

AEROSPACE IN LOMBARDY



invest in
Lombardy

POWERED BY



INDEX

Why Lombardy

Lombardy's specialization and success stories in the Aerospace Industry

Education, research and innovation

Cluster and Districts

How Invest in Lombardy can help you

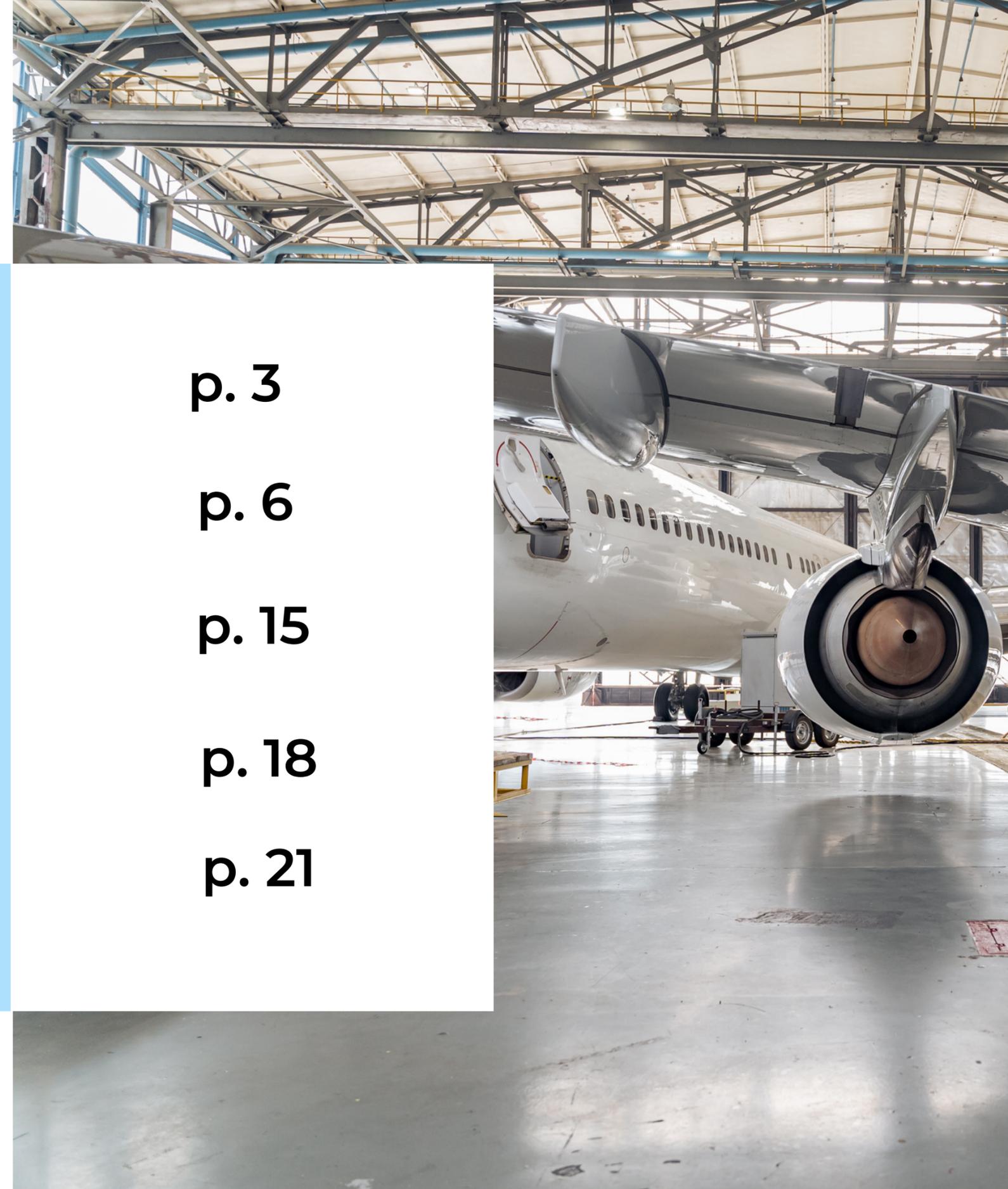
p. 3

p. 6

p. 15

p. 18

p. 21



WHY LOMBARDY

LOMBARDY IN A SNAPSHOT

AMONG THE TOP EUROPEAN REGIONS



- **2nd** EU Region for GDP
- **Among the 67** out of 240 European **Strong Innovator** Regions

