

INVESTING IN LEGHORN

ICT - HIGH TECH

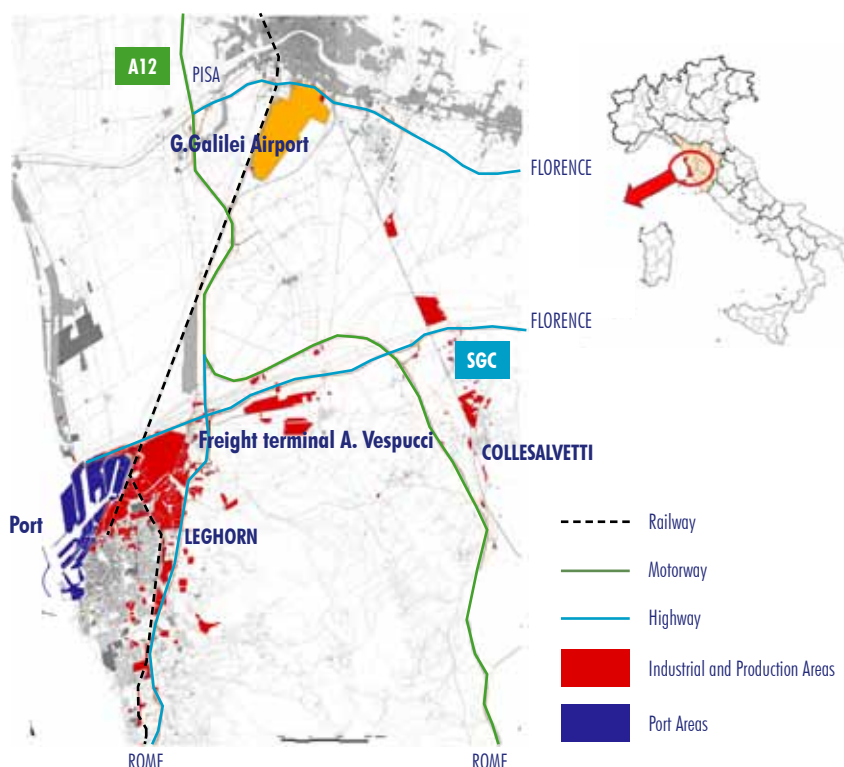
INFORMATION DOSSIER abstract

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

Geographical position with great logistic interest in the Mediterranean, between North and Centre-South of Italy

Area located in a regional context with high standard of living

Very good infrastructures and integrated logistic system

Qualified Universities and Specialised Research Centres

Competitive and exhaustive settlement offer

Industrial vocation and tradition

Local availability of specialised labour

Local policies supporting investments, networks and innovation

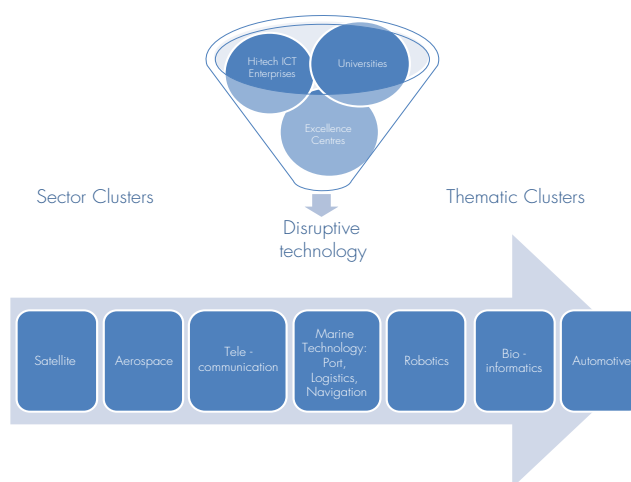
Hi-Tech ICT Enterprises

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.**



The numbers of the network ToscanaSpazio			
PMI	21	Turnover (million Euro)	350
Big companies	4	Products	210
Research centres	6	Worker	2500

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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INVESTING IN LEGHORN GREEN ECONOMY

