



ITALY

I T A L Y

Innovative Technologically Advanced Location for You

# If You Are Here To Invest - Do It

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- \$368.9 billion 2010
- \$405.1 billion 2011 (est.)
- 9.8% Increase over 2010 expected
- Italy is up from 13th to 12th in terms of Stock of Direct Foreign Investment (at home).

Source: CIA World FactBook

“Companies are opting to invest in lower risk FDI locations”

“fDi Intelligence’s analysis of source markets for greenfield investment\* shows that western Europe remained the top source region for FDI, responsible for 49% of projects.”

*March 26, 2010 Report FDI Magazine*

\* Greenfield Investment is the investment in a manufacturing, office, or other physical company-related structure or group of structures

# “Hot” Investments - Photovoltaics

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- The Italian Photovoltaics Industry is open to foreign investments.
- A strong and numerous presence of foreign companies operate in the six major business areas, from the production of silicon and various types of panel components, to the distribution of photovoltaic modules and their use in the construction of residential, industrial or power plant installations.
- Highly diversified market in terms of how electricity produced by plants is used.
- Three major market segments: residential, industrial and power production (energy produced for sale, with a threshold of > 100kW), with the residential market as the absolute leader in terms of quantity.
- Power capacity of large land power plants, so-called ‘solar farms’, has increased from 4% in 2006 to 31% in 2008 with future growth in this segment foreseen to be considerable.
- The photovoltaics market is currently emerging in Italy and shows every sign of being one of the world’s most promising markets thanks to an extremely attractive incentive system and excellent conditions for solar radiation. The Italian market also represents a favorable opportunity for photovoltaics producers and distributors due to its strategic position in South-East Europe and the Mediterranean Basin.

Source: 2009 Energy Strategy Report

"Significant recent changes in Italy's energy legislation provide the country with new opportunities to build on past successes", said Nobuo Tanaka, Executive Director of the International Energy Agency (IEA) May 10, 2010

# “Hello? Pronto?” Opportunities in ICT\*

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- A 2009 survey (Nextvalue, “Il Cloud Computing in Italian firms”) conducted on Top 100 ICT firms’ technology strategy approaches revealed a growing acceptance of virtualization combined with the need to adopt less expensive on-line applications for business and organizational purposes.
- Italian firms’ traditional system integrator approach must now be switched to solutions such as Software as a Service (SaaS) or Platform as a Service (PaaS), both concerning Cloud Computing, introducing innovative and high value-added services, and can be **supported by foreign company partnership**.
- Partnerships sought are aimed at developing both new applications and related services throughout the spectrum of Cloud Computing.

(\* ICT - “Information Communications Technology”)

# Green ICT Investments

## “Aren’t Only Domotic - They’re Great!!!”

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- Italy offers business opportunities in the following fields:
- Green Data Center: design and development of green data centers powered by renewables, largely available in Italy and integrated with energy efficiency technologies.
- Smart Grids: design and development of applications or systems (SW and HW) aimed at managing and optimizing energy flows within national or local grid(s), taking in account the power generated by renewables via power plants, which are rapidly increasing in number.
- Smart buildings and domotic: design and development of applications, sensors, and systems aimed at managing and optimizing electricity production and used within buildings (residential, commercial or industrial). Such applications could be developed via a Cloud approach, enabling users to remotely control the appliances in their own homes (PC, mobile, PDA).
- Smart Logistics: design and development of applications, sensors, and systems aimed at managing and optimizing transportation and tracking of goods within a logistic platform, a single plant or a whole value chain.

# The “Dolce Vita” Sciences Available Now Spotlight On Tuscany

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- The region has a high concentration of universities and research centers annually graduating over 9,000 students in scientific and technical fields.
- There is an effective technology transfer system, focused around research centers, technology parks and incubators, which supports spin-offs and industrial implementation of research results.
- International top players such as Novartis, Eli Lilly, Boehringer Ingelheim, and Merck operate in the Region.
- National top players such as Abiogen, Ote-Biomedica, El.En, Dedalus have emerged and consolidated themselves as market leaders.
- In September 2009, Lilly inaugurated its new € 250 million global manufacturing facility, that employs over 1,500 and is focused on production of Type 1 Diabetes treatment medicines.
- The regional government is committed to the sector and has been allocating substantial resources to guarantee an effective supportive business environment for both foreign and domestic companies operating in the region.

