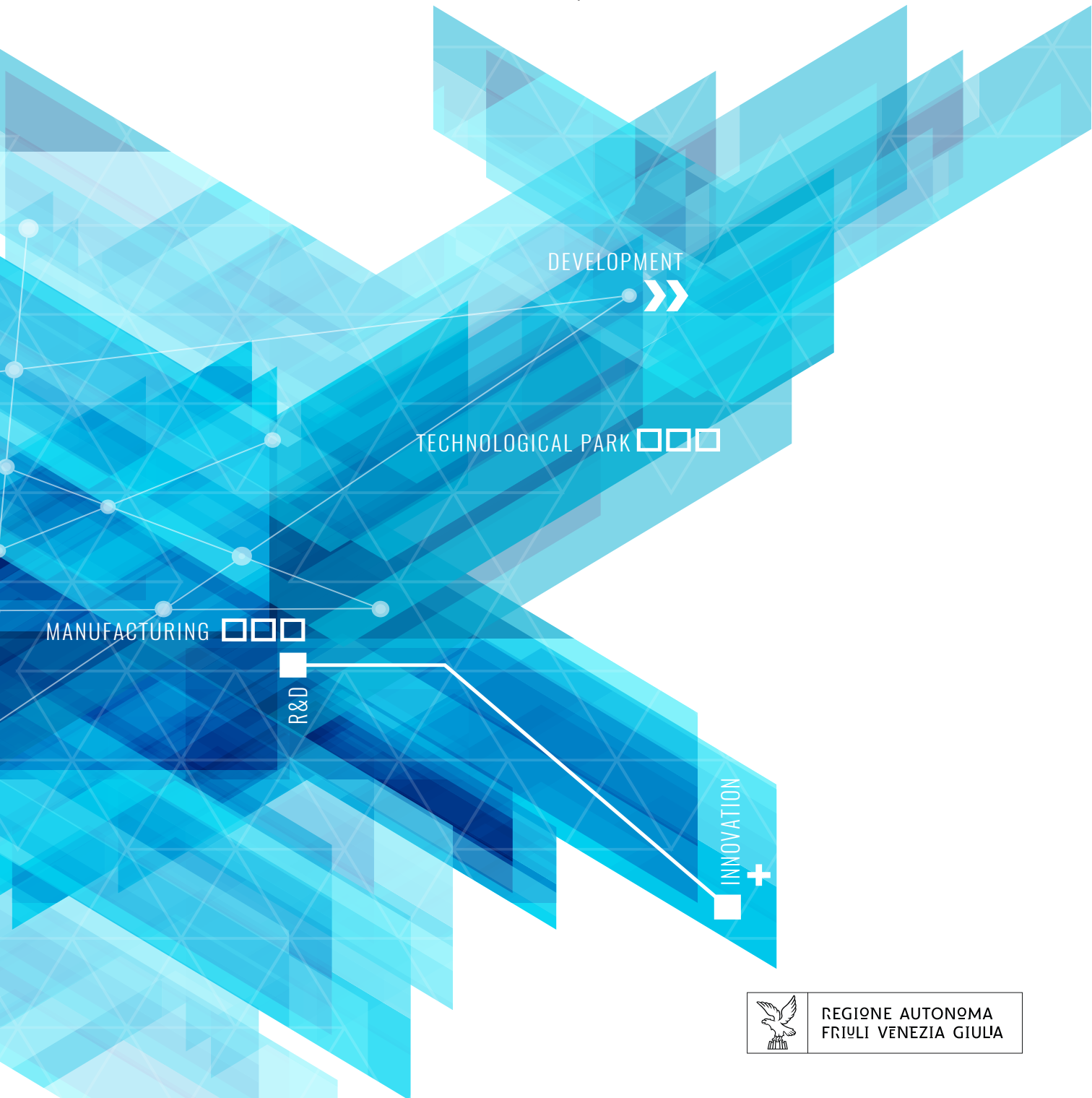


FRIULI VENEZIA GIULIA


WITH ENTERPRISES, FOR THE TERRITORY



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WITH ENTERPRISES, FOR THE TERRITORY





