

INVEST IN LAZIO

INVEST IN AEROSPACE INDUSTRY

Lazio a Region of Beauty and Innovation



Cofinanziato
dall'Unione europea



REGIONE
LAZIO



REGIONE
LAZIO

WELCOME TO LAZIO

REGION OF ROME, HEART OF EUROPE AND CENTRE OF THE MEDITERRANEAN AREA

Lazio boasts a geopolitical position of global importance: in the heart of Europe and at the center of the Mediterranean region, a crossroad towards the Middle East and South-East Asia.

Lazio is the 2nd Italian Region for Gross Domestic Product (GDP) with 186 Bn euros, contributing to 11,3% of Italian national GDP.

Lazio is the Italian Region with the highest level of specialization in manufacturing and in high-tech knowledge intensive sectors

Lazio's share of exports in global leading sectors is twice the national average (in percentage terms 72% vs 32%).



LAZIO, A CONNECTED REGION

LAZIO REGION IS F A STRATEGIC LOGISTICAL PLATFORM IN ITALY, IN THE MEDITERRANEAN AREA AND IN EUROPE



2 International Airports

(Fiumicino and Ciampino, over 50 million passengers per year). Fiumicino Leonardo Da Vinci Airport is the first stopover in Italy and the first European airport in terms of traveler satisfaction.



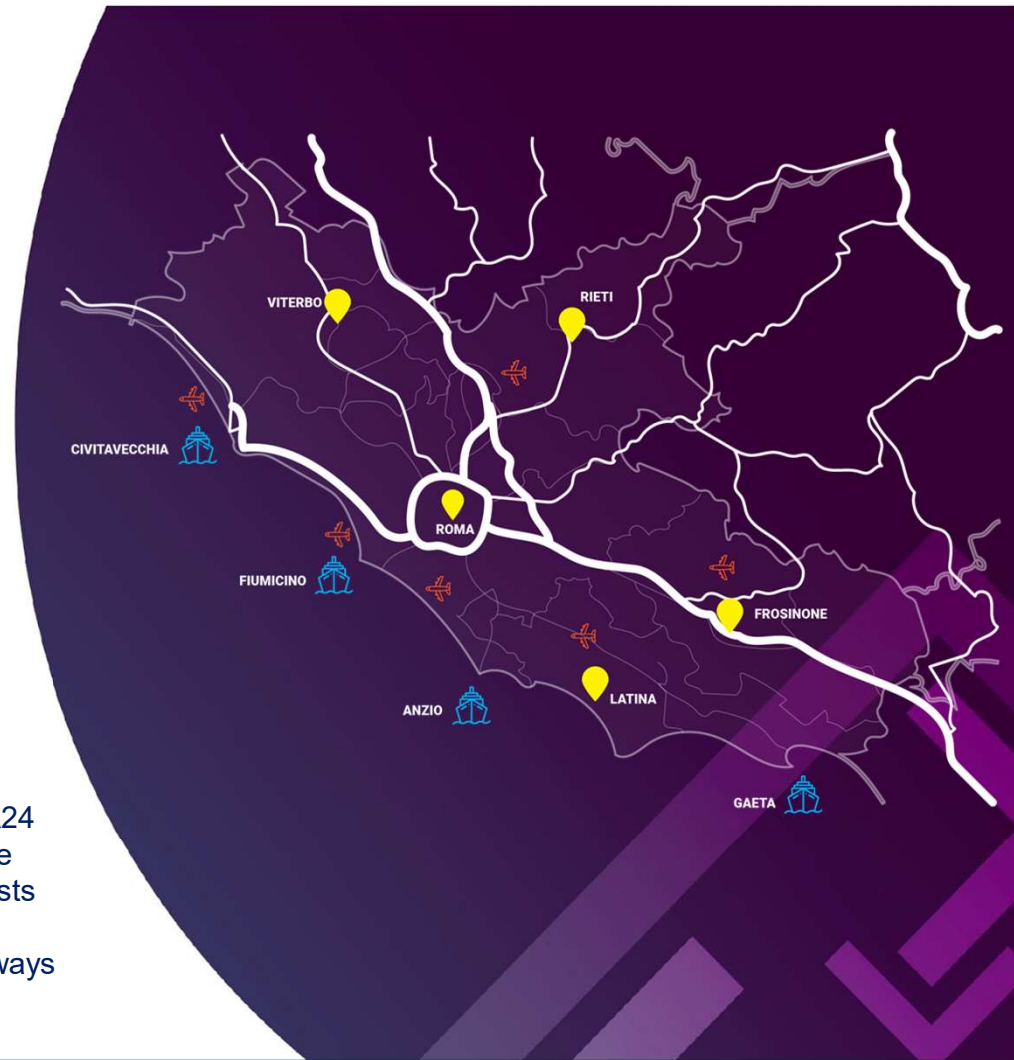
Civitavecchia Port is the major Italian touristic port, the 2nd in Europe and 7th in the world for number of passengers (3 million per year). It boasts the handling 10 million tons of goods a year.