Source: Toscana Promozione – Invest in Tuscany [www.investintuscany.com](http://www.investintuscany.com)

# Vicenza and Veneto – Ideal Location for Business & Pleasure

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- Vicenza is a thriving and cosmopolitan city, **with a rich history and culture**, and many museums, art galleries, piazzas, villas, churches and elegant Renaissance palazzi. With the Palladian Villas of the Veneto in the surrounding area, and its renowned Teatro Olimpico (Olympic Theatre), the "city of Palladio" has been enlisted as **UNESCO World Heritage Site** since 1994.
- Vicenza had an estimated population of c. 115,927, and a metropolitan area of 270 000. Vicenza is the **third-largest Italian industrial center** as measured by the value of its exports, and is one of the country's wealthiest cities.
- Especially due to its textile and steel industries which employ tens of thousands and about one fifth of the country's gold and jewelry industry is made in Vicenza, greatly contributing to the city's economy. Another important branch is the engineering/computer components industry (Federico Faggin, the microprocessor's co-inventor was born in Vicenza).
- For the business traveler or tourist, Vicenza is **a leading provider to some of the most highly advance medical facilities available** - providing exceptional care and treatment thanks to its strong medical research programs and high-sensitized familiarity in working with international clientele.



# Other Opportunities Available To You

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- Chip design: The focus here is on specific technologies that require sophisticated talent and highly specialized expertise.
- Gaming: Italy already enjoys a reputation for creativity and programming in this sector that employs the engineering talent that flows from Italian universities.
- Security: The expansion of the internet and its myriad uses require a constant updating of the technology infrastructure to assure safety and confidentiality of sensitive transactions. Here too, a talented engineering pool contributes to the attraction.
- RFID: RFID technologies are already diffuse in Italy but many more traditional industries such as food, fashion and customized products could adopt or expand their application or function.
- WiMAX: Wireless, a term originally applied to the invention of the radio by the Italian inventor Guglielmo Marconi and now used more frequently to denote wireless broadband, is ripe for further development in Italy.



# Here You Don't Have to Be Big To Play Nor Are You Alone

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- Having a large base of SMEs as does Italy, opens the door to many opportunities for US companies wanting a European partner.
- Example: Biotech in Italy is primarily comprised of SMEs; 190 of the 260 companies (73%) in this sector have less than 50 employees. The remaining companies are either medium (13%) or larger (14%) enterprises. Within Biotech, healthcare maintains a dominant share with 190 companies operating within this field ("Red Biotech Companies"), while 36 are in those for animal husbandry and veterinary applications ("Green Biotech Companies"), followed by 23 in industrial and environmental fields ("White Biotech Companies"), and with 11 oriented on Bioinformatics R&D. *Source: US State Department May 2010 Report "SMEs in Italy – a brief fact check".*
- The Country with the largest number of FDI activities is the United States. At the end of 2009, U.S. investments in Italy exceeded **\$31.4 billion** (up from \$23.4 billion in 2000). *U.S. Census Bureau, Statistical Abstract of the United States: 2011*

# If We Can, Anyone Can

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- FACT: Italy is the size of Arizona.
- FACT: Italy has approximately two-thirds the population of Germany.
- FACT: Italy is the 8th largest economic power in the World.
- But did you know?
- Italy is known for its high concentration of small firms. In fact, within Europe only Greece and Spain have comparable average enterprise size and percentages of micro-firms. Although many other countries have a large number of small firms, Italy is interesting in that it is among the largest economies in the world and, yet, **98% of industrial firms have fewer than 100 employees. Almost 90% of firms have fewer than twenty workers. The average size of Italian industrial firms is seven employees.**
- Italy is particularly interesting in that it is unique in the European Union because of its large economy characterized by relatively high labor costs and high GDP per capita, accompanying its high incidence of micro and small firms. In fact, in manufacturing sectors, **Italy registers the highest EU percentage of SMEs.** Therefore, Italy has shown that in order to have a highly developed economy, it is not necessarily true that it must be based on large firms.
- There are approximately **65 SMEs per 1000 inhabitants in Italy**, which is substantially above the EU- 27 average of ca 40. In line with this, the relative importance of SMEs for the Italian economy exceeds by far the EU average, as illustrated by a considerably above-EU-average share of persons employed and value added accounted for by SMEs. It should be noted, that this elevated importance is mainly due to the micro enterprises, while medium enterprises are, in fact, underrepresented vis-à-vis the EU average.

