

# AEROSPACE IN LOMBARDY



invest in  
**Lombardy**

**POWERED BY**



# LOMBARDY IN A SNAPSHOT

From 2012 to date, foreign direct investments in Italy amount to more than 44.4 bln €, with **Lombardy** attracting **11 bln €** and confirming itself as the **most attractive region** in Italy and among the best in Europe.



## 1ST REGION FOR:

### GDP

- **€ 368** billion
- **22%** of Italy's GDP



## NUMBER OF COMPANIES

- **815.956** companies
- **121.606** foreign companies
- **4.2 million** employees



## HUBS SUPPORTING INNOVATION

- **26%** of certified national incubators
- **18%** of national fablab



# INFRASTRUCTURES & CONNECTIONS



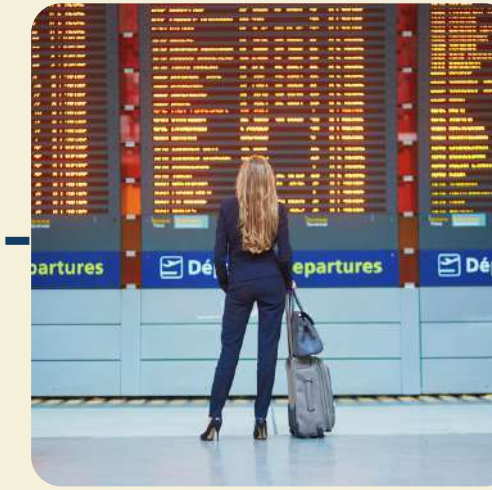
**1.920 km**  
of railway networks



**700 km**  
of highways



**11.000 km**  
of provincial roads



**4**  
international airports

Lombardy offers a wide range of direct flights to the main European and global destinations



10 h to Beijing



8 h to New York



6 h to Dubai



1.50 h to London



1.30 h to Paris

# LOMBARDY



## Aerospace Business Ecosystem

The Region, also thanks to the presence of a Regional cluster, 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, and subsystems, to satellites, helicopters, and trainer aircraft integrators

more than  
**220**

# companies

**19.300**

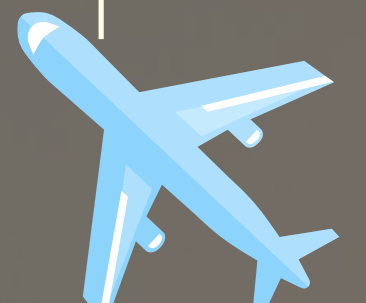
# employees

with a revenue of

**€ 5.8  
BILLION**

and export of about

**€ 1 BILLION**

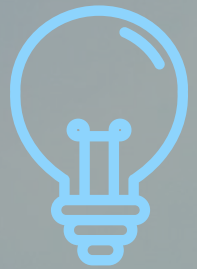




Lombardy counts for **1/3 of the total national export** in this field



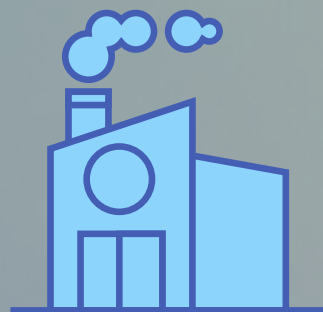
**12%** of revenues is spent on R&D



**50+** research projects as of July 2022



**255** patents in the last 15 years



**85%** out of the total are **SMEs Firms**

# Lombardy

## AEROSPACE BUSINESS ECOSYSTEM



The excellence 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

# Aerospace trends

The aerospace industry has historically been a pioneer in the development of new technologies. In recent years, in particular, **important new trends are emerging**. Some of the most interesting trends include **digitalization, automation**, but also new solutions in terms of **urban air mobility and electric airplane to reduce emissions**



The implementation of new technology and the related **process of optimization and automation of aircraft**



The rising development of **commercial electric aircraft**, powered by renewable energy



The growing importance of **Urban Air Mobility (UAM)**: aircraft set capable of short-range, low-altitude travel-both in urban and suburban spaces



