

# AEROSPACE IN LOMBARDY

attr**ACT**



**INVEST IN  
LOMBARDY**

**POWERED BY**



# LOMBARDY

## Aerospace Business Environment

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 satellites, helicopters, and trainer aircraft integrators

**220**

# **companies**,  
out of 514 on a  
national level  
(43%)

**16.000**

# **employees**,  
out of 47.274 on a  
national level  
(34%)

with a **revenue** of

**€ 6 BILLION**

and an **export** of

**€1,7 BILLION**

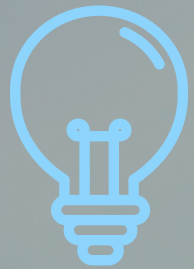




Lombardy counts for **1/3 of the total national export** in this field



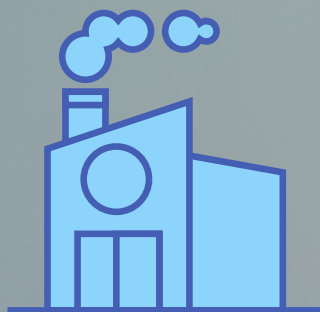
**12%** of revenues is spent in R&D



**41** research projects as of February 2020



**255** patents in the last 15 years



**88%** out of the total are **SMEs Firms**

# Lombardy

## AEROSPACE BUSINESS ENVIRONMENT



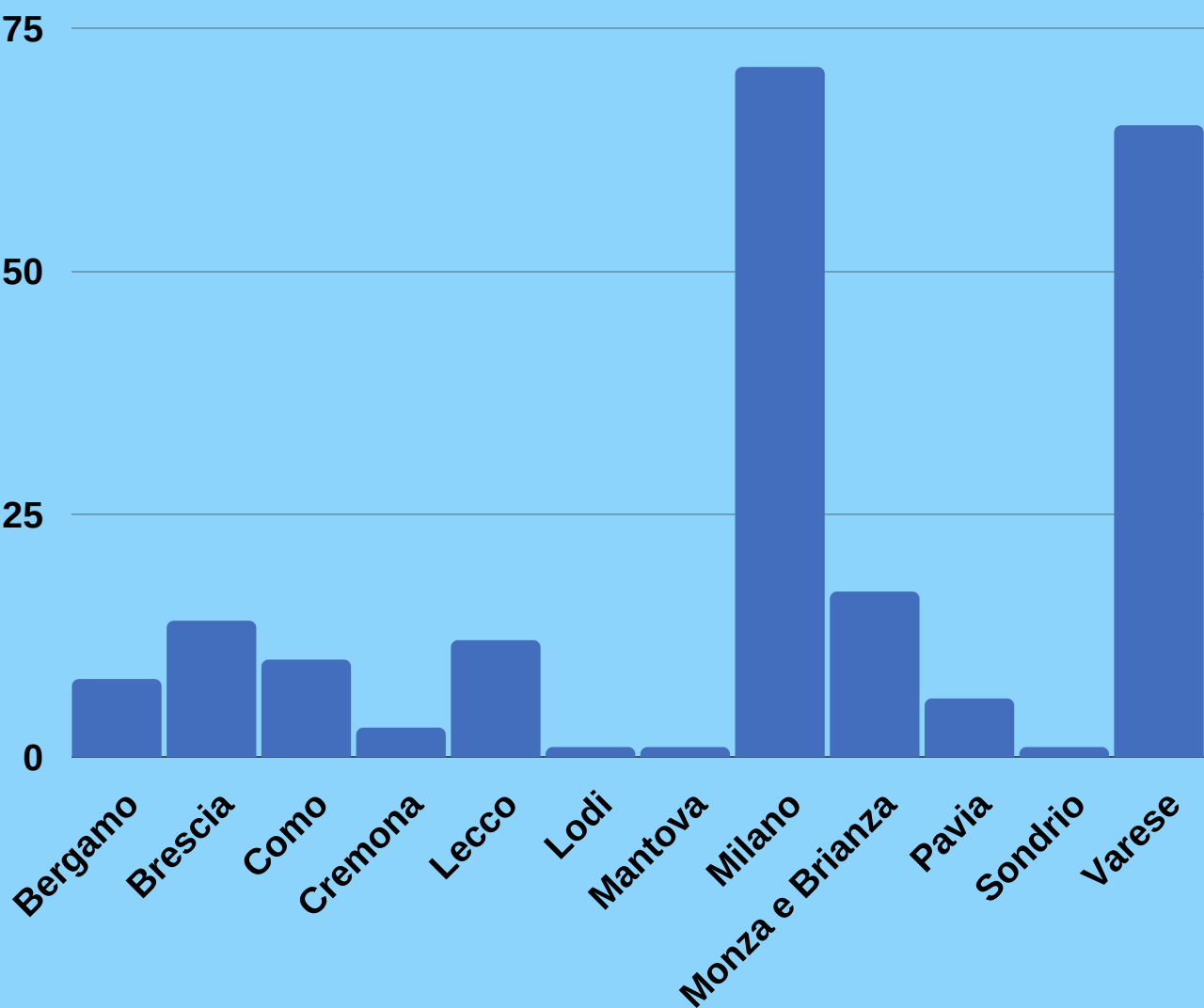
The excellences of the Lombardy Aerospace Cluster can be associated with these characteristics:

- rotary wing aircraft and vertical flight
- fixed wing aircraft and training systems
- management of air traffic
- space, satellites and scientific payload
- avionic apparatus and systems, fuel systems, electromechanical and hydraulic motor units, wireless communication systems

# National and International companies in the cluster

Lombardy Aerospace Cluster includes **220 companies**. The vast majority of them are **small or medium Italian companies**, but there is also a significant number of **large multinational firms**. Varese and Milano provinces are the areas with the highest number of companies based.

FIRMS PER PROVINCE IN LOMBARDY



# Some key players



## AEREA SPA

- **REVENUE:** €30.200.000
- **EMPLOYEES:** 150
- **LOCATION:** Turate (CO)
- **MAIN ACTIVITIES:** high precision mechanics, components, training courses



## OHB ITALIA SPA

- **REVENUE:** €90.940.000
- **EMPLOYEES:** > 200
- **LOCATION:** Milano
- **MAIN ACTIVITIES:** satellites, scientific payloads, microgravity experiments



## LEONARDO SPA

- **REVENUE:** €13.800.000.000
- **EMPLOYEES:** 31.000
- **LOCATION:** sites in the Varese, Brescia, Milan and Como provinces
- **MAIN ACTIVITIES:** helicopters, space, R&D, cyber security



## SECONDO MONA SPA

- **REVENUE:** €47.410.000
- **EMPLOYEES:** > 400
- **LOCATION:** Somma Lombardo (VA)
- **MAIN ACTIVITIES:** fuel systems, engine equipment, product design



## MECAER AVIATION GROUP SPA

- **REVENUE:** €78.830.000
- **EMPLOYEES:** 500
- **LOCATION:** Vergiate (VA)
- **MAIN ACTIVITIES:** actuation & flight control, landing, cabin comfort systems and aircraft services



## THALES ALENIA SPACE SPA

- **REVENUE:** €707.310.000
- **EMPLOYEES:** 2300
- **LOCATION:** Milano and Varese
- **MAIN ACTIVITIES:** satellites, surveillance and control systems, telecommunication systems