THE MOST ATTRACTIVE REGION IN ITALY:

FDI



- **€ 11** billion (from 2012 to date)
- **24,7 %** of 44.4 bln € Italy's FDI



1ST REGION FOR:



GDP

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



NUMBER OF COMPANIES

- About **816K** companies
- **6,300** multinational companies
- **4,2 million** employees



HUBS SUPPORTING INNOVATION

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

INFRASTRUCTURES & CONNECTIONS

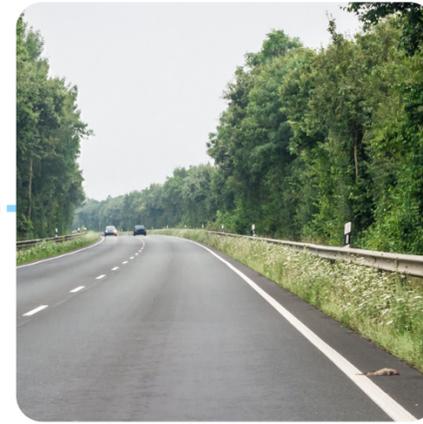
05



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



1h. 50 to London



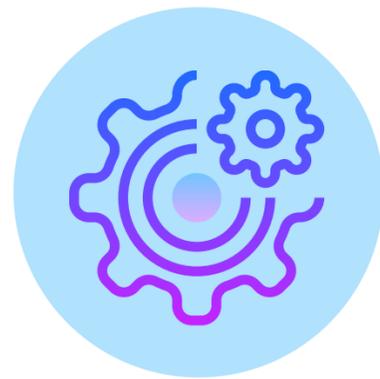
1h. 30 to Paris



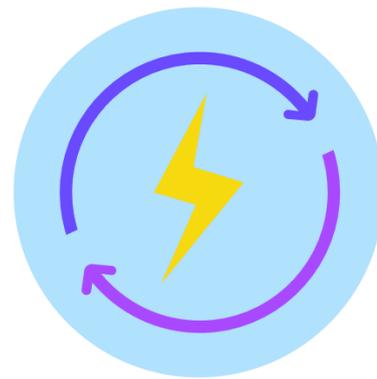
LOMBARDY'S SPECIALIZATION AND SUCCESS STORIES IN THE AEROSPACE INDUSTRY

AEROSPACE TRENDS

The aerospace industry has historically been a pioneer in the development of new technologies. In recent years **important new trends are emerging**. Some of the most interesting include **digitalization**, and **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**