FRIULI VENEZIA GIULIA is a region that can boast an extraordinary system of enterprises, infrastructure and production chains and clusters. A “**KNOWLEDGE SYSTEM**” and a tradition of cooperation with both neighbouring and distant regions, make Friuli Venezia Giulia an area that stands out, even at a European level, for **ITS EXCELLENCE IN RESEARCH AND INNOVATION**, by hosting on its territory internationally renowned scientific and technological companies. But not only that, it is a unique area for its **CULTURAL AND NATURAL HERITAGE** and its landscapes, from the Dolomites to the sea and for its typical foods and wines, praised throughout the world. Just to name a few examples, there are the Roman remains of the important site of Aquileia, the historic towns with medieval and Habsburg castles and the Venetian Villas that you can come across on a visit to the enchanting Friuli plain. All of which have made Friuli Venezia Giulia a very popular tourist destination.

This brochure shows some of the aspects that contribute to making this region attractive: the lower tax burden, the excellence of the manufacturing tradition, the prestigious international infrastructure for research and innovation, which can count on highly trained staff, and the effective coordinated regional system for subsidies, of easy access and availability, which ensure optimal development conditions for enterprises conditions for enterprises that are already set up and for those wishing to set up.

FRIULI VENEZIA GIULIA, WITH ENTERPRISES, FOR THE TERRITORY.

QUALITY OF LIFE: TOURISM, CULTURE, WELLNESS







A UNIQUE TERRITORY AND OF SUBSTANCE

FRIULI VENEZIA GIULIA is an autonomous region in Northeast Italy, in the heart of Europe and facing the Adriatic Sea, which plays an important role in linking the Mediterranean to Central and Eastern Europe.

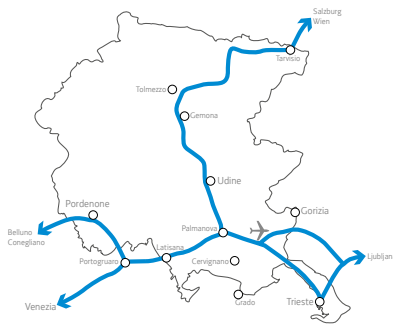
The region is crossed by major roads that connect the ports of **THE ADRIATIC SEA TO NORTHERN EUROPE AND ALSO WESTERN EUROPE TO THE BALKANS**. Milan, Vienna (Austria), Munich (Germany), Zurich (Switzerland), Budapest (Hungary), Bratislava (Slovakia), Prague (Czech Republic), Ljubljana (Slovenia), Zagreb (Croatia) are all less than 600 km away.

THE INFRASTRUCTURE SYSTEM of Friuli Venezia Giulia consists of over 466 km of railway lines, an airport, a motorway network connected with the Austrian and Slovene ones, three ports, one of which is substantial, in Trieste, with boatyards, an industrial terminal, an oil terminal and with touristic ship and ferry traffic. The infrastructure network can also count on the inland terminals/logistics hubs for the trade of goods and change of transport mode (air, water, road, rail).

Friuli Venezia Giulia, has an economy based on small and medium-sized enterprises among the most developed in Italy and has a high concentration of scientific excellence centres and technology and research parks.

The region pays close attention to economic **DEVELOPMENT POLICIES**, thus being in one of the top positions in Italy for guaranteed business support.

Friuli Venezia Giulia is also a tourist destination of excellence, thanks to the seaside and mountain resorts and historical cities which are concentrated within an hour's drive. All this enhanced by the excellent food and locally produced wine. You can enjoy numerous sports thanks to the 7 golf courses, the over 130 km of ski slopes, the 14 horse riding schools and the 23 marinas or simply relax in one of the beautiful spas in the area (www.turismofvg.it).





SCIENTIFIC
EXCELLENCE



TECHNOLOGY
PARKS



RESEARCH
CENTRES



SME SMALL AND
MEDIUM SIZED
ENTERPRISES



TOURISM
EXCELLENCE



DEVELOPMENT
POLICIES



TOGETHER DOING BUSINESS

THE FRIULI VENEZIA GIULIA REGION has created a coordinated system of subsidies for businesses, easy to access and to understand, which increases the economic, social and environmental benefits of the area through the concentration of resources, the selection of the best projects, the simplification, the computerization of contribution proceedings, the certainty of timing, the transparency and the information.