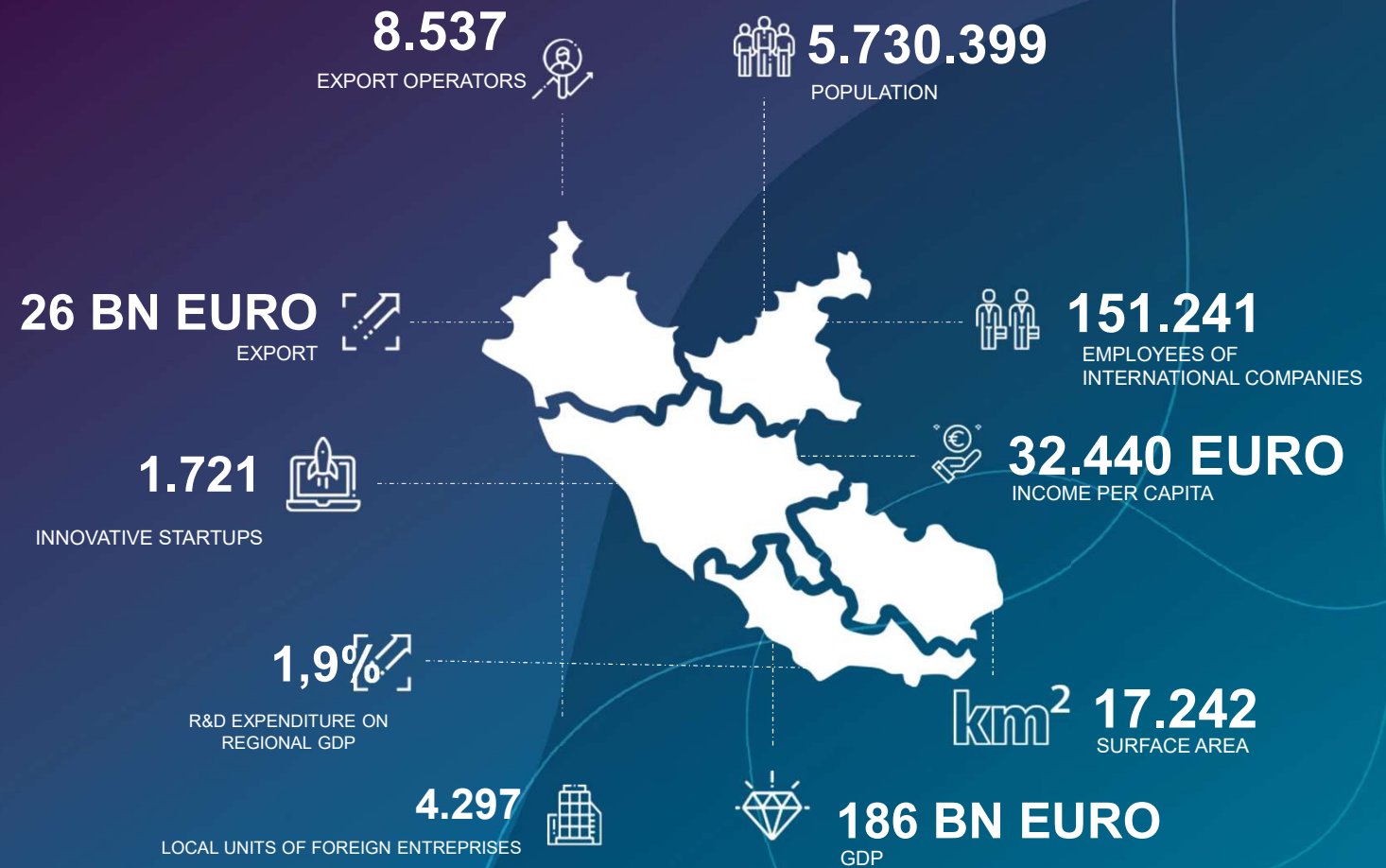
2 main railway stations (Termini and Tiburtina) which guarantee high speed rail connections with all major Italian and European cities. Lazio is part of the Trans-European Networks - Transport (TEN-T).



