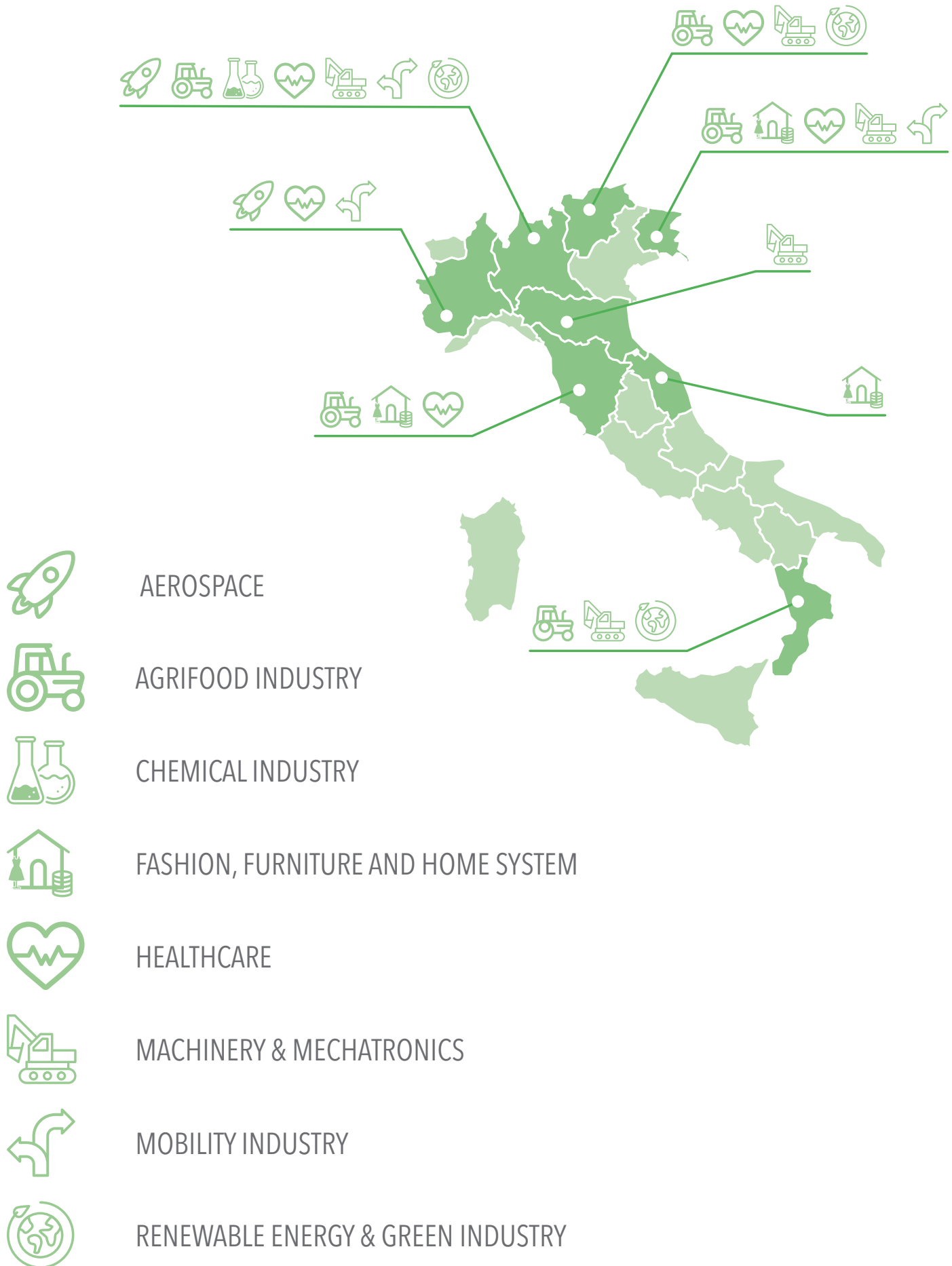


Manufacturing: Why Invest in Italy

26th September 2018 - Villa Erba, Cernobbio



Investment Opportunities in 8 Italian Regions



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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)
 - 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)



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Marco Fedato

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-pre-operative 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 & 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:
 - 80 firms
 - 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

«INTRAPRENDO» Incentives for Startups

- ✧ The incentive consists of a zero-interest-rate loan and a non-repayable grant (min €25,000 to max €65,000)
- ✧ The combination of the two can cover from 60% to 65% of the total eligible cost (min €25,000 max €65,000) of the project
- ✧ The intervention is dedicated to:
 - MSMEs active and registered in the Register of Companies for no longer than 24 months, with operating headquarter in Lombardy
 - Individual entrepreneurs that have started their own entrepreneurial activity for no longer than 24 months

Thanks also 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.

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 head-quarter 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 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.

attrACT



Piedmont | AEROSPACE

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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Federico Zardi

Industrial base

Piedmont boasts 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 organised supply chain. The Piedmont aerospace scenario is further enriched by the presence of the Torino Piemonte Aerospace Cluster and by the core of Italy's Space industry: Thales Alenia Space, the Italian Institute of Technology's (IIT) and the Centre for Space Human Robotics (CSHR), a spin-off from the Politecnico di Torino.

R&D network

Recent data confirm that Piedmont 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, 7 Innovation Hubs, 4 Science & Technology Parks
- ✧ 1st Italian region in terms of private investment in R&D
- ✧ 3rd Italian region for hi-tech patents



FACTS & FIGURES

AEROSPACE CLUSTER

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

5 International key players:

Leonardo Airborne and Space Systems, Leonardo Aircraft, GE Avio Aero, United Technologies Corporation/UTC, Thales Alenia Space

Aeronautics:

Piedmont played and still plays a key role in many international programmes: 777, 767 and 787 Dreamliner, Airbus A321, A340-500/600 and A380, Falcon 2000 and EX, Eurofighter Typhoon, C27J, ATR42, NH90 and EH101.

Space field:

Piedmont is involved in a prime contractor role in international programmes 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, ArgoMoon and many others.

Technological trends for the future of aerospace:

- ✧ Advanced materials (composites and special alloys)
- ✧ New propulsion systems (electric, hybrid, fuel cells)
- ✧ Green aero engines technology (high speed turbine, high power epicyclic transmission)
- ✧ Additive technologies (machines, products, powder handling, post processing)
- ✧ Robotics (mainly for space applications)
- ✧ Advanced satellites design

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

Aerospace Platform-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/aerospazio.html

Success story

Tyvak International Srl was established in February 2015 in Turin, 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 operations) which also includes Tyvak Nano-satellites System. The city of Turin was a strategic choice for the founders of the company, given the importance of the local aerospace industry, the proximity with the Politecnico di Torino (one of the most prestigious technical universities at European level)

and the extremely high number of interesting companies operating in neighbouring countries like France, Germany and Switzerland.

The Politecnico di Torino and its incubator I3P have provided great support to the activities of the company so far. The Politecnico is an important partner in projects and contracts of the company and has been and will be the main reservoir of highly skilled engineers; I3P has provided outstanding support during the process of creation of the company and has also favored the creation of partnerships with the start-ups based in the incubator. Another important partner for the company's growth is represented by Piemonte Agency which has been providing its support on incentives and grants, facilitating the relations with the Piemonte Region and Finpiemonte.

BLUE Engineering was born in Turin in 1993 after a major crisis in the automotive field. 4 co-founders gathered together in order to build an engineering company able to provide engineering services in different fields; the ultimate goal was to become a center of excellence in aerospace, railway and automotive sectors and provide engineering services in different markets, being a major player in some strategic countries.

The growth of the company has been well supported over the years by public institutions (Regione Piemonte) as well as Piemonte Agency. They have assisted BLUE both in the development of R&D projects and the internationalization process.

At present BLUE has signed several contracts in 9 foreign countries and is in the negotiation phase with other companies operating in 9 different countries. In this context the 3 main industrial Chinese groups - CRRC, CMC, GENERTEC ITALIA - started to express their interest in the company which resulted in the acquisition of 80% of BLUE at the end of 2016. Since then the company has implemented an important development plan with the aim to double its manpower in Italy. In the current year it has officially taken up the role of research and development center in Europe for CRRC (first railway car builder with a turnover of € 30 bn in 2016).



Calabria | AGRIFOOD

Infrastructures and connections

- ✧ 3 International airports (Lamezia Terme, Reggio Calabria e Crotone)
- ✧ 4 commercial ports (Gioia Tauro, Corigliano Calabro, Vibo Valentia and Crotone)
- ✧ Main Highways: A2 – Mediterranean Motorway (Salerno-RC)
- ✧ 3:00 h from Rome to Casablanca (Morocco)
- ✧ 2:00 h from Rome to Algeri (Algeria)
- ✧ 1:20 h from Rome to Tunisi (Tunisia)
- ✧ 2:00 h from Rome to Atene (Greece)



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

Main companies:

Companies operating inside CORAP industrial areas (Regional Consortium for the Development of Production Activities of the Calabria Region)

- ✧ unit of Cosenza: Calabria Food Company, Pasta Piro, Spadafora Vini, Campoverde, Montagna
- ✧ unit of Catanzaro: Coppi, Silagum, Campoverde, Gretigel
- ✧ unit of Vibo Valentia: Santa Rita, Cof, Callipo Group
- ✧ unit of Reggio Calabria: Attinà, Morabito, Gioia Succhi, Siam
- ✧ unit of Crotone: Facino, Liotti

FACTS & FIGURES

AGRIFOOD SECTOR

COMPANIES

- ✧ 100 companies
- ✧ 1 industrial group
- ✧ 1 reserch center

Potential for 100 companies / 2,000 employees

FOREIGN COMPANIES:

- ✧ VEGITALIA srl

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

Contact info

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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

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

- ✧ Industrial Area of Montalto Uffugo (7 ha available)
- CORAP unit of Catanzaro
- ✧ Industrial Area of Lamezia (342.5 ha available)

Success story

COF SpA represents an entrepreneurial spirit, with a common goal shared by all the Group's employees: to be a reference in Italy and Europe through IV range fruit and vegetable products. Founded in 1996 from a business project and is today a group that provide vegetables and fruit ready to use, also in private label, to the major supermarket chains, in line with the fundamental values at the base of the company's creation and development.

"Success is to reach all together our customers' trust, leaf by leaf: this is our mission"

"We are farmers and manufacturers. Together we grow, harvest, produce and offer tasty products to our customers, to the development of a sustainable and responsible economy that encourages a new way of eating and living. Our brand Ortomania, identifies all of our products available in standard and customizable formats, as well as expresses the balance between manufacturer and customer, enhancing our commitment, the quality and integrity of our products.

The raw materials used in our production are processed using technologies which protect their sensory and nutritional principles. Our company shares our goal of pursuing what is good, with quality and on a fair price."