**The return of supersonic jets** able to fly faster than the speed of sound

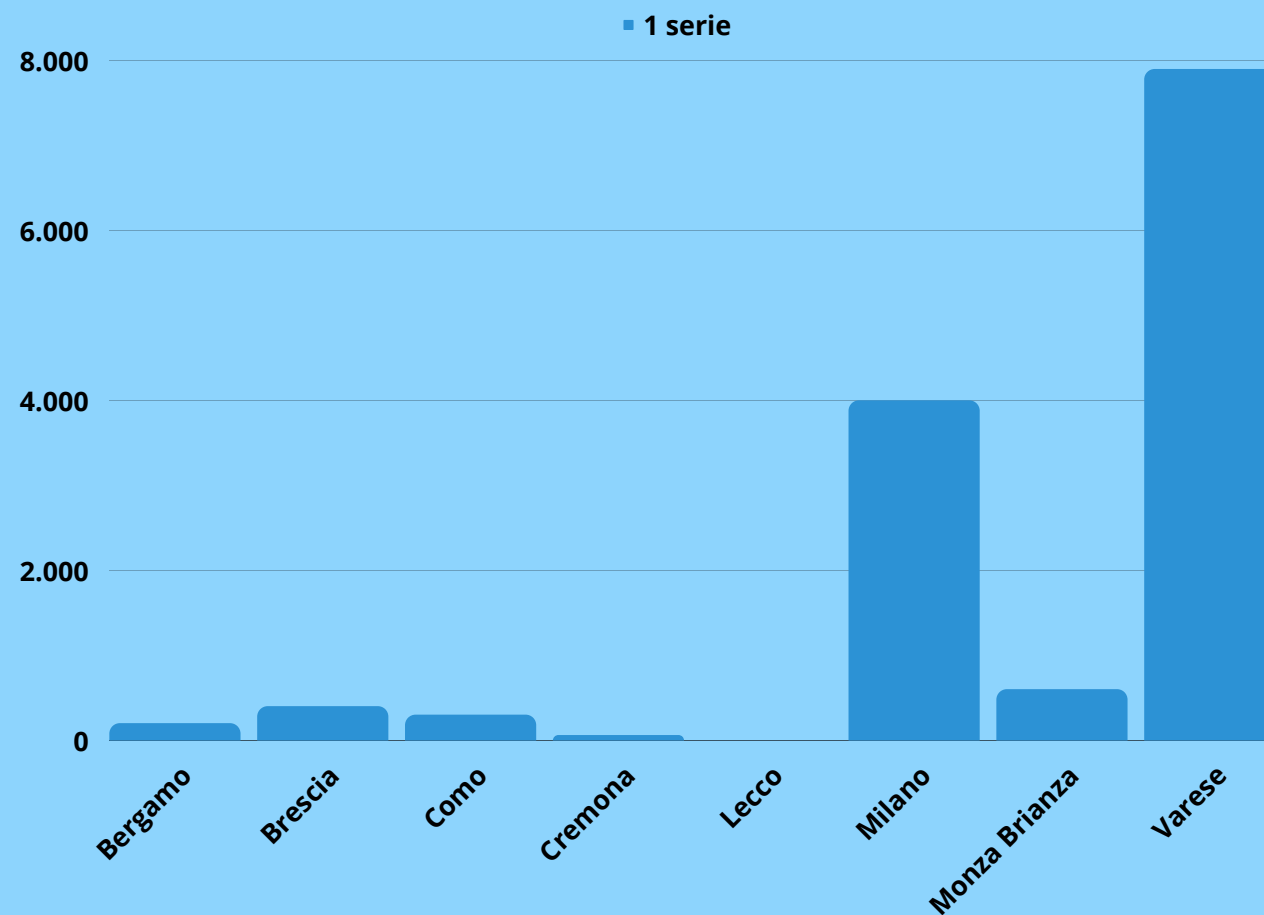


The increasing application of **innovative products** with the aim to make aircraft materials lighter

# 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 employees of Lombardy Aerospace Cluster (LAC) member companies.

Distribution by province of employees of LAC member companies



# Some key players



## AEREA SPA

- **EMPLOYEES:** 160
- **LOCATION:** Turate (CO)
- **MAIN ACTIVITIES:** high precision mechanics, components, training courses



## LEONARDO SPA

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



## THALES ITALIA SPA

- **EMPLOYEES:** 450
- **LOCATION:** Milano and Varese
- **MAIN ACTIVITIES:** defence and security, aerospace, satellites, transportation



## ASE SPA

- **EMPLOYEES:** N.A.
- **LOCATION:** San Giorgio su Legnano (MI)
- **MAIN ACTIVITIES:** electrical power generation systems for the aerospace and defence industry



## OHB ITALIA SPA

- **EMPLOYEES:** 210
- **LOCATION:** Milano
- **MAIN ACTIVITIES:** satellites, scientific payloads, microgravity experiments



## SECONDO MONA SPA

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



## THALES ALENIA SPACE SPA

- **EMPLOYEES:** 2.300
- **LOCATION:** Milano and Varese
- **MAIN ACTIVITIES:** security, transportation, aerospace, defence and space markets