The cornerstone on which this virtuous system is built is the **CATALOGUE OF SUBSIDIES**, that allows anyone to access constantly updated information on tax, contribution and financial breaks designed to help enterprises.

These subsidies help to support both industrial research and experimental development and innovation, and the processes that aim to improve the competitiveness of enterprises.

It is a series of measures dedicated to, for example, financing technological investments in machinery and innovative equipment, supporting the creation of start-ups, supporting the management of SMEs, financing coworking services and promoting fab-labs. There are also numerous **TAX BREAKS** for the IRAP (regional income tax) and various instruments have been identified to **FACILITATE ACCESS TO CREDIT** for enterprises, which allow the regional companies to obtain subsidized loans to support their investment programs and their business development.

The **FVG INVESTMENT AGENCY** promotes support to the attractiveness of the local economic context, informing businesses and investors on facilitating measures and existing funding and on available areas in the region. The Agency guides the companies through the first contacts with the network of regional expertise and helps with the evaluation of possible investments, providing personalized and timely communication. It also helps with the setting up of new enterprises in the region, through the search for investors and the promotion of investment opportunities.

**AGRI-FOOD
INDUSTRY**

1100 ENTERPRISES
7800 PEOPLE
EMPLOYED

**MECHANICAL
ENGINEERING INDUSTRY**
57,000 PEOPLE EMPLOYED
3,700 ENTERPRISES



**MANUFACTURING
TRADITION**



EXCELLENCE IN MANUFACTURING TRADITION

FRIULI VENEZIA GIULIA has identified, in accordance with the territory, the segments with greater added value able to be catalysts for innovation and on which to target investments in research and development.

The development plan for the industrial sector of the region calls for the **REVIVAL OF THE MANUFACTURING AND SERVICE SECTORS** through the improvement of the governance and the framework of the industrial areas, the attraction of entrepreneurial initiatives, the creation of new enterprises and their consolidation, the revitalization and specialization of businesses in line with the areas identified by the regional **SMART SPECIALIZATION STRATEGY** (S3), on which measures were focused to stimulate private investment in research, development and innovation, coordinated with the support instruments called for by the community programming to maximize the efficiency of the public resources invested.

There are many renowned companies operating in the region which have consolidated important market shares also thanks to their constant dedication to research and innovation.

AGRI-FOOD

Agri-food is one of the most significant sectors of the regional economy with over 527 million Euros turnover in exports (+12% compared to 2014), more than 1,100 companies and 7,800 employees (2.2% of the regional total and 7.3% of manufacturing) in late 2015.

Notable among the most representative products in exports are: coffee (Trieste is one of the centres of European excellence in this field), wines and cured meats.

MECHANICAL ENGINEERING

The engineering industry, which includes the metallurgy sector, the manufacture of metal products and of machinery and equipment, is the leading sector of the region's exports, amounting to around 6 billion euros a year, with approximately 57,000 employees and over 3,700 businesses in 2015.

SMART HEALTH:
Biomedical technologies
bioinformatics development
of innovative therapies
150 ENTERPRISES

**MARITIME
TECHNOLOGIES**

995,3 MLN EUROS
TURNOVER
IN EXPORT IN 2015



HOME SYSTEM
2800 ENTERPRISES
20000 PEOPLE EMPLOYED



HOME SYSTEM

Home system is a sector that has traditionally characterized the Friuli Venezia Giulia region, and consists of all the production activities that manufacture goods that are placed in the home. Its most important components are the timber and wood industry and the enterprises that manufacture furniture, with more than 1,440 million euros in export turnover in the first three quarters of 2014, more than 2,800 companies at the end of 2014 and approximately 20,000 employees in 2015.

