



**Flying High  
Is a Regional  
Commitment**

**AEROSPACE**



# PIEMONTE, NORTH-WEST ITALY



## European and global gateway

Piemonte is strategically positioned at the heart of the European development system, right at the crossroads of the main routes between the North-South, East-West. As part of the European Union, companies located in Piemonte have duty free access to more than 30 national markets within the European Economic Area and to the world's richest consumer market of 500 million people, over 330 million of whom work in the single currency.

Italy is Europe's 2<sup>nd</sup> largest manufacturer and in the last 30 years has always ranked in the World's Top 10 Manufacturers. Piemonte has strongly contributed to this success, demonstrating to be one of the manufacturing engines of Europe. It produces about 8% of Italy's national wealth, and its production system has reached high levels of excellence and tertiary sector expansion. Piemonte is a promising and competitive business area. The region is as dynamic in industry as in services, with a skilled, flexible and versatile workforce.

POPULATION

**4.4 m**

(7.3% OF THE NATIONAL TOTAL)

PEOPLE LIVING IN TORINO AREA

**2.3 m**

(52% OF REGIONAL TOTAL)

OVER

**1k towns**

AND 8 MAIN CITIES

EXPORT

**€47.9 bn**

(11.1% OF THE NATIONAL TOTAL)

GDP

**€127 bn**

(7.8% OF THE NATIONAL TOTAL)

COMPANIES

**436,043**

(7,2% OF THE NATIONAL TOTAL)

OVER

**1.8 m**

PEOPLE EMPLOYED

(8% OF THE NATIONAL TOTAL)

ABOUT

**€1 bn**

TO BOOST REGIONAL

COMPETITIVENESS

PIEMONTE RANKS

**4<sup>th</sup> in Italy**

FOR EXPORT QUOTA

Recent data confirms that Piemonte is a leading Italian region in R&D. Companies expenditure in R&D: 1.42% of GDP (national average of 0.65%), with a number of workers in R&D of 6.2 per 1.000 inhabitants (national average of 4.0) and an increasing IP impact, with a number of 137.6 patents registered per million inhabitants (national average of 83.6) (Source: Istat 2017).

**200**

private and public R&D centres, 7 Innovation Hubs, 4 Science & Technology Parks

**1<sup>st</sup>**

Italian region in terms of private investment in R&D

**3<sup>rd</sup>**

Italian region for hi-tech patents

**7**

Innovation Hubs

**Polo AGRIFOOD** — Agrifood - [www.poloagrifood.it](http://www.poloagrifood.it)

**BioPmed** — Life Sciences and Health - [www.biopmed.eu](http://www.biopmed.eu)

**CGreen** — Green Chemistry and New Materials - [www.cgreen.it](http://www.cgreen.it)

**CLEVER** — Energy and Clean Technologies - [www.poloclever.it](http://www.poloclever.it)

**MESAP** — Smart Products and Manufacturing - [www.mesap.it](http://www.mesap.it)

**Pointex** — Textile - [www.pointex.eu](http://www.pointex.eu)

**Polo ICT** — Information Communication Technologies

[www.poloinnovazioneict.org](http://www.poloinnovazioneict.org)





## Flying high is a regional commitment

In Piemonte, the aerospace sector is one of the productive and scientific excellences, confirming the regional vocation for technological innovation. In addition, the technical-productive specialisation of the companies, both in manufacturing and technical services, makes the local aerospace sector highly competitive on international markets.

Piemonte boasts a complete pipeline of skills and qualifications, high-level manufacturing, processes and service companies, cooperation with universities and the R&D network, unique products and engineering know-how, educational & training system and an organised supply chain. The Piemonte aerospace scenario is further enriched by the presence of the Torino Piemonte Aerospace Cluster and by the core of Italy's Space industry: Thales Alenia Space, the Italian Institute of Technology's (IIT) and the Centre for Space Human Robotics (CSHR), a spin-off from the Politecnico of Torino.

