about 2,500 million Euro. The amount per fund is: 786 million European Social Fund; 481 million European Regional Development Fund; 1,189 million European Agricultural Fund for Rural Development. The main areas where funds and incentives will be allocated are: R&I; Industry 4.0; ICT development;

Competitiveness of the economic system; Education and training; Green economy; Smart cities; Employment and social inclusion; Effective governance; Innovative start-ups (especially in green energy, high technology and creativeness).

Sites and buildings

The region offers a wide range of locations (most of which are located less than 10 kilometres from major motorway and rail junctions) with different features and characteristics for production plants, offices and innovative start-ups. Costs vary according to several factors and development agencies and other operators offer support to identify the right solution.

The presence of territorial areas with a high level of specialization gives the chance to integrate the companies with a wide system of suppliers and customers. A selection of strategic business parks has been identified by joint efforts involving the Regional Government, Provinces and Municipalities (e.g.: Ecologically Equipped Business Parks) but the regional offer is much wider. Public properties of different types (e.g.: industrial/logistic, office, commercial) with high potential in terms of access to the regional natural and cultural heritage are available in the DB "Invest in Italy Real Estate". A network of incubators and coworking spaces is available for innovative start-ups.

The Technopoles are a network of 10 infrastructures in 20 locations throughout the Emilia-Romagna region, hosting and organizing activities and services for industrial research, experimental development and technology transfer. Technopoles are home to the industrial research Laboratories of the Emilia-Romagna High Technology Network, service facilities for dissemination, exhibition and information as well as facilities for private research laboratories, innovative companies, and spin offs. The technopoles are located in strategic locations with respect to the main urban and industrial nodes. The areas inside the buildings are very different in size and layout and can be adapted to the needs of companies and/or laboratories. Each Technopole has a website and is managed by a subject who can offer specific information to interested investors. The web address www.retealtatecnologia.it/en/technopoles is useful for further information and direct contacts with the management of the areas.

Success story

AVL-FEV

AVL and FEV - two top world companies in the powertrain engineering - invested in Emilia-Romagna with the support of the Regional Law for the Promotion of Investments (L.R. 14/2014) collaborating with local stakeholders and companies.

AVL – headquartered in Austria - was founded in 1948 and is leader in development, simulation, and testing of powertrain systems for passenger cars, commercial vehicles, construction, large engines, and their integration into the vehicle. The company has an annual turnover of 1.9 billion euro. In 2017, AVL Italia opened in Cavriago (Reggio Emilia) a specialized R&D centre to collaborate with the top companies of the regional motor valley, investing almost 10 MLE (with a regional incentive of 3.3 MLE) and creating 52 additional full-time jobs. The CEO of AVL Italy stated: “The investment had to be located in Germany, but the regional support made us choose Reggio, where a location met our needs”.

FEV - founded in 1978 and headquartered in Germany – boasts 6,300 employees worldwide and is leader in design and development of advanced gasoline, diesel and hybrid powertrains and vehicle systems. In 2019, the company has opened the first private laboratory of a foreign company inside the University of Bologna -the “Green mobility research lab” – that will develop predictive algorithms in smart vehicles. In the same year, the company started another investment in the region focused on Advanced Driver Assistance System that is hiring 22 new employees (of which 18 graduated) with an investment of 2.4 MLE (with a regional incentive of 1 MLE). The managing director has explained that Bologna has been chosen for its high skills on automatic control, for the presence of top automotive companies and because of the Big Data Technopole that will be soon operative. The Fev Group was already present in Emilia-Romagna with a branch in Sant’Agata Bolognese (Bologna) since 2014.

Business opportunity

The region offers a wide range of opportunities supporting investors with:

- financial services
- wide range of locations with different features and characteristics
- highly specialized supply and value chains

The regional contact point “Invest in Emilia-Romagna” provides tailored solution for each investment request integrating financial incentives with identification of locations and connection with the main specializations.

Mail: investinemiliaromagna@art-er.it

From the 1st of October to the 6th of November 2019, it will be possible to apply again for the third call for proposal for the signing of regional Agreements for The Settlement and Development of Enterprises, the policy instrument provided by the Regional Law for the Promotion of Investments (R.L. 14/2014).

More information available at the following link: www.investinemiliaromagna.eu/en/news/2019/06_innovative-investments-in-ER.asp - Once this call will be closed, other policy instruments will still be available to support relevant investments (eg.: Development Contract, Innovation Agreements).

The technopole network represents one of the many locations available in the region, collaborating with communities of public and private actors - including research centres, companies and training institutes – such as the “Clust-ER Mechatronics and Motoristics” and the top national Competence Center Bi-Rex (Big Data Research Excellence - in collaboration with the new Big Data Technopole in Bologna).

The advanced mechanical engineering represents an opportunity of integration in every regional key sector, with cross cutting specializations in many niches. Besides mechatronics and automotive, in Emilia-Romagna there are excellences in packaging (food, pharmaceuticals, ceramics, etc.), biomedical equipment, agricultural or construction machinery and many more.

FRIULI VENEZIA GIULIA

METALWORKING

Infrastructures and connections

- Airports: Venice Marco Polo Airport, Treviso A. Canova Airport and Trieste Airport Friuli Venezia Giulia are 30/60 minutes driving from regional main towns
- Main Highways: E70-A4 Turin-Milan-Trieste, A23 Palmanova-Tarvisio, A28 Portogruaro-Conegliano
- Railway: Connections from Udine and Trieste railway stations to Milan, Rome, Turin and Venice
- Maritime connections: Trieste, Monfalcone and Porto Nogaro commercial ports Interports: Cervignano, Gorizia, Pordenone and Trieste



Contact info

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- Broadband:ERMES, with its 2,600 km of cables, 260,000 km of optical fiber, 1,679 km of backbone infrastructure and 720 km of cable infrastructure in the 86 industrial areas, is the wider broadband geographic area in Italy

Industrial base

Metalworking is one of the most important productive sectors in Friuli Venezia Giulia and its sub-sectors are: Metallurgy, Machinery production, Household appliances, Components and spare parts, Thermo-mechanics, Precision mechanics, Automotive. Over the years in Friuli Venezia Giulia, the most important companies of the sector have reached excellent results both in terms of market and in terms of research and innovation; among them we can mention: Danieli e C. SpA, specialised in providing process automation and control systems for the metals industry, Wartsila Italia SpA (large sea engines production), Savio Macchine Tessili SpA, Electrolux SpA (former Zanussi), Ferriere Nord SpA, Officine Tecnosider Srl.

Facts and figures

METALWORKING CLUSTER

Cluster export: 6 billion €

Enterprises: 3,800

Employees: 62,000

Foreign companies: 63

International research projects:

- THINGS+ (Interreg Central Europe Program)
- E-EDU 4.0 (Interreg Italia-Austria 2014-2020)
- AIM (Horizon 2020)
- ICAP (INTERREG V A Italia – Austria 2014-2020)
- BiFOCALps (ALPINE SPACE)

METALWORKING INDUSTRY FOCUS

- Mechanics
- Thermo-Electro-Mechanical Manufacturing
- Components and spare parts
- Plastics
- Metal production

R&D network

The main R&D players are:

- Universities (University of Trieste – Department of economy, management and engineering; University

of Udine – Department of engineering and architecture);

- Digital Innovation Hubs (“DIH Advanced Manufacturing Solutions”, Pordenone and “DIH Udine - Data analytics & Artificial intelligence”, Udine) both included within the Digital Innovation Hubs catalogue of the European Commission and declared as “fully operational”;
- Sissa - International School for Advanced Studies;
- Scientific and Technological Parks (Area Science Park; Parco Scientifico e Tecnologico “L. Danieli”, Udine; Polo Tecnologico “A. Galvani”, Pordenone; Consorzio Innova FVG),
- Laboratories such as LAMA FVG, Additive FVG Square and LEF 4.0 - Lean Experience Factory. Besides that, three more demo facilities are going to be established and fully operational at the beginning of 2020 - with a specialisation on 1) Big Data and Artificial Intelligence; 2) IoT – Internet of Things; 3) Data Optimization and Simulation.
- other partners such as BIC Incubatori FVG, which pursues the institutional mission of increasing the number, quality and size of innovative companies at territorial level and enhancing international cooperation among SMEs and innovation facilitators.
- IP4FVG - Industry Platform 4 FVG, Friuli Venezia Giulia digital innovation hub, supports SMEs in the industrial manufacturing digital transformation and promotes technological updating in the sector also through training, living labs and specialised services.

Besides from cooperating with all the relevant stakeholders, COMET, the Regional Cluster representing the metalworking sector of Friuli Venezia Giulia, jointly works with the regional departments as a competent technical entity on European Thematic S3 Platforms on Industrial modernisation (i.e. “SMEs Integration to Industry 4.0”; “Efficient and Sustainable Manufacturing” and “High Production through 3D Printing”).

Incentives and funding

Friuli Venezia Giulia Region has several types of incentives and funding. Regional taxes reduction can be applied to companies which meet specific criteria; public grants

can be awarded to support the creation of new enterprises and implement RDI projects. There are also incentives to support competitiveness of SMEs and measures to finance innovation technology investments. Different kinds of regional subsidised loans can be granted to support investments and business development.

Sites and buildings

- Monfalcone local economic development consortium sites near Monfalcone commercial port.
 - Industrial area (D1a) Schiavetti, city of Staranzano: 69,000 square meters area, 5 km from Trieste airport; 3.5 Km from Ronchi sud railway station; 7 km from Redipuglia A4 highway toll booth, the area is served by local transportation and the bus stop is about 400 m. away. There are railway sidings in the area. Infrastructure costs are included in the land price. Maximum building footprint 50%, maximum height 15 meters. Communal utilities are available in the area, gas, water, electricity, water and drainage system.
- Carnia Industrial Park consortium, Amaro industrial area: lots 42,648 sq. m.

Consorzio di Sviluppo Economico Locale del Friuli (Friuli local economic development consortium)

Success story

Flex Ltd is an American multinational technological manufacturer, the third largest global electronics manufacturing services (EMS), original design manufacturer (ODM) company by revenue, behind only Taiwan's Pegatron to original equipment manufacturers. Flex's corporate headquarters are located in Singapore and operates in more than 40 Countries; since 2015, the company has established production plant in Trieste (former Alcatel-Lucent), employing around 600 people.

Freud S.p.A. - part of the Bosch group – is the worldwide leader in the cutting tool industry that operates in the development, production and sale of circular saw blades, cutters & brazed cutters, knives, as well as drilling, routing and CNC tools, spare parts and accessories engineered and crafted to process different materials such as wood, aluminum, plastic and ferrous materials. The new plant established in April 2018 in the Industrial Area of Udine (Z.I.U. –

Zona Industriale Udinese) has been built in a year and a half (including six months for the site planning) and covers a 30,000 square meters lot, with about 4,000 square meters for the factory and the warehouse, whereas about 2,000 are dedicated to offices. In a first phase, over a hundred employees of the administration, commercial and research and development areas have been transferred in the new production site. Freud S.p.A. represents a success story, not only for the positive result and outcome obtained, but also because of the fruitful collaboration has been established between the Regional administration and the Industrial Area Consortium (COSEF - Consorzio per lo Sviluppo Industriale del Friuli Centrale).

