ADVANCED MECHANICAL ENGINEERING IN EMILIA-ROMAGNA

Value proposition
A top world cluster
is open to attract new investments.

Advanced mechanical engineer represents the most important specialization in Emilia-Romagna, a crosscutting sector linked to all the other regional supply and value chains (agri-food, building, health, fashion, etc.).

An industrial and innovation ecosystem of excellence – including Motor Valley, Data Valley and Packaging division - that is willing to start new partnerships.

Regional widespread education and university systems provide qualified talents.

A wide offer of locations is available to meet different requirements.
TAILORED SUPPORT FOR INVESTMENTS IN EMILIA-ROMAGNA
EMILIA-ROMAGNA: THE RIGHT PLACE TO BE

With a world-class business and innovation ecosystem, top level supply and value chains, a business-oriented public administration granting support and incentives to investors, excellent locations and an international mindset: Emilia-Romagna is just the perfect place to invest in!

INVESTMENT

Emilia-Romagna promotes:
- Innovative investments
- Creation of qualified employment
- Integration with the regional supply and value chains

PROPOSITION

Business environment and Innovation ecosystem
Top region for smart manufacturing (European Data Valley) with world famous clusters and easy access to foreign markets (1st Italian Region for per capita exports)

Locations
Wide range of properties in strategic positions

Incentives and collaborative institutions
A specific regional law promotes investments with specific incentives in addition to the national instruments

OUR SUPPORT

Facilitate partnerships with regional business and innovation ecosystem
Fact-sheets for more information

Identification of the location that better suits the investment
Invest in Emilia-Romagna Real Estate for more information

Contact point managing information about incentives and facilitating contacts and procedures with local and national actors
investinemiliaromagna@art-er.it

www.investinemiliaromagna.eu
Advanced mechanical engineer represents the core of a successful and collaborative ecosystem.

**INVESTMENT IN ADVANCED MECHANICAL ENGINEERING**

**CLUSTER**
- World famous motor valley
- Global leader in **packaging machinery** and other machinery and equipment

**MARKET**
- Export-oriented system (1° export per capita in Italy)
- Access to strategic markets (e.g. Europe, North America, Mediterranean Area, etc.)

**INCENTIVES**
- and reliable timeframes: 49 large and strategic investments financed since 2017 with specific regional agreements to attract investors

**BUSINESS ENVIRONMENT**

**PARTNERSHIPS**
Public and private innovation ecosystem open to collaboration

*including*

- Universities (86 programmes, 26 master’s degree related to Industry 4.0 + MUNER)
- Competence Center (Bi-Rex - Big Data Innovation and Research Excellence)
- PPPs (Clust-ER Mechatronics and Motoristics)
  - Etc.

**COLLABORATIVE INSTITUTIONS AND TAILORED SUPPORT**

www.investinmiliaromagna.eu
SOME FDIs IN ADVANCED MECHANICAL ENGINEERING

Some cases of foreign investments supported by national and regional incentives, agreements and facilitation

**What:** Smart factory producing new URUS model  
**Sector:** automotive  
*Regional and national incentives - Facilitation*

**What:** Innovative network product at Bologna R&D lab  
**Sector:** ICT, 5G  
*Regional Agreement - Facilitation*

**What:** Green mobility research (in collaboration with the University of Bologna)  
**Sector:** powertrain systems  
*Regional Agreement + partnership*

**What:** high-end electric and hybrid cars  
**Sector:** automotive  
*Regional facilitation*

**What:** Battery Chargers for EVs  
**Sector:** automotive  
*Regional Agreement - Facilitation*  
*Link with regional supply chains*

**What:** R&D centre (development, simulation and testing)  
**Sector:** powertrain systems.  
*Regional Agreement - Facilitation*

**What:** New manufacturing plant  
**Sector:** electric cigarettes (IQOS)  
*National incentives  
Regional facilitation*

**OTHER FOREIGN INVESTMENTS**

- **TOYOTA**  
- **Tetra Pak**  
- **FERRETTI YACHTS**  
- **CROWN**  
- **MADA**  
- **SIEMENS**  
- **DANA**  
- **ARBOS**  
- **MARPOSS**  
- **DOVER**  
- **MANITOU**  
- **BUCHER HYDRAULICS**
The regional contact point offering support in each step of the investment is managed by ART-ER, the regional development agency, on behalf of the regional government.

