

INVEST IN LAZIO

INVEST IN AEROSPACE INDUSTRY

Lazio a Region of Beauty and Innovation



REGIONE
LAZIO

SUMMARY

WELCOME

TO LAZIO



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WELCOME TO LAZIO

REGION OF ROME, HEART OF EUROPE AND CENTRE OF THE MEDITERRANEAN AREA

- Lazio boasts a geopolitical position of global importance: in the heart of Europe and at the centre of the Mediterranean region, a crossroad towards the Middle East and South-East Asia
- Rome is Italy's number one destination in Italy for international tourists and one of the most visited city in the world (with over 20 million tourists per year)



LOGISTICS & MOBILITY

THANKS TO ITS VERY CENTRAL LOCATION, ITS INFRASTRUCTURES AND SERVICES, THE REGION IS ITSELF A STRATEGIC LOGISTICAL PLATFORM IN ITALY, IN THE MEDITERRANEAN, AND IN EUROPE



2 International Airports (Fiumicino and Ciampino, over 50 million passengers per year). Fiumicino Leonardo Da Vinci Airport is the first stopover in Italy and the first European airport for the satisfaction of travellers.



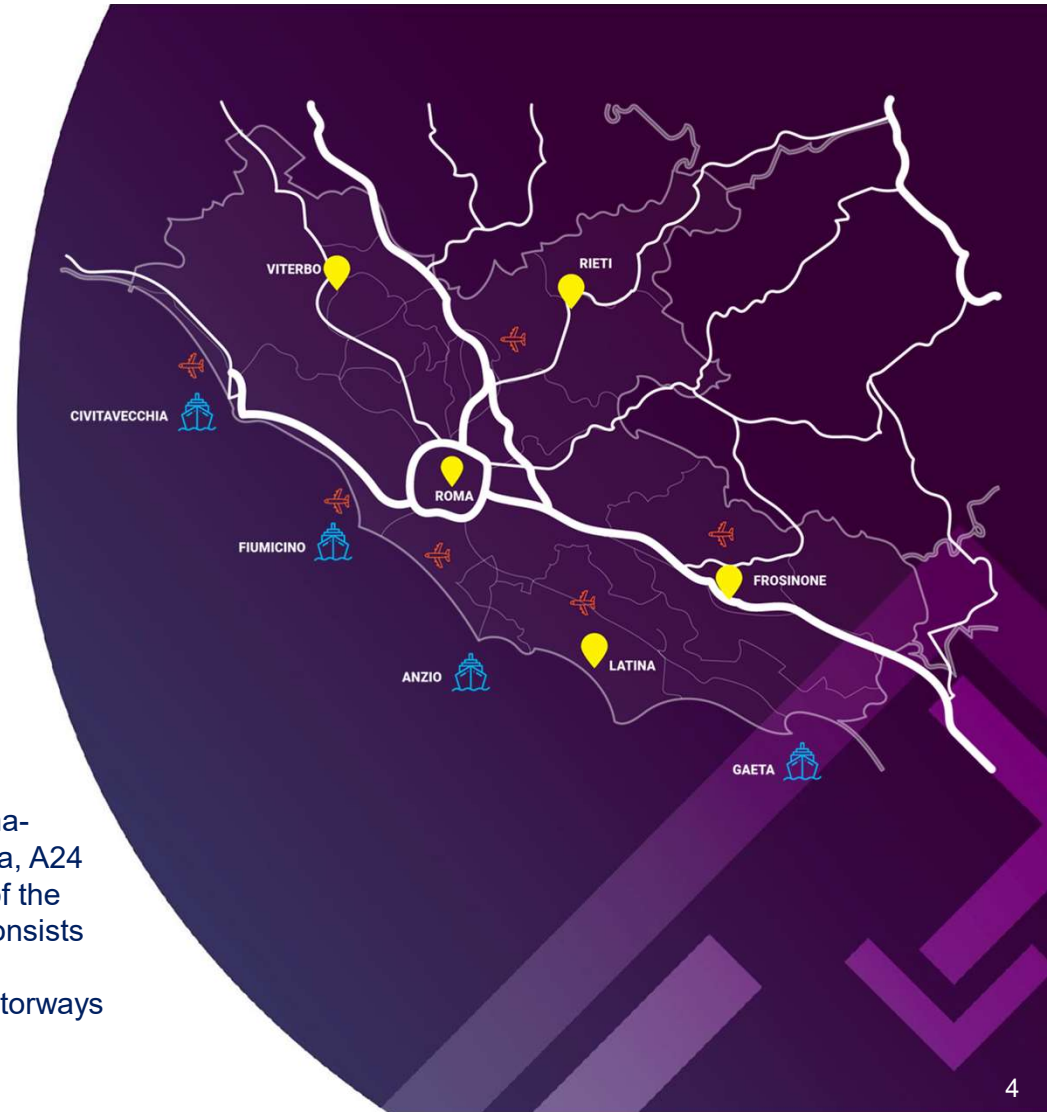
Civitavecchia Port is the major Italian touristic port, the 2nd in Europe and 7th in the world for number of passengers (3 million per year). It boasts a movement of 10 million tons of goods a year.