Business opportunity

Additive FVG Square is an initiative launched by Friuli Innovazione - Research and Technology Transfer Centre based in Udine. It is implemented in collaboration with COMET - Friuli Venezia Giulia Metal Cluster, with the participation of the University of Udine, in partnership with EOS and AM Ventures, and together with five important regional companies (Brodvedani Group, Cividale Group, SMS Group, Thermokey and Wartsila). Additive FVG Square is a space open to collaboration dedicated to the development of skills of companies in the field of additive technologies. A cutting-edge center, with a system for industrial 3D printing of metal parts, where companies can learn and experience additive technologies in a concrete and market-oriented way. Additive FVG Square represents the center of an ecosystem of integrated services for additive manufacturing (am), where the actors of the innovation and research system can learn, experiment and grow companies to make them competitive in the changing scenario of global competition.

The business opportunity for foreign companies lies in the possibility to be hosted in the Science and Technology Park in Udine (where Additive FVG Square is located) and be involved in the AM FVG ecosystem, which is characterized by:

- an advanced university research laboratory in AM and virtual prototyping;
- a large manufacturing cluster with about four thousands companies;
- professional schools and technical institutes nationally known;
- a leader enterprise in using AM technology;
- large manufacturing enterprises interested in developing AM;
- an industrial area offering infrastructures and services for companies development.

Since 1964 CSIM (Monfalcone local economic development

consortium) , has been committed to promoting investment opportunities, by setting up infrastructures, offering high quality services and supporting enterprises interested in investing in Monfalcone and Staranzano areas.

CMS is in charge of planning the territorial development of the industrial areas of competence, their infrastructures and their management, based on the Piano Territoriale Infra-regionale (Territorial Interregional Plan). The conveyance is to be deliberated by the Administrative Board after the area sectioning. The conveyance price for the consortium industrial areas situated in Lisert and Schiavetti Brancolo is presently of 40.00 euros per sqm. (VAT not included).

The land is located in a logistically strategic area, crossed by the Baltic/Adriatic corridor and the Lisbon/Kiev Corridor. It is near the Monfalcone commercial port, the northernmost port in the Adriatic sea and therefore the closest one to Central Europe

LOMBARDY

ADVANCED MANUFACTURING

Infrastructures and connections

- 573 km of highways
- 900 km of national roads
- 11,000 km of provincial roads
- 1,680 km of railway network
- 4 International airports:
 - Milano Malpensa Airport, Varese - Ferno (54.5 km from Milan)
 - International Airport Il Caravaggio, Bergamo - Orio al Serio (60.4 km from Milan)



Contact info

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- Enrico Forlanini Airport, Milano - Linate (9.7 km from Milan)
- International Airport Gabriele D'Annunzio, Brescia - Montichiari (120.5 km from Milan)
- Distance by car from Milan to Paris (8h50min), Berlin (10h45min), Frankfurt (7h30min), Barcelona (10h)

Industrial base

- The productive system includes around 100,000 firms and 1 million employees, for a total turnover of € 250 billion and a value added of € 60 billion
- Regional context with a high manufacturing value, with strong technological and research competencies in machinery and manufacturing systems development and management
- Lombardy is the first Italian region by number of patents registered at the European Patent Office (EPO) concerning manufacturing technologies: industrial technologies, metallurgy, mechanical engineering, chemicals, textiles
- Lombardy is the leading manufacturing region in Europe regarding some sub-industries such as: manufacturing of metal products, excluding machinery and equipment; textile industries; production of base metals; manufacture of wearing apparel; printing and reproduction of recorded media; wood and products of wood and cork, except furniture
- The priority themes of technological development are: mechatronics for advanced manufacturing system, modelling, simulations, forecasting methods and tools, ICT, sustainable manufacturing technology, advanced material, strategy definition and management methodologies
- The excellence of the Lombardy Cluster for the Advanced Manufacturing – AFIL is well-known for its strong focus on technologies, enabling intense technology transfer, and its strong local scientific representation (public and private research centers, universities, etc). The Cluster with a cutting-edge governance system enable an open participation of businesses of all sizes. Moreover, its strong connections with the European technological platforms and National Technological Clusters allow intense innovation activity
- The Thematic Working Groups of Lombardy Cluster for the Advanced Manufacturing – AFIL are the core

of the Manufacturing Innovation in Lombardy (in particular Additive Manufacturing, De and Remanufacturing, Digital & Intelligent factory, Material and Surface treatment)

Facts and figures

- **1° manufacturing region in Italy in terms of turnover and value added**
- **around 100,000 firms**
- **1 million employees**
- **3° manufacturing region in Europe in terms of employees**
- **1,672 foreign companies working in the field of manufacturing industry are located in Lombardy employing more than 250,000 people**
- **In the second quarter of 2018 companies from Milan recorded positive signals for the production (+2.2%), the turnover (+3.4%) and orders (+1.8%). Especially foreign companies registered an increase of +5.9% of the turnover and +4.1% for orders**
- **Presence of AFIL - Lombardy Cluster for the Advanced Manufacturing, that includes:**
 - **122 firms (69% SME, 31% Large enterprises)**
 - **12 universities/research centers**
 - **12 industrial associations**

R&D network

- The public research system consists of the CNR (ITIA - Institute of Industrial Technologies and Automation), Politecnico of Milan, University of Milan, Bicocca University of Milan, University of Brescia, University of Bergamo, University of Pavia, Insubria University
- 2,946 among researchers, professors, research fellows and PhD students focused on manufacturing
- The research and technology transfer system in the manufacturing sector consists of 208 research and technology transfer centers
- Lombardy Industry and Research are present in different platforms/initiatives at European level such as: Manufacture, EFFRA-European Factory of the Future Research Association, Eu Robotics aisbl, EUSPRI-European Forum for Studies of Policies for Research and Innovation, ENID-European

Network of Indicators Designers, IEEE- the Institute of Electrical and Electronics Engineers, CIRP-The International Academy for Production Engineering

- Within Lombardy Cluster for the Advanced Manufacturing – AFIL there is a strong member's connection with the European Technological platforms and National Technological Clusters, allowing intense innovation activity and relations

Incentives and funding

Regione Lombardia supplies incentives for corporate investments and Start-ups. For example:

«AL VIA» Corporate Investments

- 5% to 15% non-repayable grant for capital expenditures in productive assets for a specific investment project
- Long-term financing from €50,000 to €2,85M at favorable rates, with a duration from 3 to 6 years
- Free financial guarantee to cover up to 70% of the financing
- The eligible projects must fall within one of these two categories: Company Development or Relaunch of Productive Areas
- The intervention is dedicated to companies: registered in the Italian Register of Companies with an operating office in Lombardy at the time of the supply of the contribution, active for at least 24 months

«INTRAPRENDO» Incentives for Startups

«Linea Innovazione» Incentives for Innovation Projects

- The incentive consists of a subsidized-interest-rate loan and a capital contribution to support the interest payments (starting from a minimum of €300,000 up to a maximum of €7,000,000)
- The combination of the incentives can cover 100% of the total eligible cost of the project
- The financial incentive is dedicated to MSMEs employing fewer than 3,000 people, which have the Headquarter in Lombardy and are planning to invest in a project which aims to innovate the process or the product of the business

Thanks to the ERDF - European Regional Development Fund, Regione Lombardia allocated in the 2014 – 2020 program period 36% of the fund (€349.2 M) to strengthen

the research sector, foster technological development, and innovation. In the same way, 30% of the fund (€294.6 M) is allocated to promote the competitiveness of SMEs and improve access to loans.

Thanks also to the European Bank of Investment, who has allocated € 50,000,000 to financing the project, in collaboration with Finlombarda (operational partner)

Sites and buildings

- AttrACT website www.attractlombardy.it gives access to more than 100 investment opportunities (greenfield and brownfield opportunities), located in 55 Municipalities, mapped out through the AttrACT Programme. A variety of sites ranging from the office building to the industrial facility. This initiative, promoted by Regione Lombardia together with Unioncamere Lombardia, is a unique experimentation in Italy for the promotion of the investment opportunities located in Lombardy
- Within AFIL - Lombardy Cluster for the Advanced Manufacturing:
 - CSMT GESTIONE SCARL (Brescia – BS)
 - BERGAMO SVILUPPO (Bergamo –BG)
- Within The Italian Scientific and Technological Parks Network:
 - COMONEXT (Lomazzo – CO)
 - KILOMETRO ROSSO (Bergamo – BG)
- “MIND” (Milano Innovation District) a world-leading science, technology and innovation park, a business friendly “innovation ecosystem” for domestic and international players, a “catalyst” for sustainable socio-economic growth, a new vibrant community fully integrated with the city centre of Milan. Located just a few miles North-West of the city centre, which hosted the six-month Universal Exposition in 2015

Success story

SCHMERSAL ITALIA

The Schmersal Group is one of the largest supplier of safety switching devices in the world. This leading company in the workplace safety offers system solutions for automation and safety of machines and equipment. More than 1.750 employees in more than 20 countries work every day to ensure pioneering safety technology solutions. Schmersal is represented by seven manufacturing sites on three continents and with its own subsidiaries and sales partners in more than 60 nations. In 2014 it recorded a total turnover of around € 210M.

Schmersal Italia is the only Italian subsidiary of the German Schmersal Group, located in the province of Brescia. The Italian subsidiary is a leading partner since 2000 in machine building and end users.

Schmersal Italia is among the companies awarded by Cento4.0, an initiative directed by the Lombardy Cluster for the Advanced Manufacturing (AFIL), the Lombard technological cluster recognized by the Lombardy Region, which rewards the most innovative manufacturing companies of the territory.

The company has been awarded for its invention, among other things for its safety electric lock.

ABB SPA

The ABB Group is a pioneering technology leader in electrification products, robotics and motion for 130 years. ABB operates in more than 100 countries with about 135,000 employees worldwide and a turnover of € 2,241M in 2017. ABB Italia is vastly integrated in Italy with 5,799 employees in 2017 and is at least present in 6 different cities in Lombardy with its headquarter in Sesto San Giovanni (MI). ABB Italia is among the companies awarded by Cento4.0, an initiative directed by the Lombardy Cluster for the Advanced Manufacturing (AFIL), the Lombard technological cluster recognized by the Lombardy Region, which rewards the most innovative manufacturing companies of the territory.

Business opportunity

The AttrACT Program is a unique innovative program in Italy: it brings together investors, investment opportunities and local Municipalities thanks to a dedicated online pla-

tform, www.attractlombardy.it.

AttrACT aims at:

- developing the regional offering
- promoting opportunities for investment
- bringing together the main territorial stakeholders

More than 100 “ready to use” investment opportunities, representing all the 12 provinces of Lombardy and pertaining to 4 key segments: Industry, Logistics, Offices and Tourism. The Program has mapped both publicly- and privately-owned areas.