# % OF COMPANIES BY SUB-SECTORS



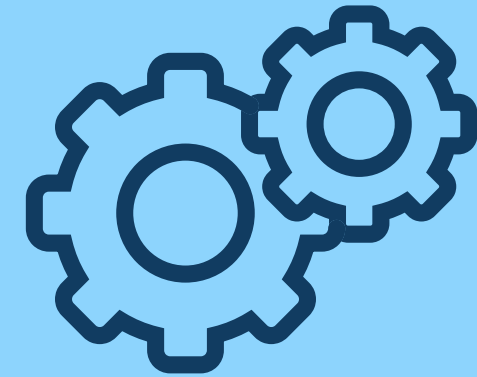
# Lombardy Competitive Advantages



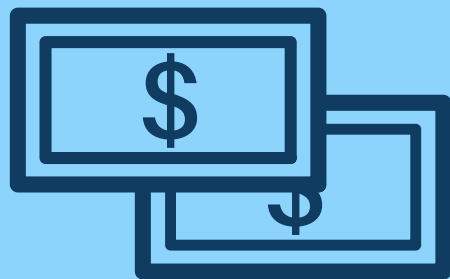
**1) CLUSTERS AND  
DISTRICTS**



**2) SKILLED  
WORKFORCE**



**3) STRONG  
SUBCONTRACTING CHAIN**



**4) COMPETITIVE  
COSTS**



**5) EDUCATION &  
RESEARCH**



**6) DIGITAL  
CONNECTIVITY**

# Competitive Advantages of the Aerospace environment in Lombardy

## SOURCES:

<http://bandaultralarga.italia.it/mappa-bul/regione/lombardia/3>  
<https://www.nperf.com/it/map/5>  
<https://www.aerospacelombardia.it/>  
[http://www.centroestero.org/repository/28\\_10\\_2009\\_17\\_36\\_settore-aerospazio.pdf](http://www.centroestero.org/repository/28_10_2009_17_36_settore-aerospazio.pdf)  
<https://www.analisidifesa.it/2015/06/cresce-il-fatturato-delle-aziende-aerospaziali-lombarde/>

## 1) CLUSTERS AND DISTRICTS

The cluster provides a system with a united, visible, and identifiable collective identity. The peculiar environment:

- **fosters innovation**
- **strengthens companies' position** in the global marketplace
- **guarantees higher competitive advantage** and stimulates the cluster companies' **growth**



## 2) SKILLED WORKFORCE

The extraordinary geographic concentration of **high-specialized firms** allows the creation of **in-depth know-how**, which guarantees **high specialized employees - roughly 16.000 - such as:**

- **aerospace engineers**
- **aerospace designers**
- **structural engineers**

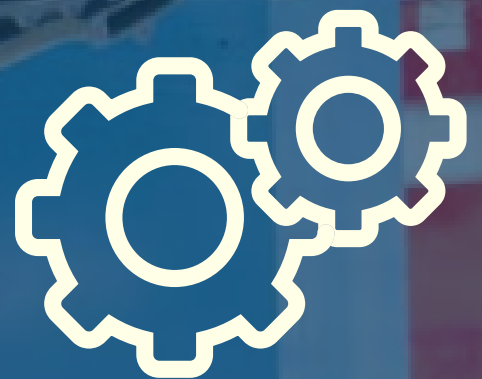


## 3) A COMPLETE SUBCONTRACTING CHAIN

**3 complete production chains:**

- **Rotary Wing**
- **Fixed Wing**
- **Space**

**The 41,5% of subcontractors is directed to machine tools and a part of that is addressed to the aerospace industry**



# Competitive Advantages of the Aerospace environment in Lombardy

## 4) COMPETITIVE COSTS

Italy is the third most convenient country in Western Europe for manufacturing **labor costs**, with an **average of € 28,8 per hour**, far below the **Euro Area average (€ 30,6)**



## 5) EDUCATION & RESEARCH

**4 Universities and 2 Research centers** specialized in topics related to the aeronautical industry: **roughly 9.000 students graduated in engineering subjects per year in Lombardy**



## 6) DIGITAL CONNECTIVITY

**Lombardy is the best Italian region** concerning the Digital Economy and Society Index in 2019 (DESI).

By the end of 2020:

almost **100% of Lombardy** will get ultra-fast broadband service

**Great Milan Area**, Brescia and 14 clusters will get 5G network



# WHAT CAN YOU DO IN LOMBARDY?

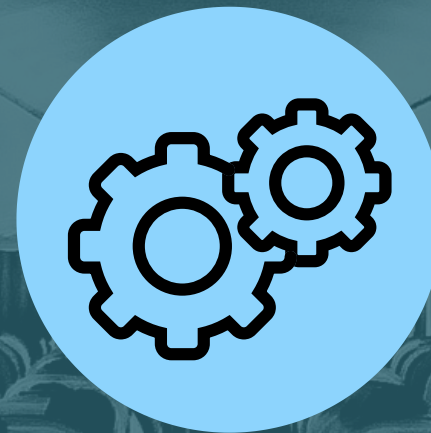
Lombardy is among the leading destinations in Europe for investments in the aerospace industry. It is the first region in Italy in terms of revenues generated (€6 bln out of €16,4 of the total turnover in 2018, equal to 37%).