INFORMATION DOSSIER abstract

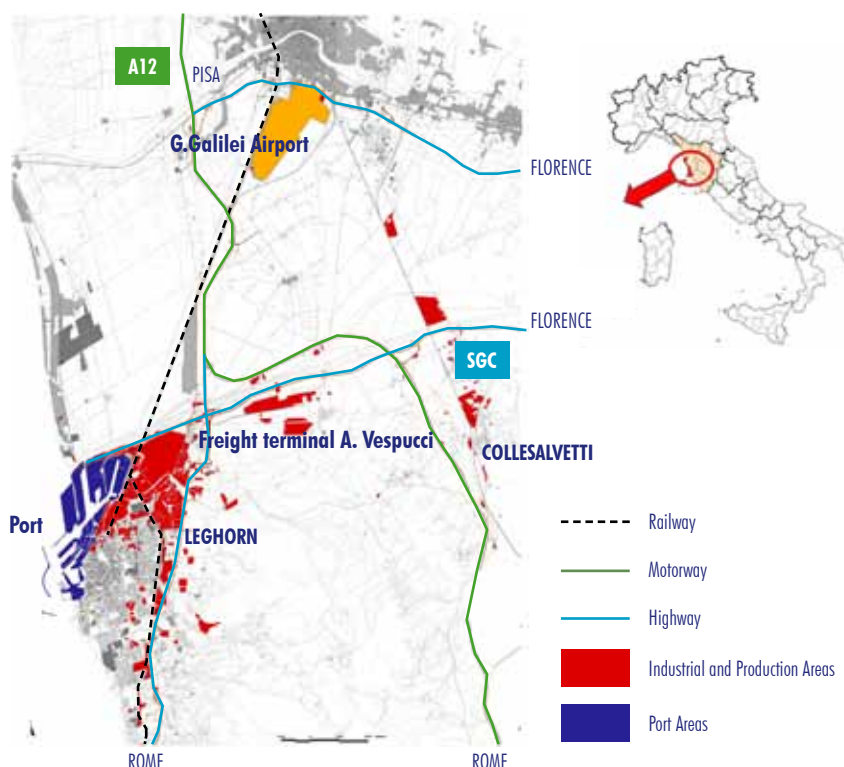
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Green Economy is one of the most dynamic sectors, **1,609 Green companies are registered in Leghorn**.

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

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

Green sectors analysed by IRPET by characteristics, in the Leghorn area. "La Green Economy a Livorno", IRPET, Florence, 2011.

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.



ID	name	activity
1	ABC ELETTOIMPIANTI	Electric and photovoltaic plants
2	ALPHA ECOLOGIA Srl	Laboratory measures for the environment and consulting, management and training of personnel for sustainable bioarchitecture plants
3	BGREEN	Sustainable bioarchitecture
4	CHEMA Srl	Green energy innovative solutions
5	EN-ECO	Renewable energy technologies
6	FLYBY Srl	Satellite monitoring, telecommunication and smartphones
7	GENERPLUS Spa	Renewable energy plants, energy efficiency, sustainable mobility
8	GEOPOLARIS Srl	Environmental studies of marine sediments, environmental surveys
9	GEOSTUDI ASTIER Srl	Equipment and software for subsoil geophysical surveys
10	IDROGEA STUDI GEOLOGICI	Geologic and environmental studies, geothermal science development
11	IDROGEO SERVICE	Geoengineering, renewable energies
12	I EM	Photovoltaic plant monitoring, energy efficiency management
13	IES SOLARE Srl	Planning, installation and maintenance of renewable energy plants
14	ITALG Srl	Green building
15	LABROMARE	Water treatment plant management
16	MET IMPIANTI	Special plants, alternative energy, industrial automation
17	NET BUILDING AUTOMATION	Building automation, home automation, industrial automation
18	PROGETTO ENERGIA Srl	Renewable energy company consortium
19	PUNTO ENERGIE	Photovoltaic electric plants
20	SINTECNICA Srl	Alternative energy integrated solutions
21	SO.IN.G. STRUTTURE E AMBIENTE	Applied geophysics, diagnostic surveys, digital geographic topography, technical and consulting services for recovery of soil and water; aquifer security measures

GreenLab network companies

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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INVESTING IN LEGHORN

ADVANCED MANUFACTURING

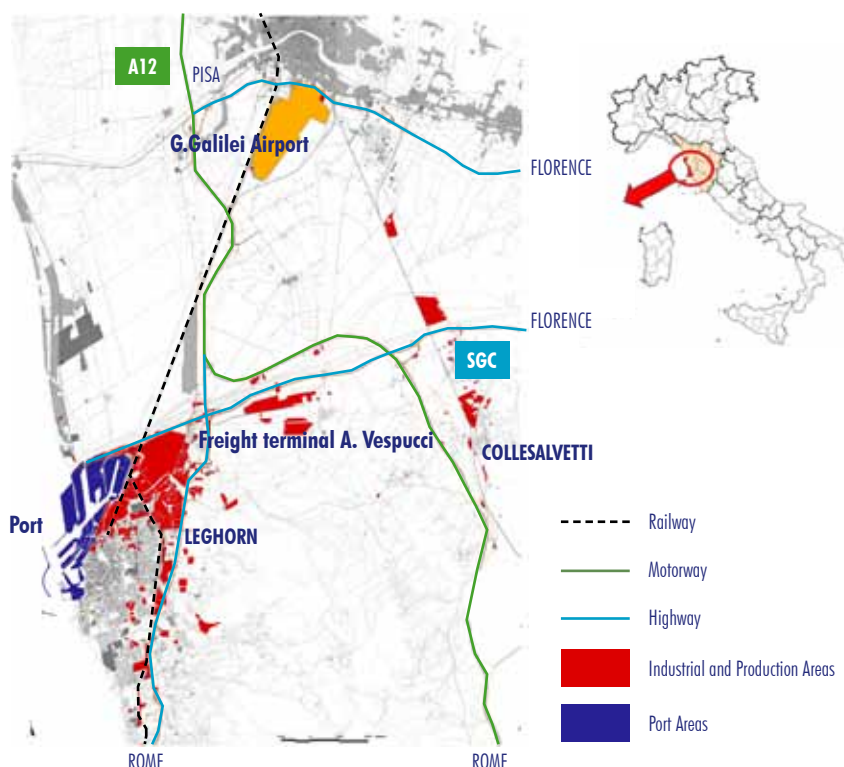
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For both its special skills and its international innovation and research centre network, Leghorn offers a proactive and competitive context to anyone operating in the advanced manufacturing sector. In particular, the traditional specialisation in the automotive sector offers an **ideal ground for developing projects and innovations consistent with the European Cars 2020 Action Plan**.