Main Highways: A1 Milano-Roma-Napoli, A12 Roma-Civitavecchia, A24 Roma-L'Aquila. The extension of the road network in Lazio Region consists of approximately 10 thousand kilometers, of which 473 are motorways and 553 national roads.



LAZIO KEY INDICATORS



ALL ROADS LEAD TO ROME

THE STRATEGIC ROLE OF ROME FOR THE ATTRACTIVENESS OF THE LAZIO REGION

TOURISM



Rome, with over **20 million tourists a year**, is the most visited city in Italy and one of the most visited in the world.

VATICAN STATE



Rome is home to the **Vatican State**, with its own 85 diplomatic representations of the main countries, residence of the Pope and home to the Basilica of St. Peter, the Vatican Museums and the Sistine Chapel.

DIPLOMACY



Rome hosts 209 diplomatic missions (embassies, consulates, permanent missions and other diplomatic representations) according to Global Diplomacy Index 2019.

ROME AS A STRATEGIC HUB



2 International airports: Fiumicino and Ciampino. Fiumicino Airport is connected to Rome by the direct train "Leonardo Express". Travelling time: only 32 minutes, trains run every 15 min.



3 major railway stations: Termini, Tiburtina and Ostiense.
Head office of the important logistics center: CAR - the ROME AGRI-FOOD CENTRE (agroalimroma.it).

INTERNATIONAL ORGANISATIONS HEADQUARTERS BASED IN ROME



FOOD AND AGRICULTURAL ORGANISATION



INTERNATIONAL FUND FOR AGRICULTURAL DEVELOPMENT



WORLD FOOD PROGRAMME



INTERNATIONAL GENETIC RESOURCES INSTITUTE



INTERNATIONAL CENTRE FOR THE STUDY OF THE PRESERVATION
AND RESTORATION OF CULTURAL HERITAGE



REGIONE
LAZIO

WHY CHOOSE TO INVEST IN LAZIO



LAZIO, REGION OF INNOVATION

ONE OF THE MOST IMPORTANT R&D AND INNOVATION SYSTEMS IN ITALY AND WORLD CLASS INTERNATIONAL EXCELLENCES



LAZIO, REGION OF KNOWLEDGE

IS ONE OF THE FIRST ITALIAN REGION FOR RESEARCHERS, UNIVERSITIES AND PUBLIC AND PRIVATE RESEARCH INSTITUTIONS



LAZIO, REGION OF CULTURE AND CREATIVITY

FIRST ITALIAN REGION BY SHARE OF ADDED VALUE AND EMPLOYMENT PRODUCED BY THE CULTURAL AND CREATIVE PRODUCTION SYSTEM



LAZIO, 8 SECTORS OF EXCELLENCE

FOR INNOVATION, RESEARCH AND HUMAN CAPITAL:

1. LIFE SCIENCES & BIOTECH
2. AEROSPACE & SPACE INDUSTRY
3. TOURISM, CREATIVE-CULTURAL & DIGITAL INDUSTRIES
4. AUDIOVISUAL & FILM INDUSTRY
5. ICT
6. ENGINEERING & AUTOMOTIVE
7. AGRIFOOD
8. BLUE ECONOMY

LAZIO, REGION OF INNOVATION

- Lazio hosts global industrial players from all over the world that run their R&D activities
- Lazio hosts many public and private research centres
- Tech Districts & Clusters play a role as aggregators, knowledge enablers and in transferring technology

4 

SCIENTIFIC AND
TECHNOLOGICAL
PARKS

3 

TECHNOLOGICAL
DISTRICTS

6 

TECHNOLOGICAL
NATIONAL CLUSTERS

1.721 

STARTUPS – Newly established
innovative startups in the last 3
years: +59% (Italy +45%)



3.7 BN€
R&D EXPENDITURE



3.5 BN€
R&D
EXPENDITURE



62.981
TOTAL EMPLOYED
IN R&D



18
NATIONAL
RESEARCH CENTRES

LAZIO, REGION OF KNOWLEDGE

LAZIO IS A TERRITORY RICH IN HUMAN CAPITAL AND IT IS AMONG THE FIRST ITALIAN REGIONS FOR NUMBER OF RESEARCHERS, UNIVERSITIES AND PUBLIC AND PRIVATE RESEARCH INSTITUTIONS.