2 main railway stations (Termini and Tiburtina) which guarantee high speed rail connections with all major Italian and European cities. Lazio is part of the Trans-European Networks - Transport (TEN-T).



Main Highways: A1 Milano-Roma-Napoli, A12 Roma-Civitavecchia, A24 Roma-L'Aquila. The extension of the road network in Lazio Region consists of approximately 10 thousand kilometres, of which 473 are motorways and 553 national roads.



LAZIO AT A GLANCE

Lazio is the 2nd Italian Region for Gross Domestic Product (GDP) with **198 Bn euros**, contributing to **1,2% of Italian national GDP** (2018). It is one of the **most important R&D systems in Italy**.

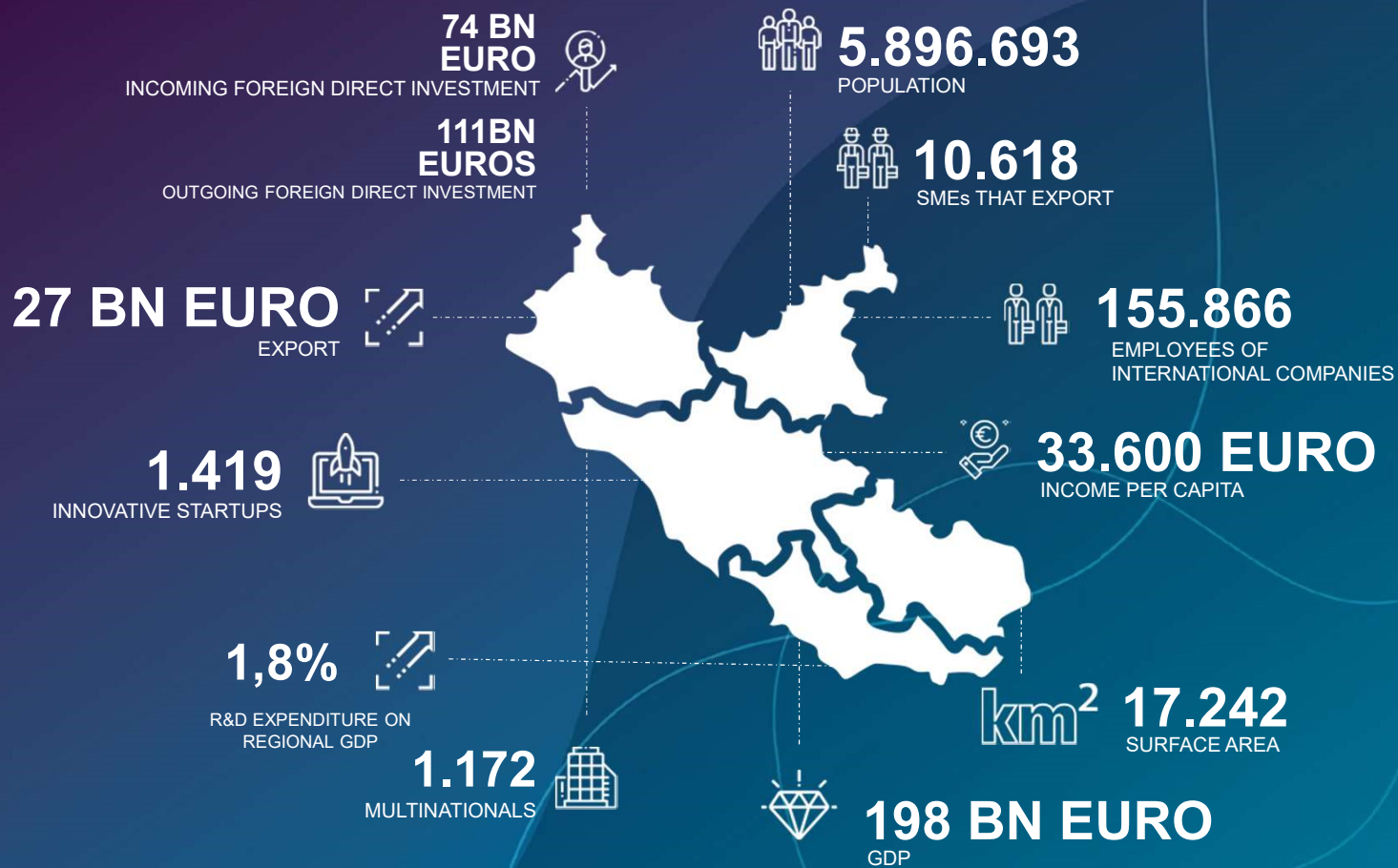
GDP per capita is equal to **€ 33.600**, above the Italian and the EU average. **Lazio is the sixth Italian Region** in terms of GDP per capita.

