

LAZIO FLIES TO INNOVATION


FARNBOROUGH INTERNATIONAL / **AIRSHOW**
22-26 JULY 2024

Italian Pavilion - Hall 1 | Stand #1437

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Lazio's aerospace ecosystem constitutes a unique excellence in the Italian manufacturing sector, with industrial and research expertise covering the entire supply chain.

It is a heritage that was born at the beginning of the 20th century and has been consolidated thanks to the process of integration between national Research Institutions of international level, Universities, Incubators, Accelerators, Technological Parks, large world-accredited companies, SMEs and high value-added startups.

An ecosystem that attracts national and international investments, thanks especially to the activity of the Aerospace Technology District, a fundamental asset for the competitiveness of the territorial economic fabric, by virtue of its ability to aggregate and develop synergies between research, universities and the world of production.

In this context, according to the provisions of Lazio's Smart Specialization Strategy, Lazio Region is supporting the development of the aerospace sector with investments aimed at enhancing technological evolution together with digital, industry and New Space Economy players, strengthening the competitiveness of small and medium-sized enterprises and encouraging the emergence of new innovative experiences.

And the local government, through Lazio Innova, it is among the key players in establishing the National Aerospace Technology Cluster (CTNA) to compete at the European and national levels.

An achievement that stems from Lazio's ability to team up among aerospace supply chain players.

Growth and competitiveness are in fact the result of a shared strategy among all the living and propulsive forces of the territory.

Our strategy also draws strength from resources: in December 2023, Lazio Region allocated about 18 million to finance 32 aerospace and homeland security projects under the Public Call "Competitive Repositioning CSR."

We will continue on this path, taking advantage of the opportunities of European funds of the 2021-2027 programming period and the PNRR (Italian National Recovery and Resilience Plan), with the aim of consolidating business research and innovation activities, technology transfer, and the development of innovative startups and research spinoffs.

Roberta Angelilli

Vice President - Regional Minister for Economic Development, Commerce, Crafts, Industry, Internationalization of Lazio

AEROSPACE IN LAZIO

The aerospace vocation in Lazio dates back to the beginning of the XX century, the result of a propensity for research and innovation that has always distinguished our territory and that has made aerospace one of the leading sectors of regional economic development.

The aerospace ecosystem of Lazio is among the largest in Italy in terms of production and scientific representativeness since it includes about **300** companies including large companies and SMEs with **23.5** thousand employees in cutting-edge technologies and an annual turnover of over **5** billion euros with a significant part (almost **2** billion) destined for **exports**.

The strong interaction with **5** public Universities and numerous world-renowned national Research and Innovation organizations is in fact one of the strengths of our ecosystem, a strength also perceived and appreciated by international companies, and which qualifies with greater value the attractiveness of Lazio for aerospace production.

INDUSTRY & SPACE ECONOMY SECTORS OF EXCELLENCE

Lazio is the **only** Italian region where the whole New Space Economy industrial value chain and a large part of the aeronautical and airport supply chain are present, a peculiarity that creates a competitive advantage at national and international level.

Among its companies, Lazio Aerospace sector includes **internationally renowned companies** of excellence in the construction of **satellites**, propulsion systems and launcher components for access to space (**Ariane and Vega**), satellite systems for **Earth observation, navigation and communication**, equipment systems and aerostructures, electronics, information technology, avionics, air traffic management and airport management services (MRO).

The Lazio aerospace value chain is characterized by a **high concentration**: 9% of the companies are large system integrators of national and international standing (“Tier 1” and “Tier 2”) which generate 85% of total revenues and employ 77% of workers, compounded by a vast group (91%) of level 2 suppliers (“Tier 3”) consisting mainly of SME subcontractors that provide electronic products and services, ICT for the development of systems and satellite applications for communication, Earth observation, satellite navigation, avionics and aeronautical and airport services.

RESEARCH AND INNOVATION CENTRES

The Lazio Region also hosts the Italian Space Agency (ASI) and in Frascati, near Rome, the European Space Agency (ESA) with the ESRIN laboratories (one of the six European centres of excellence for the exploitation of Earth observation missions, founded in 1966).