LAZIO IS ALSO ONE OF THE MOST SIGNIFICANT RESEARCH CENTRE IN EUROPE.

19 

Universities

- 6 Public
- 7 Private
- 6 Distance Learning Universities

44.599 

Graduates

- 24.860 Female
- 19739 Male

60% 

Graduates in science and economic

241.847 

University Student

82.000 

Scholarships

13.201 

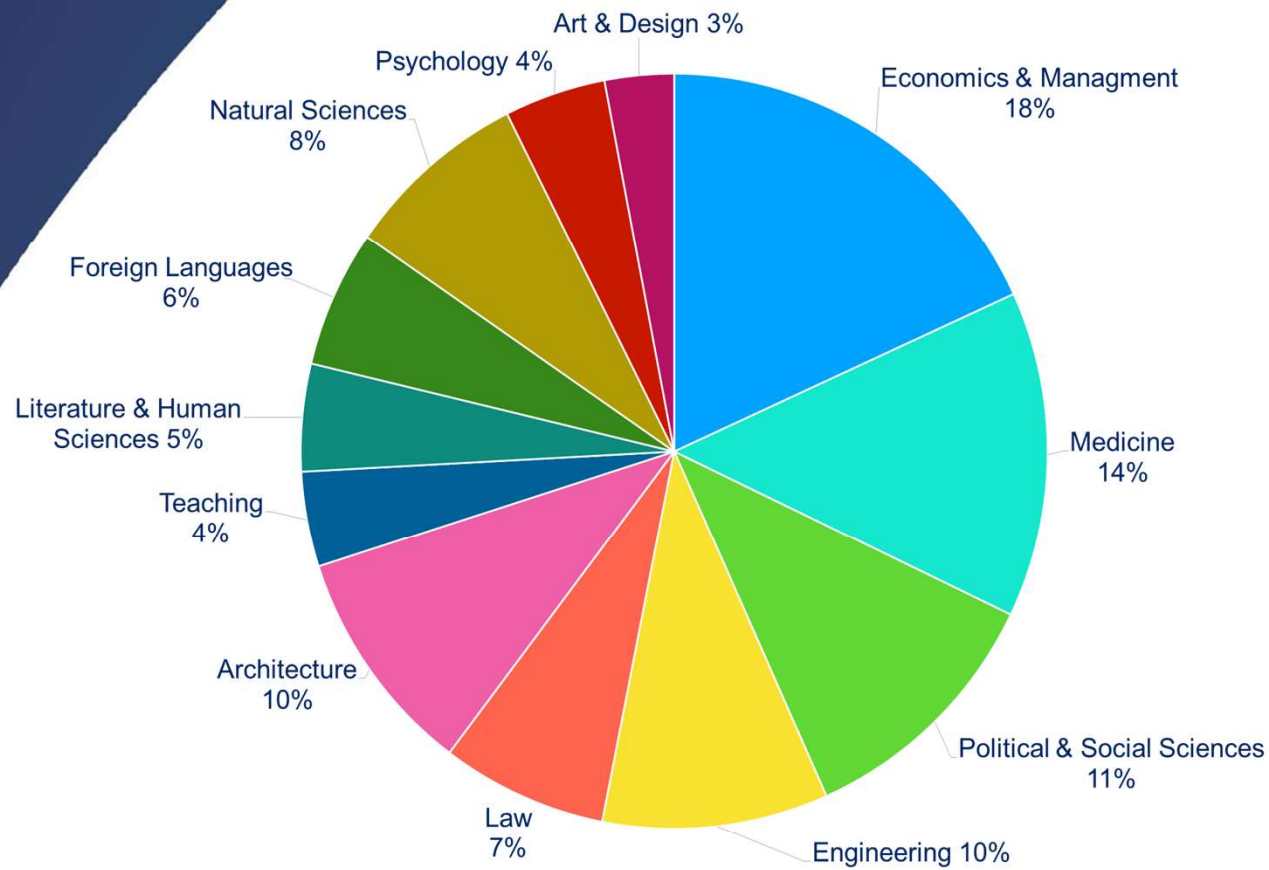
University Professors and Researchers



REGIONE
LAZIO

THE UNIVERSITY SYSTEM

Graduates for degree courses



REGIONE
LAZIO

LAZIO, REGION OF CULTURE AND CREATIVITY

- LAZIO HOSTS MOST IMPORTANT MONUMENTS AND UNIESCO SITE.
- ROME AND THE VATICAN CITY, ARE AMONG THE TEN MOST FAMOUS DESTINATIONS IN THE WORLD, WITH A UNIQUE ARTISTIC AND CULTURAL HERITAGE.
- LAZIO HOSTS MOST IMPORTANT MONUMENTS: FLAVIAN AMPHITHEATER-COLOSSEUM, PALATINE HILL AND PALATINE MUSEUM, TRAJAN'S MARKETS AND FORUM, BATHS OF CARACALLA, OSTIA ANTICA, VILLA ADRIANA E VILLA D'ESTE, ABBAZIA DI MONTECASSINO

Over
250



6

UNESCO
SITES



36

MONUMENTS

4



CENTRAL INSITUTES
OF THE MINISTRY OF
CULTURAL



30

ARCHEOLOGICAL
AREAS AND PARKS



LAZIO
INNOVA



REGIONE
LAZIO

SECTOR OF EXCELLENCE AEROSPACE AND SECURITY

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

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 located in the Region.

LAZIO AEROSPACE TECHNOLOGICAL DISTRICT (DTA) was established 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 Technological (CTNA)**.

ESA BIC (Business Incubation Centre) Lazio is a partnership among Lazio Region, **ASI (Italian Space Agency)** and **ESA (European Space Agency)**.



23.500

EMPLOYEES



250

COMPANIES



2BN €

IN EXPORTS



5 BN €

ANNUAL TURNOVER



4

FACULTY OF
ENGINEERING



12

UNIVERSITY
DEPARTMENTS



30

POST-DEGREE
UNIVERSITY COURSES



3.000

RESEARCHERS



REGIONE
LAZIO

NEW SPACE ECONOMY



TODAY LAZIO IS THE HUB OF A SPACE ECONOMY CAPABLE OF TRANSFERRING THE BENEFITS OF SPACE TECHNOLOGIES TO CITIZENS, BUSINESSES, COMMUNITIES AND TERRITORIES.

