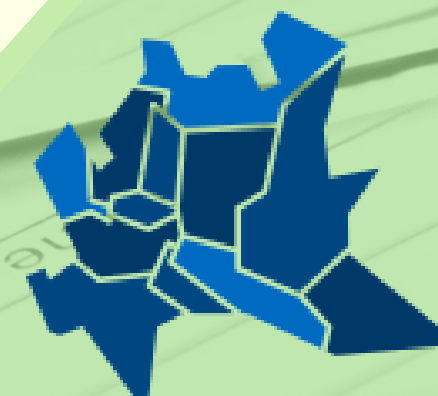


# LIFESCIENCE IN LOMBARDY



invest in  
**Lombardy**

**POWERED BY**



# LOMBARDY

## Lifescience Business Environment

Lombardy is the most developed Italian region in the lifescience sector, both considering the production value and the number of employees. The whole industry has an impact on the national total, which is equal to the 32% of production, 26% of the value added and 20% of employment.

**1st**

Region in Italy per number of companies, revenue and employees

**357.000**

# **employees**, out of circa 1.800.000 on a national level (20%)

with a **value of production** of  
**€ 71,1 BILLION**

and a **indirect value added** of  
**€ 50 BILLION**





Among the **top 4 regions in Europe**, together with Cataluña, Baden-Württemberg e Île de France



**€500 millions** spent in **R&D**  
(1/3 of the national total)



**50% of the national clinical trials** are in Lombardy



**6.270 scientific papers** realized

# LOMBARDY

## LIFESCIENCE BUSINESS ENVIRONMENT



Within the Lombardy Lifescience industry can be identified the following **three sub-sectors**:

- **Industries** (pharmaceutical ingredients, drugs, medical devices, biotech research services, industrial gasses for medical use)
- **Commerce** (wholesale and retail commerce of pharmaceutical products, medical devices and other healthcare items)
- **Health and social-health services** (hospital, dental and assistance services)

# The pharma sub-sector

Lombardy is an excellence of the European pharmaceutical industry, having in recent years expanded its competitive advantage and its international openness. In 2019 the Lombardy pharmaceutical companies exported goods for €8.4 billion (26% of total Italian exports in the sectors), with a more than double growth as compared to 2008 (+ 140%), and higher than the one experienced by its European benchmarks.