It also hosts the Nation's major research centres, including the National Research Centre (CNR), the National Institute for Nuclear Physics (INFN), the National Institute for Astrophysics (INAF), the National Institute of Geophysics and Vulcanology (INGV), the National Agency for New Technologies, Energy and Sustainable Economic Development (ENEA), the Institute for Environmental Protection and Research (ISPRA), the Centro Sviluppo Materiali S.p.A. (CSM - Rina Group), the Satellite Remote Sensing Joint Force Centre and the Air Force Flight Experimental Division (RSV).

**LAZIO AEROSPACE
TECHNOLOGY
DISTRICT (DTA)**

KEY NUMBERS



23,500 Employees



300 + Companies
(Large, Medium and Small Enterprises)



2 BN Euro in Exports



5 BN Euro Annual Turnover



4 Faculties of Engineering



12 University Departments



30 Post - Degree University Courses



3,000 Researchers



1 ESA BIC Lazio Incubator

In 2004, the signing of the APQ6 between the Lazio Region, the Ministry of Economy and Finance and the Ministry of Education, University and Research, gave life to the **DTA - Aerospace Technology District of Lazio**, the first Italian Aerospace and Defence High-Tech District.

Coordinated by Lazio Innova, an in-house company of the Lazio Region, the DTA pools together all the key players of the regional aerospace system for the following purposes:

- Fostering industrial research, training, technology transfer, and the launch of new business initiatives in line with the Smart Specialisation Strategy.
- Acknowledging a complex ecosystem that puts together large internationally relevant companies, small and medium-sized production facilities with high value-added service providers in the field of training, science and knowledge.
- Further stimulating a context that currently constitutes an internationally relevant asset, whose vocation dates back to the beginning of the last century, with the first initiatives that laid the grounds for Italy to become the third Country in the world, after USA and URSS, to put a satellite in orbit in 1964.
- Through the participation of the DTA - Aerospace Technology District of Lazio, the Lazio Region is one of the founding members of the CTNA - National Aerospace Technology Cluster, which aggregates all the key players in the national aerospace system.

MAIN STAKEHOLDERS IN DTA

RESEARCH AND INNOVATION CENTRES

ESA - ESRIN European Space Agency

ASI Italian Space Agency

SAPIENZA Università di Roma

Università degli Studi **Roma TRE**

Università degli Studi di Roma **TOR**

VERGATA

Università degli Studi della **TUSCIA**

Università degli Studi di **CASSINO** e del **LAZIO MERIDIONALE**

CNR (National Research Center)

INFN (National Institute of Nuclear Physics)

ENEA (National Agency for New Technologies, Energy and Sustainable Economic Development)

ISPRA (National Institute for Environmental Protection and Research)

INGV (National Institute of Geophysics and Volcanology)

INAF (National Institute of Astrophysics)

ESA Business Incubation Centre Lazio - Spazio Attivo Roma Tecnopolo Galaxia - the Italian Aerospace Technology Transfer Hub

RSV (Air Force Flight Experimental Division).

CITS (Satellite Remote Sensing Joint Force Centre)

CORDIFESA (former C4 Defense COMMAND)

RESMA (Department of Aeronautical Meteorology)

LARGE COMPANIES

LEONARDO

THALES ALENIA SPACE ITALIA

TELESPAZIO

AVIO

MBDA

E-GEOS

ELT GROUP

ENGINEERING

ALMAVIVA

ENAV

RINA

AEROPORTI DI ROMA

INTECS

SICAMB

AIRBUS ITALIA

BOEING ITALIA

NORTHROP GRUMMAN ITALIA

OHB ITALIA

RHEINHMETALL ITALIA

LARIMART - LEONARDO GROUP

SPACELAB - ASI & AVIO JV

IDS - FINCANTIERI GROUP

ESA BIC LAZIO

ESA Technology Transfer and Business Incubation Office started its ESA Business Incubation Centres (ESA BICs) in 2003.

Today 20 ESA Business Incubation Centres, spread over more than 60 cities, in 17 European countries aim to work with and inspire entrepreneurs to turn space connected business ideas into commercial startup companies, applying space technologies, solutions and systems in everyday life.