**CONTACT POINT**

**INVEST IN EMILIA-ROMAGNA**

investinemiliaromagna@art-er.it
+39 051 6450412
+39 051 6450490
+39 051 6450429

**MAIN ACTIVITIES (free of charge)**

- Providing information on the regional economic system
- Finding the right location
- Supporting investors in applying to regional and national incentives
- Integrating investors with public and private stakeholders
- Organizing promotion activities (missions, b2b, meetings, etc.) in Emilia-Romagna and abroad

[Contact details and website links]

**ART-ER**

*Attractiveness Research Territory*

**Mission**: to foster the region’s sustainable growth by developing innovation and knowledge, and internationalisation of the regional system

**INVEST IN EMILIA-ROMAGNA TEAM**

- Sabino Alvino
- Gianandrea Esposito
- Celeste Pacifico

[Contact details and website links]
ADVANCED MECHANICAL ENGINEERING IN EMILIA-ROMAGNA
The cluster is known worldwide for its **highly specialized** companies, leaders in their respective niches and strongly **oriented towards digital transformation and industry 4.0**

**Main data updated to 2019**
- Regional Revenues: **75 billion euros**
- N. Employees: **268,000**
- Revenues per employee: 280,000 euros
- Export Emilia Romagna: **37 billion euros**
- Exports per employee: 138,000 euros

**Fact-sheets**
Detailed description (click on this [LINK](#))

**MAIN SPECIALIZATIONS**
- automotive
- packaging machinery
- mechanical and hydraulic components
- lifting and handling equipment
- agricultural machinery
- boating

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Our worldwide known automotive cluster is **investing in electric vehicles**, with many relevant recent FDIs (AVL, FEV, FAW, BorgWarner) supported by the Regional Government.

More than 600 regional companies are part of the **green mobility sub-cluster**.

**MUNER – Motor Vehicle University of Emilia-Romagna** attracts and provides qualified talents...

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**MANUFACTURING SECTORS**

<table>
<thead>
<tr>
<th>Manufacture of</th>
<th>Local Units</th>
<th>Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor vehicles</td>
<td>89</td>
<td>8472</td>
</tr>
<tr>
<td>Bodies/ coachwork; trailers, semi-trailers</td>
<td>130</td>
<td>984</td>
</tr>
<tr>
<td>Parts and accessories for motor vehicles</td>
<td>335</td>
<td>6553</td>
</tr>
<tr>
<td>Ships and boats</td>
<td>173</td>
<td>1832</td>
</tr>
<tr>
<td>Railway locomotives and rolling stock</td>
<td>14</td>
<td>317</td>
</tr>
<tr>
<td>Air and spacecraft and related machinery</td>
<td>30</td>
<td>112</td>
</tr>
<tr>
<td>Transport equipment n.e.c.</td>
<td>214</td>
<td>2522</td>
</tr>
<tr>
<td>Other transport equipment</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total (2018)</strong></td>
<td><strong>986</strong></td>
<td><strong>20,794</strong></td>
</tr>
</tbody>
</table>

**TURNOVER (12/2018)**

10.8 Billion Euros

**EXPORT (2019)**

7.9 Billion Euros

16% of national total

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...and many others
The regional packaging division is global leader, in the Manufacturing and repairing of machinery for packaging and is highly connected with regional specializations, in particular agri-food, health, fashion.

**SOME TOP PLAYERS**

<table>
<thead>
<tr>
<th>Manufacture of packaging machinery in Emilia-Romagna (2018)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>295</strong> Companies</td>
</tr>
<tr>
<td><strong>12,442</strong> Employees</td>
</tr>
<tr>
<td><strong>3.8 bln €</strong> Turnover</td>
</tr>
</tbody>
</table>
FIND OUT MORE

Introducing Emilia-Romagna
Business and innovation ecosystems
Access to markets
Locations
Collaborative institutions
Tax and incentives
Human resources
Contacts

in the following slides
INTRODUCING EMILIA-ROMAGNA
Emilia-Romagna is an Italian region

- 1 regional government
- 1 metropolitan city: Bologna
- 8 provinces: Ferrara, Forlì-Cesena, Modena, Parma, Piacenza, Ravenna, Reggio Emilia and Rimini

