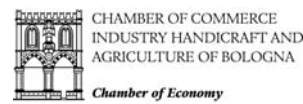


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ITALY

# Bologna System

*Bologna System is a network of public and private entities overseeing the growth of a territory that is undergoing radical change. With a surface area of 3,700 km<sup>2</sup> and a population of around one million, Bologna is one of 9 cities in Italy to receive the go-ahead from the government to become a "metropolitan city". The territory's future is defined by investments in urban quality, a permanent conservation plan for the historical centre and a programme of major urban planning projects. Bologna is considered by international real estate operators one of the emerging cities for the next ten years, and both the city and its system provide investors with opportunities and solutions in any sector, from manufacturing to value-added services.*



# Location

## Where is Bologna

Bologna is strategically situated at the heart of freight and passenger traffic transiting between Europe and the Mediterranean area. With its growing city airport, one of Europe's largest intermodal platforms, five railway lines and four motorways which connect it with Milan-Turin and France to the North-West, Padua-Venice and Eastern Europe to the North East and Austria to the North, as well as two coastal routes, one along the Adriatic the other along the Tyrrhenian, linking it with the South of the peninsula, Bologna is a major national motorway and railway hub and is the ideal point of access to Italian markets. Furthermore, in the near future the city will be crossed by the trans-European intermodal corridor I and will be within easy reach of corridor V. It comes as no surprise, therefore, that Bologna is the cultural, administrative and commercial capital of the Emilia-Romagna region, and one of the areas with the highest social and economical standards in Europe.



- Lisbon-Kiev** (Corridor V)
- Bari-Varna** (Corridor VIII)
- Rotterdam-Genoa** (The Two Seas Corridor)
- Berlin-Palermo** (Corridor I)
- South Europe** Sea Highways

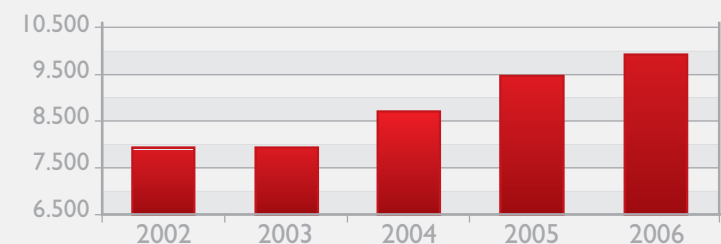
## A Growing Economy

Quality of life, the productive system, human resources and the environment. Bologna ranks second for per-capita income (Euro 35,200 in 2007), it has an unemployment level of around 2.9% and it is number one in Italy for the standard of its health services. Its social fabric nurtures its economic-productive system: 88,000 businesses including 12,000 manufacturing companies totalling almost 10 billion euros in exports to over 200 countries. Bologna is also the Italian province with the highest number of registered patents per number of active businesses. There were 10.4 registered patents every 1,000 active businesses in 2006. The modernisation of productive systems and the need for companies to rely on technologically advanced services are driving the development of the value-added services sector. This makes for a complex system which is constantly evolving, in which there has been an 83% increase in the number of businesses and a 33% growth in employment in the past ten years. It is no coincidence that the creative class (architects, engineers, lawyers, business people, managers, designers, artists) has grown over the past decade from 18% to 30% of the total workforce, exceeding the Italian average by three points and contributing to the growth of the entrepreneurship rate, which has reached one company for every 10 inhabitants in the metropolitan area of Bologna.



### MAIN ECONOMIC INDICATORS

2006	Bologna	Italy
PER-CAPITA GDP (EURO)	<b>34,332</b>	<b>24,924</b>
EMPLOYMENT RATE	<b>2.9%</b>	<b>6.8%</b>
NUMBER OF COMPANIES	<b>88,202</b>	<b>5,158,278</b>
ENTREPRENEURSHIP RATE (COMPANIES PER 100 INHABITANTS)	<b>9.28</b>	<b>8.71</b>
MANUFACTURING COMPANIES	<b>11,705</b>	<b>636,219</b>
EXPORT (BILLIONS OF EUROS)	<b>9.7</b>	<b>326.9</b>
POPULATION	<b>954,682</b>	<b>59,131,287</b>



**Exports in 2006: 9.7 billion euros; +4.6% compared to 2005**

In 2006, Germany was the number one market for Bolognese exports (1.1 billion euros), followed by the United States (1 billion euros), France (875 million euros), Spain (666 million euros), the United Kingdom (518 million euros) and the Russian Federation (412 million euros)

## The Knowledge Economy

The University of Bologna was founded in 1088 A.C. and is the oldest in the Western world. With 72 departments, 85 master's degrees, 92,000 students, 16,000 graduates in 2006 (including 4,138 in technical-scientific disciplines), the Alma Mater Studiorum is an internationally renowned place of excellence. The University's activity research, the regional research centres (a network of 57 laboratories, 27 of which in Bologna) and national centres that work alongside it, ENEA (National Agency for New Technologies, Energy and the Environment), CNR (National Research Council) and Cineca (Italy's foremost calculus centre), have over 4,500 researchers and help to make Bologna a point of reference for innovation and technological development. In 2007, 74 Bologna University patents were registered.



Equally important is the role of businesses: in 2005, 281 (+50% compared to 1997) patents were registered by Bolognese companies and published by the European Patent Office (EPO). Bologna is home to the Marconi Foundation, which specialises in telecommunications, the Johns Hopkins University, the Spanish College, the Dickinson Centre for European Studies, the China College and prestigious technical schools such as the Aldini-Valeriani technical-industrial institute. This explains why the city's urban development plan includes two multi-functional districts dedicated to the University, which will provide new homes for the departments of engineering, astronomy, chemistry and a number of administrative centres. The two districts will be integrated into the fabric of the city, thus preserving the tradition of integration between Bologna and its University.