# PIEMONTE IS AEROSPACE

**280**

SMEs

**14,800**

employees

**€ 3.9 bn**

turnover

**17%**

of national exports

**26%**

of exports directed  
to the USA

**22%**

of exports directed  
to Germany

**5**

International  
key players

Leonardo Airborne and Space Systems, Leonardo Aircraft, GE Avio Aero, United Technologies Corporation/UTC, Thales Alenia Space

## A unique and complete supply chain devoted to the future

The Piemonte aerospace supply chain is complete and based on producers of complex subsystems and suppliers of parts, components and functional groups that are incorporated in:

- Aircraft manufacturing
- Aerospace propulsion
- Components, systems & subsystems
- Composites
- Power systems
- Mechanics & special metalworking
- Plants & machineries
- Special processes
- Interior equipment and furnishing
- Electrical, electronic systems
- Space systems
- Satellites
- Test and control equipment
- Defence vehicles & systems
- Engineering
- Prototyping
- Software creation and consultancy
- UAV/UAS/OPV
- Ultralights
- Avionics
- Design and analysis
- MRO

A conspicuous group of SME subcontractors operates within the supply chain, whose technological and production processes are compatible with the technical standards - quality, precision, ability in using special materials etc. - demanded by the aerospace industry. These companies produce parts - generally based on designs and specifications supplied by the buyer - or carry out specialised types of work. Their activities vary from the production of mechanical parts, to the assembly of electronic circuits, from pressed steel to thermal and surface treatments, from the construction of moulds, tools and equipment, to electric cabling. Many of them have their leading markets in other industrial sectors, such as the automotive or machining industry, but have the experience, technological know-how and technical-production capability needed to satisfy the demands of the companies at both the end and at intermediate positions within the aerospace supply chain.

The industrial supply chain is enriched by companies with high capabilities in the manufacturing process and by others that provide technical industrial services. Their production ranges from project design to model making, from industrial design to structural calculation, also including specialised software manufacturing and the carrying out of laboratory tests.

To top up this range of capabilities, in the last years Piemonte has been developing a unique know-how in the special manufacturing processes like additive manufacturing which employs, under computer control, the melting of layers of material to create 3D objects. A pool of top class companies and big players (GE Avio Aero, Renishaw and Politecnico di Torino), is in fact active in the making of hi-tech aerospace, energy and racing components using the additive manufacturing process.



