

LAZIO FLIES TO INNOVATION



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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, Technology Parks, major 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, which is fundamental for the competitiveness of the sector, for its ability to aggregate and develop synergies between research, universities and the world of production.

According to its Smart Specialization Strategy, Lazio Region is supporting the development of the aerospace industry with investments to enhance technological evolution together with digital, industry and New Space Economy players, to strengthen the competitiveness of small and medium-sized enterprises and to encourage the emergence of new innovative experiences.

And the local government, through Lazio Innova, is among the key players in establishing the National Aerospace Technology Cluster (CTNA) in order 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.

In this catalogue, we present some outstanding companies in the production landscape of the aerospace sector in 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 worldrenowned 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.

PRODUCTION, RESEARCH AND INNOVATION

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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
RHEINMETALL ITALIA
LARIMART – LEONARDO GROUP
SPACELAB – ASI & AVIO JV
IDS – FINCANTIERI GROUP

ESA BIC LAZIO

ESA BIC Lazio is part of the **ESA GETWAY COMMERCIALITATION** network, the go-to place for innovative business ideas involving space in all areas of society and economy. **ESA GETWAY COMMERCIALITATION** network's mission is to support entrepreneurs in Europe in the development of business using satellite applications and space technology.

The **ESA BIC Lazio programme** is co-financed by **Lazio Region** and the **Italian Space Agency (ASI)** and it is managed by **Lazio Innova**. Entrepreneurs and companies in the start-up phase can be hosted **within Lazio Innova's Spazio Attivo Roma Tecnopolo**.

The selected start-ups will have access to:

- incentive funding up to 50.000 EUR for prototype building, product development and intellectual property
- personalised support by mentors
- technical support from ASI and ESA
- access to an European network of start-ups and partners
- support in fund raising and access to investors
- credibility of the ESA BIC brand

INCUBATEES





ART OTF
Betadynamiq
Cosmic
CSHARK
EDY
Finis Terrae
Involve Space
MATHCLICK
Science & Technology Italy
Space 11
Spark
Terravionics
ZeroCo2

STAKEHOLDERS



ASI - Italian Space Agency
AVIO
E-Geos
ENAC
ESA - ESRIN European Space Agency
Galaxia - the Italian Aerospace Technology
Transfer Hub
SAPIENZA Università di Roma
STAM - ESA Technology Broker Italy
Telespazio
Thales Alenia Space Italia
Università degli Studi di Roma TOR VERGATA
Università degli Studi Roma TRE

LAZIO COMPANIES AT IAC 2024

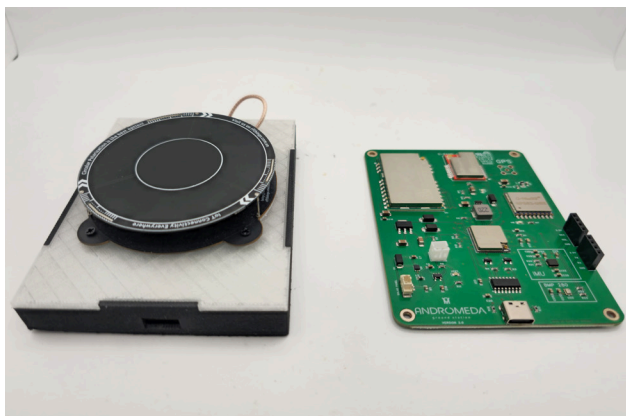


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Cshark is an innovative PMI. We work in the IT and AEROSPACE fields. Our goal is to create an inovative HW/ SW infrastructure that allows the integrationof any IoT device, gateway and can communicate with the control room even without an Internet connection at an affordable cost.