Sites and buildings

CORAP unit of Reggio Calabria

- ✧ Industrial Area of Gioia Tauro- Rosarno-San Ferdinando (117.23 ha available)
- ✧ Industrial Area of Campo Calabro- Reggio Calabria - Villa San Giovanni (12.9 ha available)

CORAP unit of Vibo Valentia

- ✧ Industrial Area of Porto Salvo (10.7 ha available)
- ✧ Industrial Area of Aeroporto (0.5 ha available)

CORAP unit of Crotone

- ✧ Industrial Area of Crotone (200 ha available)

CORAP unit of Cosenza

- ✧ Industrial Area of Schiavonea of Corigliano Calabro (162 ha available)
- ✧ Industrial Area of Piano Lago of Mangone e Figline Vegliaturo (33 ha available)
- ✧ Industrial Area of Follone of San Marco Argentano (58.6 ha available)
- ✧ Industrial Area of Sant'Irene of Rossano (6.1 ha available)
- ✧ Industrial Area of Bisignano (85.5 ha available)
- ✧ Industrial Area of Cammarata of Castrovillari (53.9 ha available)
- ✧ Industrial Area of Rocca Imperiale (8.29 ha available)

Business opportunity

CORAP (the Regional Consortium for the Development of Production Activities of the Calabria Region) develops and manages 16 industrial agglomerations in the territory of the Calabria Region in the Provinces of Cosenza, Crotone, Catanzaro, Vibo Valentia and Reggio Calabria, for a total extension of approximately 5,250 hectares of industrial area, with 5 water treatment platforms for a total of 580,000 equivalents inhabitants served. About 1,000 companies in the petrochemicals, metal carpentry, agro-industry and logistics services are part of CORAP.

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 Porto Nogaro commercial ports
- ✧ Interports: Cervignano, Pordenone and Trieste



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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

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 & FIGURES

AGRIFOOD FVG CLUSTER

Export: 758.66 mln €

Enterprises: 1,159

Employees: 8,217

Foreign companies: 26

FOOD INDUSTRY FOCUS

- ✧ Bakery and flour production
- ✧ Meat production
- ✧ Meat processing and preservation
- ✧ Dairy products supply chain
- ✧ Wine production
- ✧ Beer production



agrifoodfvg
& BIOECONOMY CLUSTER AGENCY

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); ERSR FVG (Agenzia Regionale per lo Sviluppo Rurale); Area Science Park.

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

This 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 sq.m wide and is fully equipped to offer a complete range of transport and logistics services, such as goods storage, customs clearance procedures, parking and many other services, many of which for free, so to make customers' stay comfortable.

Situated on the international line Gorizia-Nova Gorica, SDAG intermodal terminal includes:

- ✧ operation space – 20,000 sq.m
- ✧ indoor warehouse (equipped with air handling system and connected to highways and railways) – 3.000 sq.m
- ✧ 5 rails respectively measuring 500, 385, 385, 350 and 340 m
- ✧ RoLa system with cement platforms and ramps along the main rail axis
- ✧ video surveillance system
- ✧ specialised personnel

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)
- ✧ n. 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).

Companies, choosing GOFOODLOG and its territory for their production and distribution activities, can benefit from the presence of the Universities of Trieste and Udine which have some important departments in Gorizia like Biology, Engineering and Agricultural Sciences that are very active in research projects and can support enterprises which want to invest in the food sector. Moreover, not far from Gorizia there is the Area Science Park, a public national research organisation promoting the development of innovation processes, which can give institutional support and help meet industrial partners to develop innovative ideas together.

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)
 - 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)



Contact info

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Marco Fedato

Industrial base

- ✧ The AGROFOOD 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 PGI
- ✧ 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 & 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 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

- ✧ The incentive consists of a zero-interest-rate loan and a non-repayable grant (min €25,000 to max €65,000)
- ✧ The combination of the two can cover from 60% to 65% of the total eligible cost (min €25,000 max €65,000) of the project
- ✧ The intervention is dedicated to:
 - MSMEs active and registered in the Register of Companies for no longer than 24 months, with operating headquarter in Lombardy
 - Individual entrepreneurs that have started their own entrepreneurial activity for no longer than 24 months

Thanks also 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.

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 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.

attrACT



Trentino | AGRIFOOD

Infrastructures and connections

- ✧ Airports: 45 minutes from Verona airport (Catullo)
- ✧ Main Highway: A22 Brennero-Mo-
dena
- ✧ 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



Industrial base

Industrial Know-how:

Agriculture, production of fruit, small
fruits and derivatives, bakery and flour
products, dairy products, meat, viticultu-
re, 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.

R&D network

Research Centers: Edmund Mach
Foundation - FEM (agrifood, genomics,
environment), Bruno Kessler Founda-
tion (ICT, microsystems, smart mate-
rials), 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

FACTS & 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 techni-
cians

International research projects

MAIN AGRIFOOD INDUSTRY PRODUCTIONS:

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

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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).

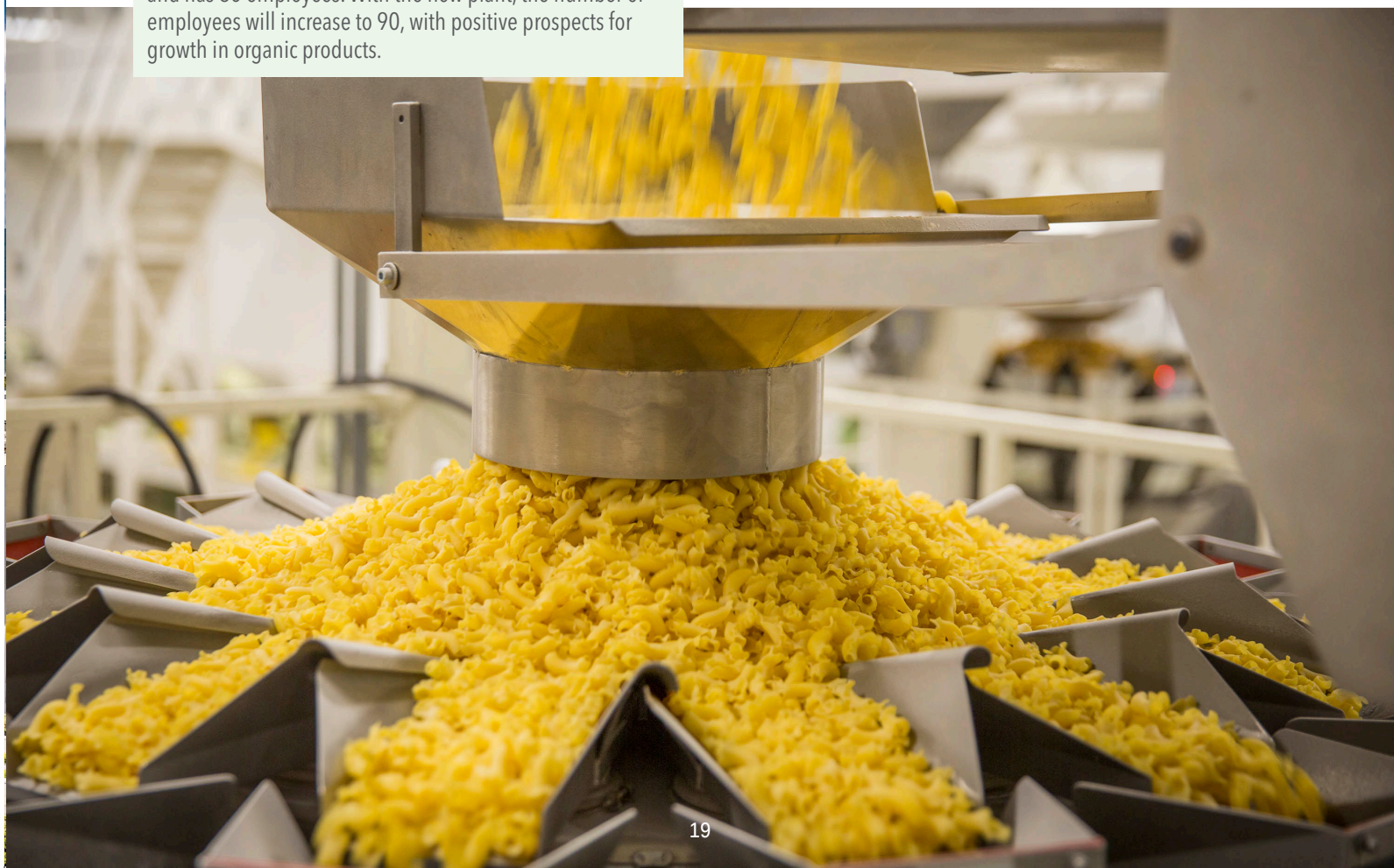
Spaces: 1 million sqm of productive spaces, 120 areas and productive assets owned by Trentino Sviluppo.

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



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)



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 & 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)

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Filippo Giabbani



R&D network

18 High School dedicated to Training for Restaurant Professions

14 High School 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

October 2018: will be issued a new regional tender for financing R&D projects.

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

1. 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
2. Bright Food (China) acquired SALOV (extra virgin olive oil)
3. Main investments are focused on the wineries, some examples: Bulgheroni Group (Argentina) owns 7 wineries in Tuscany; Constellation Brands (USA) acquired Ruffino; EPI (Européenne 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:

1. 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%;
2. 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;
3. 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);
4. Enel Green Power, an important economic player and sponsor of the project.

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:
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- ✧ 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 & 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:
 - 29 companies
 - 9 universities/research centers
 - 7 associations

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Marco Fedato

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)

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«INTRAPRENDO» Incentives for Startups

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- ✧ 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 automation 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

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AttrACT aims at:

- ✧ developing the regional offering
- ✧ promoting opportunities for investment
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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.

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AttrACT, where to invest in Lombardy.

attrACT



Friuli Venezia Giulia | FURNITURE AND HOME SYSTEM

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, 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 include 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, parquets, 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.

FACTS & FIGURES

FURNITURE AND HOME SYSTEM CLUSTER

Cluster export: 1,546 mln €

Yearly turnover: 3.4 billion €

Enterprises: 2,545

Employees: 22,315

Foreign companies: 47

International research project:

ICAP (INTERREG VA Italia – Austria 2014-2020)

FURNISHING INDUSTRY FOCUS

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

CLUSTER ARREDO/CASA FVG

SERVIZI DI INNOVAZIONE PER
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Antonio Bravo
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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. Furniture Cluster is the Innovation Hub of the Home-System Cluster and 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.