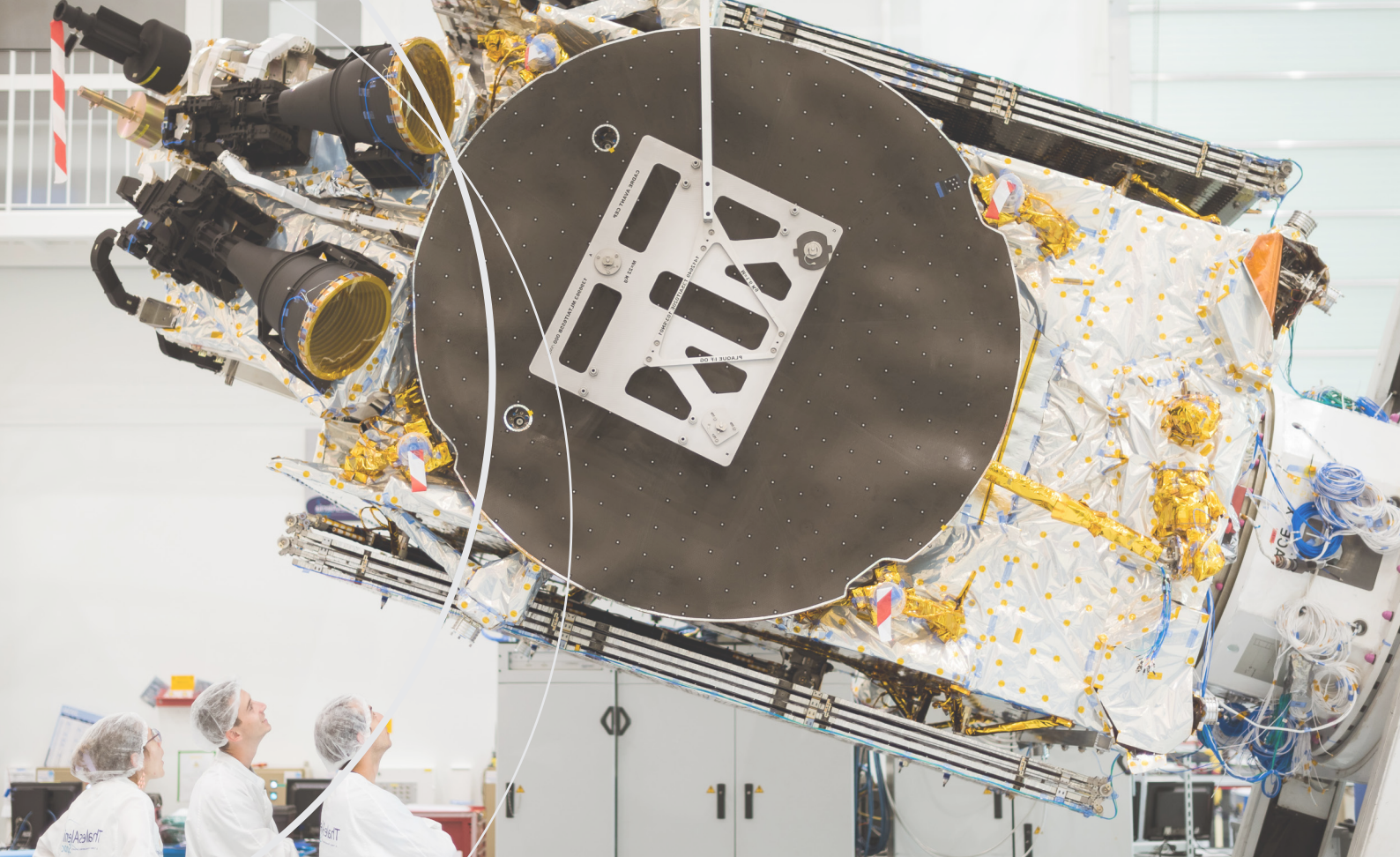
### Did you know?

As far as aeronautics is concerned, Piemonte played and still plays a key role in many international programmes: 777, 767 and 787 Dreamliner, Airbus A321, A340-500/600 and A380, Falcon 2000 and EX, Eurofighter Typhoon, C27J, ATR42, NH90 and EH101.

As regards to the space field, Piemonte is involved in a prime contractor role in international programmes such as the International Space Station (more than 50% of its pressurized modules are being developed here), ExoMars, Euclid, Bepi-Colombo, IXV and Space Rider, Ariane 5, ArgoMoon and many others.



# ACADEMIC & INDUSTRIAL ENHANCEMENT



The synergy between Piemonte's major companies, SMEs, research centres and universities - in particular the Politecnico di Torino - has made a decisive contribution to positioning the region among the leading clusters not only in Europe but also worldwide in a sector characterised by a high level of innovation and research.

## FOCUS ON

**The Piemonte Aerospace District** operates to enhance the competitiveness of Piemonte's aerospace industry, guaranteeing continuity and a long-term vision for both public and private investment in technological innovation. More specifically the District has a key role in the identification of technological priorities for an effective use of European Structural funds. By its Steering Committee, in which main industrial players, small and medium enterprises, trade unions and the academy are represented, the District is not only the joint governance body including all the regional aerospace stakeholders, but it is also the centre for the definition of the technological platforms to be financed by the government to support the technological innovation in the sector.