Source: Eurostat SBS data base

# What We Like About Ohio - Besides Its People :)

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- Ohio's leading export category to Italy was Machinery Manufactures, accounting for more than 56.1% of the state's shipments to Italy in 2010.
- The next three categories added up to just under half of that, consisting of Transportation Equipment (9.6%), Computers and Electronic Products (9.6%), and Chemical Manufactures (7%).
- 2010 Total exports: \$ 41,437,000,000 (21.5% increase over 2009)
- 2010 Exports to EU 27: \$ 7,268,798,948
- 2010 Exports to Italy: \$ \$ 610,985,005 (17% increase over 2009)

Source: Foreign Trade Division, U.S. Census Bureau

# What Ohio Likes About Us - Besides Our Food :)

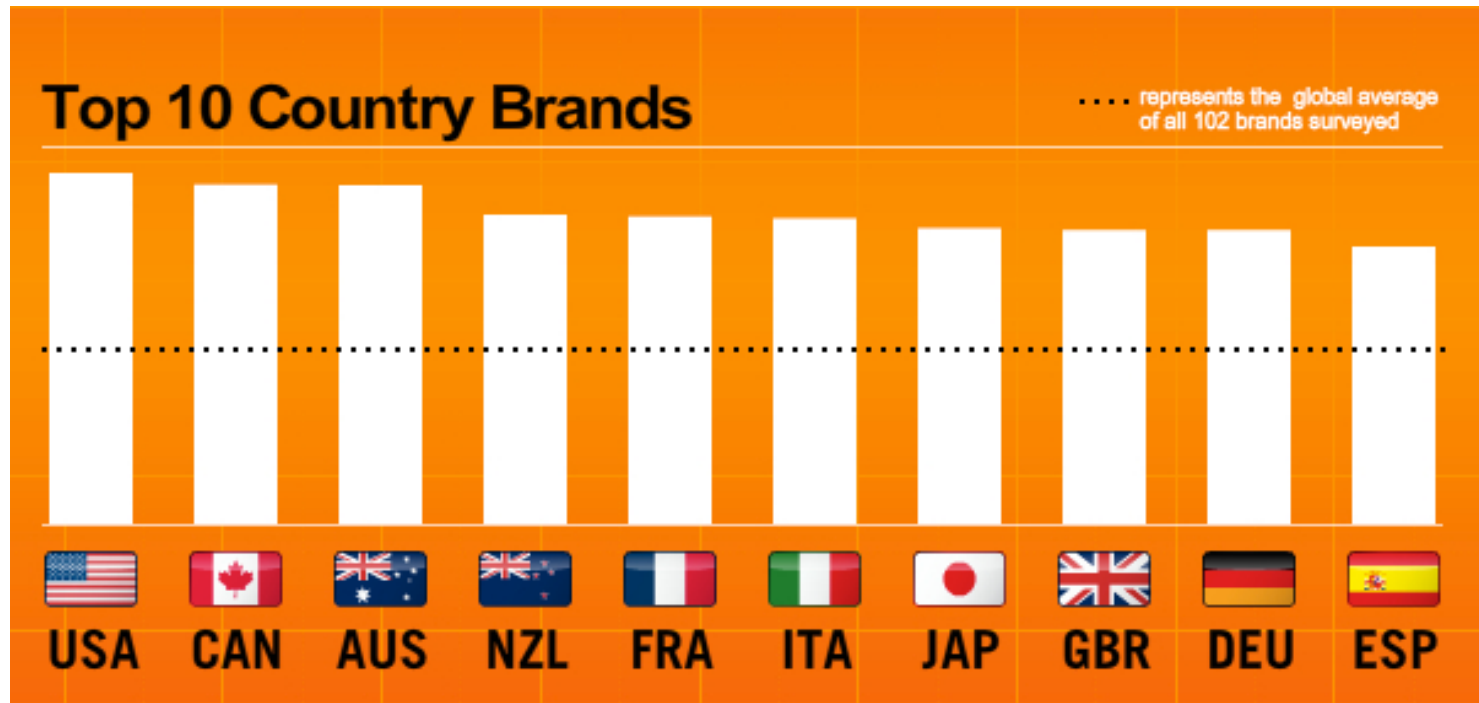
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- Italy is ranked as the 14th largest contributor to Ohio's imports.
- Most notably the machinery category was attributed with 58.6% of Italy's exports to Ohio.
- The next two were medical supplies (6.2%) and vehicles [non-railway] (4.1%).
- 2010 Total Imports From World: \$ 23.8 Billion
- 2010 Total Imports From Italy: \$ 263 Million

