

INVEST
IN ITALY

ITA
ITALIAN TRADE AGENCY

INVITALIA

AEROMART TOULOUSE

1 – 3 dicembre 2020

Italy: The Perfect Platform for Aerospace

LAZIO, SPACE TO INNOVATE

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REGIONE
LAZIO

Invest in Lazio
*Aerospace, Security &
Space Economy*

Lazio: Region of Rome, heart of Europe and center of the Mediterranean area



Lazio boasts a **geopolitical position** of global importance: in the **heart of Europe** and at the **centre of the Mediterranean** region, a crossroads towards the Middle East and South-East



Rome is the most visited city in Italy and one of the most visited in the world (with over 20 million tourists per year), it is an high international attractiveness focus point



2 International Airports (Fiumicino and Ciampino, over **50 million passengers per year**)



Civitavecchia Port is the major Italian touristic port and 7th in the world for number of passengers (2 million per year)



Main Highways: A1 Milano-Roma-Napoli, A12 Roma-Civitavecchia; A24 Roma - L'Aquila



Lazio Region KEY Indicators



The 2nd Italian Region for GDP: 194 billion euros - 11% of the Italian total amount (2018)



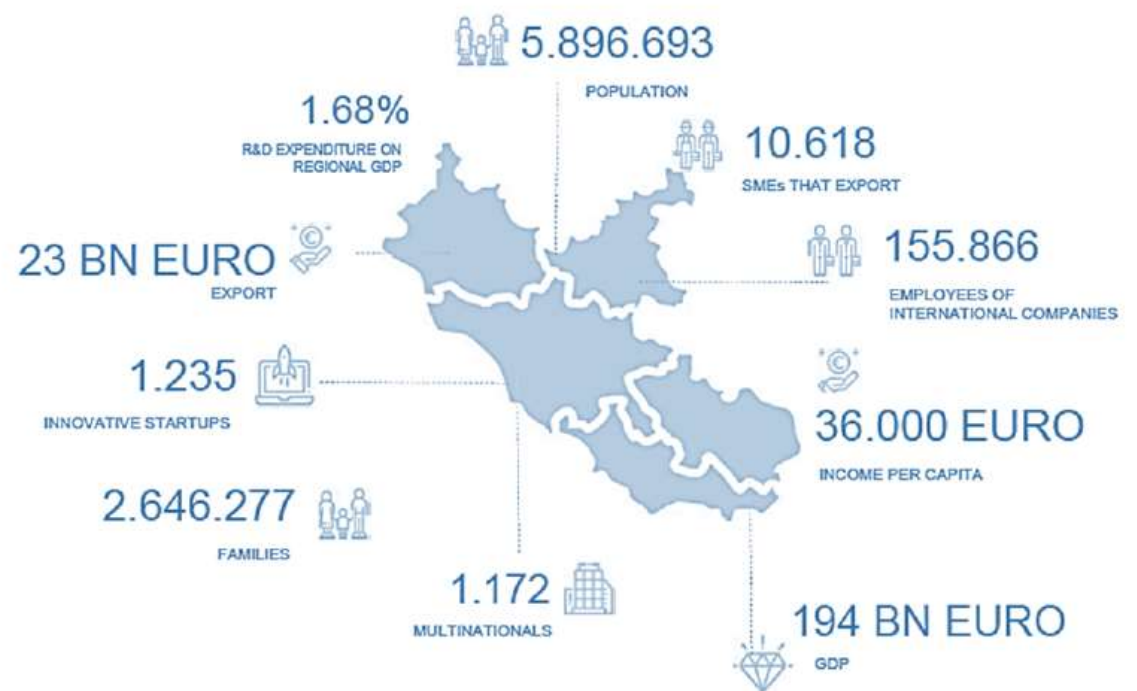
One of the most important R&D systems in Italy



Location for important industrial and multinational groups with their own R&D centres



The Italian region with the highest level of manufacturing specializations in tech knowledge intensive sector



SCIENTIFIC AND TECHNOLOGICAL PARKS



TECHNOLOGICAL DISTRICTS



TECHNOLOGICAL CLUSTER



UNIVERSITIES (PUBLIC AND PRIVATE)