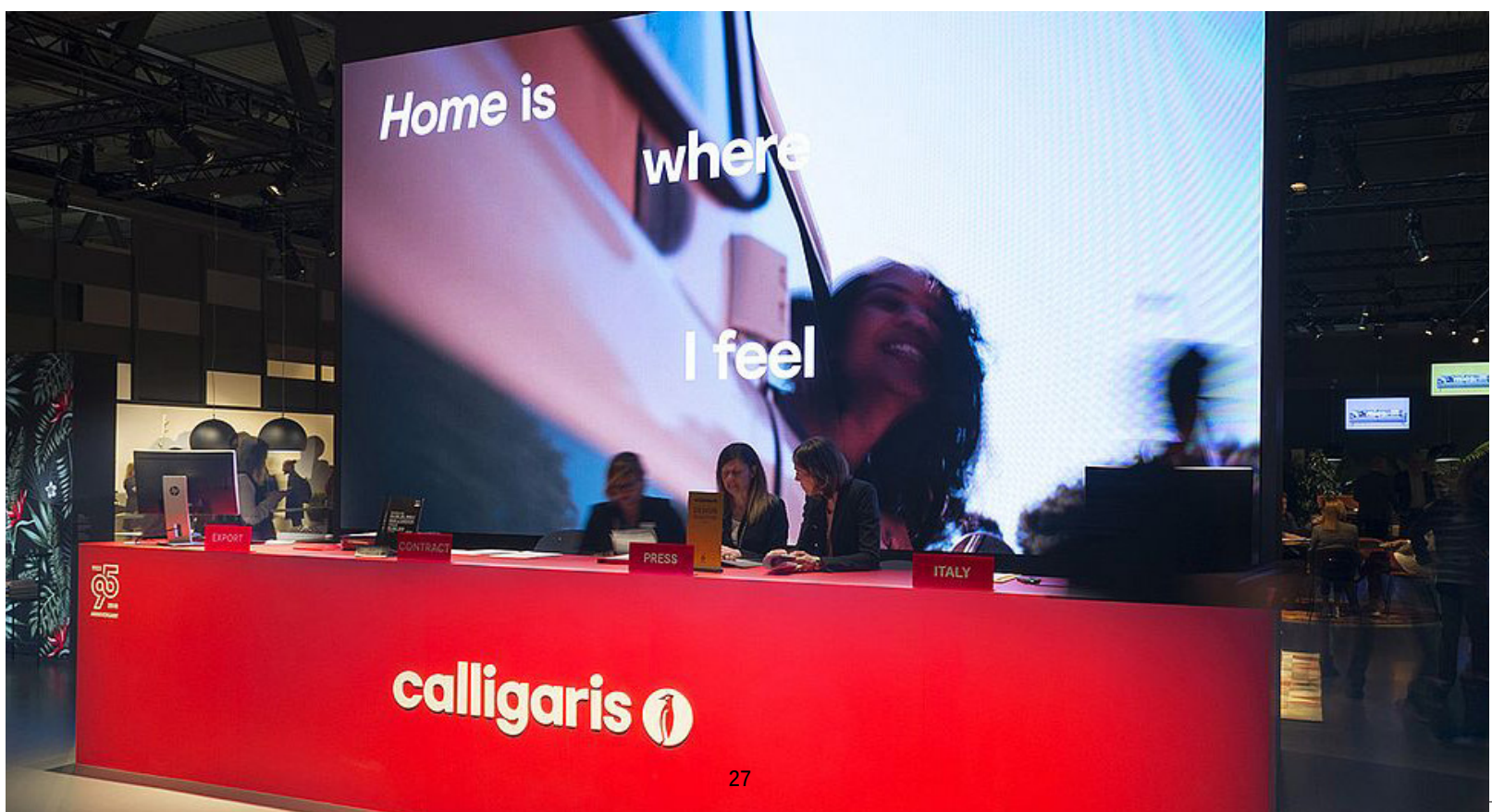
Sites and buildings

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 Calligarises 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.



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
- ✧ Railway lines connects South North and Trans Appennines
- ✧ 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 & 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

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Arch. Roberta Tarini - Marche Region
– Integrated planning – Trade –
Cooperation and Internationalization Unit



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 euros.

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 it 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.

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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Filippo Giabbani

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 & 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

October 2018: will be issued a new regional tender for financing R&D projects.

Success story

1. In April 2018 Gucci (Kering Group) inaugurated the Art-Lab centre in the area of the former Matec in Scandicci, where 900 new employees will work at full capacity
2. In May 2018 Valentino (owned by Mayhoola for Investments) announced the setting up of a new 2,400 square metre factory in Levane, a hamlet of Bucine (Arezzo)
3. 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
4. In July 2018 the Swiss holding Richemont announced a new investment in Tuscany: most of the industrial development and production of bags, wallets, belts and luggage of its fashion brands in Florence. The brands involved in the project are Cartier, Dunhill, Serapian, Purdy and Alaïa, Chloé as well as Montblanc

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
- ✧ Maritime connections: Trieste, Monfalcone and Porto Nogaro commercial ports



- ✧ Interports: Cervignano, 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 & FIGURES

SMART HEALTH CLUSTER

Export: 300-315 mln €

Turnover: 900 mln €

Enterprises: 150

Employees: 5,000

Foreign companies: 27

BIOHIGHTECH INDUSTRY FOCUS

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



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and Michela Masoch



R&D network

Key players in research and innovation: 150 companies (Bio-med and in-vivo diagnostics 30%, in vitro diagnostics 18%, Medical informatics 20%, Innovative therapies 17%, Ambient assisted living 15%; 3 Universities (Trieste, Udine, Sissa); 2 CNR sites; 5 international research institutes (ICGEB-International Centre for Genetic Engineering and Biotechnology, Elettra Sincrotrone, LNCIB (Biotechnologies University Consortium National Laboratory); Fondazione Italiana Fegato (Italian Foundation for Liver); Callerio Foundation (oncologic diseases); Area Science Park; 2 IRCCS - Sanitary research and care Institutes (Burlo Garofolo in Trieste and CRO in Aviano, Pordenone); 2 academic medical center hospitals (Trieste and Udine, both certified by the Joint Commission International); 4 technology and science hubs. 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, biosensors 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 cluster organisation of 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 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.

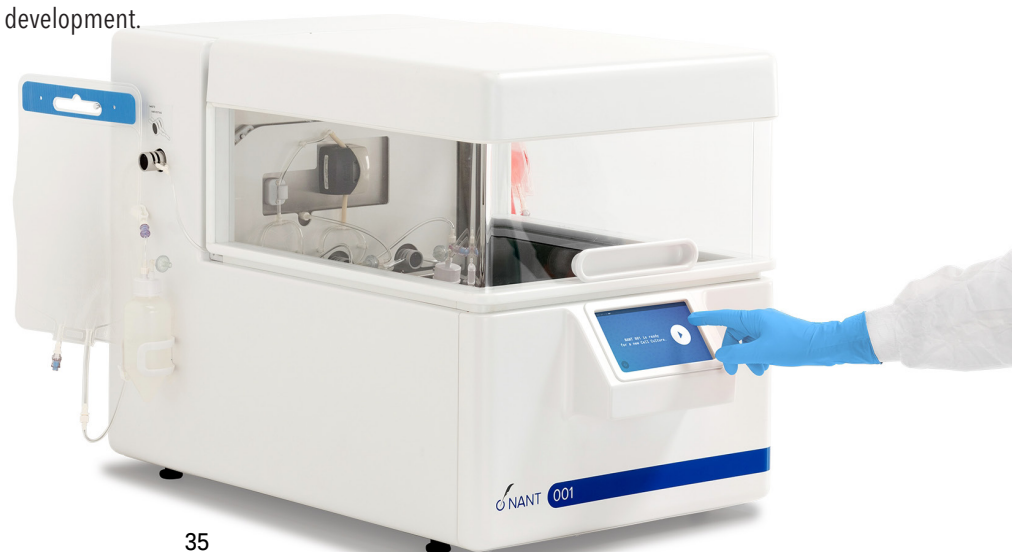
Sites and buildings

Area Science Park - Science and Technology hub
Polo Tecnologico di Pordenone - Science and Technology hub
Consorzio Innova FVG - Science and Technology hub
Friuli Innovazione - Research and Technology Transfer hub
BIC FVG S.r.l. - Enterprises incubator

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 product manufacturing for innovative and regenerative medicine therapies like autologous stem cell transplantation. To do that, it has developed "Good Manufacturing Practice - GMP in a box", medical devices enabling safe, efficacious, standardized and affordable medical treatments by creating a next generation tissue engineering manufacturing capability. Current applications include developing stem cell for the treatment of osteoarthritis as well as bone regeneration for dental /maxillofacial reconstruction. This 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 was fully acquired by NantCell Inc (based in Culver City, California), a subsidiary of NantWorks LLC group, for about 60 million dollars.



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



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Marco Fedato

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 & 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 include 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

«INTRAPRENDO» Incentives for Startups

- ✧ The incentive consists of a zero-interest-rate loan and a non-repayable grant (min €25,000 to max €65,000)
- ✧ The combination of the two can cover from 60% to 65% of the total eligible cost (min €25,000 max €65,000) of the project
- ✧ The intervention is dedicated to:
 - MSMEs active and registered in the Register of Companies for no longer than 24 months, with operating headquarter in Lombardy

- Individual entrepreneurs that have started their own entrepreneurial activity for no longer than 24 months

Thanks also 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.

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-thoraco-vascular and bariatric field of the Istituto Clinico Sant'Am-brogio, to offer patients a great multi-specialized research hospital.

attr**ACT**

Piedmont | LIFE SCIENCES

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.



Contact info

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Federico Zardi

Industrial base

In Italy, Life Sciences - specifically biotechnology, pharmaceuticals and medical devices - represent one of the most promising hi-tech industrial sector with a significant growth potential in the medium to long term. In Piedmont, the network of research centres, multinational companies and SMEs, is a cluster of innovation, education and technology transfer and is the core of a strong, interlinked system active in pharmaceuticals, biotechnology, wellness and health massively supported by converging technologies.

In particular, within the biotechnology field, the technological vocation of Piedmont's R&D is in areas such as cell and molecular technologies, molecular diagnostics and molecular and traditional imaging. The strong skills existing in Piedmont in sectors such as ICT, electronics and nanotechnologies (that are considered converging technologies) have favoured the development of significant results and expertise in bioinformatics, diagnostics, data sciences and biomedical equipment, micro and nanotechnologies, strongly fostering the innovation ecosystem in interdisciplinary fields.

Among Piedmont's leading key players: Advanced Accelerator Applications Srl (Aaa), Ephoran, Huvepharma, Ab Sciex, Agilent Technologies, Bracco Imaging, Merck Serono, Sico (Teva), Diasorin, Delpharm, Ucb Pharma, Sorin Biomedical, Olon, L'Oreal.

FACTS & FIGURES

LIFE SCIENCES CLUSTER

More than 400 companies operating in the life sciences field

Over 250 companies specifically in the healthcare and medtech supply chain

2nd Italian region with 57 companies in the biotechnology field

About 10k employees in 21 multinationals

21 multinationals in the life sciences field

3 Public Universities

1 Science & technology park dedicated to biotechnology: Bioindustry Park Silvano Fumero

1 Innovation Hub for biotechnology: bioPmed

820 research groups of which 60% in healthcare and medtech fields scientific production

Privileged position:

Piedmont is at the centre of one of the most dynamic biotech areas in Europe. Its proximity to other highly developed European regions, such as Lombardy in Italy, Rhône Alpes in France and Geneva-Lausanne in Switzerland is yet another plus for widespread, synergic and shared development in the life sciences and health sectors.



R&D network

Recent data confirm that Piedmont 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, 7 Innovation Hubs, 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 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

Innovation hub – BIOPMED is the Innovation Hub for Biotechnology dedicated to healthcare related products and services. It was established in 2009 by Regione Piemonte and has since grown into a community of about 400 members including companies, research centres, universities and foundations.

25 m€ of regional co-funding collected; over 100 training events organized; over 20 strategic agreements for international cooperation; 16 European projects activated; 60 R&D projects completed; 3 major international B2B events organized: EuroMedTech, BioEurope and Meet in Italy for Life Science.

Piemonte Health & Wellness: is a special project promoted by the Regione Piemonte, financed by ERDF – European Regional Development Fund and managed by the Piemonte Agency.

The project provides international players with a preferential channel to meet and develop business with over 100 top class selected local companies, active in the medical, wellness and cosmetics sectors. Assistance is given free of charge: from the identification of international players' outsourcing needs to the arrangement of B2B meetings with the most suitable partners and visits to local companies.

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

For more information: lifesciences@centroestero.org, www.centroestero.org/en/key-sectors/scienze-della-vita.html

Business opportunity

The new Teaching and Research Hospital is a project of strategic international relevance for the life sciences and health sectors that will further cast Piedmont on the global community scene.