Space technologies can be applied for: the development of agriculture, monitoring the environment and hydrogeological risk, emergency prevention, air traffic control and improving telecommunications services. Lazio companies are at the forefront of participation in **two important European programs** linked to space and earth observation:



COPERNICUS, the European Union's Earth Observation Programme. It provides accurate, timely and easily accessible information that enables the **monitoring of the Earth, marine and atmospheric environments.** e-GEOS and Telespazio are among the major industrial partners of the Programme involved in the space component ground segment development and operations in emergency management, land and sea safety management, land resource management, and the monitoring of climate change.



GALILEO (2nd Generation), the European Union's global satellite navigation system (GNSS), is one of the greatest and most ambitious European projects born from the collaboration of the European Union with the European Space Agency (ESA) to create a global navigation satellite system. Italy has had a major role since the very beginning of the Galileo programme, first of all, through the Italian Space Agency (ASI), and secondly, through the involvement of the Italian industry and, in particular, of the Leonardo Group.

Focus on Aerospace Sector.



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.



REGIONE LAZIO

Business Environment Main Space 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.

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**REGIONE
LAZIO**

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 SpA, 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



70

HECTARES



100

COMPANIES

AEROSPACE & DEFENCE COMPANIES

- ADPM DRONES S.R.L.
- ATEN IS SRL – RETE DI IMPRESE
- BLUE THREAD S.R.L.
- CENTRALE VALUTATIVA S.R.L.
- SUPERELECTRIC S.R.L.
- 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

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.