Lazio is the location of important industrial and multinational groups with their own R&D centres, and the Italian Region with the highest level of specialization in manufacturing and in high-tech knowledge intensive sectors.

Lazio's share of exports in global leading sectors is twice the national average (in percentage terms 72% vs 32%).



LAZIO KEY INDICATORS



ALL ROADS LEAD TO ROME



TOURISM

Rome, with over **20** million **tourists a year**, is the most visited city in Italy and one of the most visited in the world.



VATICAN STATE

Rome is home to the Vatican State, with its own 85 diplomatic representations of the main countries, residence of the Pope and home to the Basilica of St. Peter, the Vatican Museums and the Sistine Chapel.



DIPLOMACY

Rome hosts 209 diplomatic missions (embassies, consulates, permanent missions and other diplomatic representations) according to Global Diplomacy Index 2019.



ROME AS A STRATEGIC HUB

2 International airports: Fiumicino and Ciampino. Fiumicino Airport is connected to Rome by the direct train "Leonardo Express". Travelling time: only 32 minutes, trains run every 15 min.



3 major railway stations: Termini, Tiburtina and Ostiense. Head office of the important logistics centre: CAR - the ROME AGRI-FOOD CENTRE (agroalimroma.it).

WHY CHOOSE TO INVEST IN LAZIO

GROWTH POTENTIAL

- Strong growth of exports in technological niches of excellence
- Presence of large companies, even multinationals, capable of stimulating SMEs' growth through innovative demand
- Significant growth, in quantity and quality, of incubators, accelerators and other organizations and initiatives to support startups

TERRITORIAL ATTRACTIVENESS

- Geopolitical position of global relevance
- High international attractiveness of the metropolitan area of Rome
- Presence of important industrial and multinational groups with their own R&D centres
- High number of public and private research infrastructures
- High concentration of graduates in technical-scientific subjects and qualified researchers

THE REGIONAL KNOWLEDGE SYSTEM

LAZIO IS A TERRITORY RICH IN **HUMAN CAPITAL** AND IT IS AMONG THE FIRST ITALIAN REGIONS FOR NUMBER OF **RESEARCHERS**, **UNIVERSITIES** AND PUBLIC AND PRIVATE **RESEARCH INSTITUTIONS**.