Source: US Department of Commerce - Customs District Cleveland Ohio **DOES NOT INCLUDE ALL IMPORTS INTO THE STATE - GIVEN AS AN IDEA ONLY**

# If You Want Your Brand With A Top Ten Country Brand In Europe - Then Italy Is It

- USA
- Canada
- Australia
- New Zealand
- France
- **Italy**
- Japan
- UK
- Germany
- Spain

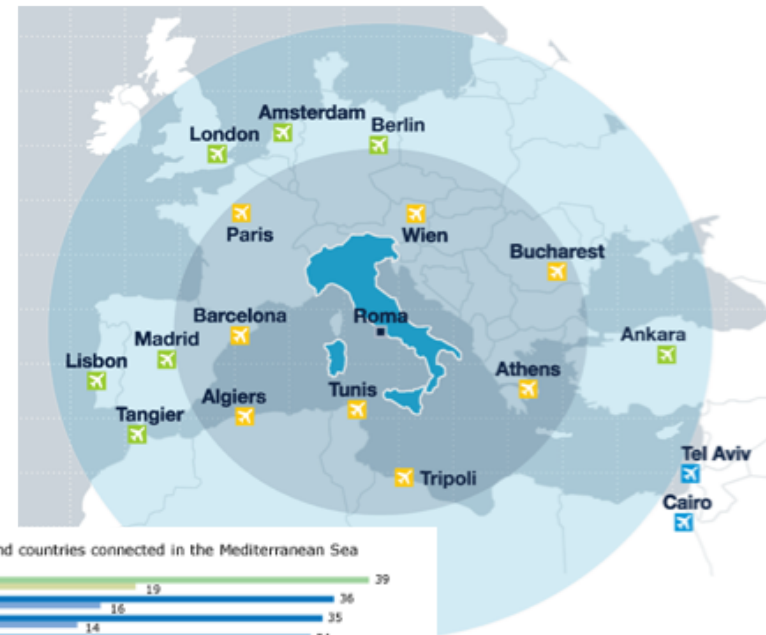


Source: FutureBrand is part of McCann Worldgroup, the official marketing services provider for the London 2012 Olympic and Paralympic Games. Country Brand Index tracks the perceptions of approximately 3,000 international business and leisure travelers from nine countries—the US, the UK, China, Australia, Japan, Brazil, the UAE, Germany and Russia. The insights from an expert panel of 47 tourism, development, policy and academic professionals are also featured. This sample has a margin of error of  $\pm 1.8\%$  at the 95% confidence level.

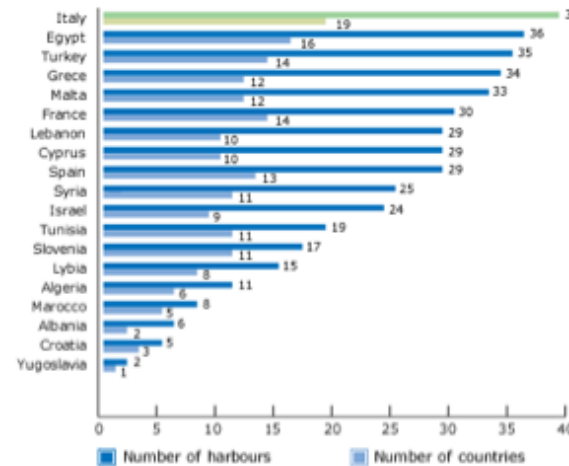
# An Excellent Market to Reach More Markets