**Strong regional manufacturing sector**
27.6% of total employees, while the Italian average is 20% and in EU27 it is 18%

This is why the economic system is highly export-oriented
1st region in Italy for per capita exports

**R&D** is much stronger than the national average
13.1% of the national R&D expenditure (while population is 7.4% of the total)

With the support of a top education and training system
7 universities (+ Motor-vehicles university), 150.000 students, 86 degree courses related to Industry 4.0

**Benchmarking with other EU regions with a strong industrial specialization**

<table>
<thead>
<tr>
<th>Surface (km²)</th>
<th>Population (mln residents, Eurostat 2018)</th>
<th>GDP per capita (Eurostat 2018 - GDP at current mkt prices)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emilia-Romagna</td>
<td>22.453</td>
<td>4.46</td>
</tr>
<tr>
<td>Italy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU 27</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Piemonte</td>
<td>25.387</td>
<td>4.36</td>
</tr>
<tr>
<td>Catalonia</td>
<td>32.108</td>
<td>7.49</td>
</tr>
<tr>
<td>Nordrhein-Westfalen</td>
<td>34.110</td>
<td>17.9</td>
</tr>
<tr>
<td>Rhône-Alpes</td>
<td>44.962</td>
<td>6.61</td>
</tr>
<tr>
<td>Aquitaine</td>
<td>41.804</td>
<td>3.43</td>
</tr>
</tbody>
</table>

www.investinemiliaromagna.eu
BUSINESS AND INNOVATION ECOSYSTEMS
The regional economic system is highly specialized and strongly export-oriented. Mechanical engineering is the main cluster, cross-cutting all the other supply and value chains but all the clusters boast excellences world-wide known.

Emilia-Romagna represents 7.7% of the Italian population but its economic relevance is much higher.

The graph on the right shows just some examples.

**FOR FOREIGN TRADE EMILIA-ROMAGNA-WORLD BY KEY SECTOR**
(2019, value in Euros)

- **MECHANICAL ENGINEERING**
  - IMPORT: 0
  - EXPORT: 16,178,115.95
  - Value: 34,918,503.586

- **AGRIFOOD**
  - IMPORT: 7,142,869.838
  - EXPORT: 7,988,780.684

- **FASHION**
  - IMPORT: 4,319,836.114
  - EXPORT: 7,557,877.727

- **HOUSING**
  - IMPORT: 1,504,526.884
  - EXPORT: 5,490,305.592

- **CHEMISTRY/PLASTIC PROD.**
  - IMPORT: 3,758,488.750
  - EXPORT: 3,791,420.079

- **HEALTH INDUSTRY**
  - IMPORT: 1,471,828.663
  - EXPORT: 3,303,278.133

- **OTHER SECTORS**
  - IMPORT: 2,926,244.687
  - EXPORT: 3,283,829.124

**EXPORT VALUE, SOME EMILIA-ROMAGNA SPECIALIZATIONS ON THE ITALIAN TOTAL (2018)**

- Tiles and ceramics: 94%
- Meat and meat-based products: 39%
- Other general purpose machinery: 29%
- Agricultural machinery: 29%
- Tubes, pipes, hollow profiles and related fittings: 26%
- Manufacture of dairy products: 24%
- Wearing apparel, except fur apparel: 22%
- Other special purpose machinery: 21%
- Knitted and crocheted apparel: 20%
- Motor vehicles: 19%

Emilia-Romagna

Other Italian regions
Emilia-Romagna qualifies as an international Data Valley boasting top world supercomputers, cutting-edge data centres and a wide ‘big data community’ with a lot of players that have connections with smart manufacturing.

**WORLD-CLASS MANUFACTURING REGION**

- Emilia-Romagna: 27,6%
- North Italy: 26,4%
- Italy: 20,4%
- EU: 18,3%

(Source: Eurostat, 2019 - Elaborated by ART-ER)

**EUROPEAN DATA VALLEY**

- 9th IN THE COMPUTING POWER WORLD RANKING (Top500.org, 2020)
- BIG DATA TECHNOPOLE – Bologna hub
- COMPETENCE CENTER: Bi-Rex - Big Data Innovation and Research Excellence
- BIG DATA ASSOCIATION: 90% of supercomputing resources for public research in Italy managed by its members