LAZIO IS ALSO ONE OF THE MOST SIGNIFICANT **RESEARCH CENTRE** IN EUROPE



8,000
Professors and Researchers
in the Universities



6,000
Other researchers



19
Universities

- 6 Public
- 7 Private
- 6 Distance Learning Universities



44,587
Graduates

- 20.422 Female
- 15.969 Male



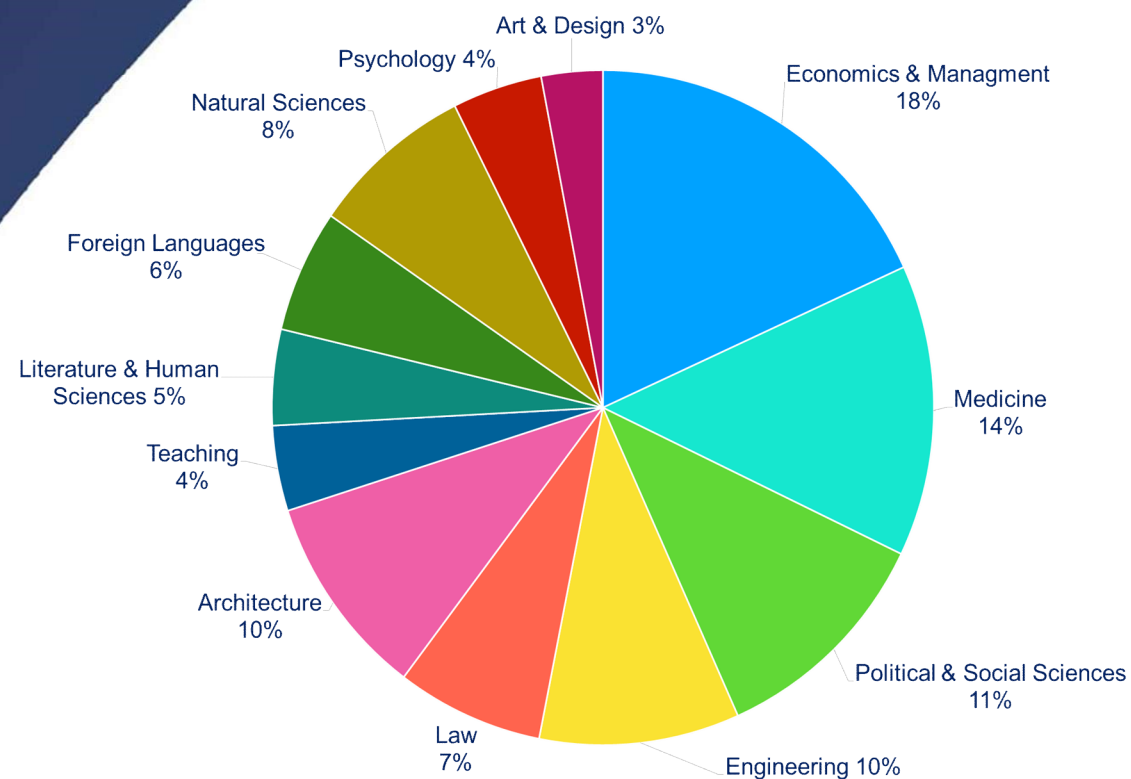
82,000
Scholarships



257,905
College freshmen

THE UNIVERSITY SYSTEM

Graduates for degree courses



AEROSPACE INDUSTRY

LAZIO PLAYS A SIGNIFICANT INTERNATIONAL ROLE IN THE INDUSTRY OF AEROSPACE, AERONAUTICS, SPACE ECONOMY AND SECURITY, BOTH IN THE MANUFACTURING INDUSTRY AND FOR SPECIFIC SKILLS IN TECHNOLOGICAL SERVICES AND R&D.



LAZIO AEROSPACE TECHNOLOGICAL DISTRICT (DTA) was established in 2004 by a Framework Agreement signed by Italy Ministry of Research and Lazio Region. In 2012, the DTA of Lazio was one of the founding partners of the Italian National Cluster for Aerospace Technological (CTNA).

MAIN SPECIALIZATIONS

- Space Launchers (Vega, Solid Rocket Motor for Ariane)
- Space Surveillance and Tracking (SST)
- Manned and Unmanned Space Exploration
- Safety & Security
- Homeland / Cyber Security
- Stratospheric Platforms
- Satellite Hyperspectral Electro-Optical Sensors, Flight Sensors and Equipment for Payloads
- Satellite Ground Segments, Terminals And Applications (EO, Sat-Com, Sat-Nav)
- Advanced Air-Maritime and Airport Traffic Management Systems
- Unmanned Air Vehicle
- Aviation MRO&U Services

SECTOR OF EXCELLENCE

250



COMPANIES

23,500



EMPLOYEES

10



MAIN RESEARCH INSTITUTIONS

5BN



ANNUAL TURNOVER

2BN



IN EXPORTS

3,000



RESEARCHERS

4



FACULTY OF ENGINEERING

12



UNIVERSITY DEPARTMENTS

30



POST-DEGREE UNIVERSITY COURSES

A FOCUS ON *NEW SPACE ECONOMY*

TODAY LAZIO IS THE HUB OF A SPACE ECONOMY CAPABLE OF TRANSFERRING THE BENEFITS OF SPACE TECHNOLOGIES TO CITIZENS, BUSINESSES, COMMUNITIES AND TERRITORORIES.

Space technologies can be applied for: the development of agriculture, monitoring the environment and hydrogeological risk, emergency prevention, air traffic control and improving telecommunications services. Lazio companies are at the forefront of participation in **two important European programs** linked to space and earth observation:

COPERNICUS, the European Union's Earth Observation Programme. It provides accurate, timely and easily accessible information that enables the **monitoring of the Earth, marine and atmospheric environments**. e-GEOS and Telespazio are among the major industrial partners of the Programme involved in the space component ground segment development and operations in emergency management, land and sea safety management, land resource management, and the monitoring of climate change.

GALILEO (2nd Generation), the European Union's global satellite navigation system (GNSS), is one of the greatest and most ambitious European projects born from the collaboration of the European Union with the European Space Agency (ESA) to create a global navigation satellite system. Italy has had a major role since the very beginning of the Galileo programme, first of all, through the Italian Space Agency (ASI), and secondly, through the involvement of the Italian industry and, in particular, of the Leonardo Group.

SECTOR OF EXCELLENCE



FIERA DI ROMA HOSTED FOR THE SECOND YEAR (2019/2020) NSE EXPOFORUM

**An International Fair dedicated to
Space Oriented Technology Transfer**

NSE PROMOTES new market opportunities and economic development in Europe and **CREATES** an opportunity to meet and exchange views among industrial players, small and medium innovative companies, investors, venturers, startupper, research centers, space agencies and institutions.



