Local context

Leghorn is the second industrial and commercial centre of Tuscany. The city is well connected with the two international airports in Pisa and Florence and with the railway lines and highways that branch out toward Europe.

The Port of Leghorn is one of the main ports of the Mediterranean for both the traffic of ferries and cruise passengers and, above all, for freight traffic.

Leghorn considers Hi Tech ICT a strategic sector for the growth and development of the local system. All activities and innovations changing Leghorn into a Smart City provided with a system of technological infrastructures and innovative services for businesses and individuals are encouraged, supported and promoted.

8 GOOD REASONS TO INVEST IN LEGHORN

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- Local policies supporting investments, networks and innovation
Hi-Tech ICT Enterprises

The Province of Leghorn can rely on a Hi-Tech sector of 96 enterprise locations, 74 of which also have headquarters in the Province, 16 with headquarters in other provinces of Tuscany, and 6 with company headquarters outside Tuscany. The turnover of the Leghorn ICT segment is about 527 million euros, 4.3% of the overall turnover produced by hi-tech companies in Tuscany. The people working in the sector are 2,621, 1,935 of whom operating in Leghorn premises.

Hi-Tech ICT in Leghorn: integration and specialisations

Thanks to an excellence network of universities, research centres and qualified technological centres, specialised in scientific subjects, several initiatives in Leghorn have led to the development of Hi-Tech ICT skills and specialisations in specific and innovative market segments such as satellite, aerospace, surveys and intelligent territories, sea technologies (for ports, logistics, navigation), robotics, bioinformatics, automotive and life-science.

Aerospace and the ToscanaSpazio network

The 31 ToscanaSpazio associates cover 75% of the Tuscan aerospace sector. Apart from supplying high professional skills Leghorn hosts specific excellent international entities such as Kayser Italia, FlyBy, Wiser Srl.

Opportunities - Services - Contacts

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The Port of Leghorn is one of the main ports of the Mediterranean for both the traffic of ferries and cruise passengers and, above all, for freight traffic. Green Economy is one of the most dynamic sectors, 1,609 Green companies are registered in Leghorn.

With 21,440 Green companies, Tuscany is the seventh region in Italy for number of companies. In 2013, 2,560 people were engaged with permanent agreements, accounting for 5.5% of the national total.

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Green economy - A growing sector

<table>
<thead>
<tr>
<th>Sectors analysed by IRPET</th>
<th>Employee number</th>
<th>Peculiarities</th>
<th>Human Capital</th>
<th>Range of Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineering and software/hardware system development (applied research)</td>
<td>5 - 20</td>
<td>Extremely high know–how level</td>
<td>Mainly originating from universities, from abroad, too</td>
<td>International</td>
</tr>
<tr>
<td>Renewable energies and eco-friendly transport</td>
<td>5 - 20</td>
<td>Extremely high know–how level</td>
<td>Mainly originating from universities, from abroad, too</td>
<td>International</td>
</tr>
<tr>
<td>Recovery and waste management, sea and territory</td>
<td>40 - 50</td>
<td>Remarkable task heterogeneity: intensive knowledge (planning and consulting) and labour intensive apprenticeship (waste collection and transport)</td>
<td>A few figures with high qualification level and remarkable share of human resources with medium-low qualification</td>
<td>Regional</td>
</tr>
<tr>
<td>Plant engineering, building, network management</td>
<td>50-150</td>
<td>More specifically hi-tech production; mix of managers and planners with high qualification level</td>
<td>mix of managers and planners with high qualification level</td>
<td>Regional/National</td>
</tr>
</tbody>
</table>


R&D and Innovation

Research and Innovation in the Leghorn area are remarkable and widespread, taking advantage of a series of favourable conditions: integration with local and regional specialised productions, the ability of creating networks, the nearby 3 Universities (University of Pisa, Scuola Superiore Sant’Anna di Pisa and Scuola Normale Superiore di Pisa) and Innovation & Research Centres, as well as availability of qualified resources originating from schools and universities in the territory.

Green Companies in Leghorn

1. Multinational companies that have invested in the chain of production and storage of biofuel.
2. Small and numerous companies with highly innovative skills, as businesses associated with the Green Lab network.