	2009	2010(f)	2011(f)
World production	-1,6	3,9	3,4
Industrialized countries	-3,4	2,3	1,6
United States	-2,6	2,7	1,8
Euro Zone	-4,0	1,5	1,2
Germany	-4,7	3,3	1,6
United Kingdom	-4,9	1,7	1,3
France	-2,6	1,6	1,4
<b>Italy</b>	<b>-5,0</b>	<b>0,9</b>	<b>1,0</b>
Spain	-3,7	-0,3	0,7
Emerging Europe	-4,0	3,3	3,5
CIS	-6,6	4,1	3,9
Middle East	1,4	4,0	5,0
Africa	1,5	4,4	5,4
Russia	-7,9	4,0	3,5
World trade	-12,2	13,5	6,3

Source: World Growth Forecast Coface Nov. 2010



Number of harbours and countries connected in the Mediterranean Sea



- Up to 2 hrs.
- 2 – 3 hrs.
- 3 or more hrs.

# Isn't A Healthy Smart Workforce Important?

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- Italian Education: Years compulsory--16. Literacy--98.4%.
- US Education: Years compulsory varies by State. Literacy -- 99%
- Italy Health: Infant mortality rate--3.38/1,000 live births. World Rank 214  
Life expectancy--79.16 years for men; 84.53 years for women. World Rank 10
- US Health: Infant mortality rate---6.06 deaths/1,000 live births. World Rank 177  
Life expectancy --75.92 years for men; 80.83 years for women. World Rank 50
- Italy Work Force (25.05 million, 2010): Services--65.1%; industry and commerce--30%; agriculture--4.2%. Unemployment rate is 8.4%. World Rank 98.
- US Work Force (154.9 million, 2010): Managerial, professional, and technical -- 37.3%; Sales and office -- 24.2%; Manufacturing, extraction, transportation, and crafts: 20.3%; Other services --17.6%; Farming, forestry, and fishing --0.7%. Unemployment rate is 9.7%. World Rank 107



# To Work Well You Have To Be Well

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The World's Healthiest Places to Live; Optimism and purpose, a low stress level, a natural diet and an active lifestyle...experts say those factors are three times as important as your genetic makeup when it comes to enjoying a long and healthy life. Luckily, it's easy to embrace those elements when you're living in a place where they come naturally. IL Magazine picked Italy as one of its 2010 top picks for the world's healthiest places to live.

- Only European Country to be named by IL Magazine is Italy, notably Sardinia
- Local wine is Cannonau, a dark, red wine with the world's highest levels of antioxidants.
- Sardinia is a Blue Zone. Due to their extraordinary number of centenarians, the close-knit villages of its interior have attracted several major research teams.

# On A Quality of Life Scale, Italy Is In The Top 10

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- Here you will find 60% of the world's art treasures, a national health care system rated second in the world by the WHO\*, Sunflowers, vineyards, and opera. And the best espresso, pizza, and ice cream you'll ever taste.
- Admittedly, some major cities and tourist hotspots are expensive. But the Mezzogiorno, Italy's deep south, is different but just as colorful. And is historic too, as Phoenicians, Greeks, and Saracens all left traces of their passing.
- Southern winters are short and mild, summers are scorching hot, however jugs of wine cost \$6.50. On Sicily and in slow-paced regions like Puglia, Basilicata, and Campania, affordable homes abound. Even farmhouses with a couple of acres surface for \$60,000. Many village houses cost even less. Decent rentals start at \$550 monthly.