AttrACT sees the direct engagement of the Lombardy Municipalities involved in the Program that are called to identify local investment opportunities (greenfield and brownfield) in their area, made it available to investors, and simultaneously made commitments to simplify administrative processes, offer economic and tax incentives and offer qualified assistance service.

Commitments can vary according to the Municipality:

- Simplification of administrative processes such as:
 - Adopting the Action Plan by the city council in less than 90 days from the request
 - Delivering a Planning Permission in less than 60 days from the request
 - Dedicating a portal or an on line “front office” service where investors can find all useful information
- Economic and Tax incentivisation such as:
 - Declaring in advance all urban planning and construction expenses without additional expenses
 - Offering reduction or exemption of IMU, TASI, e/ or TARI according to the Municipality
 - Reducing the primary and secondary land development expenses by at least 20%
- Promotion:
 - Making available a support team that coordinates the work, facilitates the relationships and encourages collaboration
 - Providing preliminary consulting services and support to companies in the presentation and implementation of their projects, with the issuance of written opinions if requested in the proposal

AttrACT, where to invest in Lombardy.

LOMBARDY

MECHATRONICS AND ROBOTICS

Infrastructures and connections

- 573 km of highways
- 900 km of national roads
- 11,000 km of provincial roads
- 1,680 km of railway network
- 4 International airports:
 - Milano Malpensa Airport, Varese - Ferno (54.5 km from Milan)
 - International Airport Il Caravaggio, Bergamo - Orio al Serio (60.4 km from Milan)
 - Enrico Forlanini Airport, Milano - Linate (9.7 km from Milan)



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Industrial base

- The sector is growing: in the first quarter of 2018 regional production rose by 1.1% over the last quarter of 2017
- Traditional mechanic firms are investing in robotics: 21% of the SMEs in the region implemented collaborative robotics systems
- Lombardy Foundation Cluster Technologies for Living Environment offers a wide range of solutions, from virtual reality to robotics, mechatronics, internet of things, advanced materials, buildings, etc.
- The Excellence of the Lombardy Foundation Cluster Technologies for Living Environment is characterized by transdisciplinary competencies that cover a wide range of sectors linked to living environments: health, ICT, safety, construction, cutting-edge materials, plants, and nutrition. The cluster focus on the individual in all living environments (home, hospital, workplace) and at all stages in life (evolutionary age, adults, the elderly) with particular attention to situations of social disadvantage. The Cluster benefits of closeness between the world of research and highly technological companies. It also counts on representatives from the entire health chain: research centers, in-house company development labs, university hospitals, rehabilitation centers, local health authorities and service providers. Finally, the cluster count on a solid research network that has worked on shared projects in neurorehabilitation for over ten years

Facts and figures

- **34,000 companies (38% of the national figure)**
- **1° region in Italy, employing 432,000 workers**
- **Export from Lombardy worth € 64 billion, equal to the 30% of the export of the whole national sector**
- **431 foreign companies working in the field of mechatronics & robotics industry are located in Lombardy employing more than 67,800 people**
- **Presence of Lombardy Foundation Cluster Technolo-**

gies for Living Environments, that includes:

- 11 firms (7 SME, 4 Large enterprises)
- 13 universities/research centres
- 8 other bodies

R&D network

Within Lombardy Foundation Cluster Technologies for Living Environment:

- Politecnico di Milano
- CNR (the National Research Council)
- Università Cattolica di Milano
- Università degli Studi di Brescia
- Università di Milano-Bicocca
- 5 Research Hospitals (IRCCS)
- 1 Rehabilitation Center

Incentives and funding

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«Linea Innovazione» Incentives for Innovation Projects

The incentive consists of a subsidized-interest-rate loan and a capital contribution to support the interest payments (starting from a minimum of €300,000 up to a maximum of €7,000,000). The combination of the incentives can cover 100% of the total eligible cost of the project. The financial incentive is dedicated to MSMEs employing fewer than 3,000 people, which have the Headquarter in Lombardy and are planning to invest in a project which

aims to innovate the process or the product of the business. Thanks to the ERDF - European Regional Development Fund, Regione Lombardia allocated in the 2014 – 2020 program period 36% of the fund (€349.2 M) to strengthen the research sector, foster technological development, and innovation. In the same way, 30% of the fund (€294.6 M) is allocated to promote the competitiveness of SMEs and improve access to loans. Thanks also to the European Bank of Investment, who has allocated € 50,000,000 to financing the project, in collaboration with Finlombarda (operational partner).

Sites and buildings

- AttrACT website www.attractlombardy.it gives access to more than 100 investment opportunities (greenfield and brownfield opportunities), located in 55 Municipalities, mapped out through the AttrACT Programme. A variety of sites ranging from the office building to the industrial facility. This initiative, promoted by Regione Lombardia together with Unioncamere Lombardia, is a unique experimentation in Italy for the promotion of the investment opportunities located in Lombardy
- Within The Italian Scientific and Technological Parks Network:
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 - KILOMETRO ROSSO (Bergamo – BG)
 - POLO TECNOLOGICO DI PAVIA (Pavia – PV)
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 - “MIND” (Milano Innovation District) a world-leading science, technology and innovation park, a business friendly “innovation ecosystem” for domestic and international players, a “catalyst” for sustainable socio-economic growth, a new vibrant community fully integrated with the city centre of Milan. Located just a few miles North-West of the city centre, which hosted the six-month Universal Exposition in 2015

Success story

HEWLETT PACKARD ENTERPRISE ITALIA

Hewlett Packard Enterprise Company is an American multinational enterprise based in California and specialized in information technology for more than 75 years. The company help customers to use tech-

nology and make the transition from traditional technology platforms to the IT systems of the future. Hewlett Packard Enterprise Italia is based near Milan (Cernusco sul Naviglio) and in Rome. With its experience for over 50 years in Italy the company focus on 4 key pillars:

- Develop an hybrid IT infrastructure that fits with the business of their customers
- Help companies to protect their digital assets
- Enable customers to use 100% of their data to speed up and improve their business decisions
- Create digital and mobile experiences for customers, employees and partners in order to increase the productivity of companies.

The Italian initiative of “Innovation Lab” is going well beyond the initial expectations, in one year and a half, the local project got widespread and raised the initial proposal of creating 15 laboratories to 21, as well as it doubled the initial investment from €10M to €20M.

In Italy other investment projects are starting to raise awareness such as a partnership with a Master degree in Bocconi University with coaching on real cases.

Business opportunity

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AttrACT aims at:

- developing the regional offering
- promoting opportunities for investment
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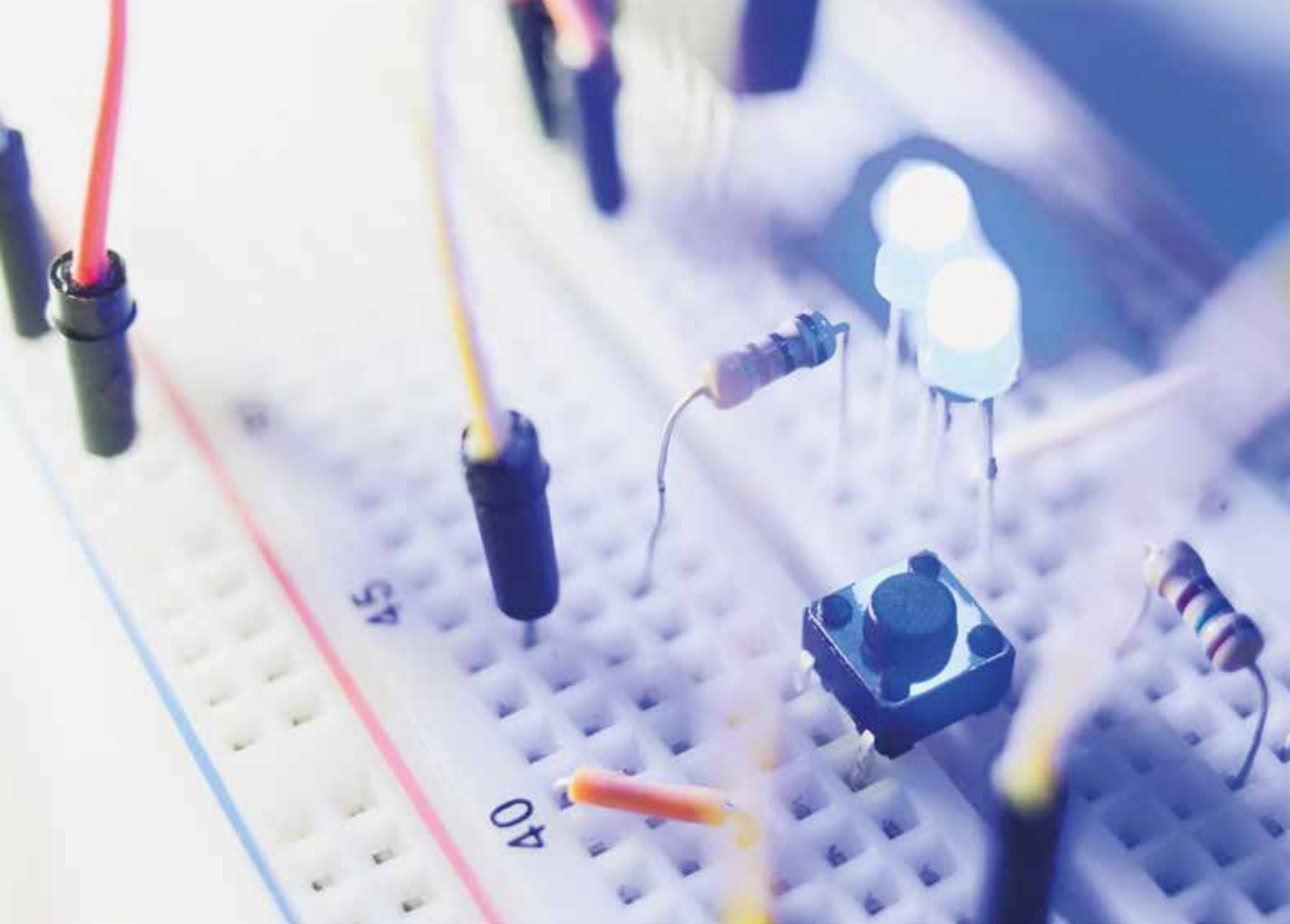
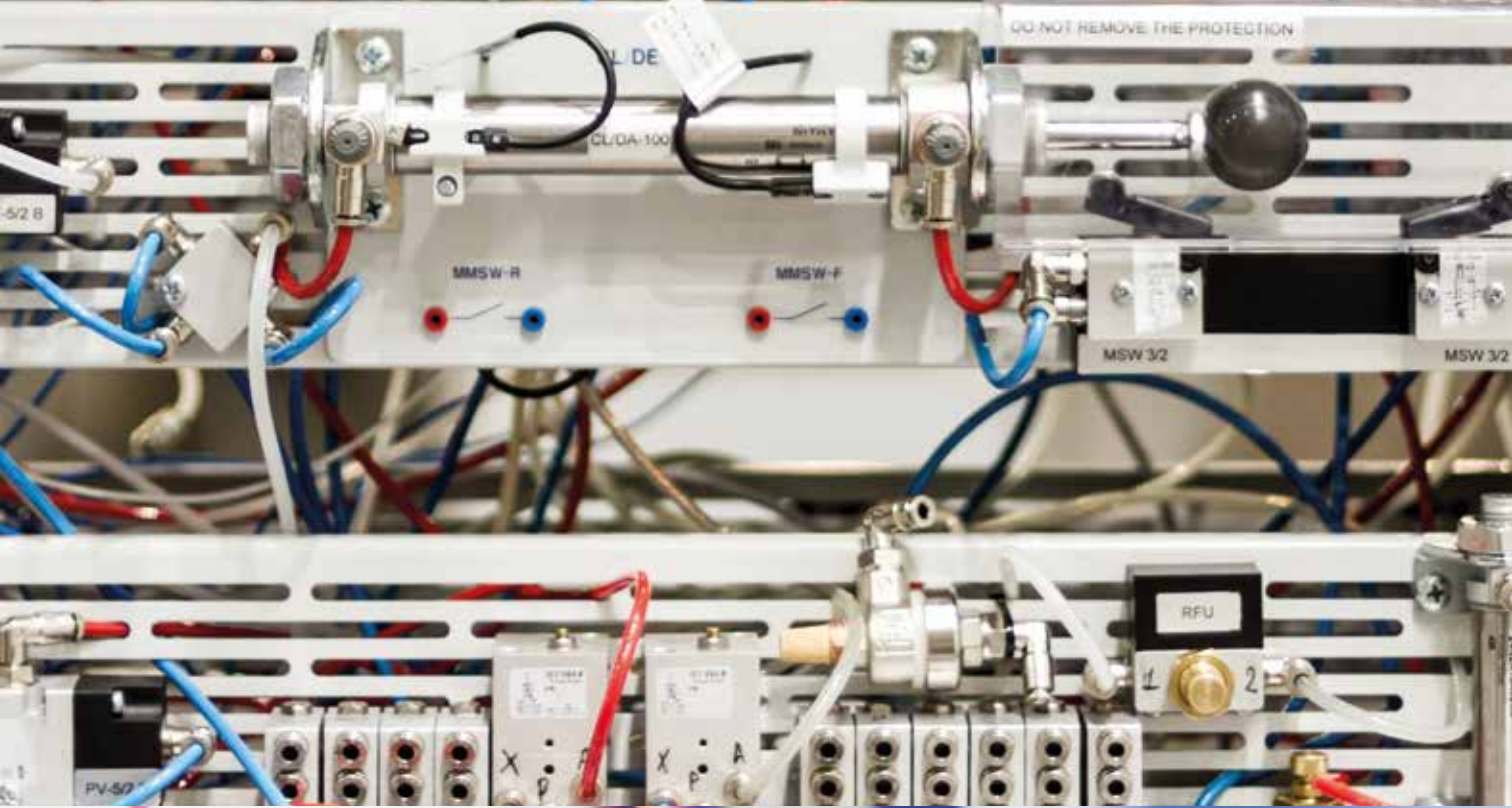
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 - Reducing the primary and secondary land development expenses by at least 20%
- Promotion:
 - Making available a support team that coordinates the work, facilitates the relationships and encourages collaboration
 - Providing preliminary consulting services and support to companies in the presentation and implementation of their projects, with the issuance of written opinions if requested in the proposal

