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# Invest Italy

  
Italian Trade Commission

 SviluppoItalia

INNOVATION, CREATIVITY, EXCELLENCE:  
*THE ITALIAN BUSINESS STYLE*

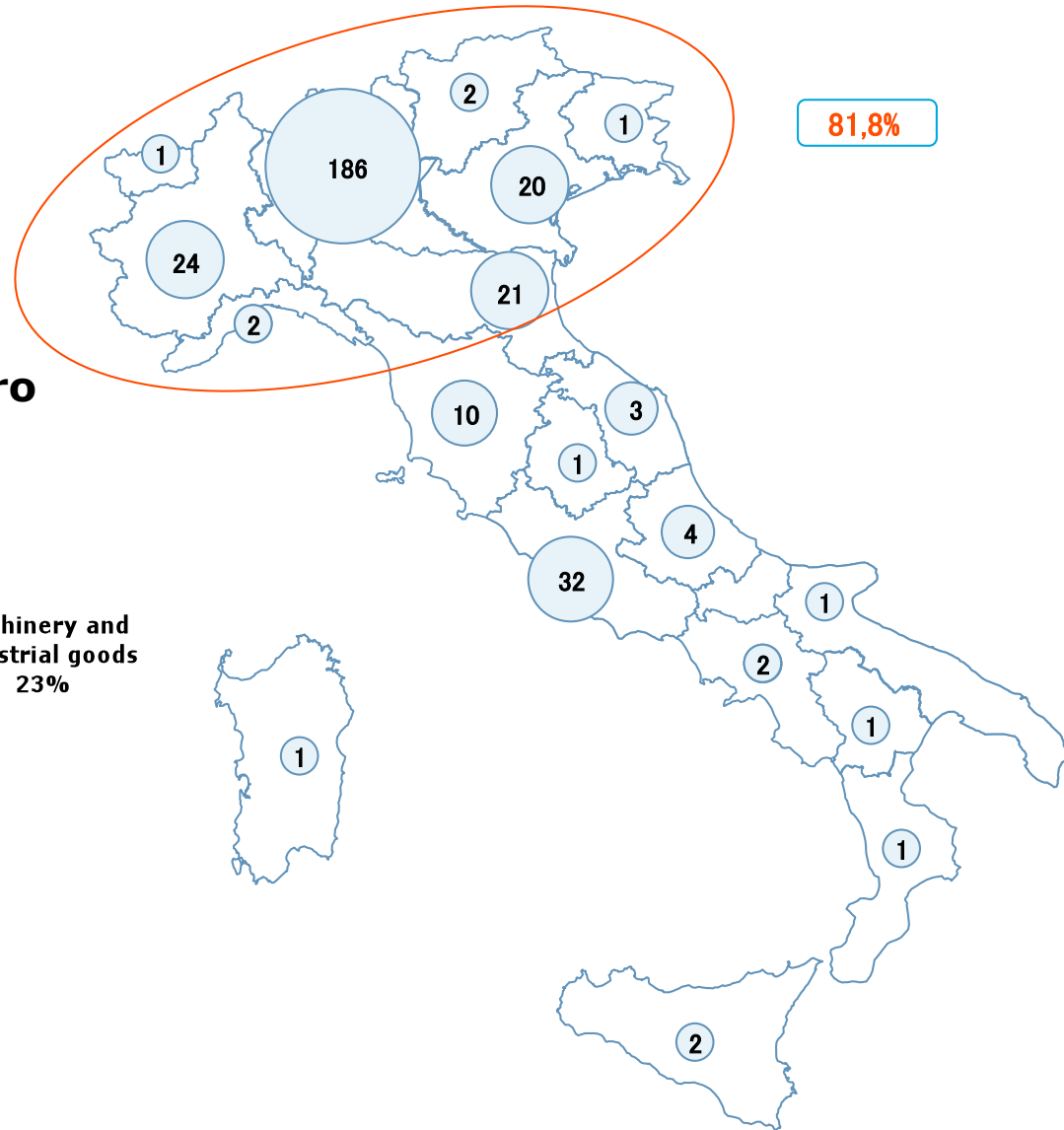
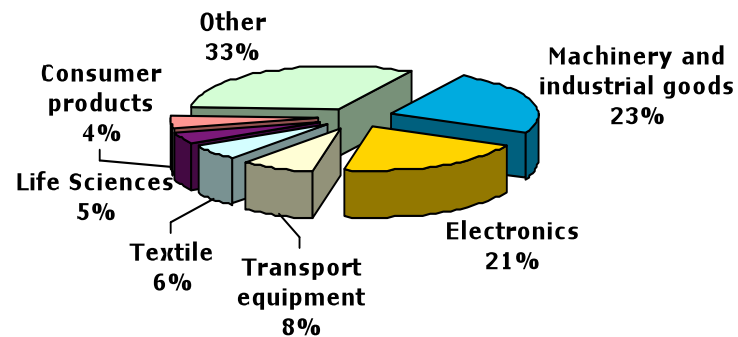
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# Invest Italy