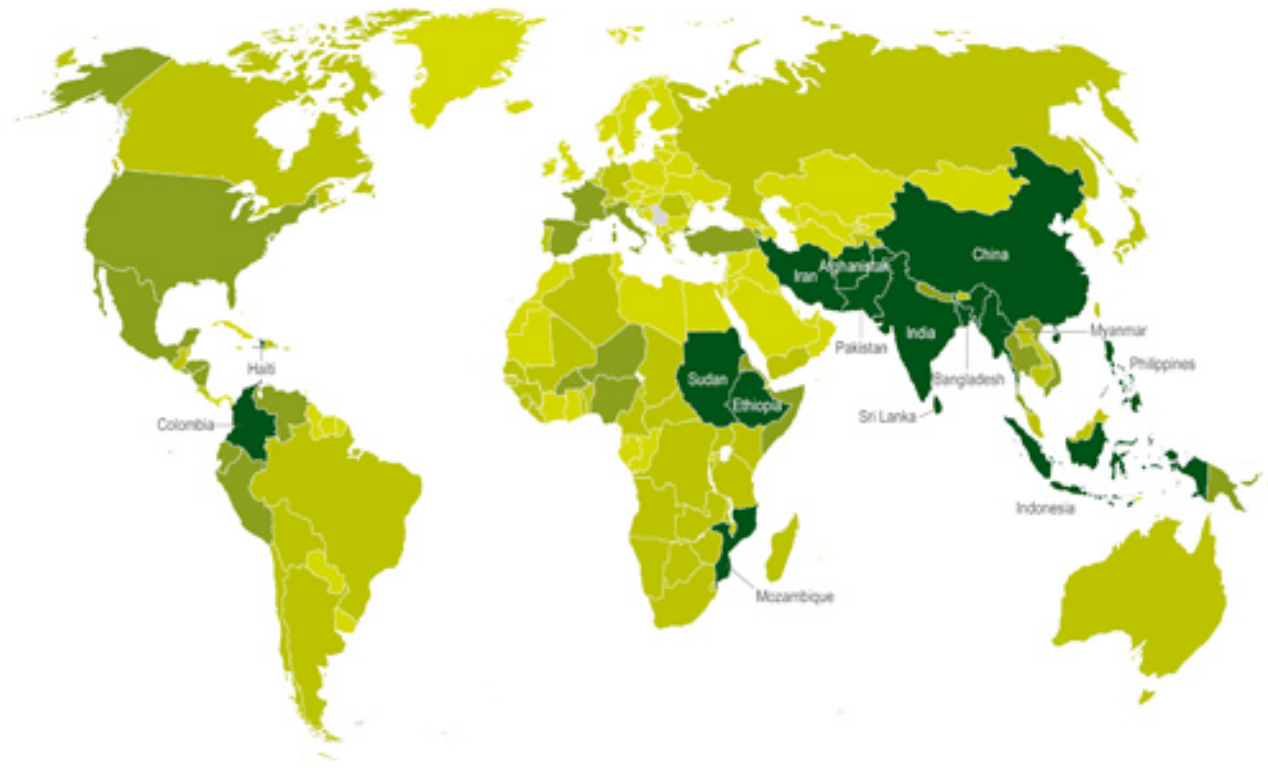
"2010 Quality of Life Index: 194 Countries Ranked and Rated" January 1, 2010 by International Living Magazine

\* World Health Organization



# Your Business Is As Safe From Environmental Dangers As In the US

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Source: 2010 Natural Disasters Risk Index (NDRI), released by global risks advisory firm Maplecroft



# Resources Available - [www.invitalia.it](http://www.invitalia.it)

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## A Swift Move to Inviting Business in Italy

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Invitalia is the government agency for inward investment promotion and enterprise development dedicated to assist companies in all stages of the investment process, to support new business ventures and to enhance local development. Its threefold business activities spin on:

- **Inward Investment:** to enhance foreign investments by providing high value-added services to investors
- **Enterprise Development:** to develop innovation and entrepreneurship in business clusters
- **Local Economic Development:** to foster location attractiveness and competitive edge to increase overall competitiveness

*Business set-up Japan Incentives India China Success Stories Photovoltaics Doing business Taxation Invitalia's services Newsletter Logistics Invitalia Business Network Labor market Sectors Contact us Living and working Reasons to invest Investment guide*

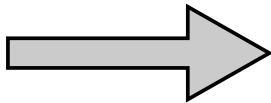
**The ICT Business fair boosting your network**  
TOSM (Torino Software and Systems Meeting) is an EXPO EVENT, arrived at 3rd edition, and is taking place in Torino from May 25th to May 27th. [26/05/2010]


**Barilla ranked top amongst Italy's most reputable companies**  
According to Reputation Institute, which conducted a survey of the world's largest companies, Barilla is the 19th most reputable company in the world and the most reputable company in Italy. [26/05/2010]