AttrACT, where to invest in Lombardy.



TRENTINO

MECHATRONICS

Infrastructures and connections

- Airports: 45 minutes from Verona airport (Catullo)
- Main Highway: A22 Brennero-Modena
- Railway that connects North East of Italy with Austria and Germany
- Brenner Basistunnel in construction
- Interporto of Trento
- Broadband with more than 1,100km of optical fiber
- Proximity to key European countries (Switzerland, Germany, Austria)
- Within 2-3 hours flight from major European cities



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Industrial base

Industrial Know-how:

Motor gearboxes, electric vehicles, advanced traction systems, optical systems, automotive, advanced sensors, drones, aeronautics & aerospace, cutting machine, industrial automation.

Main companies:

BMR – Bonfiglioli Mechatronic Research, DMTC – DANA Mechatronic Technology Centre, FLY, BLM Group, Gunnebo, CoRA, Dalmecc, Aermec, Optol, Famatec, PAMA, Cora Automazioni, Novotic, Robosense, Deltamax, Sandvik Coromant.

Facts and Figures

MECHATRONIC SECTOR

- 300 companies
- 11,000 employees

Polo Meccatronica, a dedicated incubator/hub with:

- 41 companies
- 218 employees
- Turnover: 68 million €
- 80 million € of public investment

2 dedicated vocational schools 1,400 Students, 400 Researchers

Dedicated Academy

Foreign companies: DANA, Gunnebo, Watts Industries, Carl Zeiss, Audaces, Sandvik Coromant, Scania.

Main mechatronic activities:

- Industrial Automation
- Embedded Systems, microsystem and microelectronic
- Robotic and human-machine interaction
- Sensor

R&D network

Research Centers: Bruno Kessler Foundation (ICT, Microsystems, Smart materials), Trento University.

Labs: ProM – Prototyping Mechatronics Facility, Mechatronic advanced lab, New materials characterization facility, Clean Room facility, Facilities for testing dedicated to pneumatic, vibrations, stress analysis, corrosion and friction.

Know-how:

- Automation
- Advanced sensors
- Software
- Mechanical and structural design modeling
- Human machine interaction
- New materials

Incentives and funding

- Up to 80% local grant on R&D project
- Up to 70% local grant on internationalization
- Up to 60% local grant on researchers hiring
- Up to 50% local grant on innovation
- Up to 28% investment in new machinery
- Financial support for high-technology investments (for mechatronics companies)

Sites and buildings

Polo Meccatronica, an incubator/hub dedicated to mechatronics sector.

Formulas: pre-incubation (Start Ups), incubation (SME), technology park (others).

Spaces: 32,500 sqm customizable production facilities.

ProM facility: cyber security, ICT, system integration, electronics, metrology, 3D printing & laser cutting, 6,400 sqm mechatronics prototyping laboratories, 6.4 million € value of the machineries.

By 2020: facility for mechanical tests

Competence Center with high specialization in technologies in the Industry 4.0 area. The Competence Center named SMACT is focused on the following specializations: Social networks Mobile platforms & Apps, Advanced Analytics and Big Data, Cloud Internet of Things.

Success story

In September 2011, Bonfiglioli Mechatronic Research opened its premises in Rovereto, configuring itself as a research centre for the development of innovative solutions in the field of mechatronics. Since then, the facility has focused in particular on the development of permanent magnet high-performance motors with the highest energy efficiency made available by current technology. Another goal of the centre concerns the design and industrialization of planetary precision gearboxes for servo-motion control applications. Thanks to the use of a «smart interface», the optimized

combination between the motors and the gearbox provides the current market with a cutting-edge and high performing optimized solution.

Thanks to the Pole of Mechatronics, it didn't took long for the company to recognize the assets of the territory and the value of the synergies activated with the University and the local enterprises working in its field. This is why the company decided to add a production facility to Bonfiglioli Mechatronic Research S.p.a., in order to manufacture and sell mechatronic solutions for automation that include - besides the servo motors and the planetary precision gearboxes - products like electrical drive components (inverters produced in Germany by its other research centre), operator interfaces, and communication and wiring components. Over the years, BMR has become the Italian commercial branch for the automation solutions offered by Bonfiglioli and it currently provides permanent magnet motors and servo gearboxes to the 16 global branches of Bonfiglioli and its tens of national retailers scattered around the world. Currently, BMR has an annual sales revenue of more than 6 million euros.

Business opportunity

Trentino Sviluppo, in-house company of the local Government, has realized the thematic hub Polo Meccatronica, dedicated to the mechatronics sector. We are now expanding the project, with additional spaces and infrastructures

We are looking for industrial investors in the following sectors: robotics, smart manufacturing systems, electronics, automotive, high-tech materials, product design

We provide: fully equipped spaces and infrastructures, support on technology transfer, technology partnership, supply chain development, HR selection, incentive selection

Significant local incentives, efficient&reliable autonomous government, 1st in Italy for quality of life, supportive R&D environment, 0 local tax (for 5 years), a workforce you can count on.

TRENTINO

SPORT TECH

Infrastructures and connections

- Airports: 45 minutes from Verona airport (Catullo)
- Main Highway: A22 Brennero-Modena
- Railway that connects North East of Italy with Austria and Germany
- Brenner Basistunnel in construction
- Interporto of Trento
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- Proximity to key European countries (Switzerland, Germany, Austria)
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Industrial base

Know-how: technical sportswear, bike, ski producers, ICT for Sport, snow hardware machinery.

Main companies: La Sportiva, Montura, Corehab, Motorialab, NeveXN (start up owned by Leitner Group), Emicontrol (start up owned by Technoalpin), Eurogripp, Omnimec, Eyes On, Wefit, MySnow Map.

500 km of ski runs, 230 ski lifts, 20 ski areas, 1,500 workers in the sector of ski area.

Trentino is endowed with 6 thermal centers with different types of thermal waters ideal for the recovery of athletics and sports men.

Facts and Figures

Trentino is an important hub for the sports market. The sport economy in Trentino has a value of around 1.07 billion Euros, 6.8% of the local production.

Trentino over the last few years has been firmly placed at first or second place among the most sport oriented provinces in Italy (data from Sole24Ore) in relation to 33 parameters concerning sport at a professional level.

51% of people do a sporting activity compared to the national average of 31%.

22.4% of tourists choose Trentino for sport destination.

8.17 million GDP generated by the sport cluster.

2 teams in the major league (volleyball – basketball), and various international athletes in skiing, athletics, windsurfing and cycling.

55 companies

16 innovative start up

1,500 students, 500 researchers, 2,000 employees in the sector

SPORT INDUSTRY:

- ICT for Sport
- Smart Materials
- Sportswear
- Bike
- Ski equipment
- Machinery
- COSBI

RESEARCH CENTERS:

- CeRiSM
- CIMEC

R&D network

RESEARCH CENTERS/KNOW HOW:

- FBK - ICT: Center/data analytics/eHealth
- FBK - CMM: development of sensor applied to sport equipment
- CERISM: proof of concept of biomechanics parameters
- CIBIO: research on biological molecules
- UNITN - Department of Industrial Engineering: material design, study on new materials, nanotechnologies
- FEM: research aimed at improving agricultural production, biodiversity, human health and quality of life
- COSBI – studies on the biological system

LABS:

- ProM Facility: integrated platform for prototyping and qualifying of mechatronic system, ICT tools to facilitate personnel training and retraining
- Materials treatments and testing
- Embedded Electronics and Computer systems
- Clean Room and Micro nanofacility
- Micro-Nano characterization and fabrication facility laboratory
- Microbiology Lab
- Biomolecular Sequence and Structure Analysis for Health
- Neuroinformatics Lab
- Interdisciplinary research in cognitive neuroscience
- Functional Materials & Photonic Structures

Incentives and funding

- Up to 80% local grant on R&D project
- Up to 70% local grant on internationalization
- Up to 50% local grant on innovation

Sites and buildings

Progetto Manifattura - Green Innovation Factory, an incubator/hub for sustainable projects.