There are countless benefits that come from investing in the region, as you will be able to:



## R&D

**Rely on outstanding talents with R&D skills and highly specialized know-how and worldwide renowned designers and creative thinkers**



## PRODUCTION

**Expand your subcontracting chain within an extraordinary business environment of 800.000 companies**



## MARKET

**Have access to more than 800 million european consumers and create a favourable commercial hub to the EMEA market, while consolidating marketing and sales strategies**

# SOME RECENT EXAMPLES OF FOREIGN FIRMS INVESTING IN LOMBARDY



**Air France -  
KLM**

The company has inaugurated the new **commercial offices in Milan**, a strategic city given the proximity to the Linate airport and the well connected public transports



**American  
Airlines  
Cargo**

The company has been the first client for the new World Flight Center cargo area in the Malpensa airport, a new **warehouse that will allow an increase of the handling capacities**



**Bombardier**

The company invested in a new Bombardier Line Maintenance in the Milano Linate airport, which will allow **maintenance services for aircrafts**



**CAE**

The company has inaugurated a new **training center** in Milan. A partnership was started with Easyjet that chose CAE to train 1000 future pilots

## SOURCES:

<https://www.affaritaliani.it/milano/air-france-klm-nuovi-uffici-a-milano-577410.html>

<https://aircargoitally.com/american-airlines-cargo-premia-il-suo-staff-di-malpensa/>

<http://www.travelquotidiano.com/trasporti/sea-prime-e-bombardier-intesa-per-una-base-di-manutenzione-a-linate/tqid-272214>

<https://www.cae.com/news-events/press-releases/cae-inaugurates-new-commercial-aviation-training-centres-in-london-gatwick-and-manchester>

# Recent Success Stories



MARCH 2020  
**OH B S.P.A.**

The company is among the protagonists of the **Solar Orbiter Mission**. OH B has mentioned important variables of its success are: its **extremely qualified staff** and the presence of "**ad hoc**" **updating programs** in parallel with new orders coming from space agencies, research centers and governments



MAY 2020  
**LEONARDO S.P.A.**

The Coronavirus emergency saw Leonardo operate, as part of the **consolidated collaboration with the Guardia di Finanza** (the Financial Police), also to support it in the creation of a version of the ATR42MP aircraft that would allow the safe transport of sick people.



JULY 2020  
**THALES ALENIA SPACE**

Thales Alenia Space won the largest share of prime contracts the European Space Agency awarded July 1, for further development of six new **Copernicus satellite missions**. The company was awarded the lead development role for **3/6 planned Earth-observation missions**, a contract haul totaling more than €1.4 bln.

sources:

Leonardo: <https://www.analisidifesa.it/2020/05/leonardo-e-gdf-adattano-i-velivoli-atr-42mp-a-supperto-dellemergenza-covid-19/>  
OH B: <https://www.ilsole24ore.com/art/ohb-italia-sistemi-spaziali-e-formazione-misura-corrono-ordini-ADtB7EFin-Germania-06-Apr-20>  
Thales: <https://spacenews.com/thales-alenia-space-wins-lions-share-of-newly-awarded-copernicus-contracts/>

#### SOURCES

[https://first.aster.it/\\_aster\\_/viewNews/45884/mise-bando-grandi-progetti-r-s-a-valere-sulle-risorse-del](https://first.aster.it/_aster_/viewNews/45884/mise-bando-grandi-progetti-r-s-a-valere-sulle-risorse-del)  
<https://www.regione.lombardia.it/wps/portal/istituzionale/HP/DettaglioRedazionale/servizi-e-informazioni/imprese/imprese-manifatturiere-artigiane-e-di-servizi/serv-competitivita-progetti-mise-svec>

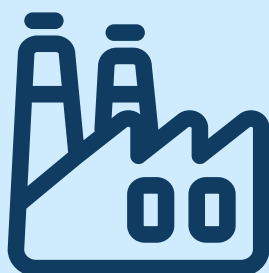
# NATIONAL INCENTIVES AND FISCAL BENEFITS