**Repower doubles wind power generation in Italy**  
Repower is increasing its involvement in wind power. It is to acquire 39 per cent of the new Giunchetto wind farm in Sicily, with the option of purchasing the remaining 61 per cent of the plant at a later date. [25/05/2010]

highlights archive»


# And Us Of Course! - [www.italtrade.com/usa](http://www.italtrade.com/usa)





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Ceramic Tiles of Italy



Italian Scientists and Scholars of North America Foundation

AtlanteTecnologica  
ITALIA 2009

**Italy's official participation at NECTFL 2011**  
110 exhibitors will participate and over 2,000 foreign language professionals are expected to attend.




**The Italian Trade Commission announces Italy's official participation at NECTFL**

2011 with an Italian Pavilion showcasing books, catalogues and multimedia products from the following 5 publishers and 2 language schools. The 58th edition will be held at the Baltimore Marriott Waterfront Hotel from April 2-3. NECTFL is the most important regional convention in the Northeast of the United States for the teaching of foreign languages. 110 exhibitors will participate and over 2,000 foreign language professionals are expected to attend.

**Italian Participants**  
...>>


**Celebrating the Best of Italian Ceramic Tiles in Architecture & Design: Ceramic Tiles of Italy Design Competition 2011**




The Ceramic Tiles of Italy Design Competition showcases the work of North American architects and designers who use Italian tile in their projects. Now in its 18<sup>th</sup> year, the annual awards program sponsored by Confindustria Ceramica, the Association of Italian Ceramics and the Italian Trade Commission, continues to yield great results. With steep competition in each of the three categories: Residential, Commercial/Hospitality and Institutional, the international jury had a decidedly difficult task. After narrowing down the finalists, they selected a winner and an honorable mention in each category based on the project's functionality, visual appeal, original ...>>

**Trade Opportunities from Italy**

**BUSINESS EVENTS**



**BETWEEN AEROSPACE AND DEFENCE THE QUALITY OF ITALIAN PRODUCTION ON SHOW IN BRAZIL**



**ITALIAN CAR INDUSTRY HEADLIGHTS ON BRAZIL**

The Italian car industry is on its

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COMING UP

Promotional Events in USA 2009

ALL

ITALIAN COMPANIES

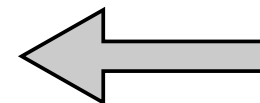
The presence of Italian companies & the distribution of Italian Products in the USA

GO

WEBSITES

List of interesting sites concerning Italian products.

GO



# These Are Just Some Of The Best Promoters of Italy Who Are Just Down the Road From You

Axim Italcementi Group - Middlebranch	FOM USA - Medina	P.E. USA, Inc. - Cincinnati	Siasprint USA, Inc. - Milford
CEIA USA Ltd.- Twinsburg	Gasparini North America - Westlake	Panini NA Inc - Dayton	Telema & Berger Resistors, Inc. - Milford
Elesa USA Corporation - Twinsburg	Luxottica - Mason	Sacma Machinery Corporation - Westlake	Universal Hydraulics International, Ltd. - Twinsburg
Eurand - Vandalia	Mario Cotta America Inc. / Zincometal - Cincinnati	Saeco USA Inc. - Glenwillow	Valbruna Corp./Bolzano Steel Corp. - Milford
Faster Inc. - Maumee	MCM USA, Inc. - Eastlake	Salvagnini America - Hamilton	Pieralisi N.A. - West Chester Twp.
Ritrama, Inc. - Cleveland	De Nora Tech - Chardon	Sito USA - Cleveland	Vigortone Ag Products - Brookville

# A “grazie” to a few special people

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- Pasquale Bova - Trade Commissioner - Italian Trade Commission Chicago
- Consul of Italy in Detroit - Hon. Marco Nobili
- Honorary Vice Consul of Italy in Cleveland - Dr. Serena Scaiola
- NOIA – The Northern Ohio Italian American Foundation
- Cleveland Council on World Affairs
- City of Cleveland
- AND OF COURSE YOU HERE TODAY!
- Hope to see you at the 2015 World Trade Fair in Milan - maybe by then you will be residents?