REGIONE
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Business Environment

Main Space Agencies

ESA BIC Lazio (Business Incubation Centre) offers business start-up support as well as technical expertise throughout their incubation period in a number of space related areas, i.e. systems and software infrastructures for data handling and integrated Earth observation, satellite navigation and communication applications. Located at the business incubator ITech in Rome, ESABIC Lazio is a partnership among Lazio Region, ASI (Italian Space Agency) and ESA, and it is part of Innovation and Ventures Office (TIA-AI) of the European Space Agency.

ESA-ESRIN, located in Frascati (Lazio) is the European centre of excellence for exploitation of Earth observation missions. The mission and payload operations of ESA's Earth observation satellites are managed here, and ESRIN is the primary source for the acquisition, distribution, and exploitation of data from these and other non-ESA satellites.

ASI – The Italian Space Agency, born in 1988, is a national public body supervised by the Ministry of Education, University and Research that cooperates with several other departments. It has established itself as one of the most important global stakeholders on the scene of space science, satellite technologies and development of means to reach and explore the cosmos. Today the Italian Space Agency plays a leading role both at a European level, where Italy is the third major contributor to the European Space Agency, and at a global level.



BUSINESS ENVIRONMENT

Tiburtino Technology Park - TECNOPOLO SpA

THE TIBURTINO TECHNOLOGY PARK MAINLY HOSTS **SMEs, STARTUPS AND RESEARCH CENTERS** OPERATING IN THE **ICTS, ELECTRONICS TELECOMMUNICATIONS AND AEROSPACE & SPACE ECONOMY INDUSTRY**. IT IS **PART OF TECNOPOLO SpA**, A PUBLIC COMPANY CREATED IN 1995 WITH THE AIM TO PROMOTE AND IMPROVE THE LOCATION AND DEVELOPMENT OF HIGH-TECH AND INNOVATIVE INITIATIVES

- PRESENCE OF KEY PLAYERS OF THE AEROSPACE AND DEFENCE INDUSTRY
- INNOVATIVE INFRASTRUCTURES AND SERVICES
- STRONG LINKS WITH UNIVERSITIES AND RESEARCH



70

HECTARES



100

COMPANIES

AEROSPACE & DEFENCE COMPANIES

- ADPM DRONES S.R.L.
- ATEN IS SRL – RETE DI IMPRESE
- BLUE THREAD S.R.L.
- CENTRALE VALUTATIVA S.R.L.
- SUPERELECTRIC SRL
- HTT – HIGH TECHNOLOGY TRANSFORMERS S.R.L.
- INTECH MICROWAVES S.R.L. (IMW)
- INTERCONSULTING S.R.L.
- LATITUDO 40 S.R.L.
- PROSER S.R.L.
- PSI PROGETTI SPECIALI ITALIANI S.R.L.
- SDS S.R.L.
- SIGMA CONSULTING S.R.L.
- SPACEEXE S.R.L.
- URBYYTORBIT SRLS
- WAVE ADVANCED TECHNOLOGY APPLICATIONS S.R.L.

BUSINESS ENVIRONMENT

Big International Players

LAZIO IS THE ONLY ITALIAN REGION WHICH HOSTS THE WHOLE AEROSPACE VALUE CHAIN. IMPORTANT BIG GROUPS OF INTERNATIONAL EXCELLENCE IN ELECTRONICS, SENSORS, AVIONICS, COMPONENTS AND INNOVATIVE MATERIALS, “SPACE” AND SATELLITE APPLICATIONS AND SERVICES, ARE HOST IN THE REGION.

THE 85% OF THE BUSINESS LANDSCAPE IS MADE UP OF SMES SPECIALIZED IN: ELECTRONICS, ICTS, ADVANCED MATERIALS AND AERONAUTICAL AND AIRPORT SERVICES.

THE FACTORIES PRODUCE COMPONENTS FOR THE ARIANE AND VEGA LAUNCHERS, SATELLITES, RADARS AND EQUIPMENT FOR AIRCRAFT AND HELICOPTERS.



BUSINESS ENVIRONMENT

Big International Players



SINCE 1948, LEONARDO HAS BEEN THE PROTAGONIST OF ITALIAN INDUSTRIAL HISTORY. TODAY IT IS ONE OF THE TOP TEN GLOBAL PLAYERS IN THE AEROSPACE, DEFENSE AND SECURITY INDUSTRY AND A STRATEGIC ASSET FOR ITALY'S GROWTH WITH OVER 31,000 EMPLOYEES IN ITALY AND 70 FACILITIES, 38 OF WHICH ARE MANUFACTURING PLANTS.

www.leonardocompany.com

ROME LAURENTINA

Design and development of critical infrastructure protection, **cyber security** and complex information networks for central and local governments

ROME LEONARDO COMPANY HEADQUARTER



POMEZIA (RM)

Military Communication Systems, avionics systems, aircraft logistics support

LATINA

Develop and produce **military communication systems**.