**1st**

Lombardy is the **first region in Italy and in Europe** per number of employees

**539**

**Value added** of the pharma sector (per inhabitant)

**427**

**Research & Development investments** (in milion €) -11% of the total firms' expenditure

**23.259**

**Number of employees**

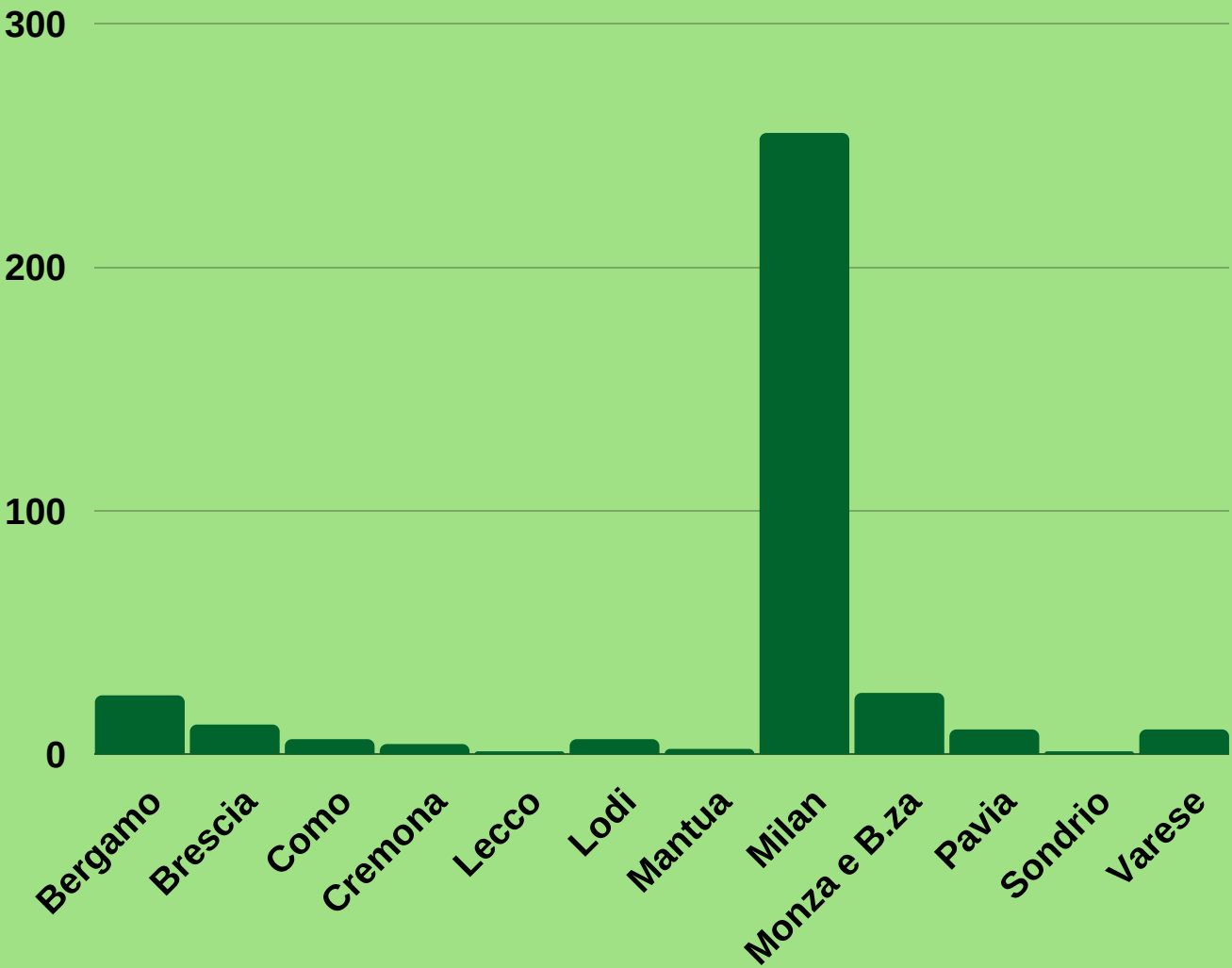
**+140%**

**% export increase** between 2008 and 2019

# National and International companies in the region

Lombardy is home to around **430 lifescience companies**. They are especially **SMEs**, but there is also a big presence of giant multinationals, like Novartis, Sanofi or Bayer. The vast majority of lifescience companies is located in the **Milan** province, but other interested territories are the ones of **Bergamo and Monza Brianza**.

## FIRMS PER PROVINCE IN LOMBARDY



# Some key players



## BAYER ITALIA SPA

- **REVENUE:** €1.700.000.000
- **EMPLOYEES:** 2.000
- **LOCATION:** Milan (MI)
- **MAIN ACTIVITIES:** human and animals pharmaceutical products; agricultural chemicals and biotechnologies



## RECORDATI SPA

- **REVENUE:** €1.280.000.000
- **EMPLOYEES:** 4.100
- **LOCATION:** Milan (MI)
- **MAIN ACTIVITIES:** development, manufacturing and marketing of pharmaceutical products



## BRACCO SPA

- **REVENUE:** €1.300.000.000
- **EMPLOYEES:** 3.420
- **LOCATION:** Milan (MI)
- **MAIN ACTIVITIES:** world leader in the production of diagnostic contrasting agents



## ROCHE ITALIA SPA

- **REVENUE:** €901.000.000
- **EMPLOYEES:** 1.200
- **LOCATION:** Monza (MB)
- **MAIN ACTIVITIES:** pharmaceuticals and diagnostics