REGIONE
LAZIO

Business Environment Big international players

SINCE 1948, LEONARDO HAS BEEN THE PROTAGONIST OF ITALIAN INDUSTRIAL HISTORY. TODAY IT IS ONE OF THE TOP TEN GLOBAL PLAYERS IN THE AEROSPACE, DEFENSE AND SECURITY INDUSTRY AND A STRATEGIC ASSET FOR ITALY'S GROWTH WITH OVER 31,000 EMPLOYEES IN ITALY AND 70 FACILITIES, 38 OF WHICH ARE MANUFACTURING PLANTS.



ROME LAURENTINA

Design and development of critical infrastructure protection, **cyber security and complex information networks for central and local governments**

ROME LEONARDO COMPANY HEADQUARTER

POMEZIA (RM)

Military Communication Systems, avionics systems, aircraft logistics support

LATINA

Develop and produce **military communication systems**.

SPACE

ROME TIBURTINA

Telespazio Spa

ROME TIBURTINA

Specialised in the design, development and testing of land and naval radars.

ANAGNI (FR) HELICOPTER DIVISION

Heart of Helicopter Division rotor blade and composite structures production.

FROSINONE

Centre of expertise and **support for the Helicopter Division** Centre of Excellence. Transmissions and mechanical parts, as well as for the Leonardo Helicopters maintenance, repair and overhaul.

www.leonardocompany.com



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Business Environment

Big international players

IN LAZIO THALES ALENIA SPACE HAS OVER 40 YEARS OF EXPERIENCE IN SPACE TELECOMMUNICATIONS, NAVIGATION, EARTH OBSERVATION, SCIENCE, EXPLORATION AND TRANSPORTATION.

THE THALES ALENIA SPACE PLANT FOR THE DESIGN AND INTEGRATION OF TERRESTRIAL OBSERVATION, NAVIGATION AND TELECOMMUNICATIONS SATELLITES IS LOCATED IN ROME - TIBURTINA VALLEY.



THALES ALENIA SPACE, A JOINT VENTURE BETWEEN THALES (67%) AND LEONARDO (33%)

THE COMPANY IS THE LARGEST SATELLITE MANUFACTURER IN EUROPE SPECIALIZING IN THE AEROSPACE, SPACE, DEFENSE, SECURITY AND TRANSPORT SECTORS.

The company contributes to **many of Space programs**, working for both government and commercial customers, including NASA, the European Space Agency (ESA) and the Italian space agency (ASI), as well as leading satellite operators.

Thales Alenia Space is the first contractor for the construction of the satellites and for the activities related to the space segment and will lead an international team formed by European industries.

In March 2021, Thales Alenia Space Italia signed a contract worth **772 million euros with ESA - the European Space Agency**, for the supply of **6 satellites, part of the SECOND GENERATION GALILEO CONSTELLATION**.



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Business Environment

Big international players

E-GEOS IS A COMPANY THAT WAS FORMED IN THE YEAR 2000 BY THE ITALIAN SPACE AGENCY AND TELESPAZIO SPA COMPANY (LEONARDO GROUP).

LOCATED IN ROME (TIBURTINA VALLEY), THE COMPANY'S MAIN OBJECTIVE IS TO PERFORM ACTIVITIES OF DEVELOPMENT, PRODUCTION AND COMMERCIALIZATION OF SERVICES, PRODUCTS AND APPLICATIONS IN THE EARTH OBSERVATION SECTOR.



THE COMPANY IS THE LARGEST SATELLITE MANUFACTURER IN EUROPE SPECIALIZING IN THE AEROSPACE, SPACE, DEFENSE, SECURITY AND TRANSPORT SECTORS.

In January 2021, a consortium led by the **Italian e-Geos** has been awarded a framework **service contract worth about 6 million euros from the European Environment Agency**. For four years the consortium will be involved in implementing the **European Ground Motion Service**, a new European service for satellite monitoring of soil movements, implemented as part of the Copernicus Land Monitoring Service.



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Business Environment

Big international players

BASED IN COLLEFFERRO, NEAR ROME, AVIO IS A LEADING COMPANY IN SPACE PROPULSION. THE COMPANY OFFERS COMPETITIVE SOLUTIONS FOR LAUNCHING INSTITUTIONAL, GOVERNMENTAL AND COMMERCIAL PAYLOADS IN EARTH ORBIT THROUGH ITS VEGA ROCKET FAMILY.



AVIO, DESIGNS, DEVELOPS, PRODUCES AND INTEGRATES SPACE LAUNCHERS AND DEVELOPS AND PRODUCES SOLID AND LIQUID FUEL PROPULSION SYSTEMS AND PAYLOAD ADAPTERS.