13,000 sqm of office space, 25,000 sqm of lab/production space by 2020. 57 companies (20 Start Up, 26 SME, 10 industrial groups, 1 Research center), potential for 110 companies/1,200 employees.

Progetto Manifattura hosts the SPIN Lab accelerator.

Success story

NeveXN was founded in 2011 following the successful participation of Francesco Besana - an expert in solar cooling - and two partners in the D2T start-cup competition. Trentino Sviluppo offered a mentoring program, at first within Progetto Manifattura, the green tech Hub that helped the company in developing its business model and finding industrial partnership.

This team of entrepreneurs won a second prize as a money grant, managed by Trentino Sviluppo, which enabled them to establish the Company and pursue the SnowRESolution concept.

In October 2016 NeveXN, thanks to the support of Trentino Sviluppo, secured an investment from Demacenko Srl, an important player on the ski industry, which makes part of the LEITNER GROUP.

In November 2016 NeveXN was rewarded by the European Community financial grant on a SME instruments.

The main objectives of the company is to complete the engineering, industrialization and commercialization of the snow-machine. For this reason Trentino Sviluppo has provided an operational space within Polo Meccatronica for the testing of the machine and it is supporting the start up in industrializing the product through the ProM facility, a serviced based laboratory endowed with fast prototyping machineries.

Business opportunity

- Trentino Sviluppo, in-house company of the local Government, has realized the thematic hub Progetto Manifattura - Green Innovation Factory, dedicated to the sport-tech and green/cleantech. We are expanding the project, with additional spaces and infrastructures
- We are looking for industrial investors in the following sectors: sport-tech (NEW), sustainable mobility
- We provide: fully equipped spaces and infrastructures, support on technology transfer, technology partnership, supply chain development, HR selection, incentive selection
- Significant local incentives, efficient&reliable autonomous government, 1st in Italy for quality of life, supportive R&D environment, 0 local tax (for 5 years), a workforce you can count on.



MOBILITY INDUSTRY

FRIULI VENEZIA GIULIA
LOMBARDY
PIEDMONT

FRIULI VENEZIA GIULIA

MARITIME TECHNOLOGY

Infrastructures and connections

- Airports: Venice Marco Polo Airport, Treviso A. Canova Airport and Trieste Airport Friuli Venezia Giulia are 30/60 minutes driving from regional main towns
- Main Highways: E70-A4 Turin-Milan-Trieste, A23 Palmanova-Tarvisio, A28 Portogruaro-Conegliano
- Railway: Connections from Udine and Trieste railway stations to Milan, Rome, Turin and Venice
- Maritime connections: Trieste, Monfalcone and Porto Nogaro commercial ports
- Interports: Cervignano, Gorizia, Pordenone and



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- Trieste
- 20 marinas grouped in a formal network called "FVG marinas"
- 3 shipyards and 4 boatyards for newco (+ boatyards for maintenance and refitting for leisure boats up to mega-yachts)
- Broadband:ERMES, with its 2,600 km of cables, 260,000 km of optical fiber, 1,679 km of backbone infrastructure and 720 km of cable infrastructure in the 86 industrial areas, is the wider broadband geographic area in Italy

Industrial base

FVG Region has a long tradition on Blue economy, in particular on heritage sectors as ship- and boatbuilding and maritime transport, and in the nautical tourism since early '900, both with a strong supply chain of vessel equipment (marine engines, pumps, marine interiors, etc.) and refitting and maintenance (ship-repair, boat maintenance), and a strong recognition at the international level.

The major key players in the Region are: Fincantieri, Wärtsilä Italia, Monte Carlo Yachts.

Nowadays, marine protection activities and marine robotics are rapidly expanding sectors. Traditionally important sectors in FVG are also fishery and aquaculture.

Facts and figures

MARE FVG CLUSTER

Export: 2,106.4 mln €

Enterprises: 1,350

Employees: 28,200

Foreign enterprises: 67

INDUSTRY FOCUS

- Ship- and boatbuilding
- Waterborne transport
- Logistics
- Leisure boating
- Offshore
- Shipping services

R&D network

Regional R&D network consists of 15 Universities departments, 23 research centres (public and private), 4 scientific and technological parks, 9 certified (by Friuli Venezia Giulia Region) laboratories, 3 centres of excellence, 4 business incubators. IP4FVG - Industry Platform 4 FVG, Friuli Venezia Giulia digital innovation hub, supports SMEs in the industrial manufacturing digital transformation and promotes technological updating in the sector also through training, living labs and specialised services. The main public R&D players are: Università degli Studi di Trieste – Department of engineering and architecture, Università degli Studi di Udine – Department of engineering and architecture, SISSA – Laboratory mathLab and OGS - Istituto Nazionale di Oceanografia e di Geofisica Sperimentale specialised in oceanography, geophysics and marine geology, Area Science Park. Mare FVG is Friuli Venezia Giulia maritime cluster management organisation. It aims to promote applied research and education programmes, to boost innovation as well as the shared use of facilities and the knowledge exchange, networking, technology transfer, internationalization. MareFVG acts to increase the intangible assets value of the regional maritime cluster. MareFVG cluster is recognised at EU level with the ESCA Silver label.

Incentives and funding

Friuli Venezia Giulia Region has several types of incentives and funding. Regional taxes reduction can be applied to companies which meet specific criteria; public grants can be awarded to support the creation of new enterprises and implement RDI projects. There are also incentives to support competitiveness of SMEs and measures to finance innovation technology investments. Different kinds of regional subsidised loans can be granted to support investments and business development.

Success story

Monte Carlo Yachts is a pioneering project in the Yachting World that breaks new ground. Genuinely Italian in its management, designers and artisanal skills, supported by the industrial strengths of French group Beneteau - the uncontested global leader in the production of sailboats,

2nd world boat manufacturer and among the 5 world power top players - Monte Carlo Yachts is dedicated to crafting timeless luxury yachts.

Monte Carlo Yachts was founded in 2008 in Friuli Venezia Giulia from the intuition of combining the best of Made in Italy (the craft tradition of the nautical sector, the search for beauty, the blending of luxury and art, its innovative design) with the industrial know-how of the Bénéteau Group, the French world leader in the yacht sector, supported by a production capacity that is unrivalled anywhere in the world. From the MCY 76, the first model of the new brand unveiled in 2010, to the actual series of seven boat from 65 to 105 feet, the MCY Yachts are thought, designed and built to stand the test of time and go beyond trends and fads that come and go.

From a societal point of view MCY started from green field and after 10 years became a company of 400+ employees with a turnover of around 100M€, with a strong relationship with the FVG territory either for the production and the knowledge and innovation chains.



LOMBARDY

MOBILITY INDUSTRY

Infrastructures and connections

- 573 km of highways
- 900 km of national roads
- 11,000 km of provincial roads
- 1,680 km of railway network
- 4 International airports:
 - Milano Malpensa Airport, Varese - Ferno (54.5 km from Milan)
 - International Airport Il Caravaggio, Bergamo - Orio al Serio (60.4 km from Milan)
 - Enrico Forlanini Airport, Milano - Linate (9.7 km from Milan)



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- International Airport Gabriele D'Annunzio, Brescia - Montichiari (120.5 km from Milan)
- Distance by car from Milan to Paris (8h50min), Berlin (10h45min), Frankfurt (7h30min), Barcelona (10h)

Industrial base

- The Automotive manufacturing industry (products and processes) includes manufacturers of motorcycles, agricultural vehicles, commercial vehicles and caravans, manufacturers of machinery, plants and equipment (moulds, assembly equipment, industrial automation systems), design, construction and marketing of vehicle components
- The Automotive supply chain in Brescia alone is Italy's second largest automotive pole after Turin, in terms of employees and local production units. Most of the companies are located in the provinces of Milan (139 companies), Brescia (130), Bergamo (90) and Monza-Brianza (64). Significant numbers also in the provinces of Lecco and Varese, with more than 50 companies in both territories
- Lombardy boasts an extremely vigorous supply chain for the building of pleasure boats, which involves leading design firms, shipyards engaged in the building of sailboats and/or motorboats, businesses specialized in fit-outs and furniture, sail makers, businesses providing maintenance, repair and refit services and logistical assistance, mooring and storage
- The excellences of the Lombardy Mobility Cluster can be associated with the strong synergies among automotive, boating, railway, and intermodal sectors (transport and infrastructures). Its strong integration with top-level research bodies helps the cluster to develop wide competencies in innovative technologies (hybrid, 3D, alternative fuels, etc), as well as in the production of top-quality components (metallurgy, mechatronics, industrial chemistry, etc) and in the sport sector
- The priority themes of technological development include structural weight reduction; reduction of CO2 signature through alternative transmissions and fuels; development and dissemination of innovative and efficient urban goods logistical systems through sustainable means; related vehicles (control systems); vehicle safety systems; advanced materials

Facts and figures

The **MOBILITY INDUSTRY** is a comprehensive field that encompasses rubber, rail and water mobility, and logistics: the Automotive manufacturing industry (products and processes) and the Boat manufacturing industry are particularly important in Lombardy

- over 43,000 employees, 592 companies that operates in different automotive fields (as direct suppliers of large manufacturers and as suppliers of second or third level)
- The Automotive cluster ranks 7th in Europe and 2nd in Italy
- 263 foreign companies working in the field of mobility industry are located in Lombardy employing more than 30,900 people
- The Boat manufacturing industry counts 3,000 companies, with 21,500 employees
- Lombardy is the 1^o Italian region as regards the number of pleasure boating companies situated in the territory and 2^o in terms of employees working for them
- Presence of Lombardy Mobility Cluster, that includes:
 - 58 companies (37 SMEs, 21 Large enterprises)
 - 6 universities/research centres
 - 7 Associations

R&D network

- The research system is composed of the following universities and research centres: University of Brescia (Department of Mechanical and Industrial Engineering), Politecnico of Milan (Department of Mechanical Engineering equipped with an Automotive & Hybrid Technology Lab among various lab), Bicocca University of Milan, University of Milan (Science of Motors), Bocconi University, Catholic University, University of Bergamo (Research centre of Engineering Lab on Automation, Mechanical technologies, Mechatronics, etc), University of Pavia and CNR (Project of researches in the field of Engineering, ICT and technologies for energy and transport)
- Politecnico of Milan was ranked the best for Engineering and among the top big universities in Italy in the CENSIS-Repubblica Italian University rankings for 2014-2015. According to the QS World University Rankings, as of 2018 it is the 17th best technical

university in the world, ranking 5th for Design, 9th for Architecture, 9th for Civil and Structural Engineering, 17th for Engineering and Technology