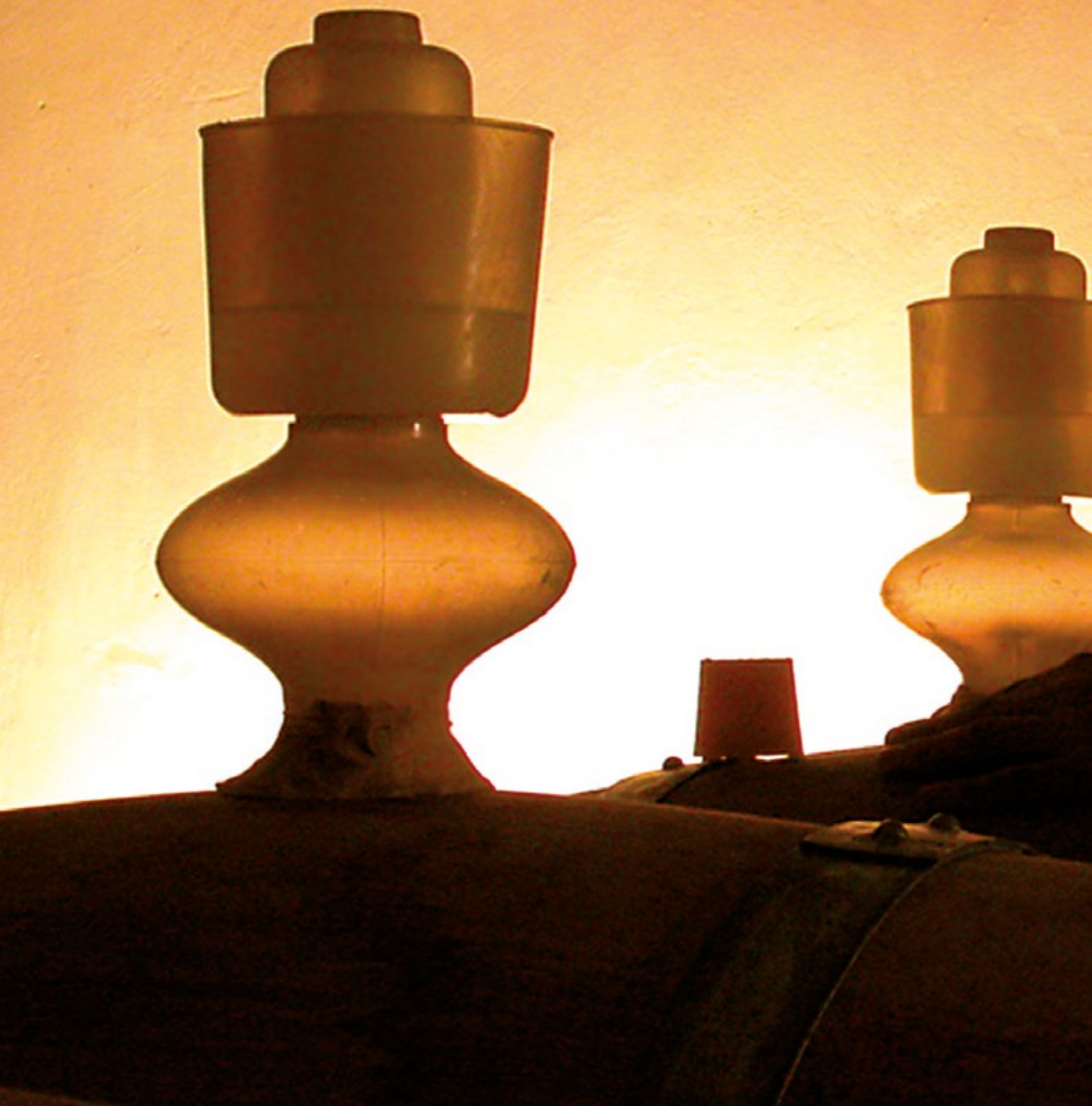
MARITIME TECHNOLOGIES

The sector of the economy of the sea is one of the most significant in the regional economy (3.6% of companies) with more than 995,3 million euros in export turnover in 2015 which equals 26.8% of the nation wide blue economy (3.7 billion euros). Moreover, between 2011-2015 Italy's north east saw an increase of 1.5% for the companies in the sector, in marked contrast with national and European data, thanks to the diversification implemented by many operators, again as part of the blue economy and the attention given to this sector by the regional strategy.

SMART HEALTH

This sector includes over 150 companies in the region active in the field of healthcare (Smart Health) in three closely related areas: biomedical technologies, bio-informatics and the development of innovative therapies. Facing powerful markets worldwide in recent years, this sector has increased staff and turnover, confirming its high potential.