AVIO developed the P120 C solid rocket motor for the first stage of Vega C and Vega E and a strap-on booster for the new European rocket Ariane 6.

The company is part of the joint Italian-French-British program for the production of Aster 30, one of the most powerful and technologically advanced air defense missiles.

AVIO recently signed a contract for the supply to Arianespace of 10 VEGA C launchers in the period 2023-2024, with an option for another 4 launchers. The VEGA C carriers will be used for institutional launches of the EU Commission's "Copernicus" program and for other needs of the ESA- European Space Agency and the ASI - Italian Space Agency.



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Business Environment R&D Network & Public Big Players



European Space
Research Institute



Italian Space Agency



Rome Airport



Italian air navigation
service provider



National Institute for
Nuclear Physics



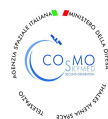
Italian National Agency
for New Technologies,
Energy and Sustainable
Economic Development



Consiglio Nazionale delle Ricerche
National Research
Council



Italian Civil Aviation
Authority



Telecommunication, Remote
Sensing, Earth Observation



National Institute for
Astrophysics



National Institute of
Geophysics and
Volcanology



Italian Institute for
Environmental Protection



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LAZIO EXPORT DATA

2020

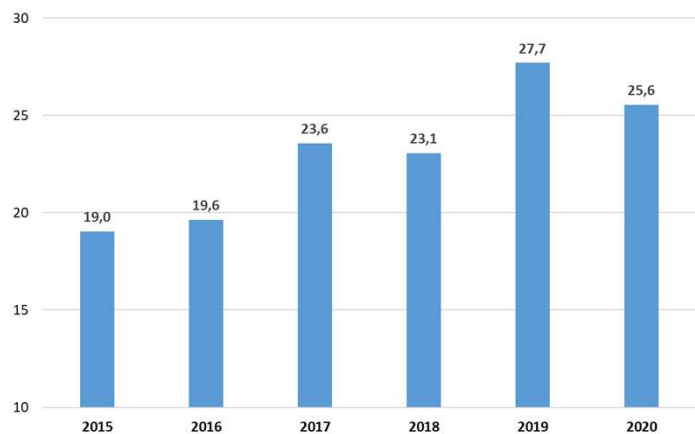


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LAZIO FOREIGN TRADE

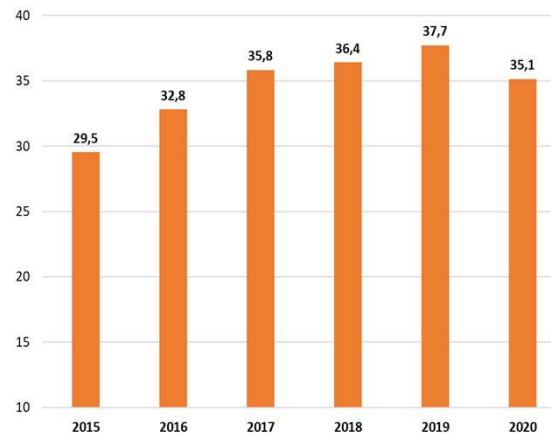
Export

(values in billions of euros)



Import

(values in billions of euros)



- In 2020 Lazio trade exchange value has been 60.7 BN of euros.
- Export amounted to 25.6 BN of euros.
- Despite of the reduction of export (-7.7%) due to pandemic crisis, in the period 2015- 2020 it increased of 34.2%.
- Import amounted to 35.1 BN of euros.