## NOVARTIS SPA

- **REVENUE:** €1.190.000.000
- **EMPLOYEES:** 2.000
- **LOCATION:** Origgio (VA)
- **MAIN ACTIVITIES:** innovative medicine, generics and eyecare



## SANOFI ITALIA SPA

- **REVENUE:** €1.400.000.000
- **EMPLOYEES:** 2.500
- **LOCATION:** Milan (MI)
- **MAIN ACTIVITIES:** general medicine, diabetes, consumer healthcare and vaccines

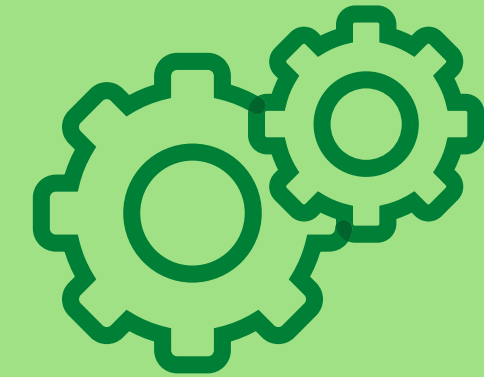
# Lombardy Competitive Advantages



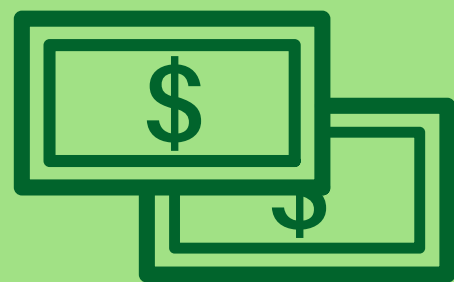
**1) CLUSTERS AND DISTRICTS**



**2) SKILLED WORKFORCE**



**3) COMPLETE SUB-SECTORS**



**4) COMPETITIVE COSTS**



**5) EDUCATION & RESEARCH**



**6) DIGITAL CONNECTIVITY**

# Competitive Advantages of the Lifescience environment in Lombardy

## 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** such as:

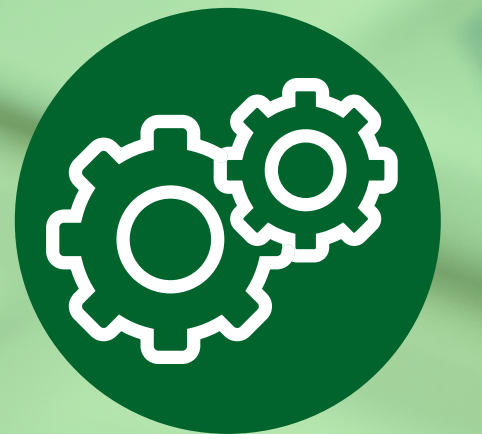
- **biomedical engineers**
- **specialized doctors and researchers**
- **high-skilled nurses and other dedicated health workers**



## 3) COMPLETE SUB-INDUSTRIES

Lifescience includes a variety of sub-sectors, among which:

- **Pharmaceuticals**
- **Medical Devices**
- **Drugs distribution**
- **Biomedical engineering**





# Competitive Advantages of the Lifescience 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

**9 Universities and 14 Research centers** specialized in topics related to the lifescience industry: **roughly 9.600 students graduated in health-related subjects per year in Lombardy**



## 6) DIGITAL CONNECTIVITY

**Lombardy is the best Italian region** concerning the Regional Digital Economy and Society Index in 2020 (DESI), with a score of 72/100.

Italy, together with Germany, Finland and Hungary is one of the best performing countries for the implementation of 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 lifescience industry.