Since the Aerospace District was launched, Regione Piemonte has invested € 50 million of

European Structural Funds which, with the addition of private funding, have made over € 100 million available for research and development. This measure has enabled Piemonte to excel in 5 key technological areas: UAVs for civil applications, eco-compatible aero engines, space exploration technologies, space debris management and new generation electromechanical actuators.

**The Politecnico di Torino** is a world leading university, and its Department of Mechanical and Aerospace Engineering is one out of 11 departments that support 5,000 engineering students per year. In particular, its aerospace programme is one of the most popular among students and welcomes about 300 first year students annually onto this course. The Politecnico di Torino is well respected within the wider industry, and often considered as a key advantage by companies since it provides access to a skilled and well-trained graduate pool. It has a long history of collaboration with leading companies, offering internships to students, and joint MA programmes, often employing graduates on their completion of the course: to mention but one, Politecnico di Torino offers joint international Master courses on Space Exploration (SEEDS) designed with Thales Alenia Space.



## Piemonte technological trends for the **future of aerospace**

- Advanced materials (composites and special alloys)
- New propulsion systems (electric, hybrid, fuel cells)
- Green aero engines technology (high speed turbine, high power epicyclic transmission)
- Additive technologies (machines, products, powder handling, post processing).
- Robotics (mainly for space applications)
- Advanced satellites design



**Piemonte Aerospace** is a special project promoted by Regione Piemonte, financed by ERDF – European Regional Development Fund and managed by Piemonte Agency, providing international players a free preferential channel to meet and start business with top class aerospace selected enterprises based in Piemonte, Italy. The Team makes an assessment of buyers' needs and technicians' requirements from all over the world and provides them with:

- top class skills and unique manufacturing know-how
- capable suppliers who can deliver on time high-quality parts and products at competitive prices
- technological qualified and competitive supply chains sharing commercial objectives, target clients and strategies
- technical working groups where local enterprises and foreign companies work together to develop projects aligned to the expectations of their international players.

The project Team's assistance is supply chain focused and completely free of charge.

For more information regarding the aerospace sector in Piemonte and its business opportunities: [aerospace@centroestero.org](mailto:aerospace@centroestero.org)



Regional policy for smart, sustainable and inclusive growth

INTEGRATED SUPPLY CHAIN PROJECTS ARE CO-FINANCED WITH EUROPEAN REGIONAL DEVELOPMENT FUND

The Regione Piemonte has allocated € 1 billion to promote the growth and competitiveness of the whole territory within the Regional Operational Programmes (ROP) of the European Social Fund (ESF) and the European Regional Development Fund (ERDF).

Notably the ROP ERDF 2014/2020 represents the main financial source of the region's industrial policy which aims to achieve 3 main objectives: to maintain and enhance the existing industrial activities, to expand investments of the companies already active on the territory, to attract new businesses wanting to realise innovation and industrial development projects. All the regional incentives can be granted through a preliminary evaluation process managed by Finpiemonte (the regional holding company for the socio-economic development of the territory), which coordinates the procedures related to the assignment, delivery and monitoring of the subsidies promoted by Regione Piemonte and financed by European, national, and regional funds.

Piemonte is the 1<sup>st</sup> Italian region to have established a regional Agency dedicated to inward and outward investment

1<sup>st</sup> Italian region to have created a dedicated financial tool for attracting and financing foreign companies willing to locate in Piemonte: the Regional Investment Contract.

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## Funding for **R&D**

- Setting up and strengthening labs and research centres
- Creating and developing start-ups
- Technology transfer from research to SMEs through Innovation Hubs
- Collaborative research on major challenges through Technological Platforms: Intelligent Factory, Life Sciences, Bioeconomics, Aerospace, Automotive
- Supporting industrialisation of research results (IR2 Call), through relevant investment programs aimed at industrializing the results of R&D activities already partially acquired





## BUSINESS MINDSET

With a long tradition in industrialisation and innovation, Piemonte has recently launched the Smart Specialisation Strategy (the Strategy – S3), in the framework of the Cohesion Policy 2014-2020 and the Europe 2020 Strategy. The main goal of the Strategy is to strengthen the R&D system as one of the main pillars to foster entrepreneurial explorations in the most promising sectors. The Strategy aims to transform the traditional industrial sectors through the discovery of emerging and new sectors supporting new ideas, products, services and models in order to give new answers to social needs.