SPACE ROME TIBURTINA

Telespazio Spa

ROME TIBURTINA

Specialised in the design, development and testing of land and naval radars.

ANAGNI (FR) HELICOPTER DIVISION

Heart of Helicopter Division rotor blade and composite structures production.

FROSINONE

Centre of expertise and **support for the Helicopter Division** Centre of Excellence. Transmissions and mechanical parts, as well as for the Leonardo Helicopters maintenance, repair and overhaul.

BUSINESS ENVIRONMENT

Big International Players

IN LAZIO THALES ALENIA SPACE HAS OVER 40 YEARS OF EXPERIENCE IN SPACE TELECOMMUNICATIONS, NAVIGATION, EARTH OBSERVATION, SCIENCE, EXPLORATION AND TRANSPORTATION.

THE THALES ALENIA SPACE PLANT FOR THE DESIGN AND INTEGRATION OF TERRESTRIAL OBSERVATION, NAVIGATION AND TELECOMMUNICATIONS SATELLITES IS LOCATED IN ROME - TIBURTINA VALLEY.

The company contributes to **many of Space programs**, working for both government and commercial customers, including NASA, the European Space Agency (ESA) and the Italian space agency (ASI), as well as leading satellite operators.

Thales Alenia Space is **the first contractor** for the construction of the satellites and for the activities related to the space segment and will lead an international team formed by European industries.

In March 2021, Thales Alenia Space Italia signed a contract worth **772 million euros with ESA - the European Space Agency**, for the supply of **6 satellites, part of the SECOND GENERATION GALILEO CONSTELLATION**.



THALES ALENIA SPACE, A JOINT VENTURE BETWEEN THALES (67%) AND LEONARDO (33%)

THE COMPANY IS THE LARGEST SATELLITE MANUFACTURER IN EUROPE SPECIALIZING IN THE AEROSPACE, SPACE, DEFENSE, SECURITY AND TRANSPORT SECTORS.

www.thalesgroup.com



REGIONE
LAZIO

BUSINESS ENVIRONMENT

Big International Players

E-GEOS IS A COMPANY THAT WAS FORMED IN THE YEAR 2000 BY THE ITALIAN SPACE AGENCY AND TELESPAZIO SPA COMPANY (LEONARDO GROUP).

LOCATED IN ROME (TIBURTINA VALLEY), THE COMPANY'S MAIN OBJECTIVE IS TO PERFORM ACTIVITIES OF DEVELOPMENT, PRODUCTION AND COMMERCIALIZATION OF SERVICES, PRODUCTS AND APPLICATIONS IN THE EARTH OBSERVATION SECTOR.

In January 2021, a consortium led by the **Italian e-Geos** has been awarded a framework **service contract worth about 6 million euros from the European Environment Agency**. For four years the consortium will be involved in implementing the **European Ground Motion Service**, a new European service for satellite monitoring of soil movements, implemented as part of the Copernicus Land Monitoring Service.



THE COMPANY IS THE LARGEST SATELLITE MANUFACTURER IN EUROPE SPECIALIZING IN THE AEROSPACE, SPACE, DEFENSE, SECURITY AND TRANSPORT SECTORS.

www.e-geos.it

BUSINESS ENVIRONMENT

Big International Players

BASED IN COLLEFERRO, NEAR ROME, AVIO IS A LEADING COMPANY IN SPACE PROPULSION. THE COMPANY OFFERS COMPETITIVE SOLUTIONS FOR LAUNCHING INSTITUTIONAL, GOVERNMENTAL AND COMMERCIAL PAYLOADS IN EARTH ORBIT THROUGH ITS VEGA ROCKET FAMILY.

AVIO developed the **P120 C solid rocket motor** for the first stage of **Vega C** and **Vega E** and a strap-on booster for the new European **rocket Ariane 6**.

The company is part of the **joint Italian-French-British program** for the production of **Aster 30**, one of the most powerful and technologically advanced air defense missiles.

AVIO recently signed a **contract for the supply to Arianespace of 10 VEGA C launchers** in the period 2023-2024, with an option for another 4 launchers. The VEGA C carriers will be used for institutional launches of the **EU Commission's "Copernicus" program** and for other needs of the **ESA- European Space Agency** and the **ASI - Italian Space Agency**.



AVIO, DESIGNS, DEVELOPS, PRODUCES AND INTEGRATES SPACE LAUNCHERS AND DEVELOPS AND PRODUCES SOLID AND LIQUID FUEL PROPULSION SYSTEMS AND PAYLOAD ADAPTERS.