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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**.

Location	Total Costs	Labour Costs	Real Estate Costs	Utilities Costs
Tuscany	20.580.099	15.784.739	4.404.480	390.880
Lyon	26.258.901	20.213.010	5.656.623	389.267
Stuttgart	31.119.339	25.372.099	5.181.074	566.164

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

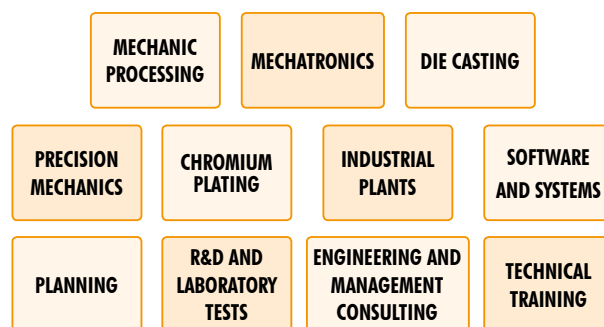
	Factories	Employees
Food & Beverage	148	779
Fashion	50	113
Wood & Furniture	60	253
Paper & Publishing	46	183
Chemicals	36	607
Non-Metal-Bearing Minerals	39	325
Metal Products	146	1190
Electronic, Optical, Electromedical and Precision Instruments	7	29
Devices and Machinery	34	374
Motor Vehicles	12	1542
Other Means of Transport	17	326
Other manufacturing activities	275	1193
Total Manufacturing Industries	870	6914
Total Economy	13920	48680

Employees and factories in the manufacturing sector - Leghorn area - Year 2011. Source: our processing, from ISTAT data.

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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INVESTING IN LEGHORN

MARINE ECONOMY

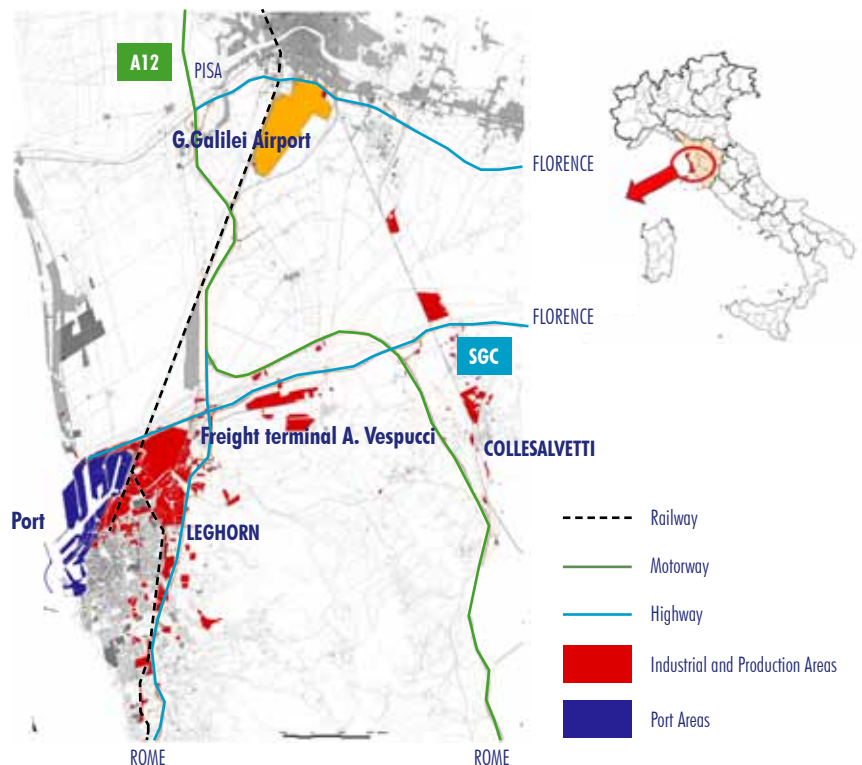
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Historically, the sea is an asset for the development of the territory of Leghorn. The traditional sectors of the economy of the local sea are **the marine industry and logistics integrated with the port**. New opportunities for growth, development 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 Tyrrhenian 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)**.

90 berths, 12,000 linear metres of docks, areas of 2,500,000 sq. m ashore; stores for 56,500 sq. m in state-owned areas; annual handling of almost 30 million tons (goods); about 3 million passengers, including about 1 million cruise passengers



A. Vespucci Freight Terminal

Area of 2,800,000 sq. m, with 324,500 sq. m of stores, and provided with all the main logistic and industrial services.

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.

AZIMUT BENETTI
GROUP

R&D in marine environments

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



OCTOPUS (credits: Massimo Brega)

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