AEROSPACE ECOSYSTEM IN LOMBARDY

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



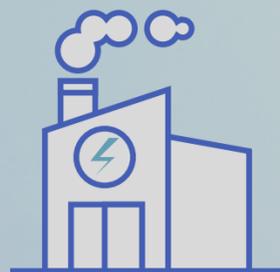
12% of revenues is spent on R&D



50+ research projects as of July 2022



255 patents in the last 15 years



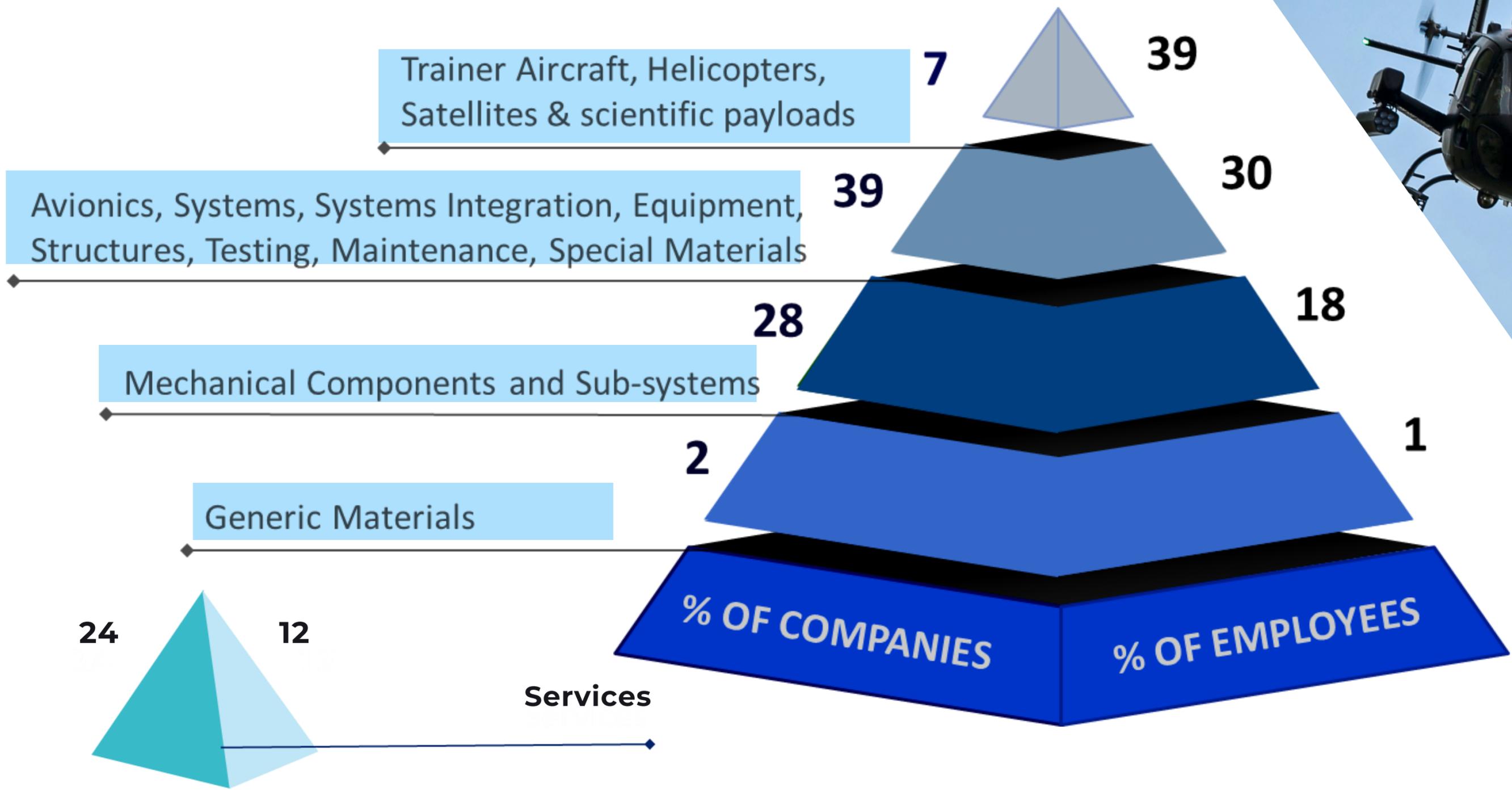
85% out of the total are **SMEs Firms**



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

% OF COMPANIES BY SUB-SECTORS



COMPETITIVE ADVANTAGES OF THE AEROSPACE ECOSYSTEM

11

Specialization and success stories

CLUSTER

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

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



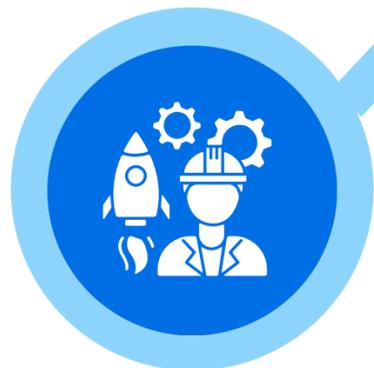
HIGH QUALITY EDUCATION SYSTEM

- **15 Universities**, including the **Polytechnic of Milan (13th in the world for Engineering&Technology)**
- **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



FAVORABLE MARKET

The region provides access to more than **800 million European consumers** and creates a favorable commercial hub for the EMEA market while consolidating marketing and sales strategies

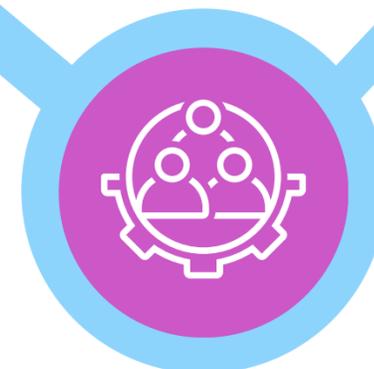


COMPLETE SUBCONTRACTING CHAIN

Lombardy hosts **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



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**

SOME NATIONAL AND INTERNATIONAL COMPANIES IN LOMBARDY

12

Specialization and success stories



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

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



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.