## Large Investments and Area of Industrial Crisis

### Development Contracts

Incentives for investment projects of at least € 20 mln in Manufacturing, Agriculture, Tourism and Environmental protection sectors (fast lane for foreign companies)



## R&D Investments

### • Innovation Agreements

Industrial research and development activities with eligible costs between € 5 mln and € 40 mln - 20% granted by National level, 3% granted by Lombardy Region)

### • Large Project R&D

Digital agenda Sustainable Industry: industrial research and development activities in the digital fields or innovation, costs between € 5 mln and € 40 mln - subsidized loan up to 70% of the eligible costs



## Fiscal Benefits

### New investments

- Fiscal Exemption on capital Investments
- Tax Credits Industry 4.0
- Tax Credits Machineries

### R&D

- Patent Box
- Tax Credits R&D
- Tax Credits Innovation

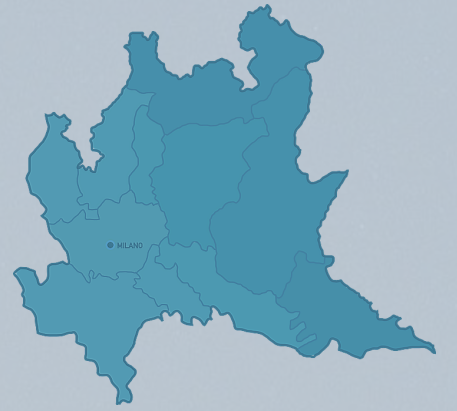
### Human resource Training

- Industry 4.0 Training
- Employment bonuses



# REGIONAL INCENTIVES

---



## «AL VIA» Corporate Investments

Long-term financing from €50.000 to €2,85 mln 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 be related to one of these two categories: Company Development or Relaunch of Productive Areas



## European Regional Development Fund R&D

The incentive consists of a subsidized-interest-rate medium-long term loan (3-7 years long), starting from a minimum of 100.000 up to a maximum of €1.000.000

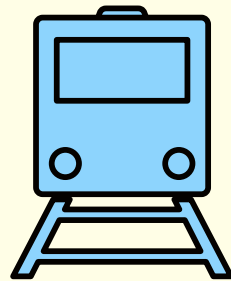
The combination of the incentives can cover 100% of the total eligible cost of the project



Sources:  
AL VIA  
ERDF

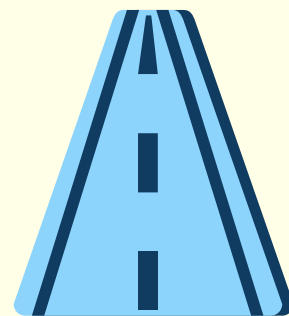
# INFRASTRUCTURES & CONNECTIONS

---



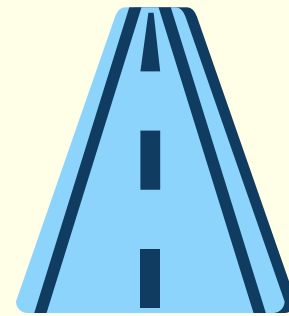
---

**1.869 km**  
Railway  
Network



---

**1.460 km**  
Highways



---

**11.000 km**  
Provincial  
roads



---

**4**  
International  
Airports



## 4 INTERNATIONAL AIRPORTS



Lombardy offers a great availability of direct flights, directed to the main European and global destinations, such as:

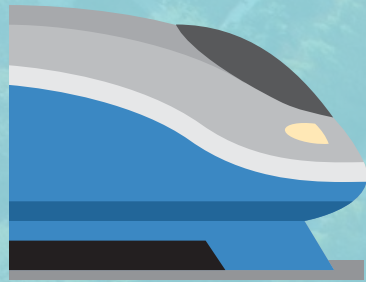
**Bergamo** - Orio al Serio

**Brescia** - Montichiari

**Milano** - Linate

**Milano** - Malpensa

- 1h to **Zurich**
- 1.30 h to **Paris**
- 1.40 h to **Berlin**
- 1.50 h to **London**
- 2h to **Madrid**
- 3.20 h to **Moscow**
- 5.45 h to **Doha**
- 6h to **Dubai**
- 8h to **New York**
- 10h to **Beijing**
- 11h to **Delhi**
- 12h to **Tokyo**
- 12h to **Taipei**
- 14h to **Hong Kong**