- ❑ **Innovation:** *a unique combination of superb design and constant attention to technological innovation*
- ❑ **Creativity:** *high quality factors - cultural environment, exciting experiences and research - make Italian products unique in the world*
- ❑ **Excellence:** *the Italian manufacturing industry is internationally acknowledged for its flexibility and its focus on clients. The trend of the scientific production in terms of papers published over a ten-year period (1996-2006) is second in Europe (+49%)*

# JAPANESE COMPANIES IN ITALY

- ❑ **Companies: 317**
- ❑ **Employees: 28,000**
- ❑ **Turnover: ~16.5 billion Euro**



# JAPANESE PRESENCE IN ITALY

## Top 20 investors

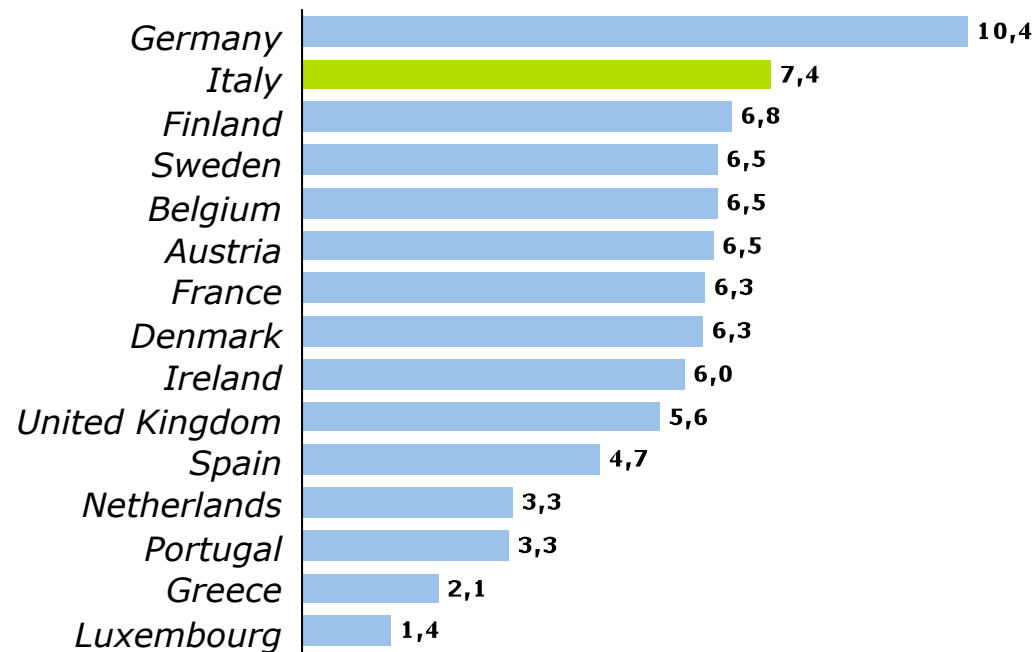
Japanese groups	N. of Italian companies with Japanese equity stake	Turnover (mln Euro)	Employees
TOYOTA MOTOR CORP.	8	2.067	726
SONY CORP.	9	1.228	701
HONDA MOTOR LTD	6	833	1.322
FUJITSU LTD	9	774	407
MATSUSHITA ELECTRIC INDUSTRIAL CO. LTD	9	698	688
DENSO CORP.	2	646	3.880
YAMAHA MOTOR CO. LTD	3	634	698
KOBE STEEL LTD	1	570	616
BRIDGESTONE FIRESTONE CORP.	3	533	1.743
mitsui & co. ltd	3	521	192
SUZUKI MOTOR CORP.	1	492	100
DAINIPPON INK & CHEMICALS INC.	4	332	810
KOMATSU LTD	3	327	639
SEIKO EPSON CORP.	1	325	150
RICOH CO. LTD	8	320	729
ASAHI GLASS CO. LTD	5	277	1.056
SUMITOMO CORP.	6	277	293
NEC CORP.	3	256	196
mitsubishi corp.	4	244	770
DAIKIN INDUSTRIES LTD	1	240	161