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The Port of Leghorn is one of the main ports of the Mediterranean for both the traffic of ferries and cruise passengers and, above all, for freight traffic. For both its special skills and its international innovation and research centre network, Leghorn offers a proactive and competitive context to anyone operating in the advanced manufacturing sector. In particular, the traditional specialisation in the automotive sector offers an ideal ground for developing projects and innovations consistent with the European Cars 2020 Action Plan.

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### 8 GOOD REASONS TO INVEST IN LEGHORN

<table>
<thead>
<tr>
<th>Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geographical position with great logistic interest</td>
<td>in the Mediterranean, between North and Centre–South of Italy</td>
</tr>
<tr>
<td>Area located in a regional context with high standard of living</td>
<td></td>
</tr>
<tr>
<td>Very good infrastructures and integrated logistic system</td>
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<td></td>
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<tr>
<td>Local policies supporting investments, networks and innovation</td>
<td></td>
</tr>
</tbody>
</table>
Companies in the advanced manufacturing sector in Leghorn

In Leghorn the manufacturing sector is traditionally important: as one can see from the number of SMEs that make up local production (about 15,000 SMEs), with the driving force of the new clusters (Hi-Tech ICT, Green Economy) and the presence of multinational leaders in their segments.

Qualified resources, low costs

Leghorn is quite competitive in terms of production and management costs for big or middle-sized factories, in several types of manufactures on both national and European level.

<table>
<thead>
<tr>
<th>Location</th>
<th>Total Costs</th>
<th>Labour Costs</th>
<th>Real Estate Costs</th>
<th>Utilities Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuscany</td>
<td>20,580,099</td>
<td>15,784,739</td>
<td>4,404,480</td>
<td>390,880</td>
</tr>
<tr>
<td>Lyon</td>
<td>26,258,901</td>
<td>20,213,010</td>
<td>5,656,623</td>
<td>389,267</td>
</tr>
<tr>
<td>Stuttgart</td>
<td>31,119,339</td>
<td>25,372,099</td>
<td>5,181,074</td>
<td>566,164</td>
</tr>
</tbody>
</table>

Comparison of operating costs for an auto parts factory - Tuscany/Lyon/Stuttgart - year 2013 (uS$). Source: Tuscany Region.

Local Supply Chain - Auto Components

Since the seventies, Leghorn has been a national centre in the sector of auto components and automotive: today there are more than 200 factories and 3,000 employees. The tissue of enterprises and the offer of services and quality products can support the development of a local supply chain of a factory of auto parts.

The components market is going through a phase of adjustment in which there may be opportunities for partnerships and acquisitions, modernization of areas and facilities, relocation of highly skilled labour.

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Employees and factories in the manufacturing sector - Leghorn area - Year 2011.
Source: our processing, from ISTAT data.
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Historically, the sea is an asset for the development of the territory of Leghorn. The traditional sectors of the economy of the local sea are the marine industry and logistics integrated with the port. New opportunities for growth, development and diversification are related to the implementation of infrastructure projects and the recovery of abandoned industrial areas.

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Port of Leghorn
The Port of Leghorn, ranked Big Regional (first level) in the Tyrrenian Corridor by the Freight Leaders Club, is a multipurpose seaport provided with a Port Approach Control (P.A.C.) for Environmental Protection and Gate Transit Security (GTS).

A. Vespucci Freight Terminal
The Vespucci Freight Terminal is perfectly connected with the Port and it is just a few kilometers from it. It relies on advanced structures and systems for storing and handling goods, and is an integral part of a communication and infrastructure network rendering Leghorn the perfect gateway to Northern Italy and Europe. This Terminal hosts highly specialised manufacturing companies, including important companies supplying services or developing logistic systems.

Marine industry
With 642 companies and about 3,000 employees Leghorn is one of the most important cluster of Tuscan nautical chain, specializing in new construction and refitting of luxury boats. Azimut-Benetti, a leading manufacturer of luxury yachts, is the leader of a network of enterprises formally recognized, which includes about 20 companies industries, based in the province of Leghorn and in neighboring provinces, covering all production chain. The chain ensures high standards of quality, innovation and efficiency.

R&D in marine environments
Specific scientific, technical and application skills as well as service supply to enterprises improve expertise in marine environments.

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