## OTHER MEANS OF TRANSPORT

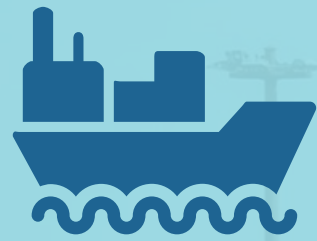


- 400 **railway stations** in Lombardy, including the 23 located in Milan, that connect the city with the other major Italian and European destinations;
- 32 train rides to **Rome** daily;
- It is possible to get to Rome in 2h 45min with the **high speed train**;
- You can easily reach any area of the Italian peninsula through a well-maintained, privately managed **highway network**

**Railways:** 1.869 km  
**Highways:** 1.460 km  
**Provincial roads:** 11.000 km

### TRAIN TRAVEL TIMES

- 3h 45 min to **Zurich**
- 7h 15 min to **Paris**
- 10h to **Wien**
- 12h to **London**
- 12h to **Berlin**
- 24h to **Madrid**



# PORTS AND NAVAL CONNECTIONS



Italy, being a peninsula, is surrounded by the sea. Consequently, many cities have a **port of strategic importance**, both from a **commercial** and a **touristic** points of view. They include:

## DISTANCES FROM MILAN:

- 2h to **Genoa**
- 3h to **Venice**
- 3.30 h to **Livorno**
- 4.30 h to **Trieste**
- 8 h to **Naples**
- 12h to **Gioia Tauro (RC)**



# SETTLEMENT OPPORTUNITIES

The Region offers a variety of locational opportunities (**greenfield** and **brownfield**) mapped out also through the AttrACT programme. Besides the relevant examples highlighted on the map, the dedicated team provided by Lombardy Region can seek for further available areas matching investors' demand



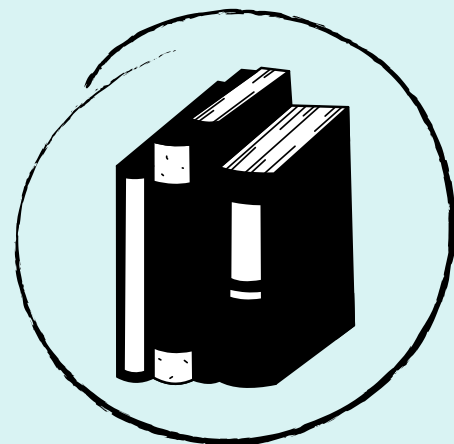
for further locations visit the website: [www.attractlombardy.it](http://www.attractlombardy.it)

# Educational and Research System

Lombardy's educational system guarantees **excellent specialization and extraordinary expertise** in several aerospace's fields.

## Specialized Research Centers of Milano Politecnico:

- Amatech
- ASCL
- AVLab
- CrashLab
- FMSLab
- Frame-Lab
- RAL
- SIAMS



## Research Centers:

- Consiglio Nazionale delle Ricerche
- Istituto Nazionale di Astrofisica

## Universities with dedicated courses:

- **Milano Politecnico**

16th Engineering University in the world

- *Aeronautical Engineering* → around 200 students p/y\*
- *Automation and Control Engineering* → around 220 students p/y
- *Mechanical Engineering* → around 560 students p/y
- *Civil Engineering* → around 500 students p/y
- *ICT Engineering* → around 1600 students p/y
- *Electronic Engineering* → around 270 students p/y
- *Energy Engineering* → around 300 students p/y
- *Industrial Engineering* → around 560 students p/y
- *Physics + Mathematics* → around 300 students p/y

- Università degli Studi Pavia
- Università Bicocca
- Università Liuc

## Technical High School Education:

- ITS (Istituti Tecnici Superiori)
- IFTS (Istituti di Formazione Tecnica Superiore)

# Innovation System



## **Lombardia Aerospace Cluster**

Recognized association founded in 2009.  
Today it includes 220 companies for  
around 16.000 employees



## **Cluster Tecnologico Nazionale Aerospazio**

Acts as a single national reference among all the main actors of the Italian aerospace system: businesses, Research Centers, Academic world, Institutions, National Agencies, Category Federations and regional Districts