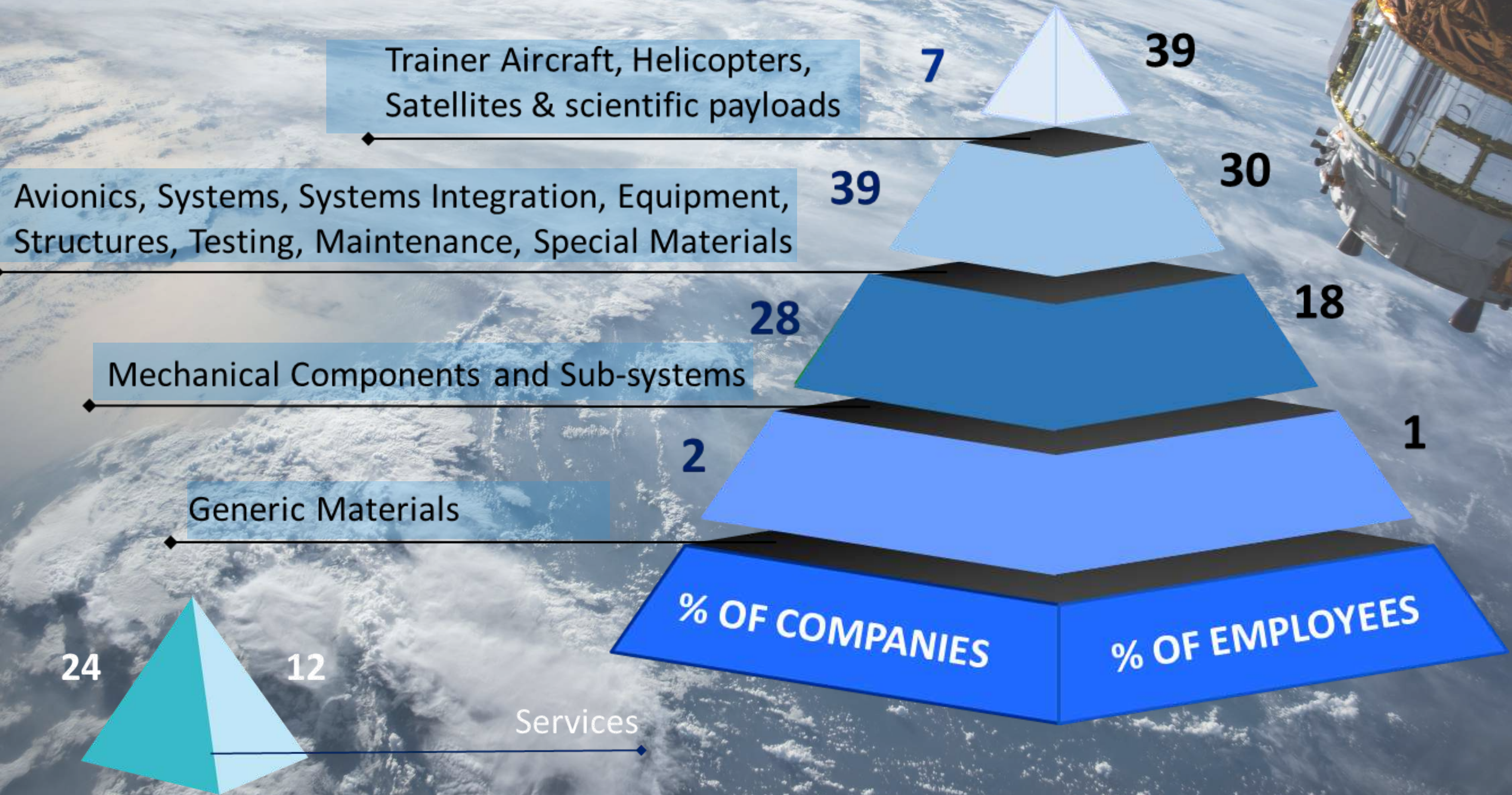


## LOGIC SPA

- **EMPLOYEES:** +100
- **LOCATION:** Cassina de' Pecchi (MI)
- **MAIN ACTIVITIES:** electronic applications for on-board products on fixed and rotary wings platforms