The subsidy system in Piemonte focuses on both the start-up of new initiatives and on the development of existing companies.

The subsidies, which can take the form of soft loans, non-repayable grants or free-of-charge guarantee support to companies according to the European regulation on state aid and can vary according to the type of beneficiary, the kind of investment and the nature of expenses.

The system is one of the richest and most effective among the European developed regions, addressing to all the relevant industrial sectors, focusing in particular on research and innovation, manufacturing, sustainability and energy efficiency. The broad panorama of official sources and subsidised tools allows Italian and foreign businesses to cover the various stages of growth and development.

## Piemonte Agency

To come to know about the local economic system, to get information on business opportunities in the area and to find a quality destination for direct investment, the Regione Piemonte offers an entry point: Piemonte Agency, the one-stop-shop to get in touch with Piemonte.

### THE AGENCY PROVIDES A COMPLETE RANGE OF FREE SERVICES TO FOREIGN COMPANIES:

- wishing to locate in Piemonte
- searching for suppliers and partners in a variety of sectors
- needing technical training on foreign trade

### THE AGENCY IS A RELIABLE PARTNER THAT GUARANTEES:

- responsive and tailored assistance at all stages of the investment project
- matchmaking of the regional production offer with the needs expressed by international markets
- targeted activities to connect highly qualified local companies with foreign partners
- training in the field of internationalization
- international cooperation projects

**Piemonte Agency** guarantees complete assistance to foreign companies willing to invest in Piemonte.

Piemonte Agency can advise on every aspect of starting and running a business in Piemonte, providing assistance at every stage of the project. In addition, the Agency acts as a liaison office between foreign investors and Public Authorities, academic/research networks, industry. Foreign companies interested in establishing a presence in Piemonte can find several investment opportunities such as R&D centres, M&A operations, technical partnerships and/or greenfield operations especially in several aerospace innovative technologies such as: development of propulsion systems, cross sector products & components, company/service centers, dust production centers.

[investment@centroestero.org](mailto:investment@centroestero.org)

#### Piemonte Agency

Corso Regio Parco 27 | 10152 Torino - Italy  
tel. +39 011 6700511 | [www.centroestero.org](http://www.centroestero.org)



## Services for investors

### BUSINESS ASSESSMENT

- Insights on economic and industrial climate and key industries
- Market data and tailored information to launch your business
- Selection of potential partners
- Identification of service providers
- Detection of R&D projects and opportunities
- Identification of funding schemes, incentives and grants programmes, legal/labour/tax procedures

### BUSINESS SET UP

- networking with the local institutions, R&D networks, science and technology parks, innovation centres and universities
- support in obtaining authorisation, visas and permits
- advice on legal, financial and corporate structure in cooperation with the partner network
- selection of grants and incentives in cooperation with the partner network
- site selection and site visits
- help in recruiting specialised personnel onsite

### LOCATION OPPORTUNITIES DETECTION

Piemonte Agency performs real-estate selection and organises tailor-made visits.

### IDENTIFICATION OF INCENTIVES & GRANTS

Piemonte Agency provides help in identifying the most appropriate available incentives and grants for your business.