It is the first region in Italy in terms of revenues generated

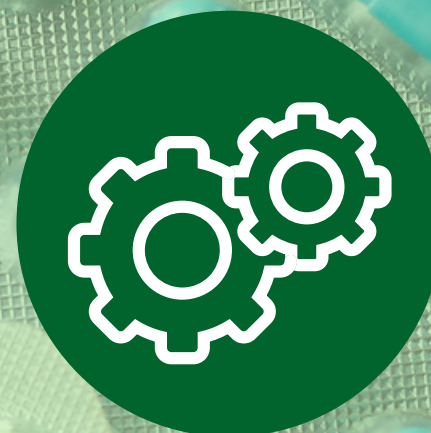
(€71,1 billion, around 32% of the national total).

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



**Ekso  
Bionics**

The company has inaugurated an **excellence center** in Costa Masnaga (CO), a rehabilitation center fully embedded with Ekso Bionics' technologies designed for patients with mobility problems



**Flowmetric**

The company has created its **European headquarters** in Bresso (MI), inside the OpenZone Campus., a scientific campus and excellence research center, fully dedicated to the lifescience sector.



**Patheon**

The project consists in the **expansion of the productive capacities** in the Monza plant. Recently a new excellence center for the development of sterile injectables was opened in Monza.



**Ultivue**

The company has inaugurated the new **branch in Milan**, which is also the first fully owned in Europe. The new offices will be able to support the activities of the company in the whole Europe.

# Recent Success Stories



JULY 2020

## HUMANITAS S.P.A.

The Humanitas hospital in Rozzano has successfully built in just 11 weeks the "**Emergency Hospital 19**". The new location was inaugurated in order to fight the burst of the virus, increasing the number of beds available in intensive and sub-intensive care, with a total investment of € 12 million.



FEBRUARY 2021

## NOVARTIS S.P.A.

Novartis has announced an investment of **€74 million in Italy in 2021**, which will be allocated among the 207 clinical trial programs currently underway. Over the next three years, investments for a total of €250 million are planned in Italy. Among the first interventions, the donation of €720.000 to the Lombardy Red Cross.



MARCH 2021

## DHL BIO PHARMA LAB

The new **DHL Bio Pharma Lab** was inaugurated in Settala (MI), dedicated to companies in the Hospital & Specialty Pharma sectors. The investment, of over €3 million, highlights the importance of the logistical side of the lifescience sector. The site includes a 6,000 sqm "cold store", which guarantees an innovative 360° management of the biotechnological product.

#### SOURCES:

<https://www.milanotoday.it/attualita/ospedale-virus-humanitas-rozzano.html>

[https://www.adnkronos.com/farmaceutica-da-novartis-in-italia-250-mln-di-investimenti-nei-prossimi-3-anni\\_MxT3pySOKxpRKI6VqWMce](https://www.adnkronos.com/farmaceutica-da-novartis-in-italia-250-mln-di-investimenti-nei-prossimi-3-anni_MxT3pySOKxpRKI6VqWMce)

<https://www.dhl.com/it-it/home/stampa/stampa-archivio/2021/dhl-supply-chain-inaugura-il-primo-bio-pharma-hub-dedicato-alla-logistica-dei-farmaci-bioteecnologici-e-delle-terapie-innovative.html>

# 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:

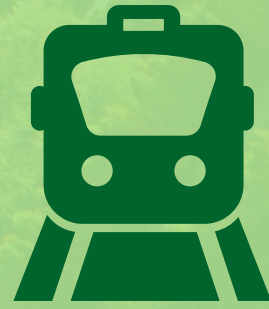
**Bergamo** - Orio al Serio

**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

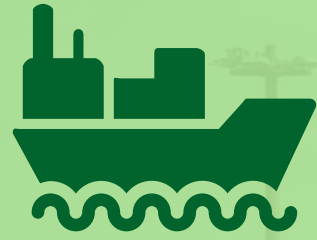


- 400 **railway stations** in Lombardy, including the 23 located in Milan, that connect the city with the other major Italian and European destinations;
- 32 train rides to **Rome** daily;
- It is possible to get to Rome in 2h 45min with the **high speed train**;
- You can easily reach any area of the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