Recent Success Stories



EDUCATION, RESEARCH AND INNOVATION

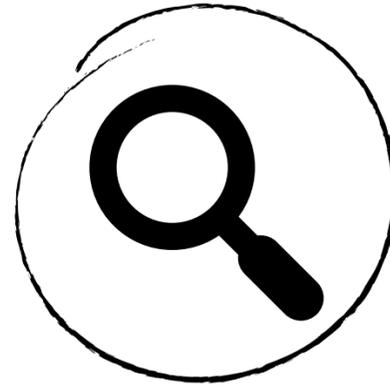
Educational and Research System

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

The highly specialized company in the region produce **helicopters, airplanes and satellites** from start to finish. Also thanks to the continuous collaboration with **universities and research centres**.



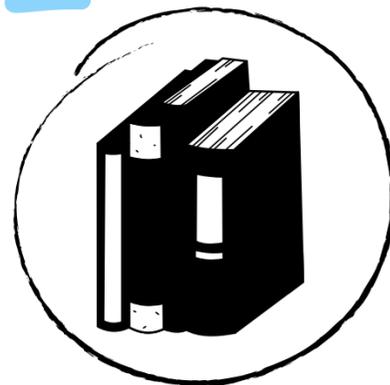
Research Centers:

- Consiglio Nazionale delle Ricerche
- Istituto Nazionale di Astrofisica



Universities with dedicated courses:

- **Milano Politecnico**
13th Engineering University in the world
- Università degli Studi Pavia
- Università Bicocca
- Università Liuc



Technical High School Education:

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

*p/y = per year

Innovation System



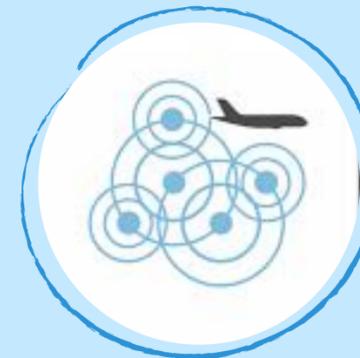
Lombardia Aerospace Cluster

Recognized association founded in 2009. Today it includes around 103 members including companies, Universities and R&D Centers specializing in the aerospace field