**INDUSTRY 4.0**

- Top industries 4.0 and technologies for digital transformation
- Collaboration with universities: 86 programmes, 26 master’s degree
- PPPs – “Clust-Er” associations

**A SMART CITIES AND QUALITY OF LIFE**

- Region at the top of the rankings concerning smart cities and quality of life (I-City Rank 2019, Sole24Ore 2020)

www.investinemiliaromagna.eu
An innovation ecosystem is easily available to investors thanks to specialized “CLUST-ERS” Associations gathering companies, laboratories and training institutes.

https://mech.clust-er.it/en/  
https://www.associazionebigdata.it/  
https://motorvehicleuniversity.com  

https://agrifood.clust-er.it/en/  
https://build.clust-er.it/en/  
https://greentech.clust-er.it/en/  

https://create.clust-er.it/en/  
https://health.clust-er.it/en/  
https://innovate.clust-er.it/en/  

www.investinemiliaromagna.eu
Be part of the Data Valley Emilia-Romagna!

**Data Valley Emilia-Romagna**

**FOCUS**
- Industry 4.0
- Life Science and Healthcare
- Climate and Sustainability
- Smart Cities, smart mobility

**ARTIFICIAL INTELLIGENCE**
- iFAB
- Almage
- cini

**COMPUTING POWER**
- CINECA
- INFN
- Leonardo
- SUPER
- MAX
- 9th in world ranking (source: Top500.org)

**SYNERGIES AMONG TOP ACTORS**
- **BigData Association**: 90% of supercomputing resources for public research in Italy managed by its members
- **Bi-Rex**: Competence Center involving top companies and organizations

**EDUCATION AND TRAINING**
- 47 Master Degrees
- AI Academy
- Data Lab – Massive entry level course for graduate students of any discipline
- MUNER
- PhD Courses: 22 in Data Science, 12 in Big Data and Artificial Intelligence
- 35 Research fellowships in BD&AI

**WEATHER FORECAST**
- ECMWF

**TOP INFRASTRUCTURES**
- BIG DATA TECHNOPOLE – Bologna hub

**INDUSTRY LED PROJECTS**
- UNIPOL, ENEL, ENI, TELECOM, LEONARDO ATOS, MOTOR VALLEY (MASA)

**ACCELERATING PROGRAMS**
- ER STARTUPS INCUBATORS NETWORK
- MOTOR VALLEY ACCELERATOR
- LAUNCHPAD ACCELERATOR

**SUPPORTED BY THE REGIONAL BIG DATA COMMUNITY**

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ACCESS TO MARKETS
Companies in Emilia-Romagna have extensive access to foreign markets

- Emilia-Romagna is well connected to supply and value chains of most of the main clusters in Europe, and it is a major junction for all transportation systems.

- European corridors connect the region to the entire Trans-European Transport Network.

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**Emilia-Romagna: top 25 countries for import+export**
(Istat Coeweb, 2018, values in Euro)

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<table>
<thead>
<tr>
<th>Country</th>
<th>IMPORT 2018</th>
<th>EXPORT 2018</th>
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<tbody>
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<td>Germany</td>
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<td>France</td>
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<td>United States</td>
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<td>UK</td>
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<td>China</td>
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<td>Belgium</td>
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<td>Poland</td>
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<td>Austria</td>
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<td>Switzerland</td>
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<td>Japan</td>
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<td>Czech Republic</td>
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<td>India</td>
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<td>Hungary</td>
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<td>Denmark</td>
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<td>Slovakia</td>
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<td>South Korea</td>
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<tr>
<td>Greece</td>
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<tr>
<td>Australia</td>
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<tr>
<td>Austria</td>
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<tr>
<td>Portugal</td>
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</tbody>
</table>
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Million Euro
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Main infrastructures:

- **Via Emilia** (the road cross-cutting the region from Rimini to Piacenza)

International airports
- Other airports in the surrounding area: Milano Linate, Malpensa, Bergamo (67-120-109 km from Piacenza), Verona (70 km), Firenze (45 km)

Freight villages and intermodal terminals (e.g. Bologna, Parma and Piacenza)

Ports
- **Ravenna port** ([www.port.ravenna.it/home-en/](http://www.port.ravenna.it/home-en/))
- Other ports in the surrounding area: Genova (140 km), Porto Marghera - Venice (130 km), Livorno (170 km)