ESA BIC (Business Incubation Centre) Lazio is a partnership among Lazio Region, ASI (Italian Space Agency) and ESA and it is part of the Innovation and Ventures Office (TIA-AI) of the European Space Agency.

ESA BIC Lazio offers an incubation programme with integrated services for creating and developing space-tech based startups and support to finance and technology transfer.

**LAZIO
COMPANIES
AT FIA 2024**



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Aero Sekur S.p.A. provides design, manufacturing and maintenance for a suite of systems and services for the Aerospace & Defence (Emergency Flotation, Liferrafts and Fuel Systems). Certifications include EN9100:2018, EASA Part21.J, Part21.G, Part145. Engineering capabilities exploit advanced design and simulation tools to optimize the performances, mitigating the certification risks. Manufacturing evolves through new technologies aimed to improve existing products and promote innovative solutions.

Since 1987, Arescosmo S.p.A. gained specific knowledge in the design, qualification and construction of parachutes, trajectory stabilizers and drogue parachutes. The company, continuing its strategy in the defence sector, expanded its product catalogue with ballistic vests and CBRN protective equipment. Since 2010, Arescosmo is part of the JSF Programme, producing Ground Support Equipment. Arescosmo developed significant capabilities in the manufacturing of products for space applications, being part of the ExoMars mission.





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ARS Electronics is proud to offer an extensive line of products which comply with the MIL-STD-Environmental standards (SHOCK/VIBRATION/LOW-HIGH TEMP) & DO160.

Aviorec Composites is an Italian aeronautical company based in Anagni (near Rome), with a sister Company in Poland (called JFG), where the same kind of products are produced. Aviorec is specialized in the design and production of composite structural (and non-structural) parts. Aviorec is mainly focused for production of helicopters parts but also operates in the Aviation, Aerospace, Nautical & Rail sectors.





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CELAB Srl operates in the testing and certification industry, in Italy and around the world, providing a wide range of services among which: CE Marking and Assessments as Notified Body; Certification of Conformity and Voluntary Certification for Import-Export Activities; Testing Laboratory for CE Marking on Electromagnetic Compatibility (EMC), Electric Safety (LVD), Radio Equipment (RED); Environmental Qualifications and Mechanical Simulations.

LA Consulting is the lead company of the “Cloud for Defence” Business Network which has been operating in the Aerospace and Defence sector for 10 years. The network has innovative solutions in the field of technologies to support Space Economy such as Cloud Computing, cybersecurity and data privacy.

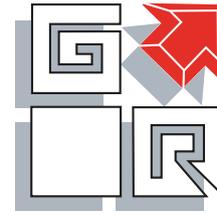


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Electron Source Co has accrued 33 years' experience in manufacturing high performance electromechanical Relays, Timers and various electronic Sensors (for voltage frequency/ currents/three-phase sequence) for the Aerospace and Defense industries. Our company has knowledge and a strong experience in reproducing obsolete items with the same Fit, Form & Function of the original device by new design or reverse engineering. An MRO smart solution! Company Certified AS9100-ISO9001-ISO45001-ISO14001.

GRTT Srl is a leader company in high technology heat treatment in Italy. The main processes are Vacuum Heat Treatments, Gaseous Nitriding, Carburizing, Carbonitriding, Controlled Atmosphere Hardening and Tempering, Solution treatment, Precipitation hardening, Normalizing, Annealing, Stress Relief and customized heat treatments.

GRTT is specialized in heat treatments on steel or nickel-based alloys parts for mechanical, automotive, aerospace, biomedical, and oil and gas industries. Accreditations: EN 9001, 9100, 14001 and NADCAP.





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GMSpazio Srl has been operating in the Aerospace, Defense, and Homeland Security sectors since 2005, with solutions focused on 4D (Space + Time) Synthetic Scenarios Management to help manage: Complex Simulation Scenarios, SST and SSA issues, Border Control, Missile Defense Network Modeling, Satellite Remote Sensing, and UAVs Surveillance. GMSpazio provides products, services, and training to develop integrated and customized Information Systems and software applications.