- The private research system includes: BREMBO RESEARCH CENTER housed in the KILOMETRO ROSSO Science Park, active in mechatronics and sensortronics (a joint-venture with the DaimlerChrysler Laboratory, that involves ceramic composites and base materials), PIRELLI LABS, which represents the centre of technological excellence of the Pirelli Group

Incentives and funding

Regione Lombardia supplies incentives for corporate investments and Start-ups. For example:

«AL VIA» Corporate Investments

- 5% to 15% non-repayable grant for capital expenditures in productive assets for a specific investment project
- Long-term financing from €50,000 to €2.85M at favorable rates, with a duration from 3 to 6 years
- Free financial guarantee to cover up to 70% of the financing
- The eligible projects must fall within one of these two categories: Company Development or Relaunch of Productive Areas
- The intervention is dedicated to companies: registered in the Italian Register of Companies with an operating office in Lombardy at the time of the supply of the contribution, active for at least 24 months

«Linea Innovazione» Incentives for Innovation Projects

The incentive consists of a subsidized-interest-rate loan and a capital contribution to support the interest payments (starting from a minimum of €300,000 up to a maximum of €7,000,000). The combination of the incentives can cover 100% of the total eligible cost of the project. The financial incentive is dedicated to MSMEs employing fewer than 3,000 people, which have the Headquarter in Lombardy and are planning to invest in a project which aims to innovate the process or the product of the business. Thanks to the ERDF - European Regional Development Fund, Regione Lombardia allocated in the 2014 – 2020 program period 36% of the fund (€349.2 M) to strengthen the research sector, foster technological development, and innovation. In the same way, 30% of the fund (€294.6 M) is allocated to promote the competitive-

ness of SMEs and improve access to loans. Thanks also to the European Bank of Investment, who has allocated € 50,000,000 to financing the project, in collaboration with Finlombarda (operational partner).

Sites and buildings

- AttrACT website www.attractlombardy.it gives access to more than 100 investment opportunities (greenfield and brownfield opportunities), located in 55 Municipalities, mapped out through the AttrACT Programme. A variety of sites ranging from the office building to the industrial facility. This initiative, promoted by Regione Lombardia together with Unioncamere Lombardia, is a unique experimentation in Italy for the promotion of the investment opportunities located in Lombardy
- Within Lombardy Mobility Cluster: CSMT Gestione scarl (Brescia – BS)
- Within The Italian Scientific and Technological Parks Network:
 - COMONEXT (Lomazzo – CO)
 - KILOMETRO ROSSO (Bergamo – BG)
 - BERGAMO SVILUPPO (Bergamo – BG)
- “MIND” (Milano Innovation District) a world-leading science, technology and innovation park, a business friendly “innovation ecosystem” for domestic and international players, a “catalyst” for sustainable socio-economic growth, a new vibrant community fully integrated with the city centre of Milan. Located just a few miles North-West of the city centre, which hosted the six-month Universal Exposition in 2015

Success story

VODAFONE AUTOMOTIVE ITALIA

Vodafone Automotive Italia Spa is the new name of Cobra after the acquisition of the entire Cobra Group by Vodafone Global Enterprise in August 2014. This acquisition combines the reputation of Vodafone as a global leader in telecommunications and connectivity, with cobra's 40 years of experience in providing vehicle security and innovative technologies based in the municipality of Varese. In Europe, Vodafone Automotive operates in 44 countries with interconnected security centers continuously assisting customers in their language of origin. Vodafo-

ne Automotive is also 10 business units all around the world, approximately 880 employees, and assembly and production sites based in China and Italy.

The English company is heavily exposed to the 4.0 industry, among Vodafone's Automotive customers there is a growing list of world best-known car manufacturers. Vodafone Automotive is growing also in terms of employees in Italy, making more than 80 hires in the last 3 years and other 30 for 2018.

Business opportunity

The AttrACT Program is a unique innovative program in Italy: it brings together investors, investment opportunities and local Municipalities thanks to a dedicated online platform, www.attractlombardy.it.

AttrACT aims at:

- developing the regional offering
- promoting opportunities for investment
- bringing together the main territorial stakeholders

More than 100 “ready to use” investment opportunities, representing all the 12 provinces of Lombardy and pertaining to 4 key segments: Industry, Logistics, Offices and Tourism. The Program has mapped both publicly- and privately-owned areas.

AttrACT sees the direct engagement of the Lombardy Municipalities involved in the Program that are called to identify local investment opportunities (greenfield and brownfield) in their area, made it available to investors, and simultaneously made commitments to simply administrative processes, offer economic and tax incentives and offer qualified assistance service.

Commitments can vary according to the Municipality:

- Simplification of administrative processes such as:
 - Adopting the Action Plan by the city council in less than 90 days from the request
 - Delivering a Planning Permission in less than 60 days from the request
 - Dedicating a portal or an on line “front office” service where investors can find all useful information
- Economic and Tax incentivisation such as:
 - Declaring in advance all urban planning and construction expenses without additional expenses

- Offering reduction or exemption of IMU, TASI, e/ or TARI according to the Municipality
- Reducing the primary and secondary land development expenses by at least 20%
- Promotion:
 - Making available a support team that coordinates the work, facilitates the relationships and encourages collaboration
 - Providing preliminary consulting services and support to companies in the presentation and implementation of their projects, with the issuance of written opinions if requested in the proposal

AttrACT, where to invest in Lombardy.

PIEDMONT

AUTOMOTIVE

Infrastructures and connections

Piedmont is located at the intersection of the two main axes Lisbon-Kiev European Corridor and Genoa-Rotterdam Corridor 24.

The region is a strategic point for goods distribution in Europe with 3 logistics platforms - S.I.T.O (Turin), C.I.M. (Novara), Interporto Rivalta Scrivia (Tortona) - and a network of about 1,000 km of motorways and 2,000 km of railways. Its position bordering Liguria makes it the ideal rear logistics service location for the port of Genoa (150 km from Turin).

Turin international airport :30 minutes from the city center.
Milan-Malpensa intercontinental airport: 1 h from Turin.



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Industrial base

Italy is the fourth largest European automotive market after Germany, the UK and France. The Italian automotive industry is primarily concentrated in Turin and in Piedmont: around 50% of the 2,600 companies (with 170,000 employees) active in Italy are in fact established here. Piedmont and its capital Turin, birthplace of Fiat, now FCA after merging with Chrysler, are not only the core of the national automotive industry, but of European car and mobility technology. The key players of the automotive world are located in Piedmont: major OEMs, SMEs and supply chain, R&D centres and engineering academies. The synergy between these key players has made a decisive contribution to positioning the region among the worldwide leading clusters in a sector characterized by a high level of innovation and research, such as the automotive sector: in fact, the technological innovation is subject of constant attention and is deeply rooted within the engineering culture of Piedmont. Universities and research institutions play a very active role in the overall development and innovation of the industry: from skilled vocational training and niche specialised engineering programs to independent and collaborative research projects, universities are a key component of the industrial sector. Piedmont is the forerunner in Italy in terms of automotive components companies.

Facts and figures

35% of the Italian automotive components industry is in Piemonte

40% of the Italian automotive components turnover is in Piemonte

80% of companies export abroad

42% of companies invest in industry 4.0

Among Piedmont's leading key players:

AVL, Changan Automobile European Designing Center, CNH Industrial, Delphi, Italia Automotive Systems, Denso Thermal Systems, Eaton, Endurance, Overseas, FCA Fiat Chrysler Automobiles, FEV, GM Global Propulsion Systems, Italdesign, JAC Italy Design Center, Lear Corporation, Magna Steyr Italia, Magneti Marelli, Microsoft Innovation Center Torino, Oerlikon Graziano, Reply, Schaeffler Italia, SKF Industrie, Telecom Italia, Valeo, Webasto, Yanfeng Italy, Automotive Interior Systems, ZF -TRW Automotive, 5T.

Piedmont's automotive production encompasses the entire supply chain from the upstream phases to the final products, offering business and know-how from the concept of the vehicle till its final delivery: project planning, prototyping, styling, robotics and automation, components and mass production, industrialisation of the product and test driving.

R&D network

R&D and innovation play an important role: 43.7% of the Turin-Piedmont automotive enterprises invest more than 2% in R&D (31% invest from 2 to 5, 7.7% from 6 to 10, 5% more than 10%) and are responsible for more than 50% of the European patents granted to inventors in Piedmont. The region's strong expertise in the field of engines and the approach to sustainable mobility is strengthened by the presence of Fiat Research Centre, General Motors Global Propulsion Systems and FPT Industrial that develop new generations of engines in their research centres based in Turin. In addition, more than 350 companies perform activities in the "green tech" field. Thanks to the presence of the Politecnico di Torino, the University of Turin and other specialised research centres, Piedmont provides the necessary support to design and R&D activities.

Advanced digital technology and smart mobility: it's possible to find in Piedmont the necessary know-how for electric vehicle integration and all the solutions based on full electrical mobility, encompassing energy harvesting with both on-board and off-board photovoltaic generation. Companies are indeed developing more and more distinctive technologies and solutions in the fields of connectivity, autonomous driving, sharing mobility, sensor fusion, big data and Internet of Things.

Incentives and funding

Regione Piemonte has allocated € 1 bn to promote the growth and competitiveness of the whole territory. The Region's industrial policy aims to achieve 3 main objectives: to maintain and enhance the existing industrial activities, to expand investments of the companies already active on the territory, to attract new businesses wanting to realise innovation and industrial development projects. Funding is provided for: setting up and strengthening labs

and research centres; creating and developing start-ups; technology transfer from research to SMEs through Innovation Hubs; collaborative research on major challenges through Technological Platforms: Intelligent Factory, Life Sciences, Bioeconomics, Aerospace, Automotive; supporting industrialisation of research results (IR2 Call), through relevant investment programs aimed at industrializing the results of R&D activities already partially acquired. The subsidy system in Piedmont focuses on both the start-up of new initiatives and on the development of existing companies. Subsidies to companies can take the form of soft loans, non-repayable grants or free-of-charge guarantee support (in compliance with the European regulation on state aid) and can vary according to the type of beneficiary, the kind of investment and the nature of expenses.

Sites and buildings

Piemonte Automotive is a special project promoted by the Regione Piemonte, financed by ERDF – European Regional Development Fund and managed by the Piemonte Agency, providing international players a free preferential channel to meet and start business with top class automotive selected enterprises based in Piedmont, Italy. The Team makes an assessment of buyers' needs and technicians' requirements from all over the world and provides them with:

- top class skills and unique manufacturing know how
- capable suppliers who can deliver on time high-quality parts and products at competitive prices and leading edge technologies and solution
- technologically qualified and competitive supply chains sharing commercial objectives, target clients and strategies
- technical working groups where local enterprises and foreign companies work together to develop projects aligned to the expectations of their international players.