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

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 AND DISTRICTS

Districts and Supply Chains

Lombardia Aerospace Cluster

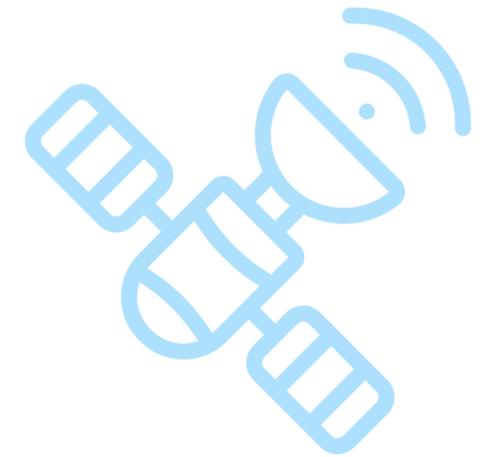


5

Areas of activities

50 +

Initiatives



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

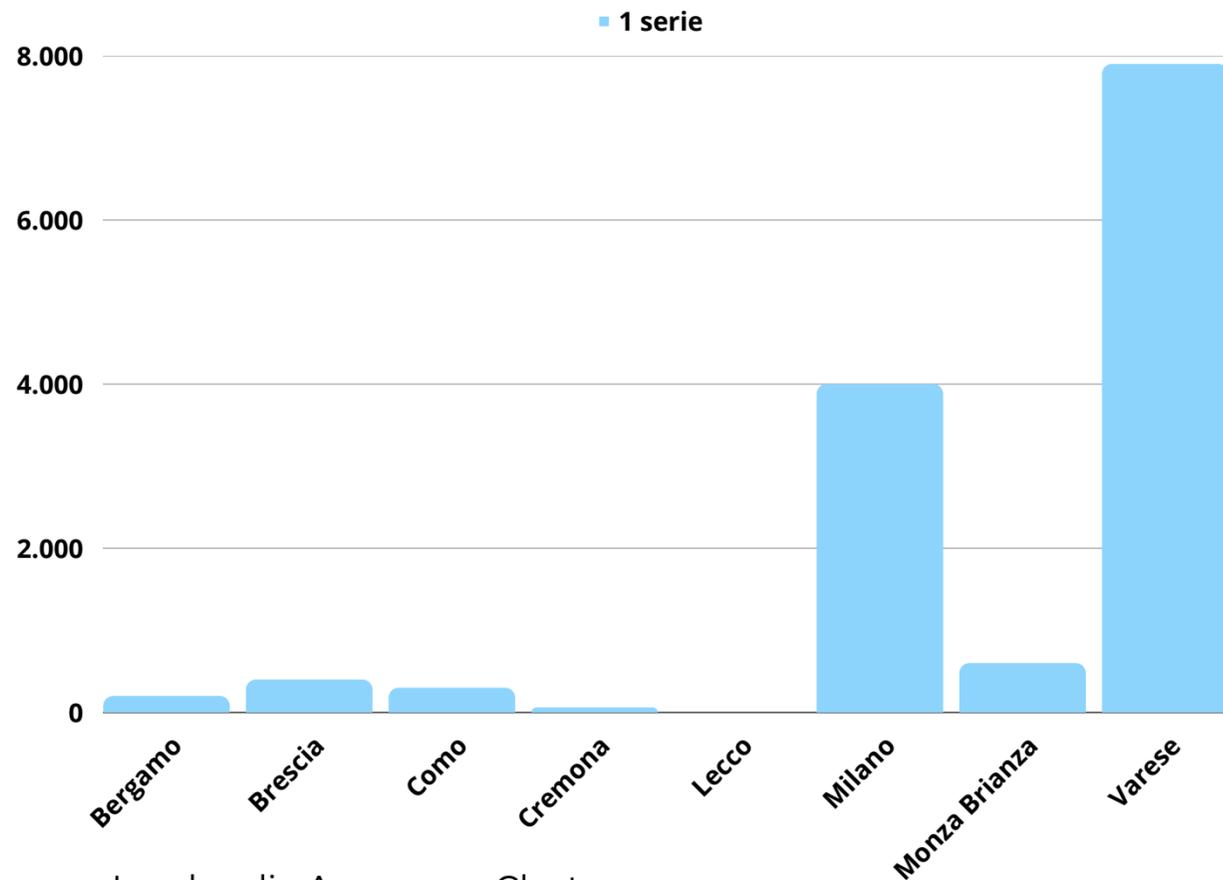
2021

Advanced Air Mobility (AAM) project development

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



Source: Lombardia Aerospace Cluster





HOW INVEST IN LOMBARDY CAN HELP YOU

INVEST IN LOMBARDY: ONE-STOP-SHOP DEDICATED SERVICES



LOCATION SCOUTING

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



NETWORKING

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



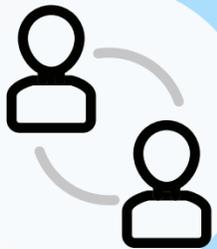
BUSINESS INTELLIGENCE

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



INCENTIVES

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



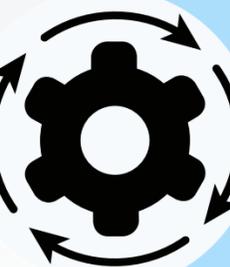
PUBLIC ADMINISTRATION

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



HUMAN RESOURCES

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



START OF THE OPERATIONS

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



EXPANSION & RELOCATION

General support to the expat workers in the relocation process

CONTACT US

FOR QUESTIONS, COMMENTS
AND SUPPORT



WEBSITE

www.investinlombardy.com



PHONE

+ 39 02 8515 5220



EMAIL

info@investinlombardy.com