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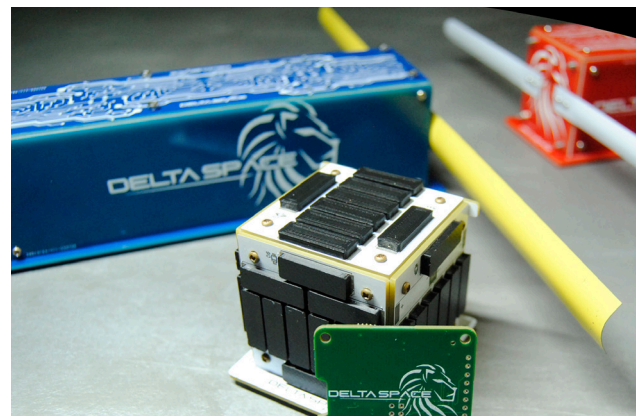
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Delta Space provides IoT connectivity through a proprietary constellation of satellites in Low Earth Orbit (LEO).

We remotely monitor and control agricultural facilities, highway infrastructures, energy systems, and the maritime logistics sector.

We reach all corners of the globe without the need for cellular or internet coverage. Unlike legacy telcos, our antennas are in orbit, allowing us to serve the entire world in near real-time.

With our Deployer we also offer Launch Services for picosats.



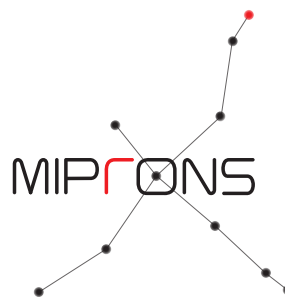
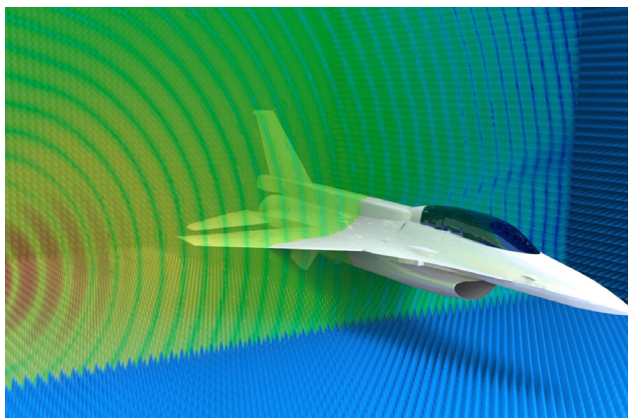


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GMSpazio has been operating since 2005 for Aerospace, Defense and Security, Managing 4D Synthetic Scenarios(Space+Time), AI and digital twin.



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MIPRONS is an innovative small enterprise whose mission is to develop a high-performance, miniaturized, patented water electrolysis space propulsion system, designed to enhance satellite operations. MIPRONS' solution stands out due to its technological, procedural, and commercial advantages. It delivers high thrust while maintaining compact size and low weight, thereby increasing sustainability, safety, reliability, and operational lifespan, and offering profitability gains of up to €40 million per satellite. Astronaut Roberto Vittori has become the official Ambassador for MIPRONS' technology.





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Progetti Speciali Italiani Srl (PSI) is an Italian SME entirely owned by Italian shareholders, specializing in Integrated Systems and Multidisciplinary Activities. With a turnover of 20 million euros and around 200 employees, PSI still maintains a small fraction focused on special projects. The combination of High Tech and Multidisciplinary approach demonstrated to be successfully in the competitive environments participated by PSI with Italian and Foreign Final Client with dedicated development of High Performances Microsatellites and UAV with their relevant payloads for Dual Use Application for EO, SAR, ELINT and METEO mission.

Studiomapp is a leading provider of geospatial intelligence solutions, leveraging advanced AI, remote sensing and data analytics to optimize decision-making. Our expertise lies in transforming satellite imagery and geospatial data into actionable insights, enabling organizations to enhance situational awareness, planning and operational efficiency in several domains. At Studiomapp, we specialize in proprietary AI-powered image analysis, multi-sensor data fusion and development software solutions to support remote monitoring. Our innovative solutions contribute to enhancing safety, security, and environmental sustainability.



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