WORK CULTURE: BUSINESS, TRADITION AND INNOVATION





3
UNIVERSITIES:
SISSA, TRIESTE, UDINE

MIB
SCHOOL OF
MANAGEMENT

AREA
SCIENCE PARK

SIS
Science and
Innovation System

SCIENTIFIC AND
TECHNOLOGICAL PARK
LUIGI DANIELI

PORDENONE'S
TECHNOLOGICAL
POLE

CONSORZIO
INNOVA FVG

ELETTRA
SINCROTRONE



INNOVATION FEELS AT HOME

FRIULI VENEZIA GIULIA, as is clear from the Regional Innovation Scoreboard 2016, is one of two Italian regions and one of the 65 European regions (on 214 of 22 EU Member States) classified as **“STRONG REGIONAL INNOVATORS”**. It is the best Italian region in terms of patent applications submitted to the European Bureau for patents in relation to regional GDP and of SMEs that work on marketing and organizational innovation in relation to regional SMEs. It also excels in the percentage of population that has a higher level education and on the public and private spending for research and development and innovation, which is made apparent by the high number of regional companies that innovate in-house. Also significant is the high number of researchers per capita and the presence of students, researchers and teachers from foreign countries.

To promote the enhancement of scientific potential for economic and social purposes Friuli Venezia Giulia’s **SCIENCE AND INNOVATION SYSTEM** (SiS) is active. It aims to set up a “Scientific network of excellence” for the development of the territory.

Together with the AREA Science Park (Trieste), a leading science and technology multi-sector park in Europe, the Science and Technology Park Luigi Danieli of Udine, the Technology Centre of Pordenone and the Consorzio Innova FVG work together as mediators for innovation.

An additional contribution, to create this very favourable environment for the development of innovation and technology transfer, also for the benefit of the business system, comes from the Universities of Trieste and Udine, the International School for Advanced Studies (SISSA), the MIB School of Management of Trieste, the Research Centre ELETTRA Sincrotrone Trieste and a wide range of research institutions of international excellence also operating mainly in the fields of life sciences, physics, mathematics, environment, engineering and human and social sciences. Furthermore, four technical colleges offer hands on study courses in the specialization areas identified by the regional smart specialization strategy, aiming to revive the region’s manufacturing and service sectors.

165
START UPS

GDP OVER
35,000
MLN EUROS

R&D
1.59%
OF THE GDP

18
INNOVATIVE SMES





WE HAVE GOT THE NUMBERS

In 2015, regional GDP amounted to 35,681 million euros, and the per capita GDP to 29,147 euros, higher than the national average (27,045 euros).

The household disposable income per capita stood at 19,744 euros, 2,000 euros more than the Italian average.

FRIULI VENEZIA GIULIA is one of Italy's most export-oriented regions, 2015 closed with a 1.3% annual increase (3.4% for manufacturing) and a growth of the sector is expected in the coming years. Fixed investments are on the rise and in 2015 the regional government registered the best public finances among the Italian regions.

The port system of FVG handled 62,451,180 tonnes of cargo in 2015, registering increases in traffic in all three regional ports.

FVG is among the regions with the **HIGHEST RATE OF TOURISM**. In 2015 the tourist flow in the region exceeded 2 million visitors, half of which were foreigners.

EXPENDITURE ON R & D amounts to 1.59% of the regional GDP (2014), **ABOVE THE NATIONAL AVERAGE** which amounts to 1.38%. The percentage of people employed in research is among the highest in the Italian regions, while unemployment is below the national average by 4 percentage points.

With 165 innovative start-ups, 51 of which operate in manufacturing, FVG shows **THE HIGHEST INCIDENCE** in Italy of **INNOVATIVE START-UPS WHICH OPERATE IN THE INDUSTRIAL SECTOR** and boasts two provinces which place in the top-ten for provincial density (percentage of start-ups for companies in the province): Trieste places 2nd, and Pordenone 9th. There are also 18 innovative SMEs in the region.

In the fields of technology for information and communication, FVG continues to expand its infrastructure for **BROADBAND CONNECTION** for businesses, also for those set up in the consortia of local economic development, and the public administration. 98.6% of companies have access to the internet, 92.4% with fixed line or mobile broadband connection. In the last five years FVG has been among the regions where the frequency of internet use by citizens had the largest increase (+ 12%).

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