The project foresees high quality care and teaching integrated with the healthcare system. There will be 4 functional centres, all closely interconnected and served by private parking, underground and a multi-store car park:

1. Healthcare and Clinical Training Centre: an area of 127,000 m², of which 5,000 m² are dedicated to clinical training, and a total capacity of 1,040 beds
2. Research centre: an area of 10,000 m² designed for about 1,000 people and shared by teachers, assistants, doctoral students and auxiliary staff
3. Teaching centre: an area of 31,000 m² designated for one-cycle master degree programs, three-year degree courses and specialist degree courses in medicine or health professions for a total of 5,000 students
4. Residential centre: an area of 8,000 m² offering short-term accommodation for temporary guests working or involved in activities in one of the centres (190 places) and for the discharged patients that still need temporary low-intensity care (30 places)

Trentino | HEALTHCARE

Infrastructures and connections

- ✧ Airports: 45 minutes from Verona airport (Catullo)
- ✧ Main Highway: A22 Brennero-Mo-dena
- ✧ 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 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, Microbion, Wondergene.

R&D network

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

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
- ✧ Computational models

FACTS & FIGURES

HEALTHCARE CLUSTER

- ✧ Export: 106 million euros
- ✧ 40 companies
- ✧ 5th Region for turnover generated
- ✧ 20 million € invested in R&D by the Public Sector
- ✧ 1.5 million € for R&D on digital Healthcare

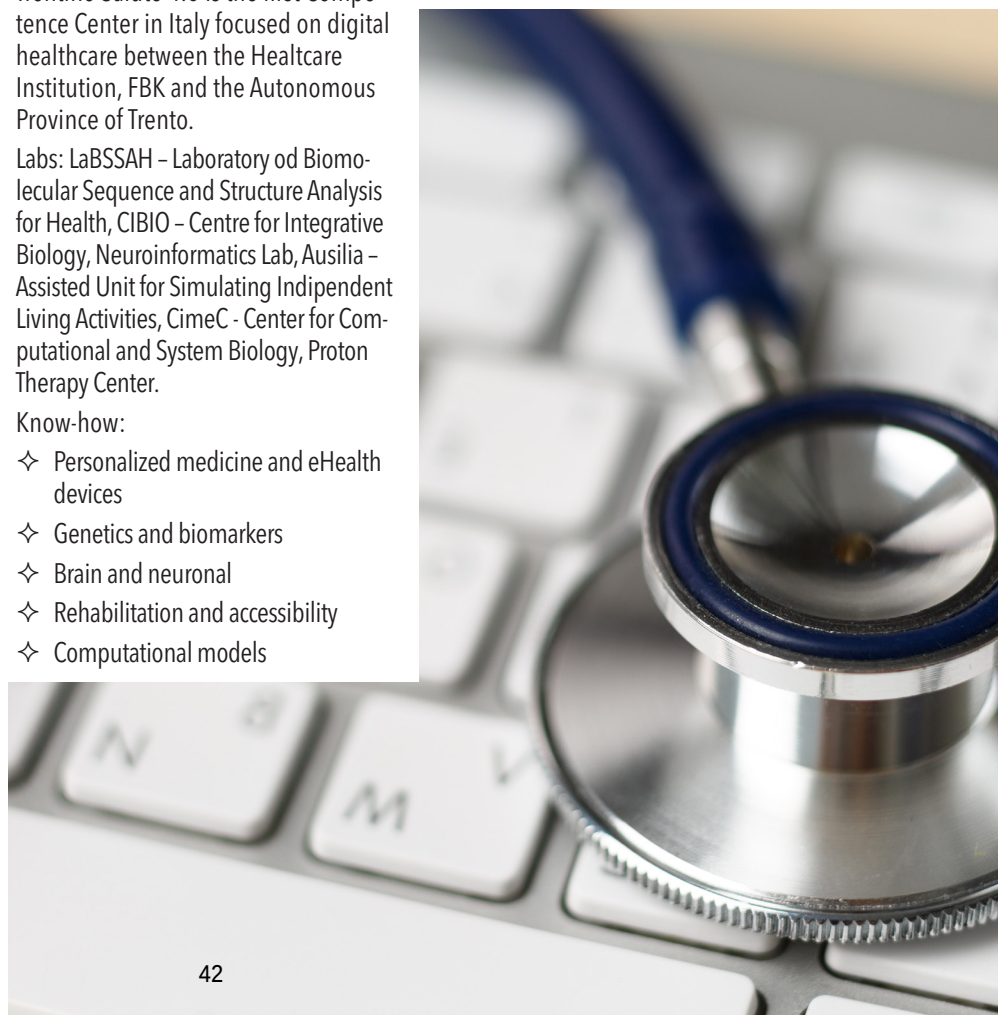
400 researchers, 200 employees

Foreign companies:

- ✧ Novartis-Sandoz
- ✧ OPT SurgiSystems

Specialization areas:

- ✧ eHealth
- ✧ Medical devices
- ✧ Rehabilitation
- ✧ Biology



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 €

Sites and buildings

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

Dedicated spaces for biotech industries at CIBIO and FBK.

Formulas: pre-incubation (Start Ups), incubation (SME), accelerator programs (BIO4 Dream).

Success story

Eurocoating was founded in 1990 by the company Centro Sviluppo Materiali to follow up on the research of new materials undertaken at the Pergine Valsugana site. In 1998 it was acquired by Biocoating, active in the biomedical field, and began the production of coatings and surface treatments on third party medical devices. Coatings are mainly applied to orthopedic prostheses and dental implants, using plasma spray technologies (APS and VPS), both in titanium and in hydroxyapatite.

Established in the Pergine Valsugana Business Innovation Center since 2006, and specialized in the 3D printing technology (additive manufacturing) of titanium metal components, Eurocoating started the research activity in this sector well in advance of the current explosion of the market. Thanks to the advantage gained, the company is now industry leader and it is considered one of the biggest multinational companies globally, to support the largest production of innovative prosthetics that has ever been realized with this technology.

Eurocoating has requested and obtained new additional spaces to support the current business development phase and to continue the research activities necessary to maintain the competitive advantage gained. It will therefore have 1,340 square meters available, compared to the current 560 square meters. In 2015, Eurocoating's turnover amounted to 21 million euros and at the end of 2017 raised up to 25 million euros. Thanks to the agreement signed with Trentino Sviluppo for the expansion in the Pergine BIC, the company will increase from the current 127 employees to 150 workers, guaranteed until 2019.

Business opportunity

- ✧ Trentino Sviluppo, in-house company of the local Government, has 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
- ✧ Significant local incentives, efficient and 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
- ✧ Provide Equity through Trentino Invest, the Trentino public/private investment company



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)



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 & 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 LifeScience in Tuscany

1. Pharma (Advanced Therapy - Antibodies - Blood Factors - Growth Factors - Cytokines - Drug Development - Immunotherapies - Pharma production - Antitumor compounds - Development of anti-parasitic and antiviral agents - Orphan diseases)
2. Software (Bioinformatics - Communication systems - eHealth - Telemedicine - Telematics - Telemetry - Image Analysis - IT infrastructures - Mobile App)
3. Biotechnology (Genomic search for new diagnostics - Protein atom depth analysis)

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Filippo Giabbani



R&D network

- 3 major Universities (Florence, Siena and Pisa)
- 2 Superior Graduate School (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

October 2018: will be issued a new regional public grant for financing R&D projects.

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

1. 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
2. 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
3. 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 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.

Calabria | METALWORKING

Infrastructures and connections

- ✧ 3 International airports (Lamezia Terme, Reggio Calabria e Crotone)
- ✧ 4 commercial ports (Gioia Tauro, Corigliano Calabro, Vibo Valentia and Crotone)
- ✧ Main Highways: A2 - Mediterranean Motorway (Salerno-RC)
- ✧ 3:00 h from Rome to Casablanca (Morocco)
- ✧ 2:00 h from Rome to Algeri (Algeria)
- ✧ 1:20 h from Rome to Tunisi (Tunisia)
- ✧ 2:00 h from Rome to Atene (Greece)



Industrial base

Industrial specialization:

- ✧ metalworking and production of metal objects
- ✧ production of machinery and plants
- ✧ production of metallic carpentry

Main companies:

Companies operating inside CORAP industrial areas (Regional Consortium for the Development of Production Activities of the Calabria Region)

- ✧ unit of Cosenza: Construit
- ✧ unit of Catanzaro: Mantella, Isal, Gruppo Mercuri
- ✧ unit of Vibo Valentia: Itacal, G.E., Metalsud
- ✧ unit of Reggio Calabria: De Masi Costruzioni, RCS Terminal Container/ General Gas
- ✧ unit of Crotone: Metal Carpenteria

FACTS & FIGURES

METAL WORKING SECTOR

COMPANIES

- ✧ 30 companies
- ✧ 1 industrial group

Potential for 100 companies / 2,000 employees

FOREIGN COMPANIES:

G.E.NUOVO PIGNONE - HITACHI

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

R&D network

- ✧ University of Calabria of Cosenza - Faculty of engineering
- ✧ Mediterranean University of Reggio Calabria - Faculty of Engineering

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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 1.1.5 – POR Calabria FESR 2014-2020

Sites and buildings

CORAP unit of Reggio Calabria

- ✧ Industrial Area of Gioia Tauro – Rosarno -San Ferdinando (117.23 ha available)
- ✧ Industrial Area of Campo Calabro - Reggio Calabria - Villa San Giovanni (12.9 ha available)

CORAP unit of Vibo Valentia

- ✧ Industrial Area of Porto Salvo (10.7 ha available)
- ✧ Industrial Area of Aeroporto (0.5 ha available)

CORAP unit of Crotone

- ✧ Industrial Area of Crotone (200 ha available)

CORAP unit of Cosenza

- ✧ Industrial Area of Schiavonea of Corigliano Calabro (162 ha available)
- ✧ Industrial Area of Piano Lago of Mangone e Figline Vegliaturo (33 ha available)
- ✧ Industrial Area of Follone of San Marco Argentano (58.6 ha available)
- ✧ Industrial Area of Sant'Irene of Rossano (6.1 ha available)
- ✧ Industrial Area of Bisignano (85.5 ha available)
- ✧ Industrial Area of Cammarata of Castrovillari (53.9 ha available)
- ✧ Industrial Area of Rocca Imperiale (8.29 ha available)
- ✧ Industrial Area of Montalto Uffugo (7 ha available)

CORAP unit of Catanzaro

- ✧ Industrial Area of Lamezia (342.5 ha available)

Corporate Structure is due to the necessity to have a flexible and strongly willing structure, where the request of manpower can be satisfied depending on the workload.

Thanks to the consolidated experience and highly qualified skills of its members, ITACAL Srl is able to manage and to coordinate all the operative phase of a job: designing, manufacturing, site assembly, site assistance and maintenance. An effective "turnkey" service able to guarantee to the Client efficient implementation, competence and reliability.

ITACAL Srl, thanks to flexibility and dynamism of its staff, is able to tackle complex situation in the refinery and industrial plants.

ITACAL core business is focused on the manufacturing of heavy and medium-heavy carpentry, piping, boilers and, in general, parts of industrial plant for chemical, petrochemical and environmental fields.

The Company aims also to supply small turnkey plants in the above indicated fields.

The efficient internal organization is supported by advanced information tools. Thanks to TechEngineering Srl support, ITACAL can use an advanced system in Cloud Computing that allows to organize a team working on a project with the possibility to relocate internal resources outside the company headquarters, allowing the Customer a continuous monitoring of progress of the project.