LAZIO COMPANIES ECONOMIC PERFORMANCE



461.071
Businesses
(Industry, Trade & Services)



382 Bn €
TURNOVER



85 Bn €
VALUE ADDED



32 Bn €
SALARIES



1.6 Mn
EMPLOYEES

Source Istat 2019



LAZIO
INNOVA



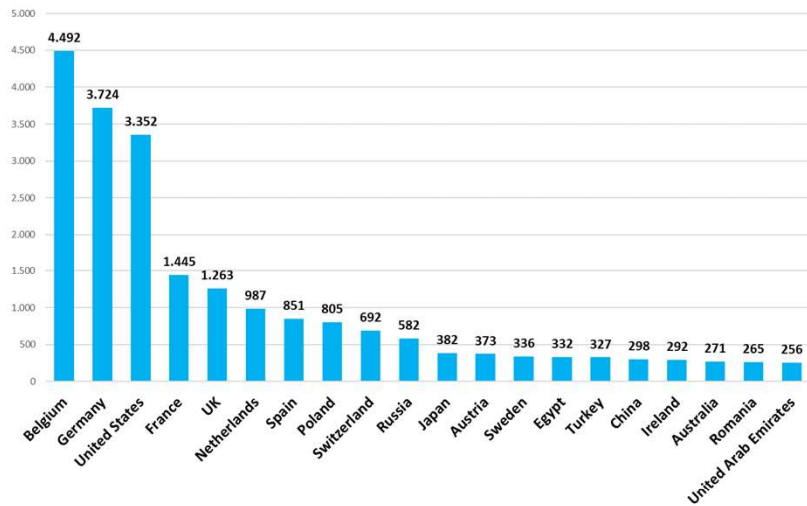
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LAZIO MAIN PARTNERS AND PRODUCTS

In Lazio there are 8.537 export operators (according to the region of origin of the goods).

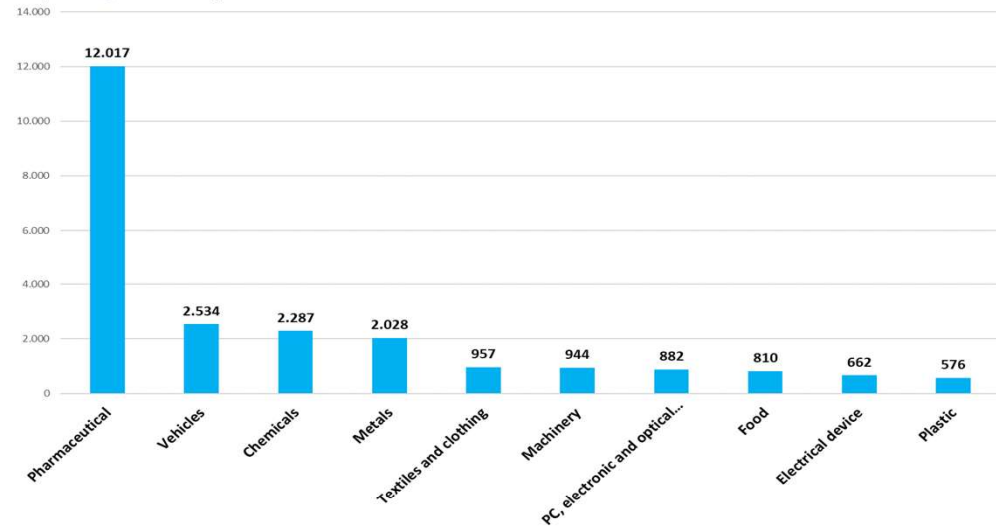
Lazio main trading partners are located in the European area, particularly in the Union area (EU27, 58,7% of the total, 15 Bn Euro).

Top 20 countries where Lazio has exported goods in 2020 (values in mln euros)



The main products exported from Lazio are pharmaceuticals with 12 Bn euro (47% of the total), followed by vehicles with 2,5 Bn euro (10% of the total).

Top 10 goods exported from Lazio in 2020 (values in mln euros)



LAZIO STRONG AND SUSTAINABLE ECONOMIC GROWTH

Lazio is the first Italian region for:

- **employment growth: +5,6% (Italy +1,5%)** Source Istat 2012-2020
- **growth in female employment: +6,8% (Italy +2,7%)** Source Istat 2012-2020
- **export growth (considering only largest regions): +34,2% (Italy +5,9%)** Source Istat 2015-2020
- **reducing greenhouse gas emissions: -11,4% (Italy -1,7%)** Source ISPRA-Istat 2017-2019

- **Top-ranked Italian region in innovation according to the EC Competitiveness Index (2019)**

- **Lazio is the second Italian region as for Innovative startups: 1.721** (February 2022)

Newly established innovative startups in the last 3 years: +59% (Italy +45%)

(Source Infocamere 2018-2021)



REGIONE
LAZIO

Contact us

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COMMUNITY OF INNOVATORS 

Aerospace: <https://www.linkedin.com/groups/8847462/>



Cofinanziato
dall'Unione europea



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