The project Team's assistance is supply chain focused and completely free of charge.

For more information: automotive@centroestero.org, www.centroestero.org/en/key-sectors/automotive.html



RENEWABLE ENERGY AND GREEN INDUSTRY

CALABRIA
LOMBARDY
TRENTINO



CALABRIA

GREEN INDUSTRY

Infrastructures and connections

- 3 International airports (Lamezia Terme, Reggio Calabria e Crotona)
- 4 commercial ports (Gioia Tauro, Corigliano Calabria, Vibo Valentia and Crotona)
- Main Highways: A2 – Mediterranean Motorway (Salerno-RC)
- 4:00 h from Lamezia Terme to Casablanca (Morocco)
- 3:15 h from Lamezia Terme to Frankfurt (Germany)
- 3:00 h from Lamezia Terme to London (UK)



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Industrial base

Industrial specialization:

- intelligent building sites
- sustainable building energy savings
- materials
- seismic safety,
- environmental protection,
- land reclamation,
- management of hazardous and non-hazardous waste
- wastewater treatment
- air pollution, soil pollution, water pollution

Main companies: Enel Green Power, Ecologia oggi, Ecosistem, Biomasse Italia.

Facts and figures

COMPANIES

- 9,818 companies that have made eco-investments in the period 2014-2018 in green products and technologies
- 8,017 Green jobs
- Favourable geographical position in the centre of the Mediterranean Sea
- Strong synergy among the 3 regional universities, the research centers and the companies
- Availability of highly qualified work force
- Wide range of incentive schemes with the maximum level of aid intensity available through the EU
- ZES - Special economic zones - recipient areas of important tax benefits and administrative simplifications

R&D network

- The “Green HoMe” Sustainable Building Innovation Hub has the objective of concretely developing cooperation and research opportunities between national and European operators and networks. The Energy and Environment Innovation Hub (NET, with offices in Crotona and Reggio Calabria) has a focus on the issue of energy efficiency, includes 65 members among companies, universities and research centers.

- The NEW MATERIAL Innovation Center, managed by the Calabria Science and Technology Park - CALPARK, is a specialized intermediary for research and innovation between the Calabrian production system and the research system. The Innovation Center has activated a focus on building materials and technologies. The Center supplies specialized technical-scientific services in three macro-areas: innovative materials and technologies for the building industry, innovation in materials and production processes of SMEs, micro and nano structured materials.
- The Green HoMe Innovation Center believes in establishing an ecologically sustainable way of designing, building and living in a home, by adopting an approach which is suitable for a Mediterranean climate and which provides the opportunity to promote natural, entrepreneurial and scientific resources outside Calabria.
- University of Calabria in Cosenza - Faculty of engineering – Department of environmental engineering, Mediterranean
- University of Reggio Calabria – Faculty of engineering - Department of Civil, Energy, Environmental and Material Engineering (DICEAM); Department of Information Engineering, Infrastructure and Sustainable Energy (DIIES)

Incentives and funding

Wide range of incentive schemes with the maximum level of aid intensity available through the EU, among which:

- ZES - Special economic zones - recipient areas of important tax benefits and administrative simplifications
- Regione Calabria call for tenders - Negotiated procedure implementing the PRIR - Action 1.5.1 – POR Calabria FESR 2014-2020
- Regione Calabria Strategic Guideline for internationalization and foreign investment 2017/2020 - POR Calabria 2017 2020 – PAC 2017 2020

- Strategic Project “Calabriaimpresa.eu”: DGR n. 304/2016

Sites and buildings

Availability of industrial sites and buildings in the following areas:

Reggio Calabria:

- Industrial Area of Gioia Tauro - Rosarno - San Ferdinando; Industrial Area of Campo Calabro - Reggio Calabria - Villa San Giovanni;

Vibo Valentia:

- Industrial Area of Porto Salvo; Industrial Area of Aeroporto;

Crotone:

- Industrial Area of Crotone;

Cosenza:

- Industrial Area of Schiavonea of Corigliano Calabro; Industrial Area of Piano Lago of Mangone e Figline Vegliaturo; Industrial Area of Follone of San Marco Argentano; Industrial Area of Sant'Irene of Rossano; Industrial Area of Bisignano; Industrial Area of Cammarata of Castrovillari; Industrial Area of Rocca Imperiale; Industrial Area of Montalto Uffugo;

Catanzaro:

- Industrial Area of Lamezia Terme.



Success story

PVC UpCycling

PVC UpCycling: Circular Economy and Zero Waste with the upcycling of waste from the management processes of electrical systems. From the de-manufacturing with the recovery and recycling of pvc electrical cables of energy plants to re-manufacturing for products with low environmental impact. The project is the winner of the research and development call of the POR Calabria 2014-2020, Axis 1, Action 1.2.2. (<https://circulareconomy.europa.eu/platform/en/good-practices/pvc-upcycling-reclaiming-pvc-copper-and-aluminium-decommissioned-electric-cables>). The leading partners are R.ED.EL., the DIATIC Department of the University of Calabria UNICAL and the ENEA Research Centre. (<https://www.pvcupcycling.com/home-eng>).

Ecosystem

Ecosistem made from 2010 to 2013 an important investment of 15 million euros for the construction of a complex plant for solid and liquid waste treatment. The plant is located in Lamezia Terme and extends over 100,000 square meters. In particular, the following plants are active: Chemical-physical treatment plant through neutralization, chemical precipitation and oxidation of water-based liquid waste (102,000 tons/y); stabilization plant for non-recoverable solid wastes and soil washing of recoverable fractions (37,000 tons/y); solid fuel production plant (RDF) (44,000 tons/y); selection of materials containing asbestos with a fixed unit of depression (2,000 tons/y); semi-automatic selection of urban waste from separate waste collection.

Business opportunity

Innovative Substrates Development for electro-optical polymeric flexible self consistent devices for applications in the field of the Energy saving – NOTREDAME SRL – Polo di Innovazione Smart manufacturing “Nuove Materie”.

The opportunity aims to produce and commercialize the Smartlayercal technology (SL). The SL is an advanced device, based on electrochromic technology, energetically self consistent, that should be applied on the glazing of the buildings, allowing, to tune thermal and optical transmission for the adjustment of interior living conditions. The SL is adhesive, flexible, energetically self-sufficient and wi-fi controlled. In this way, it is possible to apply the Smartlayercal straight on the windows of new and existing buildings, in order to obtain up to 30% of the energy savings transforming a traditional window to a smart one with the ability of modulating the light and heat transmission between the interior and exterior of the buildings, thus optimising the use of winter heaters and summer air conditioners, resulting in a reduced energy consumption. The SL is an high innovative product which is: easy to apply and to remove, not a structural element of the building, totally controlled by the customer. This business opportunity shows: global market with great growth, clear business model; product at high performances and exit present and realistic. The IP belongs to the NOTREDAME Srl. At the present time the SL is an industrial prototype ready to be produced and commercialized. For this reason we ask to the potential investor/s to join us to quickly introduce the SL in the global market and in three years to quote our company in order to allow all partners to choose the exit strategy that wish more. The target investors are all the players that wish to invest in a company with potential very high revenue in few years: capital ventures, construction companies, technological companies, international distributors, etc.

OMNIA GENIUS - AEI SRL

Omnia Genius is a Smart Home Energy Management System that can be integrated into buildings in order to guarantee energy efficient operation while ensuring a high quality indoor environment and smart living. It is conceived for domestic and micro-business users and it is aimed at: 1.

informing the users about his energy habits; 2. optimizing energy consumptions through smart loads management based on predefined and self-learning logics; 3. facilitating the deployment of solutions that would improve demand response in buildings.

Key characteristics: ALL IN ONE system, able to embrace in a single device different application areas; Plug&play device, no need for technical operations for installation; ADD- ON logic, allowing integration of system with other devices without need for on-site interventions; Simple and intuitive APP able to “drive” the user in a virtuous containment path of the energy costs; European patent on smart logic. OMNIA GENIUS proposes a technological partnership for the development of product’s functionalities and partnership for the production and commercialization of product on large scale, on international markets. Target investors: Commercial representative, Venture capitalist, Distribution partner, Technological partner.

LOMBARDY

GREEN INDUSTRY

Infrastructures and connections

- 573 km of highways
- 900 km of national roads
- 11,000 km of provincial roads
- 1,680 km of railway network
- 4 International airports:
 - Milano Malpensa Airport, Varese - Ferno (54.5 km from Milan)
 - International Airport Il Caravaggio, Bergamo - Orio al Serio (60.4 km from Milan)
 - Enrico Forlanini Airport, Milano - Linate (9.7 km from Milan)



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- International Airport Gabriele D'Annunzio, Brescia - Montichiari (120.5 km from Milan)
- Distance by car from Milan to Paris (8h50min), Berlin (10h45min), Frankfurt (7h30min), Barcelona (10h)

Industrial base

The GREEN INDUSTRY is composed of a rich and varied system of skills, which include:

- Energy & Cleantech: power generation, renewable energy, water management and purification, smart grids, energy efficiency and sustainable building
- Green chemistry: production of chemical products and energy from renewable sources from biomass and/or organic waste, production processes that reduce or eliminate the use of dangerous substances thus reducing the environment footprint

Lombardy has all of the ingredients of a dynamic ecosystem through which the Cleantech Energy Sector thrives and prospers

The excellence of the Lombardy Energy Cleantech Cluster is characterized by four pillars: Smart Energy System, Sustainable Manufacturing, Green Building and Water Energy Nexus.

- Smart Energy System at the production site is enabled by supporting affiliates in analyzing and planning activities at every step of the way. From the production to the distribution of conventional and renewable energy, including semi-finished and finished products.
- Sustainable Manufacturing is supported by actions to boost plant sustainability and energy efficiency.
- Green Building is enabled by reducing energy consumption close to zero as possible (NZEB), reducing greenhouse gas emissions and using recyclable materials as part of an integrated approach encompassing the entire life cycle of the building.
- Finally, Water Energy Nexus is part of a wide, cross-discipline vision including the necessity to deal with pollutants, raise awareness, reduce environmental impacts, treat emerging pollutant substances and develop water management technology.

The priority themes of technological development are summarized as follows: energy efficiency also in buildings, renewable energies (biomasses, solar, hydro, geothermal, wind), emission reduction, energy storage, smart grids, power system flexibility, nuclear energy, material recycling, reduction of water consumption and recovery, internal en-

vironmental quality, air, water and soil quality.