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## ITALIAN STRONGHOLDS:

### *1) a Skilled and Creative Workforce*

Employment in medium-high/high tech manufacturing % of total workforce



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## ITALIAN STRONGHOLDS:

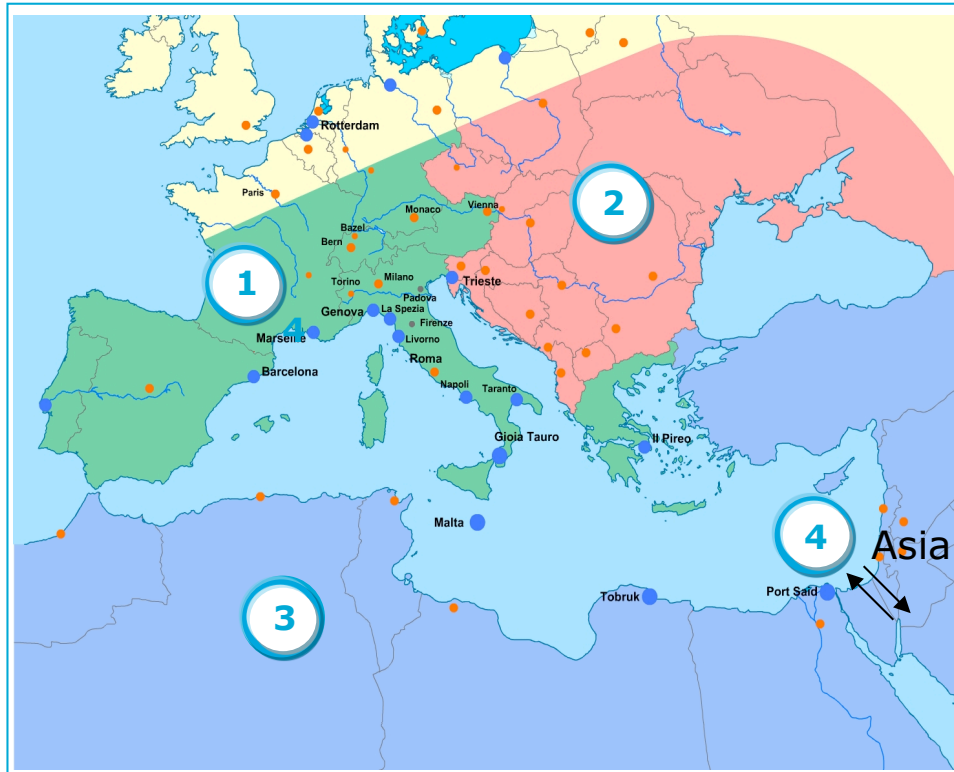
### 2) *a sophisticated Consumer Market*

- ❑ Italy is one of the largest economies in the world with a GDP of 1,500 billion Euro in 2006
- ❑ Italy ranks 8<sup>th</sup> in the “Quality-of-Life Index”
- ❑ Its population (58 million) is characterized by a large number of sophisticated consumers with high standards of living

# ITALIAN STRONGHOLDS:

## 3) Italy's strategic position

### Geographical borders of the most promising markets served by Italian Ports



- **Hub** for intercontinental trade with Asia (*India, China and Japan*) and Europe.
- **Strategic position** in the Mediterranean, bordered by several industrialized countries with high growth potential.
- **Rapid and efficient distribution links** to the major European countries.
- **Optimization of the interchange** between the carriers, exploiting all means of transportation: air, road, sea and rail