# % OF COMPANIES BY SUB-SECTORS



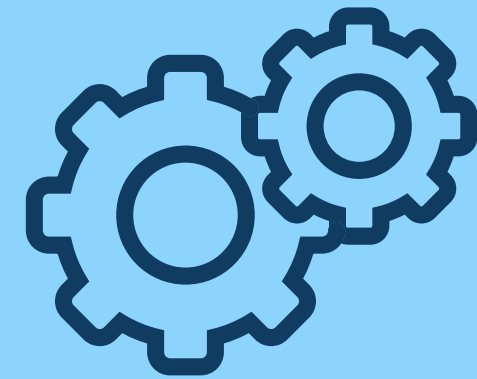
# LOMBARDY COMPETITIVE ADVANTAGES

lombardia  
aerospace  
cluster

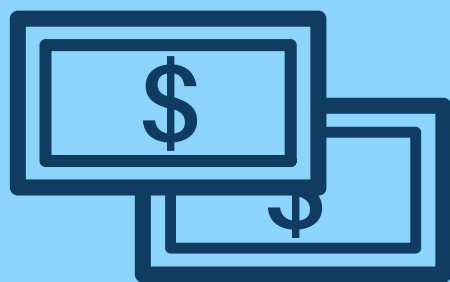
1) CLUSTER



2) SKILLED  
WORKFORCE



3) STRONG  
SUBCONTRACTING CHAIN



4) COMPETITIVE  
COSTS



5) EDUCATION &  
RESEARCH



6) DIGITAL  
CONNECTIVITY

# Competitive Advantages of the Aerospace ecosystem in Lombardy

## 1) CLUSTER

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 **highly specialized employees - roughly 19.300 - 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 are directed to machine tools and a part of that is addressed to the aerospace industry



# Competitive Advantages of the Aerospace ecosystem 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

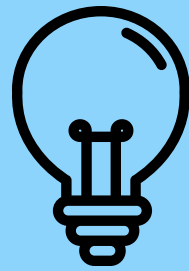
**Lombardy is the second-best Italian region** concerning the Regional Digital Economy and Society Index in 2021 (DESI), with a score of 56,2/100.

Italy, together with Germany, Finland, and Hungary, is one of the best-performing country for the implementation of the 5G spectrum, with **more than 60% of the spectrum already assigned**. The provinces that already enjoy 5G are Milan, Monza e Brianza, Brescia, Bergamo, Como, and Varese.



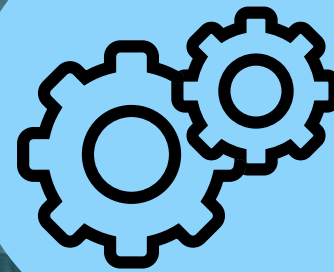
# WHAT CAN YOU DO IN LOMBARDY?

Lombardy is among the leading destinations in Europe for investments in the aerospace industry. There are countless benefits that come from investing in the region, as you will be able to:



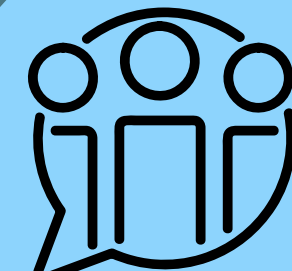
## R&D

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 favorable 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 transport



**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 capabilities**



**Eva Air**

**The company has opened an office in Milan** and planned 2 flights a week from Malpensa to Taipei



**CAE**

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

# Recent Success Stories



DECEMBER 2022

## APOGEO SPACE - D'ORBIT

Apogeo Space of Brescia, an innovative SME focused on research activities, reached an agreement with D'orbit (CO) leading company for orbital logistics and transportation, to put its satellites into orbit. The launches are planned to start in 2023. The project will reinforce **Italy's role in telecommunications and nanosatellite constellations.**



APRIL 2021

## WINTER OLYMPICS 2026

The Winter Olympics 2026, which will take place in Milan-Cortina, represents an important innovation opportunity. The Aerospace sector, in particular, will be especially involved in opportunities concerning **satellite or drone monitoring**, and in those concerning the creation of a **system of heliports and vertiports for integrated mobility.**



NOVEMBER 2020

## LEONARDO S.P.A.

Recently Leonardo **won a contract worth \$60 million from the European Union** to design and develop a cutting-edge uncrewed helicopter.



JULY 2020

## THALES ALENIA SPACE

Thales Alenia Space won the largest share of prime contracts the European Space Agency awarded on 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. euros.