Facts and figures

- More than 40,000 businesses, with around 190,000 employees
- 300 Cleantech companies
- 291 foreign companies working in the field of manufacturing industry are located in Lombardy employing more than 4,100 people
- 50% of the Italian energy plant building industry
- approximately 40% of the Italian renewable enterprises
- The energy production system has approximately 28,700 employees and a turnover of 9 billion euro
- Presence of Lombardy Energy Cleantech Cluster, that includes:
 - 109 firms
 - 11 universities/research centres
 - 10 associations
 - 8 Public bodies
 - 3 Financial Institutions
 - 3 media

R&D network

- The research system of this varied area consists of approximately 3,000 units counting professors, researchers and temporary staff
- 10 Universities and 5 Research centers provide the most advance researches in the field
- Research groups are very active in exploring the extreme horizons of technology in the Cleantech energy field through 440 joint projects with other universities
- 200 active research and technology transfer public/private bodies, including: University of Milan, Bicocca University of Milan, University of Insubria, University of Pavia, Politecnico of Milan, University of Bergamo and Brescia, Bocconi University, Carlo Cattaneo LIUC University, CNR – Consiglio Nazionale delle Ricerche and RSE – Ricerca sul Sistema Energetico
- Politecnico of Milan is the 1st University in Italy in the field of Engineering and Technology, with more than 700 patents and 23 spin-off in the field of energy efficiency and sustainable building

- Lombardy Energy Cleantech Cluster collaborates with European and international cluster networks and other industrial and R&D platforms, fostering and taking part in innovative actions and project consortia

Incentives and funding

Regione Lombardia supplies incentives for corporate investments and Start-ups. For example:

«AL VIA» Corporate Investments

- 5% to 15% non-repayable grant for capital expenditures in productive assets for a specific investment project
- Long-term financing from €50,000 to €2.85M at favorable rates, with a duration from 3 to 6 years
- Free financial guarantee to cover up to 70% of the financing
- The eligible projects must fall within one of these two categories: Company Development or Relaunch of Productive Areas
- The intervention is dedicated to companies: registered in the Italian Register of Companies with an operating office in Lombardy at the time of the supply of the contribution, active for at least 24 months

«Linea Innovazione» Incentives for Innovation Projects

The incentive consists of a subsidized-interest-rate loan and a capital contribution to support the interest payments (starting from a minimum of €300,000 up to a maximum of €7,000,000). The combination of the incentives can cover 100% of the total eligible cost of the project. The financial incentive is dedicated to MSMEs employing fewer than 3,000 people, which have the Headquarter in Lombardy and are planning to invest in a project which aims to innovate the process or the product of the business. Thanks to the ERDF - European Regional Development Fund, Regione Lombardia allocated in the 2014 – 2020 program period 36% of the fund (€349.2 M) to strengthen the research sector, foster technological development, and innovation. In the same way, 30% of the fund (€294.6 M) is allocated to promote the competitiveness of SMEs and improve access to loans. Thanks also to the European Bank of Investment, who has allocated € 50,000,000 to financing the project, in collaboration with Finlombarda (operational partner).

Sites and buildings

- AtTRACT website www.attractlombardy.it gives access to more than 100 investment opportunities (greenfield and brownfield opportunities), located in 55 Municipalities, mapped out through the AtTRACT Programme. A variety of sites ranging from the office building to the industrial facility. This initiative, promoted by Regione Lombardia together with Unioncamere Lombardia, is a unique experimentation in Italy for the promotion of the investment opportunities located in Lombardy
- Within The Italian Scientific and Technological Parks Network:
 - COMONEXT (Lomazzo – CO)
 - KILOMETRO ROSSO (Bergamo – BG)
 - POLO TECNOLOGICO DI PAVIA (Pavia – PV)
 - BERGAMO SVILUPPO (Bergamo – BG)

“MIND” (Milano Innovation District) a world-leading science, technology and innovation park, a business friendly “innovation ecosystem” for domestic and international players, a “catalyst” for sustainable socio-economic growth, a new vibrant community fully integrated with the city centre of Milan. Located just a few miles North-West of the city centre, which hosted the six-month Universal Exposition in 2015

Success story

ONESUN ITALY

OneSun Inc. is a start-up coming from USA, with the project to realize cutting-edge solar panels, more efficient and at the same time economic and achievable, thanks to a simple printer.

The start-up is developing its market of lightweight and customized solar panels to bring anywhere in the world access to green energy. This is a new solution to traditional solar market that Regione Lombardia decided to support and finance.

“OneSun project” is of € 5.75M out of what Regione Lombardia financed almost €3M thanks to one of the research agreements foreseen by the law “Lombardia è ricerca e innovazione”.

The Lead partner will be the Italian branch of OneSun Inc., OneSun Italy srl. The other partners in the project will be the CNST (Center for Nano Science and Technology) and

Ribes Tech (an innovative start-up collaborating with Omet Srl from Lecco) specialized in the engineering and production of printers.

The CNST will host the project inside its workplace in Milan. Both Ribes Tech and OneSun Italy are associated with the Lombardy Energy Cleantech Cluster (LE2C).

The project led by OneSun Italy will immediately create new jobs (starting from 10 of high qualification employees inside the start-up).

Business opportunity

The AtTRACT Program is a unique innovative program in Italy: it brings together investors, investment opportunities and local Municipalities thanks to a dedicated online platform, www.attractlombardy.it.

AtTRACT aims at:

- developing the regional offering
- promoting opportunities for investment
- bringing together the main territorial stakeholders

More than 100 “ready to use” investment opportunities, representing all the 12 provinces of Lombardy and pertaining to 4 key segments: Industry, Logistics, Offices and Tourism. The Program has mapped both publicly- and privately-owned areas.

AtTRACT sees the direct engagement of the Lombardy Municipalities involved in the Program that are called to identify local investment opportunities (greenfield and brownfield) in their area, made it available to investors, and simultaneously made commitments to simply administrative processes, offer economic and tax incentives and offer qualified assistance service.

Commitments can vary according to the Municipality:

- Simplification of administrative processes such as:
 - Adopting the Action Plan by the city council in less than 90 days from the request
 - Delivering a Planning Permission in less than 60 days from the request
 - Dedicating a portal or an on line “front office” service where investors can find all useful information
- Economic and Tax incentivisation such as:
 - Declaring in advance all urban planning and construction expenses without additional expenses
 - Offering reduction or exemption of IMU, TASI, e/

or TARI according to the Municipality

- Reducing the primary and secondary land development expenses by at least 20%
- Promotion:
 - Making available a support team that coordinates the work, facilitates the relationships and encourages collaboration
 - Providing preliminary consulting services and support to companies in the presentation and implementation of their projects, with the issuance of written opinions if requested in the proposal

AttrACT, where to invest in Lombardy.



TRENTINO

RENEWABLE ENERGY AND GREEN TECH

Infrastructures and connections

- Airports: 45 minutes from Verona airport (Catullo)
- Main Highway: A22 Brennero-Modena
- Railway that connects North East of Italy with Austria and Germany
- Brenner Basistunnel in construction
- Interporto of Trento
- Broadband with more than 1,100 km of optical fiber
- Proximity to key European countries (Switzerland, Germany, Austria)
- Within 2-3 hours flight from major European cities



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Industrial base

Industrial Specialization:

- Renewable energy
- Energy efficiency
- Green & smart buildings
- Environmental technologies
- Recycling, e-mobility.

Main companies:

RTR, Solid Power, Inergia, Ardian, Green Building Council Italy, Habitech (consortium of 300 companies), Ri-Legno, Dolomiti Energia, Green Energy Storage, Glass to Power, Terra Institute, Enerzyme.

R&D network

Main Research Centers:

Bruno Kessler Foundation (ICT, Microsystems, Smart materials), Edmund Mach Foundation (agrifood, genomics, environment), Trento University (civil & environmental engineering, materials engineering, Master in energy engineering).

Labs: Biomass characterization Lab, Laboratory of Atomic and Molecular Physics, Hydrogen, Energy and Environment Lab.

Know-how:

- Energy harvesting and storage system
- Energetic enhancement of biomass
- Simulation, modelling and measuring systems
- Eco-composite and recycling processes
- Green Buildings

Facts and figures

“PROGETTO MANIFATTURA” -
 GREEN INNOVATION FACTORY,
 a dedicated incubator/hub

COMPANIES:

- 20 Start UP
- 24 SME
- 12 industrial groups
- 1 Research center
- TESS Lab

TURNOVER: 260M€

Potential for 110 companies/1,200 employees

FOREIGN COMPANIES:

- Ardian, Next Energy, Solid Power, RTR, Baywa.RE
- **MAIN SECTORS:**
- Sustainable mobility
- Renewable energy
- Green buildings
- Circular economy

Incentives and funding

Up to 80% local grant on R&D project

- Up to 60% local grant for researchers hiring
- Up to 40% local grant on environmental investment
- Up to 50% local grant on innovation
- Climate-KIC startup accelerator program: grants for cleantech projects aiming to accelerate the transition to zero-carbon economy

Sites and buildings

Progetto Manifattura - Green Innovation Factory, an incubator/hub for sustainable projects.

Formulas: pre-incubation (Start Ups), incubation (SME), technology park (others).

Spaces: 13,000 sqm of office area, 25,000 sqm of lab/production area by 2020.

Dedicated Labs: energy storage, infrastructures, IT, distributed energy systems, modelling.

Success story

SOLIDpower: Leader Company in “green economy”, for micro-cogeneration systems with “fuel cell” technology.

The company, in constant expansion, has more than 70 employees in Italy (in the Trentino Sviluppo Business Innovation Centre), 15 in Switzerland, more than 30 in Germany and 10 in Australia. With foreign funds from Leverage Green Energy and Kew Capital (30 million investments), in 2012 has launched the first cogenerator, expanding soon to international markets.

Today, Microsoft is among its customers and a second plant is about to open in Trentino (with Trentino Sviluppo support) with the prevision of 80 new jobs and 9 million private investment on research.

Business opportunity

- Trentino Sviluppo, in-house company of the local Government, has realized the thematic hub Progetto Manifattura - Green Innovation Factory, dedicated to the green/cleantech sector. We are now expanding the project, with additional spaces and infrastructures
- We are looking for industrial investors in the following sectors: sustainable mobility, green/smart buildings, circular economy, sport-tech
- We provide: fully equipped spaces and infrastructures, support on technology transfer, technology partnership, supply chain development, HR selection, incentive selection
- Significant local incentives, efficient&reliable autonomous government, 1st in Italy for quality of life, supportive R&D environment, 0 local tax (for 5 years), a workforce you can count on

Layout grafico e impaginazione
Superhumans

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INVEST
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ITALIAN TRADE AGENCY
ICE - Agenzia per la promozione all'estero e
l'internazionalizzazione delle imprese Italiane



Ministero dello Sviluppo Economico

INVITALIA



Regione Calabria

Regione Emilia-Romagna



ART-ER
ATTRACTIVENESS
RESEARCH
TERRITORY



REGIONE AUTONOMA
FRIULI VENEZIA GIULIA



REGIONE
LAZIO



Regione
Lombardia



REGIONE
MARCHE



REGIONE
PIEMONTE



CENTRO ESTERO INTERNAZIONALIZZAZIONE
PIEMONTE Agency for Investments, Export and Tourism
Promoted by Regione Piemonte and Chambers of Commerce



REGIONE PUGLIA

pugliasviluppo

TRENTINO



invest in tuscany

Région Autonome
Vallée d'Aoste



Regione Autonoma
Valle d'Aosta