Business opportunity

CORAP (the Regional Consortium for the Development of Production Activities of the Calabria Region) develops and manages 16 industrial agglomerations in the territory of the Calabria Region in the Provinces of Cosenza, Crotone, Catanzaro, Vibo Valentia and Reggio Calabria, for a total extension of approximately 5,250 hectares of industrial area, with 5 water treatment platforms for a total of 580,000 equivalents inhabitants served. About 1,000 companies in the petrochemicals, metal carpentry, agro-industry and logistics services are part of CORAP.

Success story

ITACAL Srl was established on 2015 by an highly qualified staff with different and complementary skills operating in the design, construction and installation fields of industrial plants.

ITACAL members are: highly qualified technicians with significant experience in the construction and installation of complex plants in Petrochemical and Environmental field; the company TechEngineering Srl specialized in designing and engineering of high technology plants in various industrial fields; people having an high professional profile operating in national and international market since many years.

ITACAL Srl is specialized in the designing, construction and assembly of high technology plants in various industrial fields.

The idea of a Company where the employees are part of the

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 (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 coasts



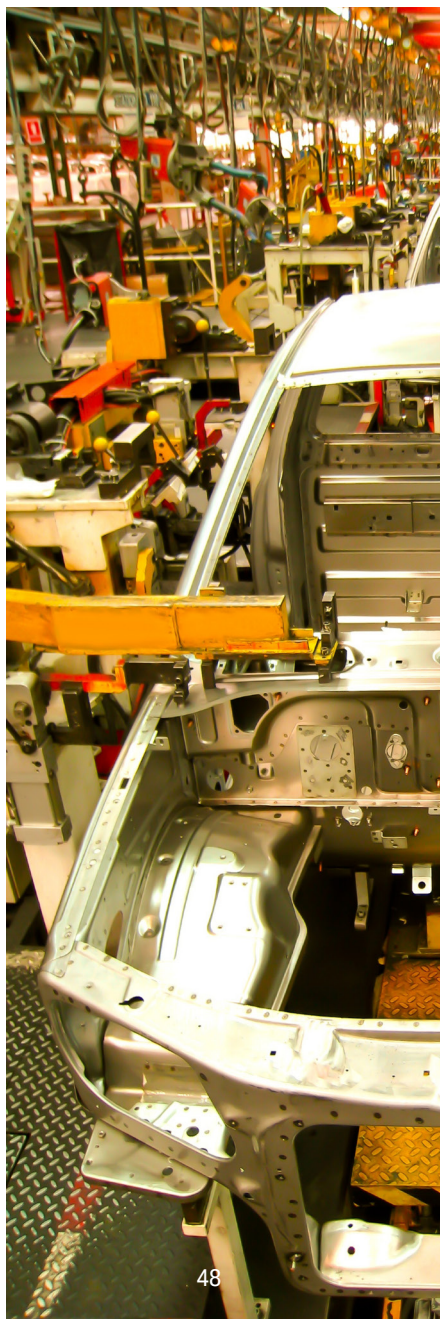
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Paola Maccani (head); Sabino Alvino

- ✧ 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)



FACTS & 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: 33.8 billion Euro

- 15.7% of the national cluster
- 56.4% of the total regional export
- regional exports of the cluster are twice the imports

(2017, Istat - Coeweb)

TURNOVER

Over 70 billion euro (Istat - 2015)

MECHATRONICS AND AUTOMOTIVE in S3 SMART SPECIALIZATION STRATEGY

1,096 projects financed by regional policies from 2014 to the beginning of 2018, providing 214 million euro of incentives (on 684 million of total investments), involving 1,230 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, Eon Reality, Gea, Guillin, Lovol Arbos, Manitou, Segula, Siemens, TetraPak, Toyota, Volkswagen

INTERNATIONAL TRADE FAIRS

At least 19 exhibitions related to the cluster (e.g. EIMA, Autoropromotec, MECSPE, Cibus Tec, MotorShow)

Industrial base

- ✧ Emilia-Romagna has a strong manufacturing sector (25.6% of total employees, while Italian average is 19.9% – Istat 2017) 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 R&D 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, Belco)
- 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)

R&D network

- ✧ Emilia-Romagna is one of the Italian regions with the highest proportion of R&D personnel per 1,000 inhabitants (7.2% in 2015 while Italian average is 4.3%). There are 31,919 employees in R&D sectors, while total investment in R&D amounted to

2,682 million Euro in 2015

- ✧ 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 82 Industrial Research Laboratories and 14 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

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).

- ✧ 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 also financial support for the following types of action: R&D Research & Development, 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. A Call can focus on specific thematic areas (e.g.: industry 4.0, Big Data). The key sectors identified by the regional S3 Strategy (Mechatronics and Automotive, Agro-food, Construction, Health and Wellbeing, Culture and Creativity, ICT, Logistics and Knowledge Intensive services) are a priority for the selection of the investment.

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 business parks (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. Technopoles are a network of infrastructures hosting and organizing activities and services for industrial research, experimental development and technology transfer.

Success story

EON Reality Italia (www.eonreality.com/offices/bologna/) is part of EON Reality, Inc., global company headquartered in USA. EON's main economic activity is development of Augmented and Virtual Reality technologies for Industry & Education, with products including: AVR Platform/Software/Display systems/ Development services.

The company is working with more than 450 industry customers, more than 400 academic institutions and 55 different governments

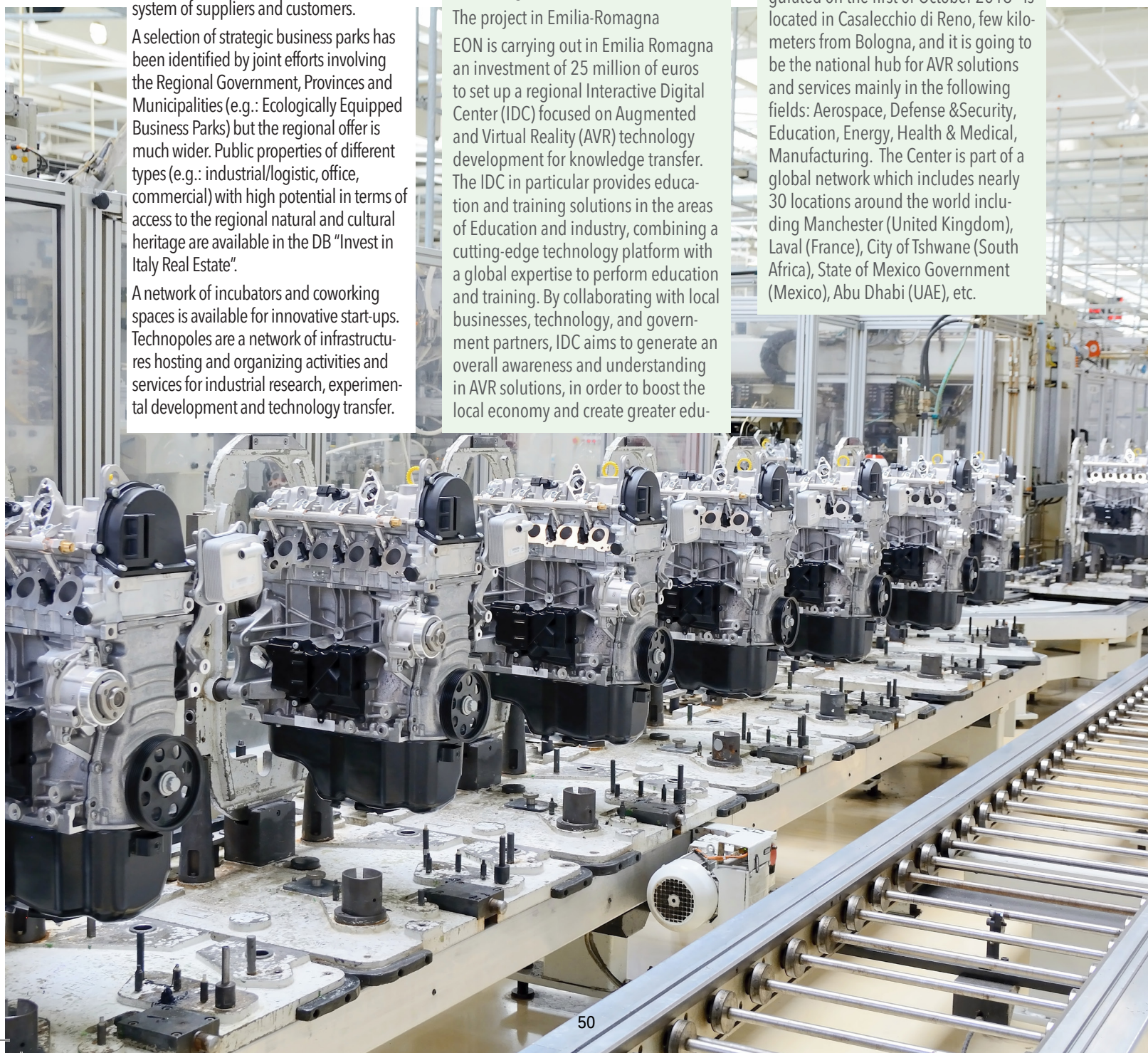
The project in Emilia-Romagna

EON is carrying out in Emilia Romagna an investment of 25 million of euros to set up a regional Interactive Digital Center (IDC) focused on Augmented and Virtual Reality (AVR) technology development for knowledge transfer. The IDC in particular provides education and training solutions in the areas of Education and industry, combining a cutting-edge technology platform with a global expertise to perform education and training. By collaborating with local businesses, technology, and government partners, IDC aims to generate an overall awareness and understanding in AVR solutions, in order to boost the local economy and create greater edu-

cational value. In fact, the center will create 160 new direct jobs and several thousands of indirect jobs within the next four years.

The offer of the center will include: Technology transfer (AVR digital content factory); State of the art AVR solutions; High Educational System platform (School with free access for the students -no tuition fee); Local IP development; Fast-track knowledge transfer to address the technology disruptive issues.

The investment - expected to be inaugurated on the first of October 2018 - is located in Casalecchio di Reno, few kilometers from Bologna, and it is going to be the national hub for AVR solutions and services mainly in the following fields: Aerospace, Defense & Security, Education, Energy, Health & Medical, Manufacturing. The Center is part of a global network which includes nearly 30 locations around the world including Manchester (United Kingdom), Laval (France), City of Tshwane (South Africa), State of Mexico Government (Mexico), Abu Dhabi (UAE), etc.



Business opportunity

Offer of spaces in specialized "Technopoles" structures, devoted to research and development.

The Technopoles are a network of 10 infrastructures located in 20 locations throughout the Emilia-Romagna region, hosting and organizing activities and services for industrial research, experimental development and technology transfer. The Technopoles host 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.