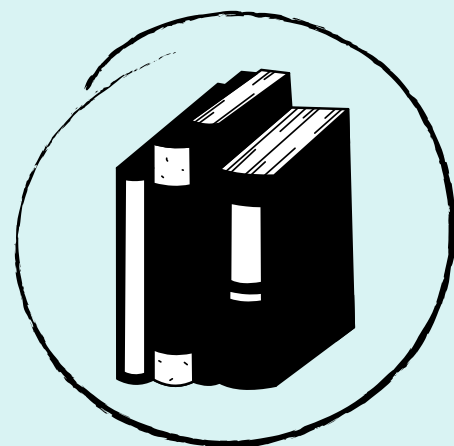


# Educational and Research System

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 500 students p/y\*
- *Automation and Control Engineering* → around 290 students p/y
- *Mechanical Engineering* → around 600 students p/y
- *Civil Engineering* → around 500 students p/y
- *ICT Engineering* → around 1600 students p/y
- *Electronic Engineering* → around 170 students p/y
- *Energy Engineering* → around 300 students p/y
- *Industrial Engineering* → around 700 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

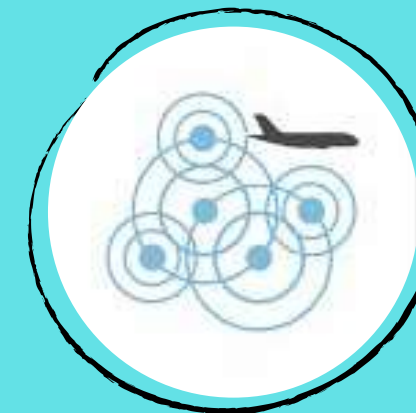
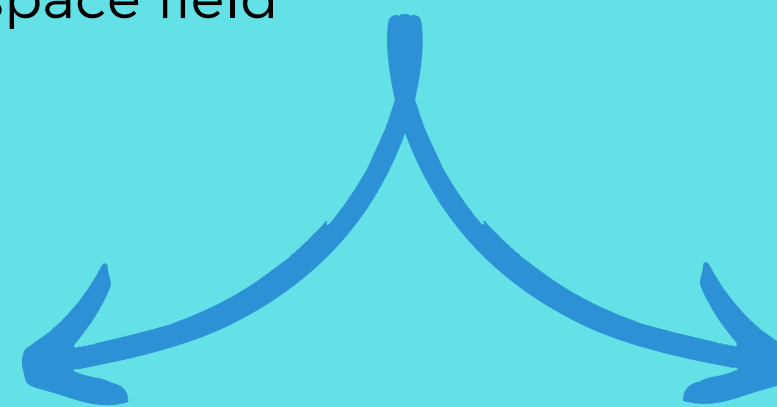
Recognized association founded in 2009. Today it includes 220 companies with around 19.300 employees as well as Universities and R&D Centers specializing in the aerospace field

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



## Cluster Tecnologico Nazionale Aerospazio

Acts as a single national reference among all the main actors of the Italian aerospace system: businesses, Research Centers, the 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

# Districts and Supply Chains



## Lombardia Aerospace Cluster

5

Areas of activities

3

Complete supply chains:

- rotary wing (helicopter supply chain)
- fixed-wing
- space

## History of the Lombardy Cluster

FEBRUARY  
2009

Foundation of the **Lombardia Aerospace Cluster, born on the initiative of 8 companies in the field**

JUNE  
2010

The Cluster becomes part of the **European Aerospace Cluster Partnership**

SEPTEMBER  
2012

The Cluster becomes part of the new born **National Aerospace Cluster**

OCTOBER  
2014

**The Cluster obtained the Bronze Label** certification, an important certification at the European level.

2019

In 2019, the Cluster celebrated its 10th anniversary

2021

Advanced Air Mobility (AAM) project development

# SETTING UP A COMPANY IN LOMBARDY

## 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

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01

## **Location scouting**

Find the best locations for your business through a dedicated network of local public institutions and private partners

02

## **Business intelligence**

Providing useful information on sectors/markets, supporting the evaluation of business opportunities in Lombardy

03

## **Public Administration**

We facilitate the dialogue with the public administration & support you in dealing with administrative procedures

04

## **Start of the operations**

Tailor-made technical support for the set-up of a new business

05

## **Networking**

We are a business integrator, facilitating the connection with private and public, local and national stakeholders

06

## **Incentives**

Overview of the tax incentives, grants, loans, and applicable bilateral conventions with institutions

07

## **Human resources**

Assistance in choosing the most suitable staff recruitment channels for your business

08

## **Expansion & relocation**

General support to the expat workers in the relocation process

# CONTACT US

FOR QUESTIONS, COMMENTS  
AND SUPPORT

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WEBSITE

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



PHONE

+ 39 02 8515 5220



EMAIL

[info@investinlombardy.com](mailto:info@investinlombardy.com)