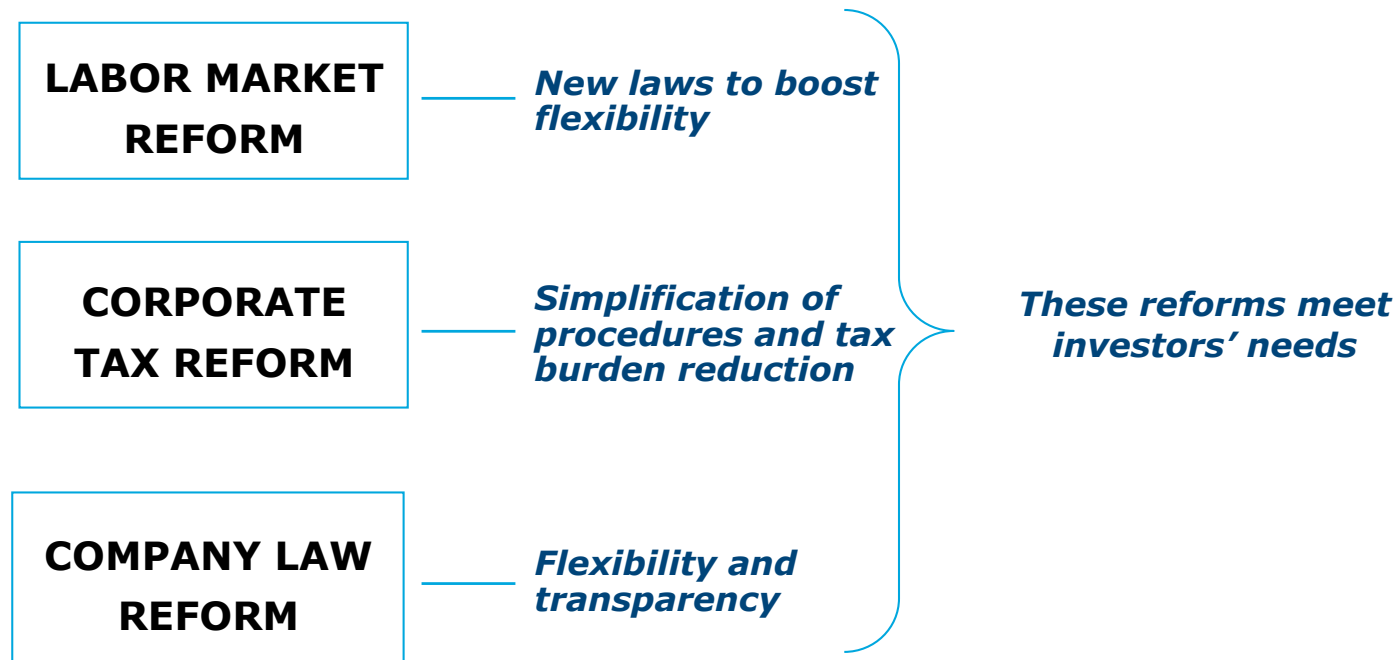
ITALY PROVIDES AN **EASY ACCESS** TO A MARKET OF **700 MILLION CONSUMERS**

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## NEW OPPORTUNITIES:

A new business framework

- ❑ **A NEW BUSINESS ENVIRONMENT** following:



- ❑ **A STRONG REGULATORY** system which safeguards **INTELLECTUAL PROPERTY RIGHTS**



## NEW OPPORTUNITIES IN VARIOUS SECTORS:

Wireless applications and services,  
Digital industry, IT security,  
Semiconductors design.