NATIONAL RESEARCH CENTRES

Facts and Figures

Aerospace, Security & Space Economy

LAZIO PLAYS A SIGNIFICANT **INTERNATIONAL ROLE** IN THE INDUSTRY OF AEROSPACE AERONAUTICS, SPACE ECONOMY AND SECURITY, BOTH IN **THE MANUFACTURING INDUSTRY** AND FOR SPECIFIC SKILLS IN **TECHNOLOGICAL SERVICES AND R&D**

MAIN INDICATORS

250 companies
23,500 employees
5 billion euros turnover
1.6 billion euros of exports
10 Research Centres
5 Universities
3,000 R&D PhD & Specialists
6 Incubators, Accelerators
Technology Parks

MAIN SPECIALIZATIONS

- ✓ Launchers (Vega, solid rocket motor for Ariane)
- ✓ EO, NAV & TLC satellites
- ✓ Micro nano sats constellations
- ✓ Space surveillance and tracking (SST)
- ✓ Manned and unmanned Space Exploration (incl. International Space Station)
- ✓ Safety & Security
- ✓ Air Traffic Management
- ✓ Homeland / Cyber Security



LAZIO AEROSPACE TECHNOLOGY DISTRICT (DTA) was built in 2004 by a Framework Agreement signed by Italy Ministry of Research and Lazio Region. In 2012, the DTA of Lazio was one of the founding partners of the Italian National Cluster for Aerospace Technology (CTNA).



Business Environment

Tiburtino Technology Park- TECNOPOLO SpA

THE TIBURTINO TECHNOLOGY PARK MAINLY HOSTS SMES, STARTUPS AND RESEARCH CENTERS OPERATING IN THE ICTS, ELECTRONICS TELECOMMUNICATIONS AND AEROSPACE & SPACE ECONOMY. IT IS PART OF **TECNOPOLO S.P.A.**, A PUBLIC COMPANY CREATED IN 1995 WITH THE AIM TO PROMOTE AND IMPROVE THE LOCATION AND DEVELOPMENT OF HIGH-TECH AND INNOVATIVE INITIATIVES

- PRESENCE OF KEY PLAYERS OF THE AEROSPACE AND DEFENCE INDUSTRY
- INNOVATIVE INFRASTRUCTURES AND SERVICES
- STRONG LINKS WITH UNIVERSITIES AND RESEARCH



AEROSPACE & DEFENCE COMPANIES

ADPM Drones S.r.l.
ATEN IS Srl – Rete di imprese.
Blue Thread S.r.l.
Centrale Valutativa S.r.l.
GEMAC ENTERPRISE NETWORK
HTT – High Technology Transformers S.r.l.
INTECH MICROWAVES S.r.l. (IMW)
Interconsulting S.r.l.
Latitudo 40 S.r.l.
PROSER S.r.l.
PSI Progetti Speciali Italiani S.r.l.
SDS S.r.l.
Sigma Consulting S.r.l.
SPACEEXE S.r.l.
UrbyetOrbit Srls
Wave Advanced Technology Applications S.r.l.



Business Environment

Space Main Agencies

ESA BIC Lazio (Business Incubation Centre) offers business start-up support as well as technical expertise throughout their incubation period in a number of space related areas, i.e. systems and software infrastructures for data handling and integrated Earth observation, satellite navigation and communication applications. Located at the business incubator ITech in Rome, ESABIC Lazio is a partnership among Lazio Region, ASI (Italian Space Agency) and ESA, and it is part of Innovation and Ventures Office (TIA-AI) of the European Space Agency.

ESA-ESRIN, located in Frascati (Lazio) is the European centre of excellence for exploitation of Earth observation missions. The mission and payload operations of ESA's Earth observation satellites are managed here, and ESRIN is the primary source for the acquisition, distribution, and exploitation of data from these and other non-ESA satellites.