HTT is a SME focused on design, manufacturing, and value-added services for HiRel and VHiRel custom magnetic devices and power electronic equipment. With over 30 years of experience, HTT offers t-key solutions, collaborates with research institutes and universities and supports customers with a 360° cooperative approach. HTT offers design, reverse engineering and manufacture of custom transformers, inductors, electric motors, generators, power supply and units, and converters.





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Since 1994, M.E.R.I.N Srl team designs, manufactures and tests customized flexible, crashworthy and self-sealing fuel tanks in house to maintain total control of the quality and safety of each product prior to delivery. At M.E.R.I.N it is our mission to produce high quality customized fuel safety systems built on the back of a true spirit of partnership with our clients. This forms the basis of our culture of innovation. Merin's Quality System complies with ISO 9001 and AS/EN 9100 certifications.

Med Technology Srl operates in the Aeronautical, Space, Military and Naval sectors as distributor and Service Provider in particular of Chemicals and Raw Materials of High Technology products.

The Management has over 30 years of experience and with passion, as from day one, implements work standards thanks to a professional, dynamic and efficient technical and administrative staff, ensuring solid and reliable partnerships.





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Since 1983, New Digimatic Srl has been designing and producing electronics for video signal management. Specializing in customized video controller boards for panels of various sizes and resolutions, offer tailored solutions for OEMs in several applications. With over 40 years of experience and made in Italy production, it manages the entire process from R&D to production, ensuring high quality and long-term support for continuous operation.

OMS Srl specializes, since 1982, in very high precision mechanical workings for aerospace, aeronautical and military sectors (Certification 9100:2018 and Ex art. 28 T.U.L.P.S.). Over the years we have specialized in the production of turbopumps and other critical components for aerospace programs such as ARIANE 5/6, VEGA, etc. Furthermore, OMS produces, for the aeronautical and military sectors, flight parts obtained from honeycomb panels and engine components.





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Progetti Speciali Italiani Srl (PSI) is an Italian SME 100% owned by Italian shareholders specialized in the development of High Performances Cubesat, Microsatellites and UAV with their relevant payloads for Dual Use Application for EO, SAR, ELINT and METEO.

PSI with his SME partner, forming PSI Group, has a total turnover of about 20 million euro and 200 employees.

SIGMA INTEGRATED SYSTEM, founded in 1998, is a company with 30 years of experience in the design and integration of electronic and ICT systems for applications in the fields of Aerospace, Intelligence, Homeland Security, Smart Cities, Smart Farming, Flight Simulation and IOT World. Since 2014, Sigma has been the mandated company of the ATEN IS network, a group consisting of 50 companies and 4 research centres and universities. Operating as an Open Innovation-oriented organisation, the network aims to design high value-added products and services for the global market.





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At Space 11 we revolutionize Smart Cities and industrial operations with AI, rovers, drones and space technology. Our digital twin improves efficiency and sustainability through real-time decisions. Specialized in predictive maintenance, we prevent dangerous and intervention situations and reduce downtime to a minimum. Our solutions promote sustainability and safety. Through strategic partnerships, we continually innovate, driving towards a smarter, more sustainable future.

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Since 1998, Superelectric Srl focused its activities on the development of multispectral georeferenced EO Sensors. SUPERELECTRIC designs and develops multispectral and Hyperspectral imaging systems for aircrafts, drones and turret-based observation devices. SUPERELECTRIC is present at SIAE 2023 with: systemONE M4T, AI based Imaging Spectrometer; T360 Thermal Anti-drone Radar with AI Tracking; DCS, High resolution Thermal Visible dual camera system.

SPiN offers satellite integration solutions to transform satellites into modular systems. The solutions include a flexible service for designing satellites and a universal plug-and-play adapter, the Multipurpose Adapter Generic Interface Connector (MA61C). MA61C is an intelligent data node that adapts the communication interface and protocol standards of different suppliers to the onboard computer standard, allowing satellites to be assembled like Legos.



**EXPLORE THE GEO-REFERENCED MAP
OF MORE THAN 300
LAZIO AEROSPACE COMPANIES**



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