<https://www.avio.com>

Business Environment

R&D Network and Public Big Players



European Space
Research Institute



Italian Space Agency



Rome Airport



Italian air navigation
service provider



National Institute for
Nuclear Physics



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



Consiglio Nazionale delle Ricerche
National Research
Council



Italian Civil Aviation
Authority



Telecommunication, Remote
Sensing, Earth Observation



National Institute for
Astrophysics



National Institute of
Geophysics and
Volcanology

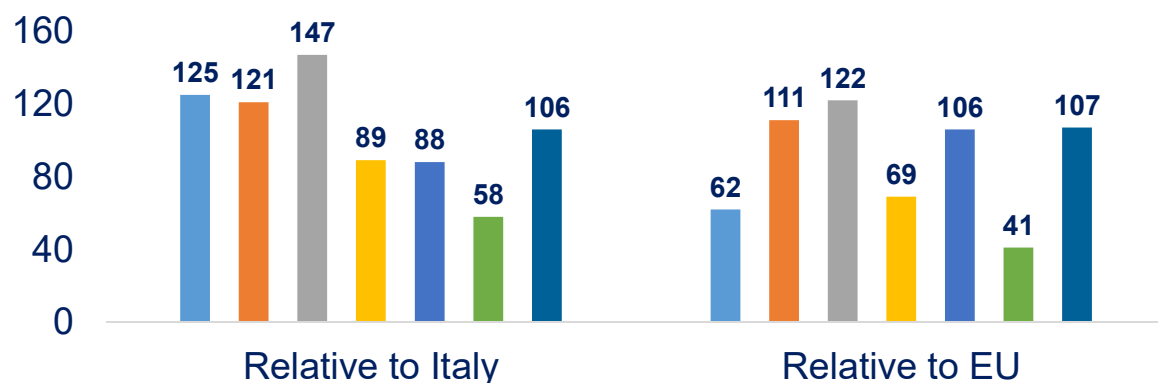


Italian Institute for
Environmental Protection

ECONOMIC INFORMATION ANNEX

LAZIO IN THE REGIONAL INNOVATION SCOREBOARD (RIS 2019)

The innovation performance has increased by 1,4% between 2011 and 2019



- Tertiary education
- International scientific co-publications
- R&D expenditures public sector
- R&D expenditures business sector
- Product/process innovations
- PCT patent applications

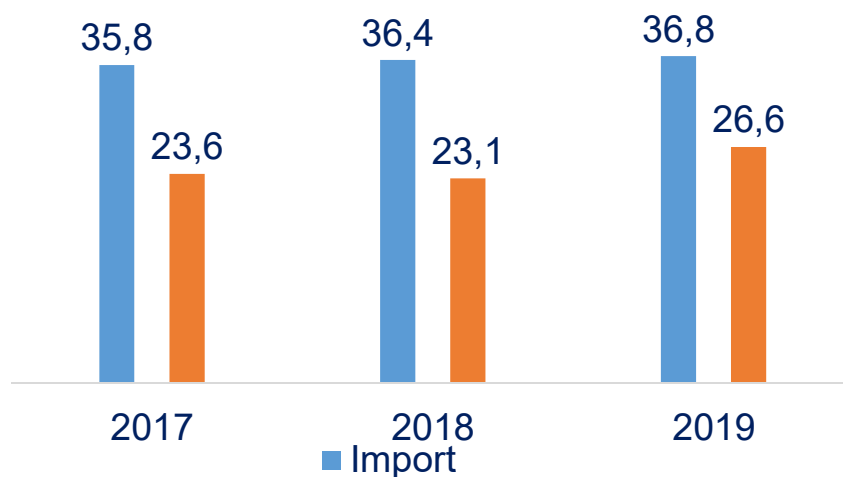
In the latest RIS (2019), Lazio region is considered as a "moderate innovator"

STRENGTHS

- employment in sectors with high added value
- public spending on research
- participation in international scientific publications

FOREIGN TRADE

Lazio Import and Export
(values in billions of euros)



In 2019, Lazio region exported goods and services for 26.6 Bn euros, recording a growth of 15% compared to 2018.

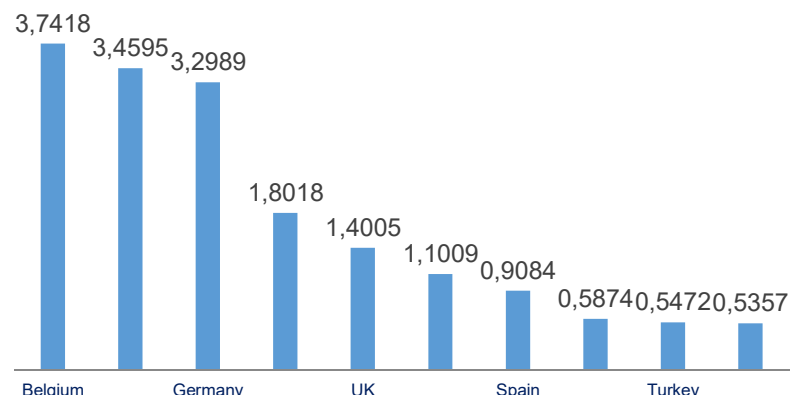
Imports in 2019 increased to 36.8 Bn euros, slightly up compared to 2018 (+ 1.5%).