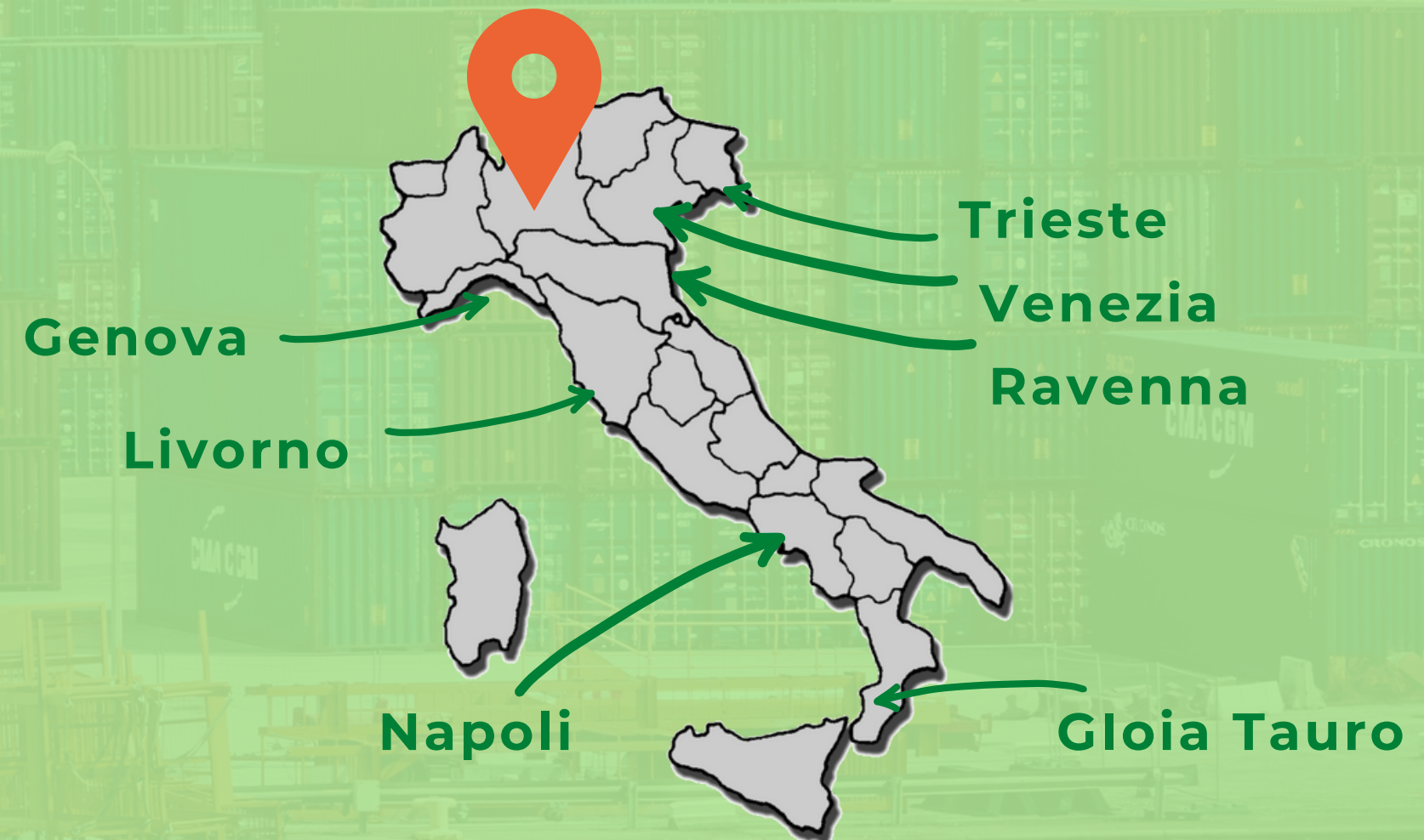
# PORTS AND NAVAL CONNECTIONS



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:

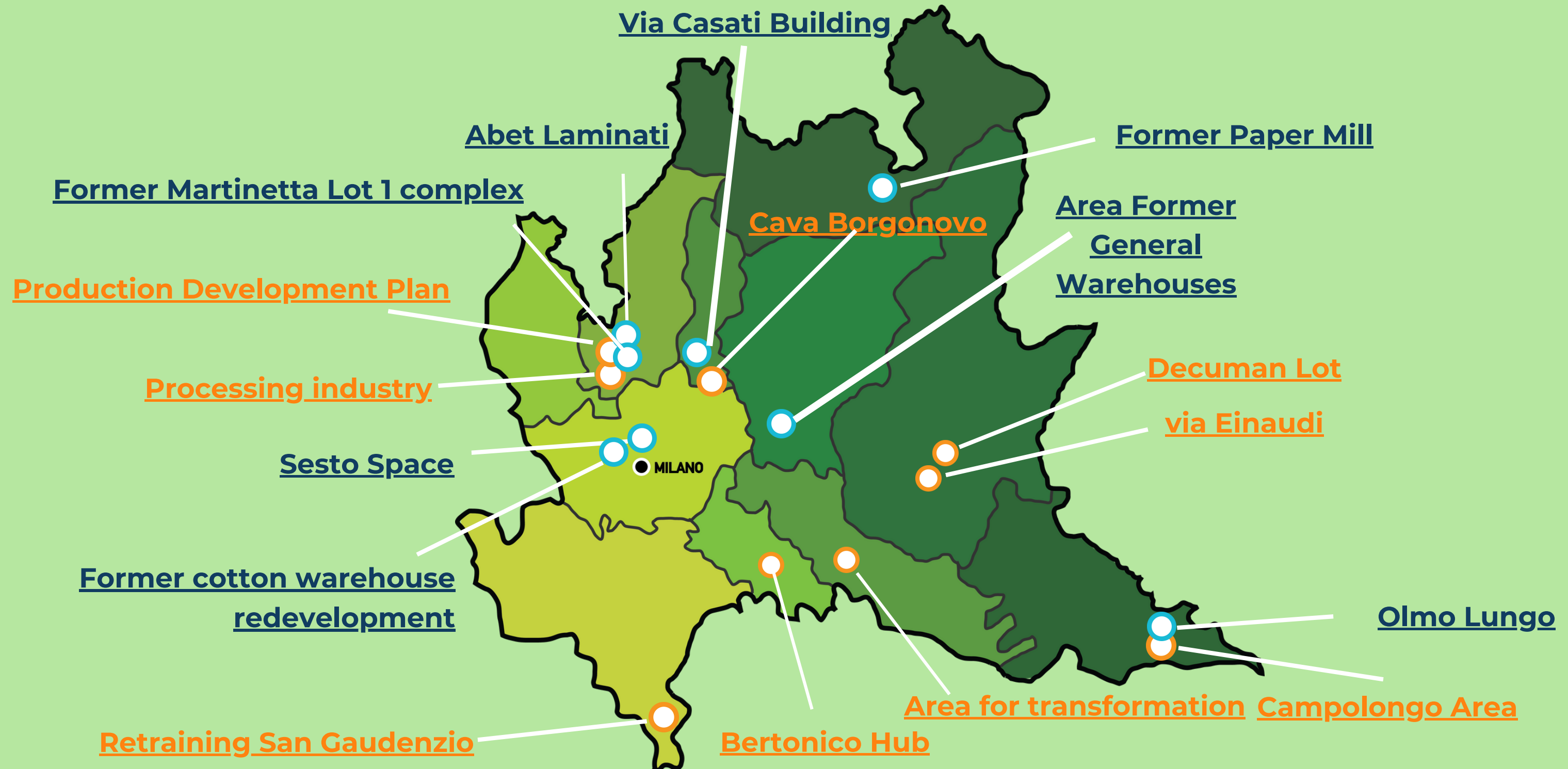
- 2h to **Genoa**
- 3h to **Venice**
- 3.30 h to **Livorno**
- 4.30 h to **Trieste**
- 8 h to **Naples**
- 12h to **Gioia Tauro (RC)**