High-speed trains connect the region with major cities
- E.g.: Bologna – Milan (1h 06’), Florence (39’), Rome (2h 24’), Naples (3h 36’), Turin (2h27’
LOCATIONS
The region boasts a **wide offer of business parks**, most of them located less than 10 kilometers from major motorways and train stations. Invest in Emilia-Romagna - our contact point for foreign investors - provides **support for identifying the best location for you**

Have a look at **Invest in Emilia-Romagna Real Estate**, the website dedicated to strategic real estate opportunities on the regional territory, managed by ART-ER on behalf of the Emilia-Romagna Region and in collaboration with territorial bodies:  

You will find:
- A wide range of opportunities
- Detailed information for each property
- Description of the territorial context with a specific focus on each province
A reliable network of local territorial entities aims to promote, facilitate and retain investments in Emilia-Romagna. Invest in Emilia-Romagna Real Estate is supported by an effective network among local municipalities, public bodies and development agencies providing information to support entrepreneurs and to find strategic real estate opportunities in the regional territory.

A system of local partners and actors - suppliers, public bodies, universities and others structures dedicated to research & development, innovation and education – supports the integration of new settlements also in terms of services required by the new company.

<table>
<thead>
<tr>
<th>TYPES OF PROPERTY</th>
<th>TYPES OF INTERVENTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial</td>
<td>New Construction</td>
</tr>
<tr>
<td>Logistic</td>
<td>Renovation</td>
</tr>
<tr>
<td>Student House</td>
<td>Demolition &amp; Reconstruction</td>
</tr>
<tr>
<td>Tourism - Hospitalty</td>
<td>Urban Development</td>
</tr>
<tr>
<td>Residential</td>
<td>Other</td>
</tr>
<tr>
<td>Commercial</td>
<td></td>
</tr>
<tr>
<td>Land</td>
<td></td>
</tr>
</tbody>
</table>

**Featured properties**

- **REGGIANE INNOVATION PARK**
  - The property consists of 210,000 sq.m (of which 70,000 sq.m of existing industrial buildings) to be converted in dl [more]

- **FAIBENE – ITALIAN WELLNESS FACTORY**
  - The project concerns development of the former Novarese Colony (built 1933 - 1934); an important example of rational [more]

- **NAVILE – STUDENT HOUSE**
  - The area is in a strategic position due to its proximity to the university of Bologna area, the High Speed railway [more]
TAX AND INCENTIVES
EMILIA-ROMAGNA provides strong incentives for manufacturing activities

Emilia-Romagna has a specific law to promote investments

**REGIONAL LAW N. 14/2014**

The main tool foreseen by the law is the **AGREEMENT FOR THE SETTLEMENT AND DEVELOPMENT OF ENTERPRISES** to be signed by the Regional government, the investor local bodies and other stakeholders involved in the investment.

The Agreement provides **financial incentives** and also a **definite timeframe** for procedures and completion of the investment ensuring collaboration with local authorities and stakeholders.

The Agreement allows to put together incentives in one procedure for different types of investment that can be used for manufacturing investment programmes

**Type of actions that can be financed**

- R&D - Research and development
- **Productive investments for SMEs**; (for large companies only in assisted areas)
- Research facilities
- Environment protection: energy efficiency, co-generation in energy production from renewable sources, recycling and reuse of waste
- Training projects

**Many foreign investments have already been financed by the Agreement**, such as: AVL, Teko Telecom (JMA Wireless), Eon Reality, IBM, B.Braun, Lamborghini e Ducati (part of Volkswagen/Audi group), Qura, FEV Italia, Bellco, Isotta Fraschini, Borgwarner Systems Lugo

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NATIONAL FINANCIAL INCENTIVES

National incentives are also available (the Region can co-finance them).

• DEVELOPMENT CONTRACT
  supports large investments in the sectors of industry, tourism and environmental protection

  AMOUNT OF INVESTMENT: >20 million euro (7.5 mln for agro-industry businesses)

  INCENTIVES: - in compliance with EU regulation - intensity depends on the type of project, location and the size of the company. The incentives consist of grants and soft loans towards. Investors must contribute financially at least 25% of the eligible costs.