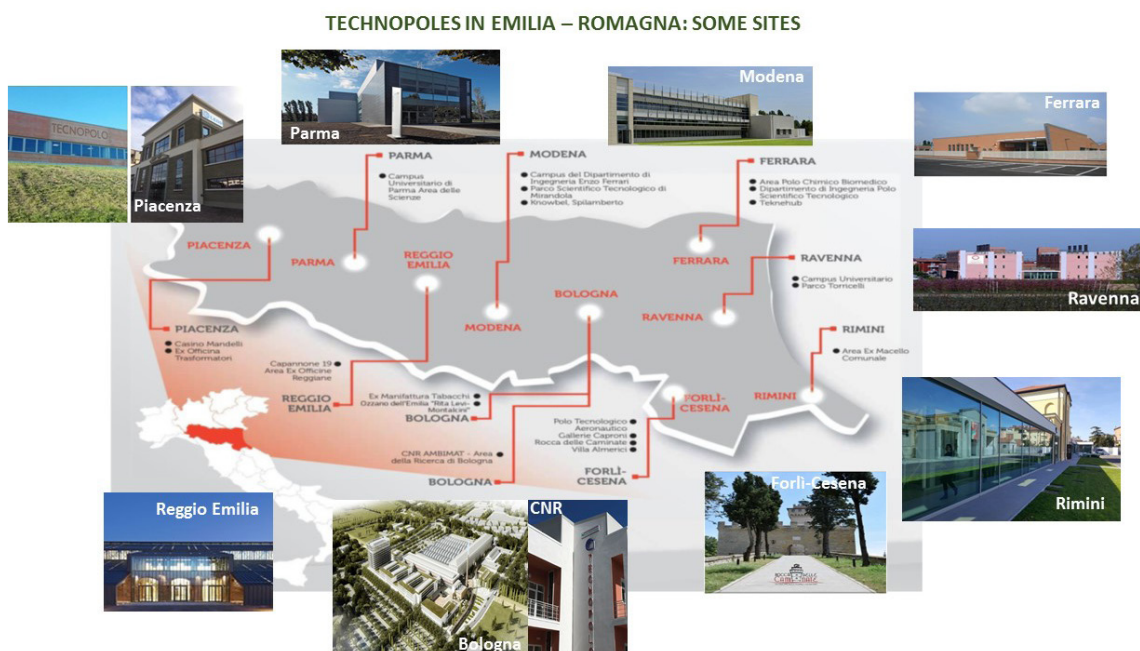
The technopoles are located in particularly strategic locations with respect to the main urban and industrial nodes. The areas inside the buildings are very different in size and layout and can be adapted to the needs of companies and/or laboratories.

Each Technopole has a website and a management providing specific information to interested investors, such as:

1. Reception and first orientation
2. Need analysis
3. Organization of in-depth meetings
4. Information and support regarding contracts and intellectual property
5. Information and support on financial instruments to support innovation
6. Hospitality events and animation of the territory
7. Other services

Bi-Rex (Big Data Research Excellence) - The former Manifattura Tabacchi of Bologna is turning into a Big data Technopole aimed at creating a critical mass of research centers and support innovative companies. The area is part of the Technopole network and will include ECMWF (with the European data centre for weather forecasts), Cineca, INFN and many others.

The web address www.retealtatecnologia.it/en/technopoles is useful for further information and direct contacts with the management of the areas.



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, 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

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, Ferriere Nord SpA, Officine Tecnosider Srl.

FACTS & 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)

METALWORKING INDUSTRY FOCUS

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



Contact info:

Central Directorate for productive activities and tourism
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investinfvg@regione.fvg.it

T: 040/3772448; 040/3772423

Responsible: Central Director, Antonio Bravo

Contact info: Rodolfo Martina and Michela Masoch

R&D network

The main R&D players are: Area Science Park, Diex, LAMA, Lean Experience Factory, Scientific and Technological Parks: Parco Scientifico e Tecnologico "L. Danieli", Udine, Polo Tecnologico "A. Galvani", Pordenone, Consorzio Innova FVG, BIC Incubatori; Sissa - International School for Advanced Studies; University of Trieste - Department of economy, management and engineering; University of Udine - Department of engineering and architecture.



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

1. 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.
 - LISERT: the area is located in Monfalcone, 25 km from Trieste and 130 km from Venice; it is near Monfalcone commercial port, 4 kilometers from Highway A4 Venezia-Trieste 3 km from the railway station and 7.5 km from Trieste Airport. Railway connections between the commercial port and the railway station are available. The whole area is served by local public transportation.
2. Carnia Industrial Park consortium, Amaro industrial area: lots 42,648 sq. m.

Success story

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, cutterheads & 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).

Nidec Asi spa, electric machinery production, via Marconi n.1, area Schiavetti, Monfalcone.

Nidec ASI was established in December 2012 as a result of Nidec Corporation's acquisition of Ansaldo Sistemi Industriali S.p.A. The company is renowned for its engineered-to-order electric motor and drive systems, industrial automation and power quality solutions. It is also a leading player in renewable energy including Battery Energy Storage. Planning and production are not continuous, yet "custom made" and every characteristic of the machine is established in advance with the clients.

One of the last commissions they have had, is the 15 million euro order to replace the 36 motors of a Russian oil pipeline old and obsolete pumping plants.

Emilab is a testing laboratory and certification body, specialising in tests and analysis in the fields of electromagnetic compatibility, electrical, environmental and vibration testing. It mainly works in the automotive, transport and industrial sectors. Emilab s.r.l. was founded in 1995, in 2012 opened its current 1300 sq. m. facilities in Amaro (Udine, Italy) and as of 2017, Emilab forms part of the Applus+ group. Established in Barcelona, Applus is one of the world's leading companies in inspection, testing and certification. Applus+ Emilab are part of the Applus+ Laboratories division, whose strategic plan carried out also with this acquisition is to increase its international presence in high-technological value sectors. With this integration, the division increases its geographical coverage of electromagnetic compatibility, electrical safety and environmental testing services. The combined capabilities of both companies will enable the improvement and expansion of testing and certification services for manufacturers of electrical and electronic products. Applus+ also strengthens its position as a testing laboratory for automotive components and completes its range of accreditations in this sector.

Business opportunity

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 the Monfalcone area. CSIM is in charge of planning the territorial development of the industrial areas of competence, their infrastructures and their management, based on the Piano Territoriale Infraregionale (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 and in the municipality of Staranzano is presently of 40,00 euros per sq. m. (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)
 - 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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Marco Fedato

- ✧ 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 & 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)
 - 14 universities/research centers
 - 9 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:

«ALVIA» 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

- ✧ The incentive consists of a zero-interest-rate loan and a non-repayable grant (min €25,000 to max €65,000)
- ✧ The combination of the two can cover from 60% to 65% of the total eligible cost (min €25,000 max €65,000) of the project
- ✧ The intervention is dedicated to:
 - MSMEs active and registered in the Register of Companies for no longer than 24 months, with operating headquarter in Lombardy
 - Individual entrepreneurs that have started their own entrepreneurial activity for no longer than 24 months

Thanks also 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.

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 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.

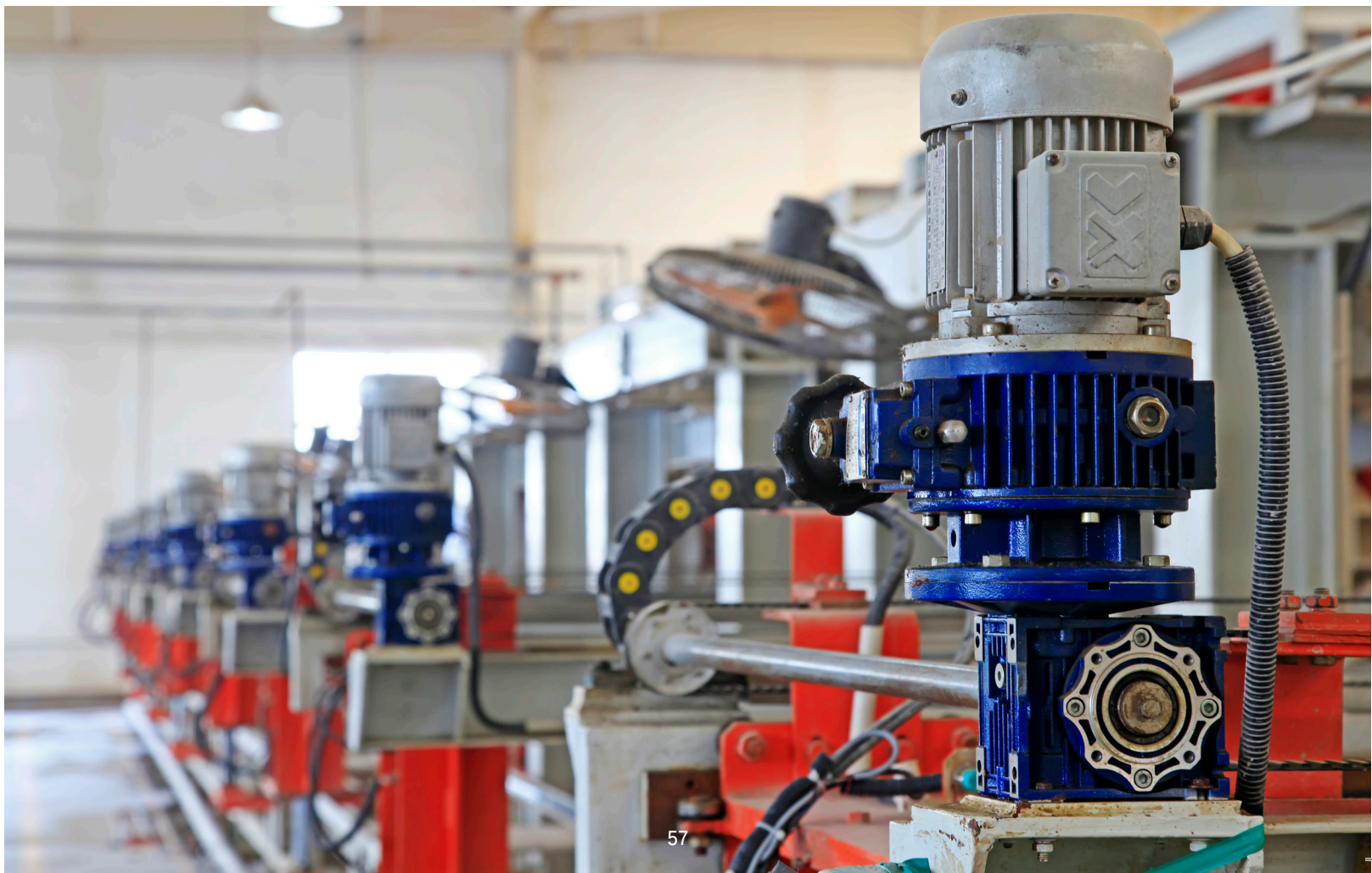
AttrACT sees the direct engagement of the Lombardy Municipalities involved in the Program that are called to identify local investment opportunities (greenfield and brownfield) in their area, made it available to investors, and simultaneously made commitments to simplify administrative processes, offer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

attrACT



Lombardy | MECHATRONICS & ROBOTICS

Infrastructures and connections

- ✧ 573 km of highways
- ✧ 900 km of national roads
- ✧ 11,000 km of provincial roads
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Marco Fedato

- 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 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 & 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 Technologies 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