# 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 lifescience's fields.

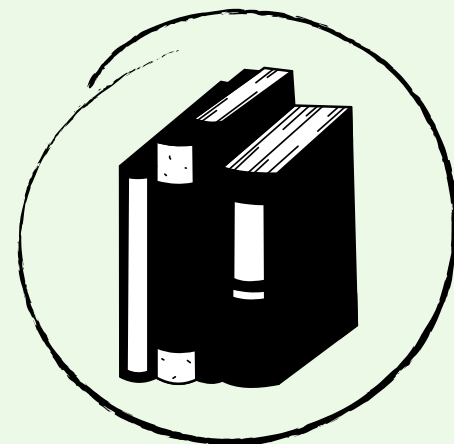


## Research Centers:

- Consiglio Nazionale delle Ricerche
- Fondazione Centro San Raffaele
- Fondazione Humanitas per la Ricerca
- Fondazione Istituto Insubrico di Ricerca per la vita
- Fondazione Istituto Nazionale di Genetica Molecolare
- Fondazione per la Ricerca Ospedale Maggiore di Bergamo
- Fondazione Regionale per la Ricerca Biomedica
- Fondazione Sanità Futura
- Fondazione Telethon
- IFOM
- Istituto di Ricerche Farmacologiche Mario Negri

## Universities with dedicated courses:

- Humanitas University
- **Milan Politecnico**
- Università Cattolica del Sacro Cuore
- Università degli Studi di Bergamo
- Università degli Studi di Brescia
- Università degli Studi di Milano
- Università degli Studi di Pavia
- Università degli Studi Milano - Bicocca
- Università Vita - Salute San Raffaele



## Technical High School Education:

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

## Specialized Research Centers of Milano Politecnico:

- Biomedical Applications
- E-Health
- LaBS
- Lucid Lab
- Near Lab
- TMB Lab

# Innovation System



## **Cluster Lombardo Scienze della Vita**

The Cluster, founded in 2015, includes as of today 106 members and its aim is to promote the lifescience sector in Lombardy, bringing together all the different actors in the field.



## **Cluster Nazionale Scienze della Vita - ALISEI**

The National Cluster proposes itself as a central subject at national level for the definition and promotion of research and development, and for innovation and technological transfer in the life sciences sector.



## **Mind Innovation District**

An innovation, culture, and research center, capable of attracting international excellence and promoting Italian technology and culture in an extraordinary location. Thanks to the collaboration with the Galeazzi research and treatment hospital and with the University of Milan, it is able to gather the excellence in the orthopedic field of IRCCS Galeazzi and the experience gained in the cardio-thoracovascular, and bariatric field and bariatric field of the Istituto Clinico Sant'Ambrogio, to offer patients a great multi-specialized research hospital.

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

# Districts and Supply Chains



The "**Cluster Lombardo Scienze della Vita**" is the community dedicated to lifescience in Lombardy. It is one of the nine technological Clusters of the Lombardy Region. It **brings together private and public actors in different lifescience areas of activities**, in order to promote the progress of the sector, to favor internationalization and encourage the creation of new business opportunities

## The Cluster in numbers

109

**Members**, between companies, associations, clinics and research centers and universities

3

**Main areas of interventions:** research and open innovation, experience sharing and community, national and international promotion

## History of the Lombardy Cluster

JULY  
2015

**Foundation of the Cluster**, from the impulse of the Lombardy Region, as a non-profit organization

DECEMBER  
2016

The Cluster joined the life science national cluster - **ALISEI** - that today counts 22 members

FEBRUARY  
2017

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

JUNE  
2019

**The Cluster joined as an associate member the UEHP** - European Union of Private Hospitals - . an association that promotes European private hospitals

OCTOBER  
2019

11 projects of the Cluster have been awarded a **grant of €36 million from the Region**, thanks to the Call HUB research and innovation tender

## 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

## 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

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