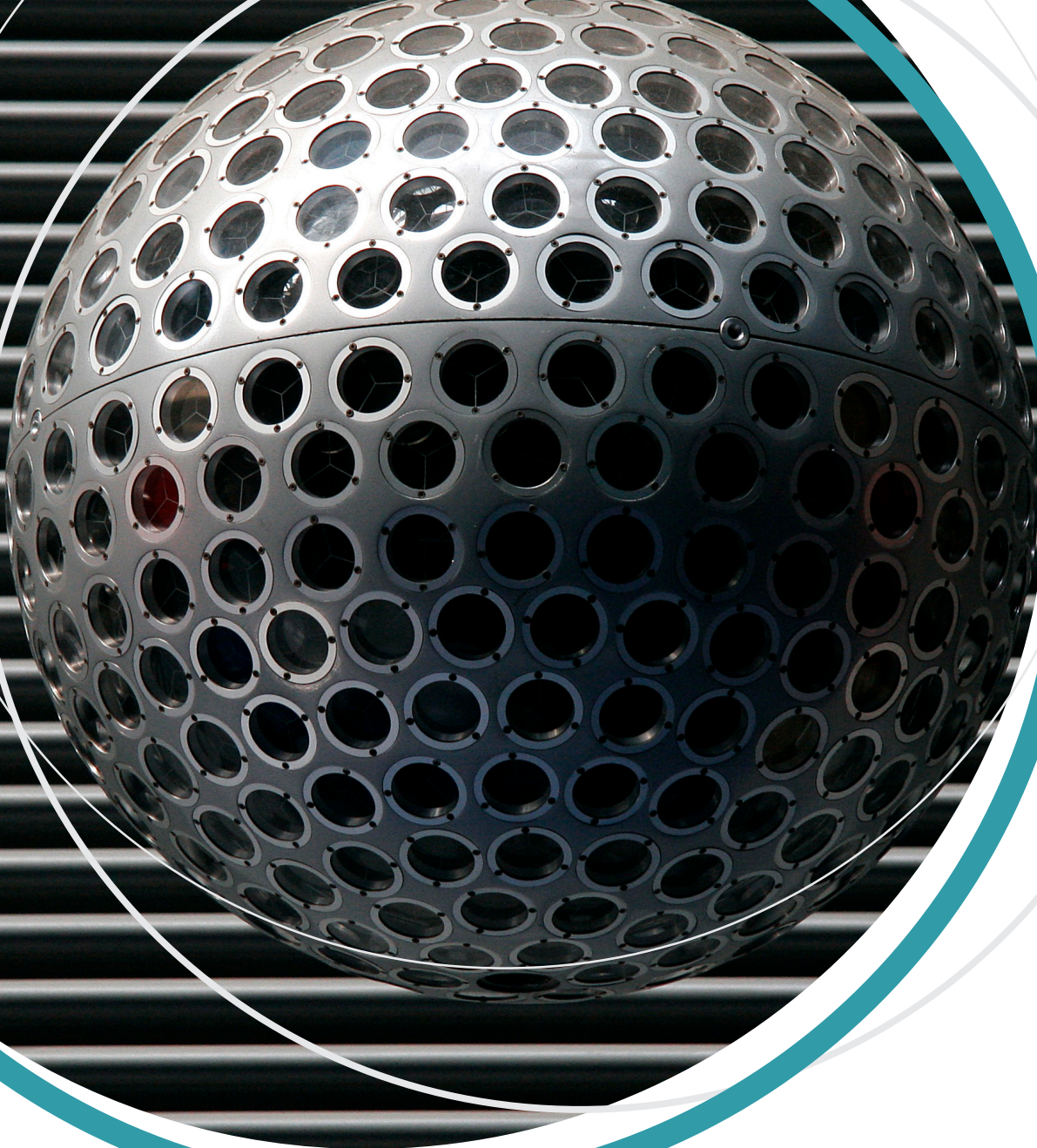
Divided by framework of application, appropriately combined, the incentives are able to cover the entire range of business investment expenses:

- start-up
- investments in machinery and plant
- equipment
- hiring and training of personnel
- research and development

The service is provided in collaboration with the Regional Government and Finpiemonte.







ITALY  
**PIEMONTE**  
THE PLACE TO INVEST

[www.piemontetheplacetoinvest.it](http://www.piemontetheplacetoinvest.it)