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

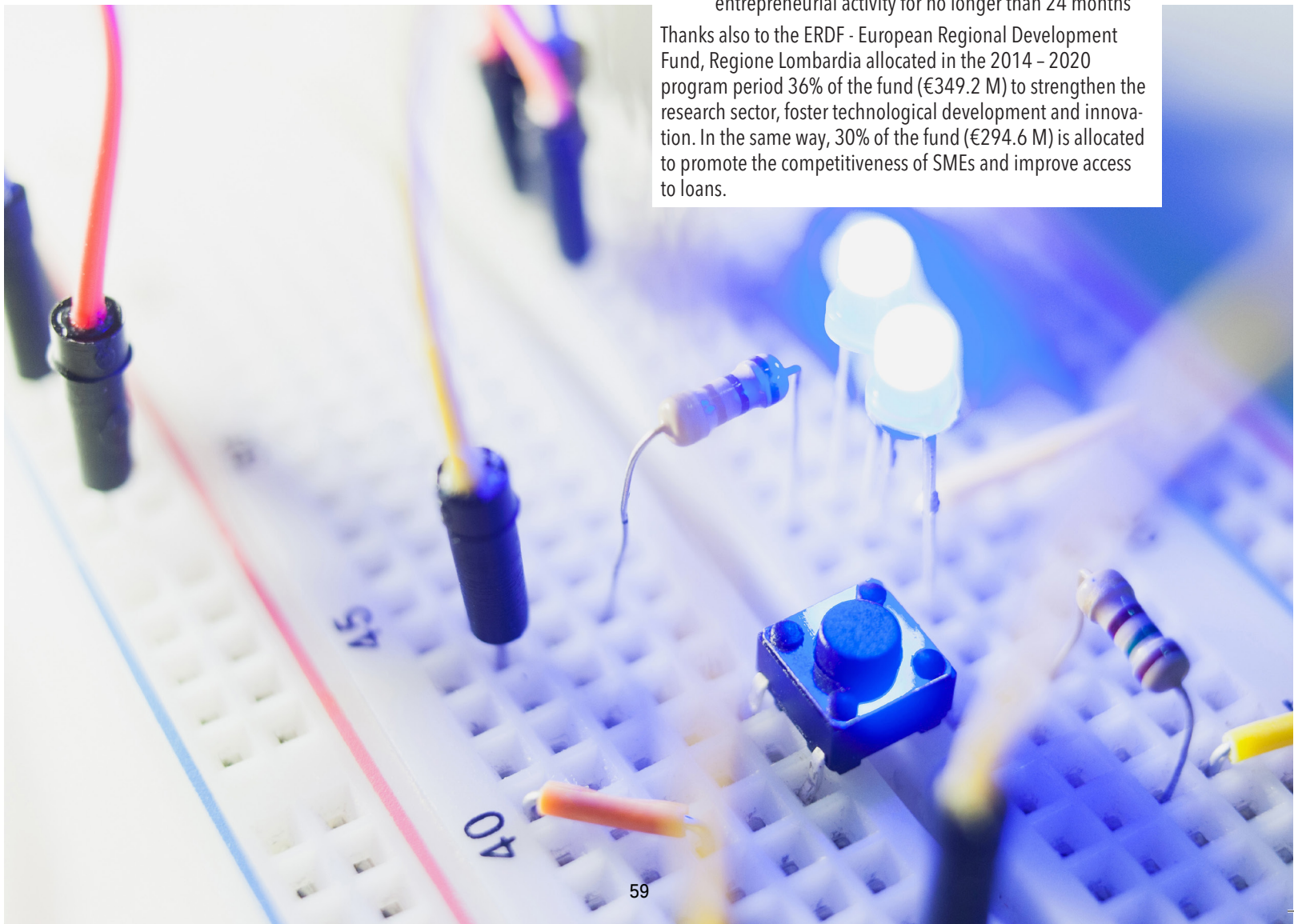
«AL VIA» Corporate Investments

- ✧ 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

- ✧ The incentive consists of a zero-interest-rate loan and a non-repayable grant (min €25,000 to max €65,000)
- ✧ The combination of the two can cover from 60% to 65% of the total eligible cost (min €25,000 max €65,000) of the project
- ✧ The intervention is dedicated to:
 - MSMEs active and registered in the Register of Companies for no longer than 24 months, with operating headquarter in Lombardy
 - Individual entrepreneurs that have started their own entrepreneurial activity for no longer than 24 months

Thanks also 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.



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

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 technology and make the transition from traditional technology platforms to the IT systems of the future.

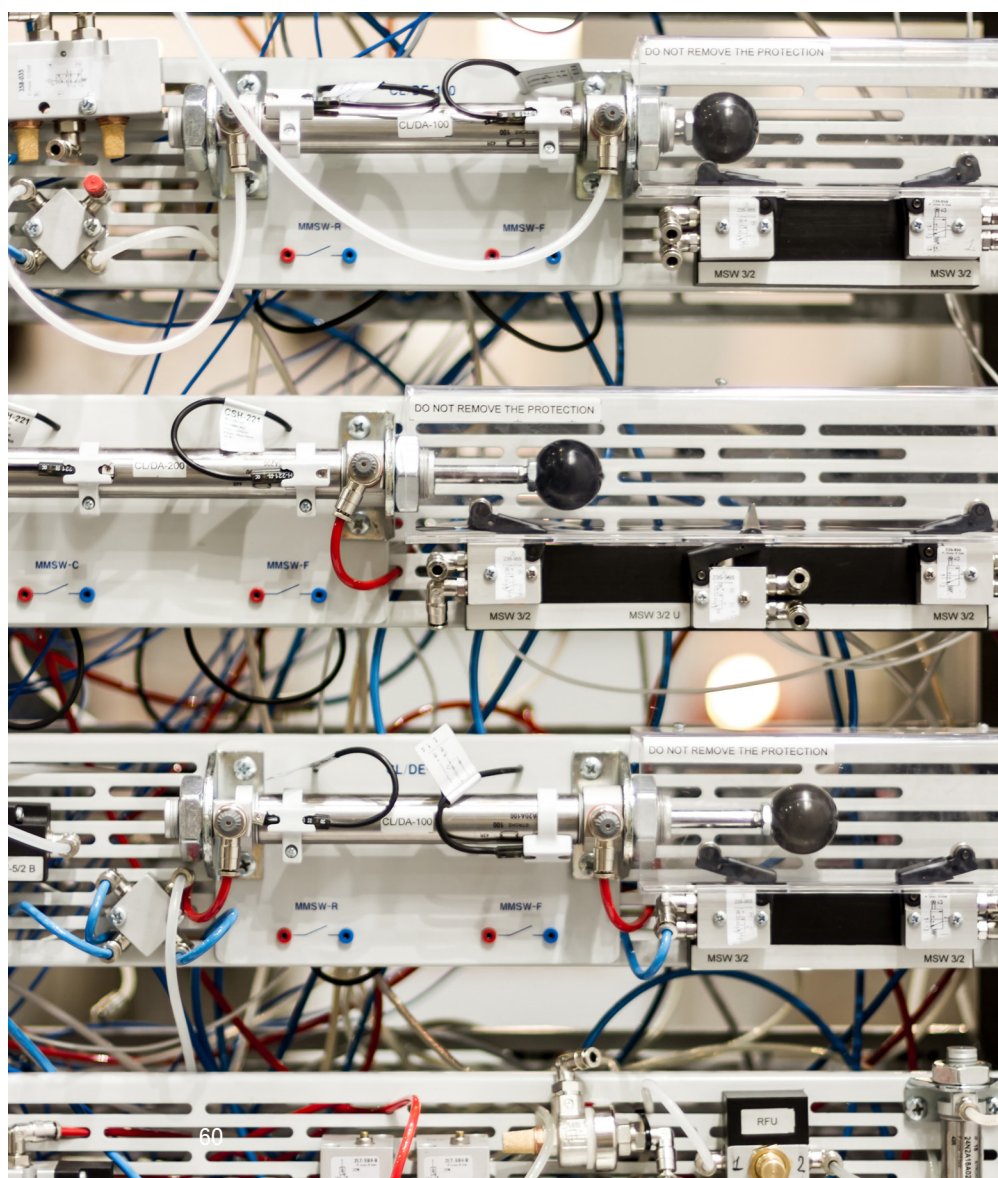
Hewlett Packard Enterprise Italia is based near Milan (Cernusco sul Naviglio) and in Rome. With its experience for over 50 years in Italy the company focus on 4 key pillars:

- ✧ 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

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.

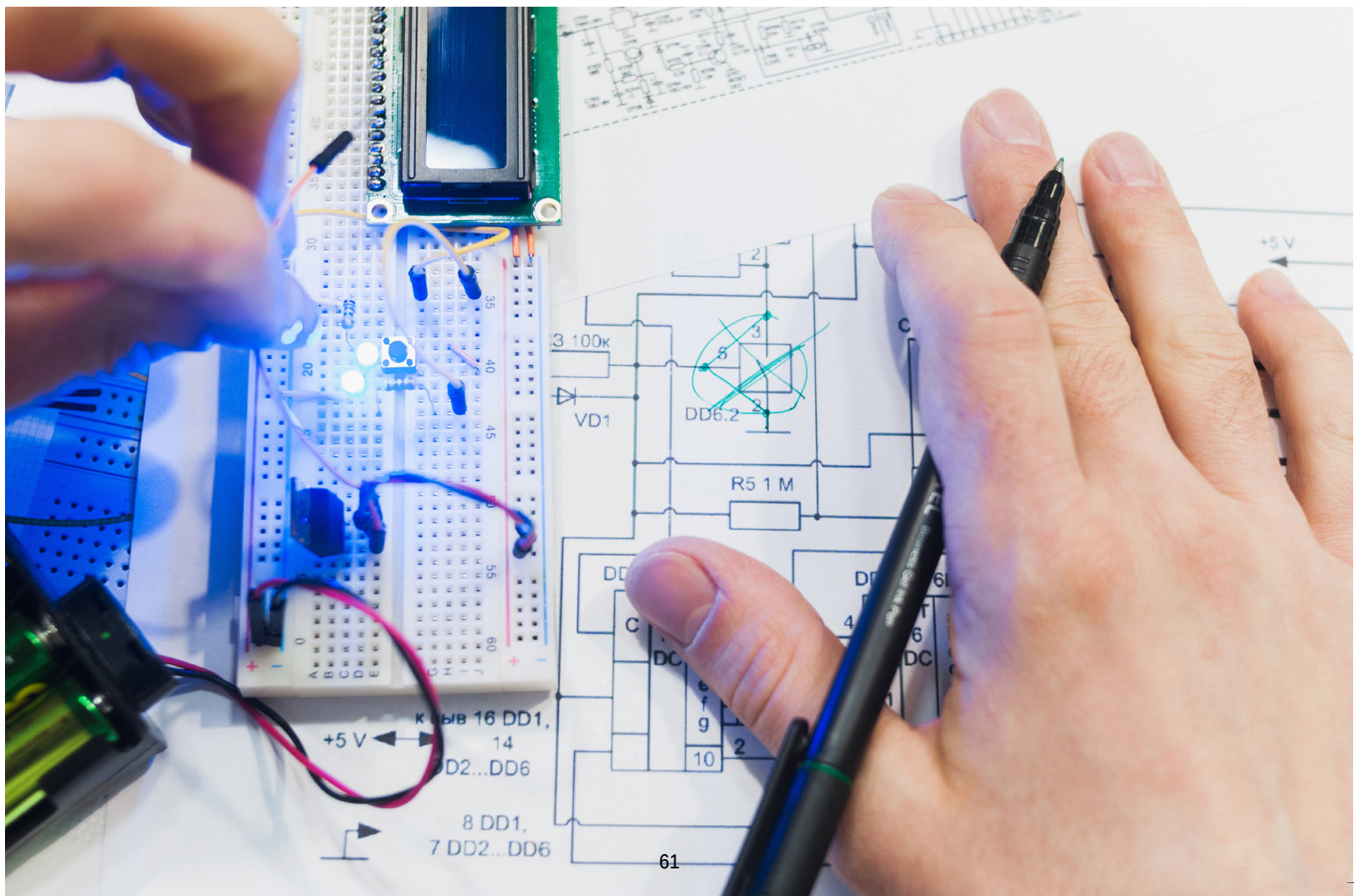
AttrACT sees the direct engagement of the Lombardy Municipalities involved in the Program that are called to identify local investment opportunities (greenfield and brownfield) in their area, made it available to investors, and simultaneously made commitments to simplify administrative processes, offer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

attrACT



Trentino | MECHATRONICS

Infrastructures and connections

- ✧ Airports: 45 minutes from Verona airport (Catullo)
- ✧ Main Highway: A22 Brennero-Mo-
dena
- ✧ 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

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 & FIGURES

MECHATRONIC SECTOR

- ✧ 300 companies
- ✧ 11,000 employees

Polo Meccatronica, a dedicated incu- bator/hub with:

- ✧ 35 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 de-
dicated to pneumatic, vibrations, stress
analysis, corrosion and friction.