Lazio exports highly innovative products, i.e. pharmaceuticals, but also more traditional goods, such as agrifood products. The agrifood sector has grown three times faster than national average in the last years.

In Lazio there are 10.618 export operators (according to the region of origin of the goods) out of a national total of over 217 thousand operators.

Lazio main trading partners are located in the European area, particularly in the Union area (EU28, 60,9% of the total, 16,2 Bn Euro). The first country where Lazio exported goods in 2019 is Belgium with 3.7 Bn Euro, followed by US with 3.5 Bn and the Germany with 3.3 Bn.

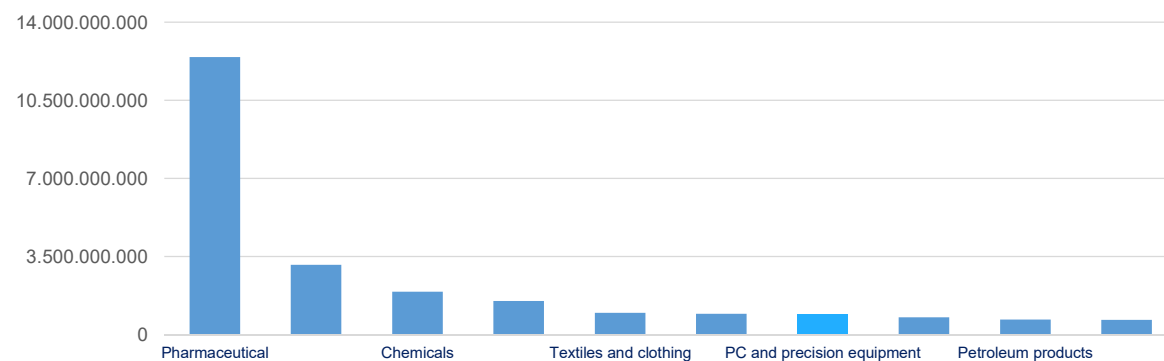
Top 10 countries where Lazio has exported goods in 2019
(values in Bn €)



From Istat - NATIONAL INSTITUTE OF STATISTICS

The main products exported from Lazio are pharmaceuticals with 12.5 Bn Euro (46,7% of the total), followed by vehicles with 3.1 Bn (12%) and Chemicals products with 1.9 Bn Euro (7%).

Top 10 goods exported from Lazio in 2019
(values in euros)



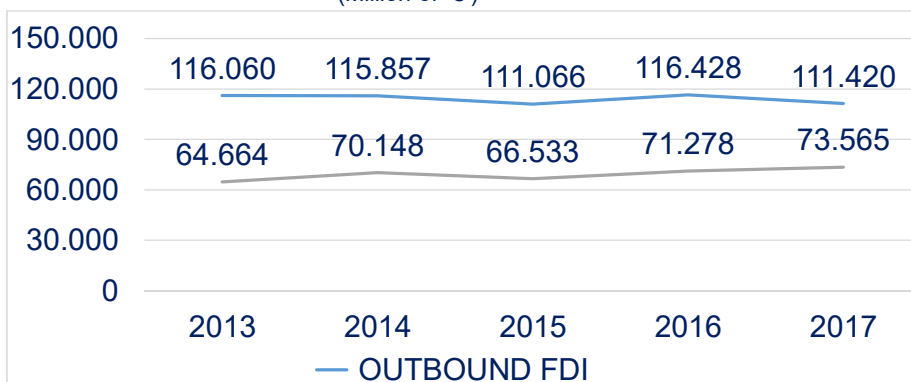
From Istat - NATIONAL INSTITUTE OF STATISTICS

FDI FOREIGN AND MULTINATIONAL DIRECT INVESTMENTS

In 2017, the stock of outbound FDI (from Lazio to foreign countries) amounted to 111.4 Bn euros.

Incoming FDI (from foreign countries to Lazio) amounted to 73.6 Bn euros, the best value of the last five years and over 2 Bn euro more than 2016.

Stock of FDI 2013-2017
(Million of €)



In 2018, in Lazio there are **1.185 companies** with foreign participation (8,4% of the national total).

145.000 employees work in these companies (10,5% of the national total).

105 Bn Euro turnover produced (17% of the national total).

IN LAZIO THE SIZE OF COMPANIES WITH FOREIGN PARTICIPATION IS HIGHER THAN THE NATIONAL AVERAGE.

SOURCE: Istat – ICE

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ECONOMIC PERFORMANCE OF LAZIO COMPANIES



Contact us

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COMMUNITY OF INNOVATORS



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