*ICT*

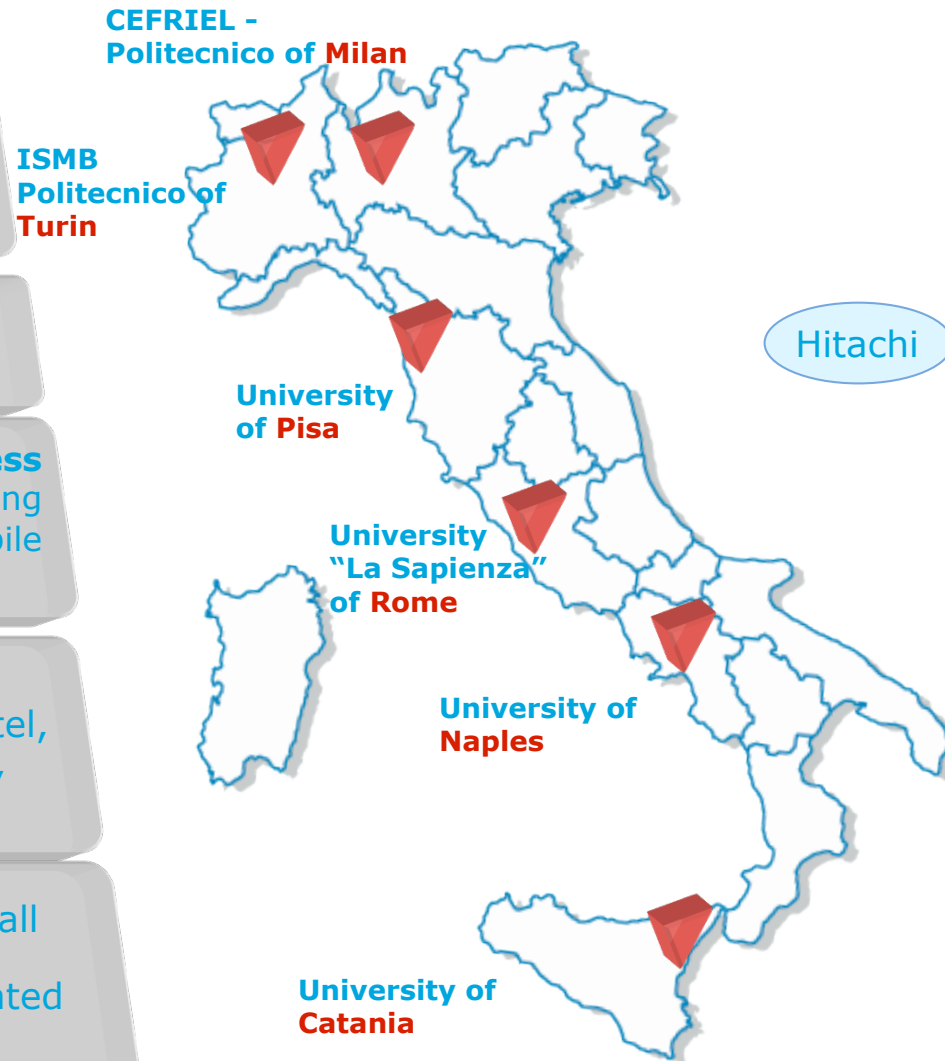
**Italy is the 4th largest ICT market in Europe:** 70 billion Euro, representing about 11% of the EU market value

Over **500 foreign ICT companies**

One of the **most developed wireless market worldwide:** ranking 1<sup>st</sup> among leading industrialized countries for mobile phone penetration

**Recent R&D centers established:**  
HP, Intel, Microsoft, Motorola, Alcatel, IBM, Siemens, LG, Marvell, Infineon, Maxim, International Rectifier

**A strong base of HR** appreciated all over the world: about 50,000 new degree graduates a year in ICT-related disciplines



## NEW OPPORTUNITIES IN:

### *Life Sciences – Biotech*

**Strong competence in Biomedicine, Oncology, Diagnostics, Neurosciences**

**Ranking 5th for world market value, with annual growth rate of +19.3% - second only to Canada**

Spending in Private R&D: 1,200 million Euro  
Annual turnover: 4,000 million Euro

Contracts with Big Pharmas signed in 2006 for over 450 million Euro

Very competitive R&D labor and facilities costs compared to USA, UK, Germany and France



## NEW OPPORTUNITIES IN:

*Nanotech*

**Over 300,000 companies** (materials, bio-pharma and electronics) involved in nanotech applications

Strong scientific and industrial competence in **nanomaterials**, **nanobiotech** and **nanoelectronics**

High potential **start-ups** and **leading large companies** including Pirelli, ENI, STMicroelectronics, FIAT, GlaxoSmithKline

**Dedicated Hi-tech districts** and about **100 R&D public centers** operating in nanoscience and nanotech fields

University nanoscience related HR: **94,000 graduates** every year + **42,000 researchers**

FIAT  
Research  
Center  
Turin

TASC  
Trieste

Nanofab  
Venezia

S3  
Modena

NEST  
Pisa

NaMatEE

NNL  
Lecce

IMM  
Reggio  
Calabria



## NEW OPPORTUNITIES IN:

### *Automotive sector*

**3<sup>rd</sup> largest market** for motor vehicles and spare parts in Europe - after Germany and Great Britain

**"A long tradition of automotive excellence"** – Fiat, Ferrari, Maserati, Lamborghini, Alfa Romeo, Lancia, Pininfarina, Bertone, Magneti Marelli, Brembo, Pirelli, ...