ASI – The Italian Space Agency, born in 1988, is a national public body supervised by the Ministry of Education, University and Research that cooperates with several other departments. It has established itself as one of the most important global stakeholders on the scene of space science, satellite technologies and development of means to reach and explore the cosmos. Today the Italian Space Agency plays a leading role both at a European level, where Italy is the third major contributor to the European Space Agency, and at a global level.



Business Environment

Big International Players

LAZIO IS THE ONLY ITALIAN REGION WHICH HOSTS THE **WHOLE AEROSPACE VALUE CHAIN**. IMPORTANT **BIG GROUPS** OF INTERNATIONAL EXCELLENCE IN ELECTRONICS, SENSORS, AVIONICS, COMPONENTS AND INNOVATIVE MATERIALS, “SPACE” AND SATELLITE APPLICATIONS AND SERVICES, ARE HOST IN THE REGION.

THE 85% OF THE **BUSINESS LANDSCAPE** IS MADE UP OF **SMES SPECIALIZED** IN: ELECTRONICS, ICTS, ADVANCED MATERIALS AND AERONAUTICAL AND AIRPORT SERVICES.

THE **FACTORIES** PRODUCE COMPONENTS FOR THE **ARIANE** AND **VEGA LAUNCHERS**, **SATELLITES**, **RADARS** AND **EQUIPMENT** FOR **AIRCRAFT** AND **HELICOPTERS**.

ThalesAlenia
a Thales / Leonardo company Space

LEONARDO

VITROCiset
a LEONARDO company

RHEINMETALL
DEFENCE

ALTRAN

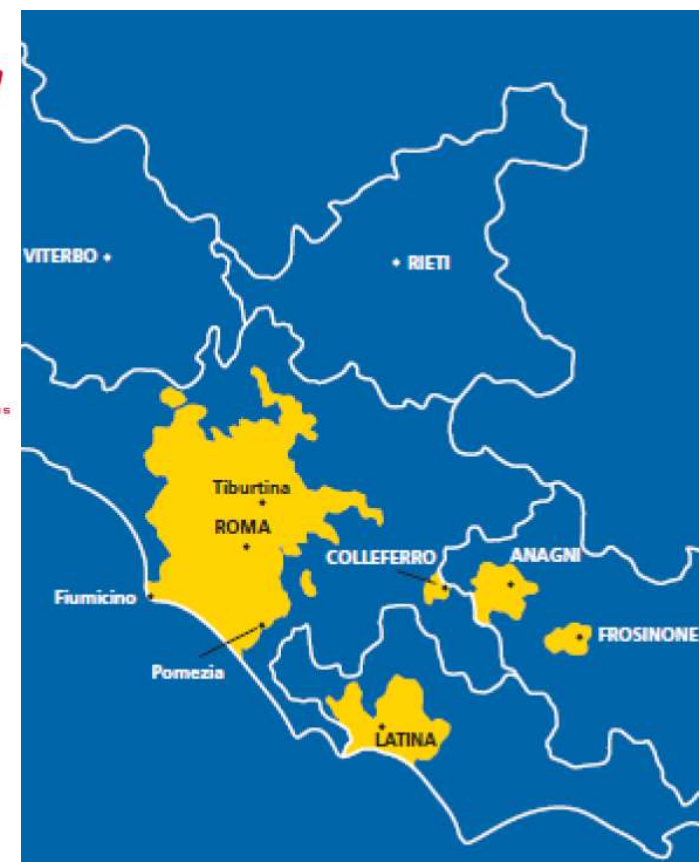
MBDA
MISSILE SYSTEMS

TELESPAZIO
a LEONARDO and THALES company

AVIO

AERO SEKUR

AVIOGEI
Airport Equipment



Business Environment

R&D Network and Public Big Players



European Space
Research Institute



Italian Space Agency



Rome Airport



Italian air navigation
service provider



National Institute for
Nuclear Physics



Italian National Agency
for New Technologies,
Energy and Sustainable
Economic Development



Consiglio Nazionale delle Ricerche
National Research
Council



Italian Civil Aviation
Authority



National Institute for
Astrophysics



National Institute of
Geophysics and
Volcanology



ISPRA
Italian Institute for
Environmental Protection



THANK YOU

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