  Some examples: LAMBORGHINI, YNAP, KASTAMONU, ALCAR, CAVIRO, ALSTOM

Projects presented by foreign companies - amount of investment > €50 mln (€20 mln for agro-industry) - gain access to the “fast-track” procedure (shorter timing, ad hoc resources). More info at www.invitalia.it/eng

• R&D INSTRUMENTS (PUBLIC CALLS)
  finance R&D and experimental development projects

  AMOUNT OF INVESTMENT / INCENTIVES - in compliance with EU regulation - depend on the type and location of the project and the size of the company
Here are some examples of the main national tax credits and employment bonus:

**Tax Credit on R&D and innovation expenditures**
Companies investing in R&D projects can count on tax credit on expenditures (personnel, tangible assets depreciation charges, consultancy, etc.) related to:
- R&D (20%),
- Technological innovation (10%),
- Technological innovation for Industry 4.0 (15%),
- Aesthetic conception (textile, footwear, fashion sectors) (10%).

**Tax credits on assets**
Companies investing in tangible and intangible capital goods accordingly to the Industry 4.0 national strategy can benefit of a wide range of tax credits:
- 15-20% (intangible assets)
- 10-50% (tangible assets).
Companies investing in ordinary tangible assets can benefit of a 10% tax credit.

**Employment bonuses**
Bonus up to 6000 euro per year (per max 3 years) on tax relief for employers who hire young workers (under 36 years old) on permanent basis in 2021 and 2022;
HUMAN RESOURCES
Italian Labour cost in industrial companies is lower than the Eurozone average

Per hour labour cost in €, in enterprises with 10 or more employees,
**Industry**, Eurostat 2018

<table>
<thead>
<tr>
<th>Industry</th>
<th>Per hour labour cost in €</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>40.2</td>
</tr>
<tr>
<td>France</td>
<td>38.3</td>
</tr>
<tr>
<td>Austria</td>
<td>37.6</td>
</tr>
<tr>
<td>Euro_area</td>
<td>33.2</td>
</tr>
<tr>
<td>Italy</td>
<td>28</td>
</tr>
</tbody>
</table>
Availability of highly educated and skilled human resources ensured by a widespread university system and higher training institutes

7 universities in Emilia-Romagna
- over 400 courses
- 153 masters
- 126 specialization courses
- 113 Ph.D
- 150 thousand students enrolled

- Industry 4.0: 86 university programmes, 37 doctoral programmes and 26 master’s degree programmes
- MUNER, the Motorvehicle University of Emilia-Romagna

158 thousand students in Technical Institutes (year 2017-18) in North East Italy

The regional offer includes:
• Polytechnic Networks
• Higher Education and Technical training (IFTS)
• Higher Technical Institutes related to the regional specializations
• Foundations (e.g. FITSTIC, INDUSTRY 4.0)
An example of collaboration among top companies, universities and institutions

**Courses**
- Advanced Automotive Electronic Engineering
- High Performance Design
- Advanced Powertrain
- Racing Car Design
- Advanced Motorcycle Engineering
- Advanced Sportscar Manufacturing

**MEMBERS**

**The Regional University system:** Universities of Bologna, Ferrara, Modena and Reggio Emilia, Parma

**The best brands of the automotive industry:**
Automobili Lamborghini, Dallara, Ducati, Ferrari, Haas F1 Team, HPE Coxa, Maserati, Toro Rosso, Marelli, Pagani
A TOP CLUSTER, AN OPEN REGION, A GREAT OPPORTUNITY

Emilia-Romagna is an open region with top world clusters that aims to attract new investments to be integrated in its main supply and value chains.

The region boasts convenient locations and collaborative administrations providing incentives and reliable timeframes and a business and innovation ecosystem of excellence that is willing to start new partnerships.

CONTACT POINT

Sabino Alvino, Gianandrea Esposito, Celeste Pacifico

Mail
INVESTINEMILIAROMAGNA@ART-ER.IT

Phone
+39 051 6450412
+39 051 6450490
+39 051 6450429

Website
WWW.INVESTINEMILIAROMAGNA.EU

EMILIA-ROMAGNA REGION

GD Knowledge Economy
Department for Business internationalization & FDI Attraction
Director: Ruben Sacerdoti
E-mail: Ruben.Sacerdoti@regione.emilia-romagna.it