Know-how:

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

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Francesca Azzolini

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: 80,000 sqm production facilities, 17,000 sqm customizable production spaces.

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.

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

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.



Trentino | SPORT TECH

Infrastructures and connections

- ✧ Airports: 45 minutes from Verona airport (Catullo)
- ✧ Main Highway: A22 Brennero-Mo-dena
- ✧ 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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Francesca Azzolini

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), Emicon-trol (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 & FIGURES

Trentino is an important hub for the sports market. The sport economy in Trentino has a value of around 1.07 bil-lion 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



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 moleculars
- ✧ 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 Demaclenکو 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



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, Pordenone and 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



Contact info:

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investinfvg@regione.fvg.it

T: 040/3772448; 040/3772423

Responsible: Central Director,
Antonio Bravo
 Contact info: Rodolfo Martina
and Michela Masoch

FACTS & FIGURES

MARE FVG CLUSTER

Export: 995.3 mln €

Enterprises: 1,350

Employees: 28,200

Foreign enterprises: 67

INDUSTRY FOCUS

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

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, also marine protection activities and marine robotics are sectors in rapid expansion. Fishery and aquaculture in FVG have also a long tradition even if mainly dedicated to local consumption of products.



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. 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 the cluster management organisation of the maritime cluster of the Region Friuli Venezia Giulia. 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 FVG Region 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)
 - 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)



Contact info

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Marco Fedato

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 tran-

missions 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 & 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 2th 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° Italian region as regards the number of pleasure boating companies situated in the territory and 2° in terms of employees working for them
- ✧ Presence of Lombardy Mobility Cluster, that includes:
 - 50 companies (33 SMEs, 20 Large enterprises)
 - 6 universities/research centres
 - 6 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 di Milano (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 di Milano 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 components and base materials), PIRELLI LABS, which represents the centre of technological excellence of the Pirelli Group

Incentives and funding

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 - 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. Vodafone 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.

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Commitments can vary according to the Municipality:

- ✧ Simplification of administrative processes such as:
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- ✧ 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.

attrACT



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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Federico Zardi

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 & FIGURES

36% of Italian automotive components industry is in Piedmont

55% of Italian automotive E&D companies is in Piedmont

82% of companies export abroad

68% of companies invest in R&D

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, Bio-economics, Aerospace, Automotive; supporting industrialisa-

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

Automotive Platform-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



Calabria | GREEN INDUSTRY

Infrastructures and connections

- ✧ 3 International airports (Lamezia Terme, Reggio Calabria e Crotone)
- ✧ 4 commercial ports (Gioia Tauro, Corigliano Calabro, Vibo Valentia and Crotone)
- ✧ Main Highways: A2 - Mediterranean Motorway (Salerno-RC)
- ✧ 3:00 h from Rome to Casablanca (Morocco)
- ✧ 2:00 h from Rome to Algeri (Algeria)
- ✧ 1:20 h from Rome to Tunisi (Tunisia)
- ✧ 2:00 h from Rome to Atene (Greece)



Contact info

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Eng. Marilena Collorafi

Industrial base

Industrial specialization:

- ✧ environmental protection
- ✧ land reclamation
- ✧ management of hazardous and non-hazardous waste
- ✧ wastewater treatment
- ✧ air pollution, soil pollution, water pollution

Main companies:

Companies operating inside CORAP industrial areas (Regional Consortium for the Development of Production Activities of the Calabria Region)

- ✧ unit of Cosenza: Ecology Green; Ecoross
- ✧ unit of Catanzaro: Ecosistem, Ecologia Oggi, Econet, Deca
- ✧ unit of Vibo Valentia: 4R srl
- ✧ unit of Reggio Calabria: IAM spa, Ecologia Oggi
- ✧ unit of Crotone: Salvaguardia Ambientale, Mida, Recycling

R&D network

- ✧ University of Calabria in Cosenza - Faculty of engineering - Department of environmental engineering
- ✧ Mediterranean University of Reggio Calabria - Faculty of Engineering - Department of Civil Engineering, Energy, Environment



FACTS & FIGURES

COMPANIES

- ✧ 50 companies
- ✧ 1 industrial group

Potential for 100 companies / 2,000 employees

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

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

Sites and buildings

CORAP unit of Reggio Calabria

- ✧ Industrial Area of Gioia Tauro – Rosarno - San Ferdinando (117.23 ha available)
- ✧ Industrial Area of Campo Calabro - Reggio Calabria - Villa San Giovanni (12.9 ha available)

CORAP unit of Vibo Valentia

- ✧ Industrial Area of Porto Salvo (10.7 ha available)
- ✧ Industrial Area of Aeroporto (0.5 ha available)

CORAP unit of Crotone

- ✧ Industrial Area of Crotone (200 ha available)

CORAP unit of Cosenza

- ✧ Industrial Area of Schiavonea of Corigliano Calabro (162 ha available)
- ✧ Industrial Area of Piano Lago of Mangone e Figline Vegliaturo (33 ha available)
- ✧ Industrial Area of Follone of San Marco Argentano (58.6 ha available)
- ✧ Industrial Area of Sant'Irene of Rossano (6.1 ha available)
- ✧ Industrial Area of Bisignano (85.5 ha available)
- ✧ Industrial Area of Cammarata of Castrovillari (53.9 ha available)
- ✧ Industrial Area of Rocca Imperiale (8.29 ha available)
- ✧ Industrial Area of Montalto Uffugo (7 ha available)

CORAP unit of Catanzaro

- ✧ Industrial Area of Lamezia (342.5 ha available)

collection (6,200 tons/y;

6. Washing, shredder and granulation of plastic film (LDPE) for granule production End of waste (8,300 tons/y)
7. Washing and shredding of rigid plastic (HDPE, PP) for chip production End of waste (6,200 tons/y.

Moreover, since 2010 it has revamped an urban wastewater treatment plant and is currently involved in the management of the 120,000 inhabitants wastewater treatment plant.

It also has a stake in a company that makes construction of waste water treatment plants and solid and liquid waste.

Currently employs more than 130 employees.

Business opportunity

CORAP (the Regional Consortium for the Development of Production Activities of the Calabria Region) develops and manages 16 industrial agglomerations in the territory of the Calabria Region in the Provinces of Cosenza, Crotone, Catanzaro, Vibo Valentia and Reggio Calabria, for a total extension of approximately 5,250 hectares of industrial area, with 5 water treatment platforms for a total of 580,000 equivalents inhabitants served. About 1,000 companies in the petrochemicals, metal carpentry, agro-industry and logistics services are part of CORAP.

Success story

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:

1. Chemical-physical treatment plant through neutralization, chemical precipitation and oxidation of water-based liquid waste (102,000 tons/y)
2. Stabilization plant for non-recoverable solid wastes and soil washing of recoverable fractions (37,000 tons/y)
3. Solid fuel production plant (RDF) (44,000 tons/y)
4. Selection of materials containing asbestos with a fixed unit of depression (2,000 tons/y)
5. Semi-automatic selection of urban waste from separate



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)
 - 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)



Contact info

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Marco Fedato

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 environmental quality, air, water and soil quality.

FACTS & 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:
 - 95 firms
 - 9 universities/research centres
 - 10 associations
 - 6 Public bodies
 - 4 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

«INTRAPRENDO» Incentives for Startups

- ✧ The incentive consists of a zero-interest-rate loan and a non-repayable grant (min €25,000 to max €65,000)
- ✧ The combination of the two can cover from 60% to 65% of the total eligible cost (min €25,000 max €65,000) of the project
- ✧ The intervention is dedicated to:
 - MSMEs active and registered in the Register of Companies for no longer than 24 months, with operating headquarter in Lombardy
 - Individual entrepreneurs that have started their own entrepreneurial activity for no longer than 24 months

Thanks also 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.

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

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 - Declaring in advance all urban planning and construction expenses without additional expenses
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 - Reducing the primary and secondary land development expenses by at least 20%
- ✧ Promotion:
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 - 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.

attrACT



Trentino | RENEWABLE ENERGY & GREENTECH

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.

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 & FIGURES

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

COMPANIES:

- ✧ 20 Start UP
- ✧ 26 SME
- ✧ 10 industrial groups
- ✧ 1 Research center

TURNOVER: 260M€

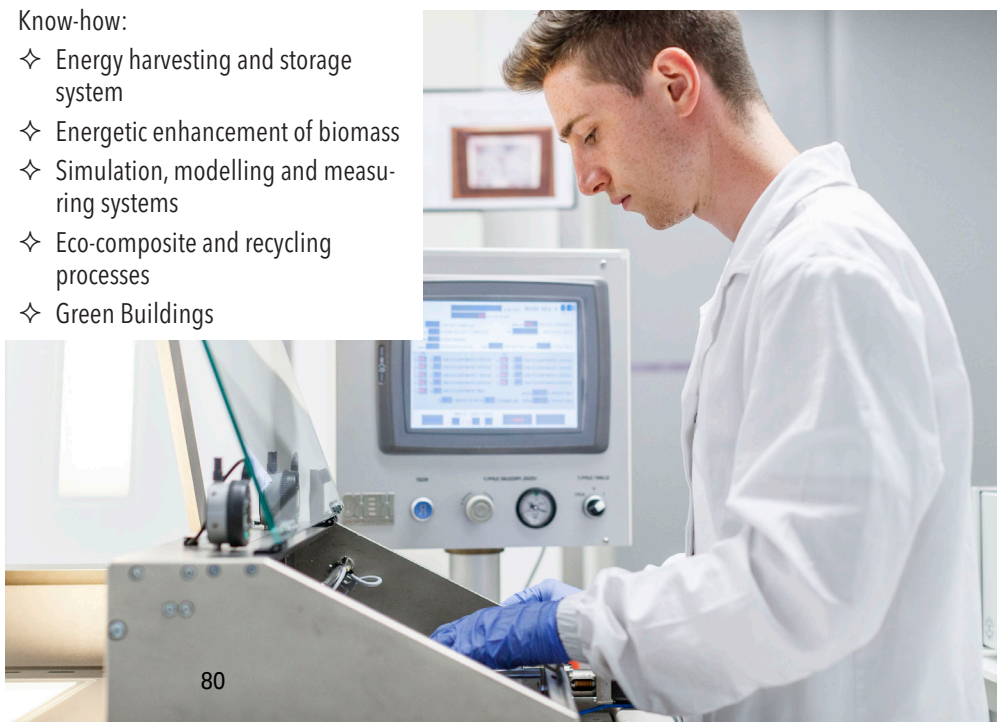
Potential for 110 companies/1,200 employees

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

Irene Caterina Luca, Vincenzo Lioi, Giovanni Beccu | Ufficio Coordinamento Promozione del Made in Italy

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INVEST IN ITALY

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