**Specialized research institutes** for automotive technology: FIAT Research Center, BOSCH Research Center, Elasis Research Center

**A global leader:** more than 3,000 firms, who employ 173,000; annual production volumes 1.2 million vehicles

**A young and highly qualified workforce:** over 200,000 students enrolled in specific engineering courses



## A SINGLE REFERENCE POINT FOR INVESTORS

With Headquarters in Rome, InvestInItaly, in cooperation with the Ministry of Foreign Affairs and its diplomatic network abroad, relies on:

- ❑ **ICE - Italian Trade Commission Offices abroad**

**Desks InvestInItaly in:**

- *Asia*: Tokyo, Shanghai, Dubai
- *USA*: Los Angeles, New York
- *EU*: Paris, London, Amsterdam, Berlin

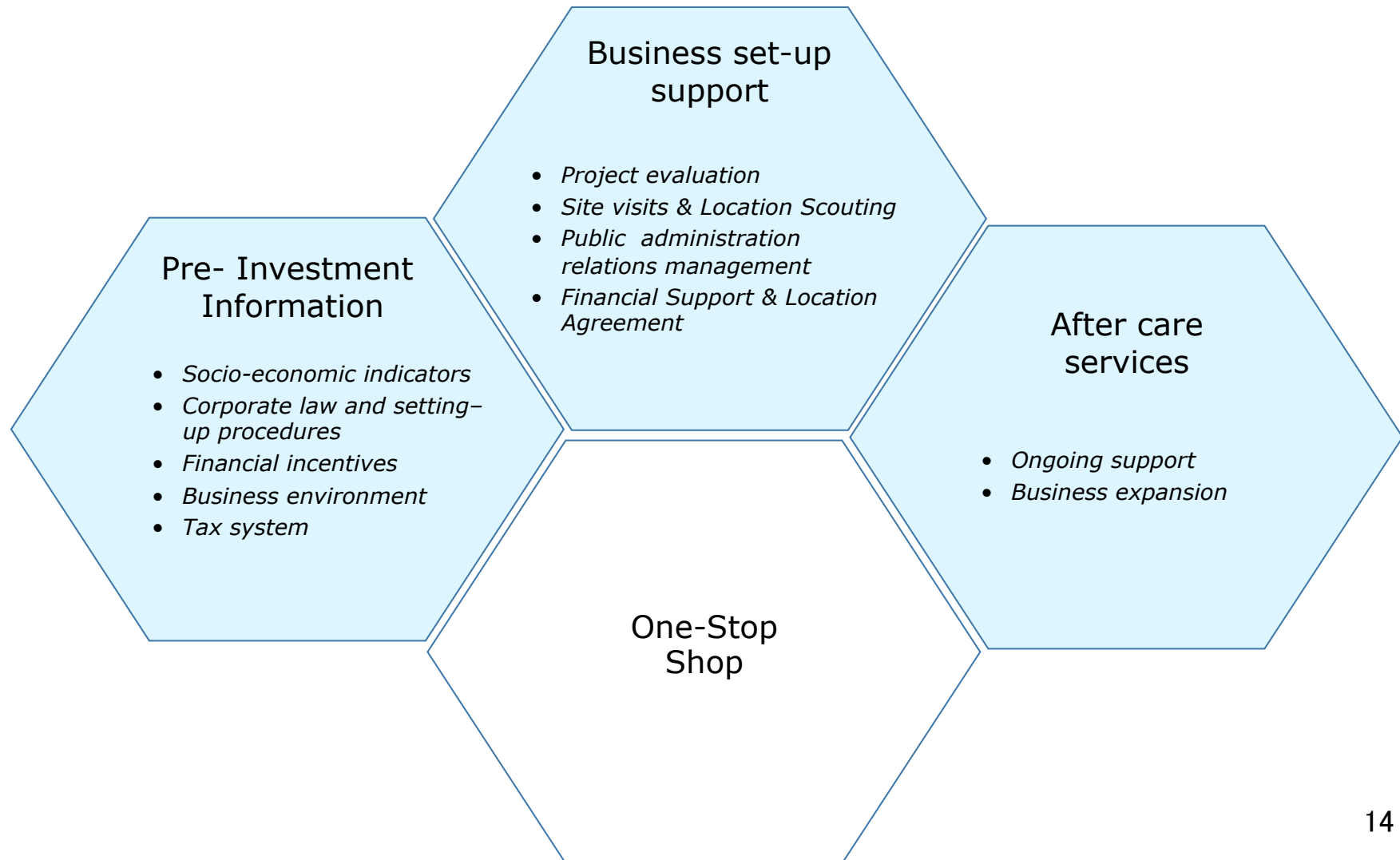
- ❑ **Selected partners** in different countries (France, Germany, UK, Japan, China, USA)

**provide direct assistance** to investors and promote business opportunities in Italy.

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# Invest **In** Italy

provides a full spectrum of **PROFESSIONAL SERVICES** throughout the investment process.



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# Invest Italy



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