## **European Aerospace Cluster Partnership**

A permanent partnership between collaborating European aerospace clusters. It currently comprises 45 clusters from 18 countries and was initiated in 2009 and co-funded by the European Commission

**Lombardy's territory** is full of **innovation centers** which guarantee the **coordination of the aerospace networks**, and carry out relevant **researches and development projects**

# Districts and Supply Chains

**Lombardy's territory** is full of **innovation centers** which guarantee the **coordination of the aerospace networks**, and carry out relevant **researches and development projects**

## Lombardia Aerospace Cluster

5

Areas of activities

3

- Complete supply chains:
- rotary wing (helicopter supply chain)
  - fixed wing
  - space

## History of the Lombardy Cluster



## Limited Liability Company

### Società a Responsabilità Limitata - SRL

Only 5 steps-**2/3 days:**

1. Registration of directors and shareholders with Italian Tax Authorities
2. Execution of the articles of association with a public notary
3. Issuance of the company VAT number
4. Issuance of the certificate of incorporation
5. Open a bank account for the company

## Branch\*

The establishment of a branch enables the company to operate in Italy with a more cost-effective structure

The establishment of a branch in Italy requires - **2/3 days:**

- Registration of the branch with the Italian Registrar of Companies
- To appoint a representative of the branch whose name will be shown in the Italian Registrar of Companies
- To have an address in Italy
- To obtain an Italian VAT number

## Representative Office\*

A representative office is a fixed place of business of a foreign company in Italy engaged only in marketing and promotional activities, or scientific (not commercial activities).

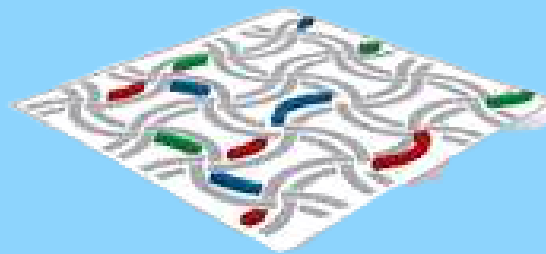
The establishment of a RO in Italy requires - **2 days:**

- Registration of the RO with the Italian Registrar of Companies
- To appoint a representative of the RO
- To have an address in Italy
- The company and the representative of the RO shall obtain a tax identification number

\*The establishment of a branch or a representative office shall be authorized by a special resolution of the company's corporate body that is competent pursuant to the law of the place of incorporation.

# Services offered by Lombardy's Assistance team

---



**INVEST IN  
LOMBARDY**

attr**ACT**

01

## Investment evaluation

- Business Plan
- Market Analysis

02

## Starting the business

- Advice on the most suitable corporate form
- Support with bureaucratic procedures

03

## Sites selection

- Search for suitable work spaces for the business
- Assistance in the evaluation phase

04

## Personnel recruitment

Assistance in choosing the best channels for staff selection

05

## Access to funding resources

- Search for the best incentives for the business
- Connection with the main credit institutions and other financial subjects

06

## Access & Research

- Support to market researches
- Facilitation in dealing with local partners

07

## Managerial Training

Customized courses for companies and managers

# THE INSTITUTIONS INVOLVED



The Lombardy Region Economic Development Department promotes the attraction of investments in Lombardy



Unioncamere Lombardia is identified within the Agreement for the economic development and competitiveness of the Lombardy's system as the implementing entity of AttrACT initiative



## OTHER INSTITUTIONS

Various institutional collaborations exist with regional and local administrations involved in the settlement processes (ARPA, Lombardy's prefects, ATS, other authorities)



Promos Italia - the Agency for International activities of the Italian Chambers of Commerce - is the acting technical partner in FDI attraction through the "Invest in Lombardy" project. The AttrACT program has consolidated this collaboration

# CONTACT US

FOR QUESTIONS, COMMENTS  
AND SUPPORT

---



---

## WEBSITE

[www.investinlombardy.com](http://www.investinlombardy.com)  
[www.attractlombardy.it](http://www.attractlombardy.it)

---

## PHONE

+ 39 02 8515 5220

---

## EMAIL

[info@investinlombardy.com](mailto:info@investinlombardy.com)  
[attract@regione.lombardia.it](mailto:attract@regione.lombardia.it)