# Vocations

## The Area's Vocation

### A Unique Mix of Tradition and New Technologies

The economy of Bologna features a high degree of specialisation in numerous sectors and the presence of local industrial groups, some important multinationals and a dense network of specialised suppliers. Bologna's industrial system stands out for the presence of certain clusters which over time have developed specialised services alongside traditional commercial activities, as well as research and technological transfer centres and expo activities. The most consolidated sectors in the area - motor industry, packaging machinery industry, electronics, agro-food industry, fashion - owe their success to the ongoing innovation of production lines, industrial processes and services, and to having been capable of adapting to the constantly changing demands of clients and markets. Alongside such activities, for which Bologna is already a national and international point of reference, there are new areas of specialisation in which Bologna excels. The logistics sector is a growing cluster, Bologna offers numerous logistic advantages owing to its natural and strategic geographical location. The other main emerging clusters - health and



medical industry and the creative industry - are part of the knowledge economy and, along with manufacturing, rely heavily on research, know-how and creativity. Bologna's development policy is based on support and enhancement of the value-added service industry and the so-called 'soft economy'. On the strength of its manufacturing traditions, Bologna is implementing numerous projects in the metropolitan area dedicated to these emerging sectors, including the creation of new offices and commercial districts.

## vocations

consolidated clusters	MOTOR INDUSTRY	emerging clusters	LOGISTICS
	PACKAGING MACHINERY INDUSTRY		HEALTH & MEDICAL INDUSTRY
	ELECTRONICS		CREATIVE INDUSTRY
	AGRO-FOOD INDUSTRY		VALUE-ADDED SERVICE INDUSTRY
	FASHION		

## The most relevant clusters

- 1 MOTOR INDUSTRY**
  - Over 8,000 employees
  - Exports: 1,240 million euros
  - Number of companies: 140
  - In the heart of the 'Motor Valley': an area that is unique in the world, featuring numerous mechanical engineering firms, race tracks, motor-related events (Motor Show), museums and private collections
  - Specialisation in the design and production of luxury sports cars, competition cars and motorbikes, including some well-known names: Lamborghini, Ducati, Malaguti
  - Numerous small- and medium-sized companies producing components and spare parts for cars and motorbikes. Among which: Marzocchi, Tecno Trasmissioni, Paioli Meccanica, Sinteris, Verlicchi
- 2 PACKAGING MACHINERY INDUSTRY**
  - 9.5% of the sector's worldwide trade volume is represented by Bologna's packaging machinery industry
  - 216 active companies with more than 6,300 employees. Among which: SACMI, IMA and GD
  - Exports: about 2 billion
  - Production, of which 80% is aimed to overseas markets (USA, Germany, Russia, France), targets primarily the food, pharmaceutical, cosmetics, chemical and tobacco industries
  - There are important qualified technical schools and research laboratories
  - Subsuppliers
- 3 ELECTRONICS**
  - Specialisation in the production of mechanical and motor industry components, electronic reading devices, measuring and electromedical devices
  - Over 1,500 active companies. The main ones: Datalogic, Marpos, Arcotronics, Schneider Electric
  - Exports: 1,022 million euros, equal to 38% of the regional total and 3.5% of the national total
- 4 AGRO-FOOD INDUSTRY**
  - Number of companies: 1,400
  - Number of employees: 9,500
  - A productive network featuring both cooperatives and private enterprises, including: Granarolo, Coop, Conad, Conserve Italia, Alcisa, Segafredo Zanetti
  - Exports: 233 million euros
  - Specialisation in dairy products, vegetable preserves and meat processing, bread and pastry products and processing and preservation of fruit and vegetables

- 5 FASHION**
  - Specialisation in the following sectors: textile-clothing, shoes and leather goods
  - 1,320 companies employing over 9,870 workers, including brands such as La Perla, Mandarina Duck, Bruno Magli, Piquadro, Furla, Redwall
  - Exports: 866 million euros (+19% over the past 5 years)
  - The Centergross, the largest wholesale centre in Europe
- 6 LOGISTICS**
  - Bologna is home to the main global logistics operators, including TNT, Prologis, Schenker, and companies capable of offering systems, machinery and logistics tools
  - Number of companies: 3,500
  - 7,701 tonnes is the annual volume of freight handled in Bologna's logistical hubs (Airport, Freight Village, Centergross and CAAB)
- 7 HEALTH & MEDICAL INDUSTRY**
  - Over 15 public hospitals and 14 private health care centres
  - Nearly 7,000 beds
  - 80% of all artificial limbs produced in Italy are made in Bologna
  - Exports: 105 million euros; Bologna ranks third in Italy for export value
- 8 CREATIVE INDUSTRY**
  - Over 150 creative companies specialising in film-making, videos and documentaries production
  - Bologna is home to the Cineteca, which is recognised internationally for its activity in film restoration and conservation and with an archive of over 18,000 films and numerous international festivals (Future Film Festival, Biografilm Festival, Netmage, Human Rights Nights Festival, Slow Food on Film)
  - Bologna has been nominated the UNESCO 'Creative City of Music'. It has 22 theatres, 122 music-related associations and over 1,550 employees
- 9 VALUE-ADDED SERVICE INDUSTRY**
  - 24,000 companies (+83% growth in ten years)
  - Specialisation in IT services, global services, economic-social research, insurance and advertising
  - 73,000 employees (+33% between 1995 and 2004)
  - Added value: 7.5 billion euros

Bologna

# Transformations

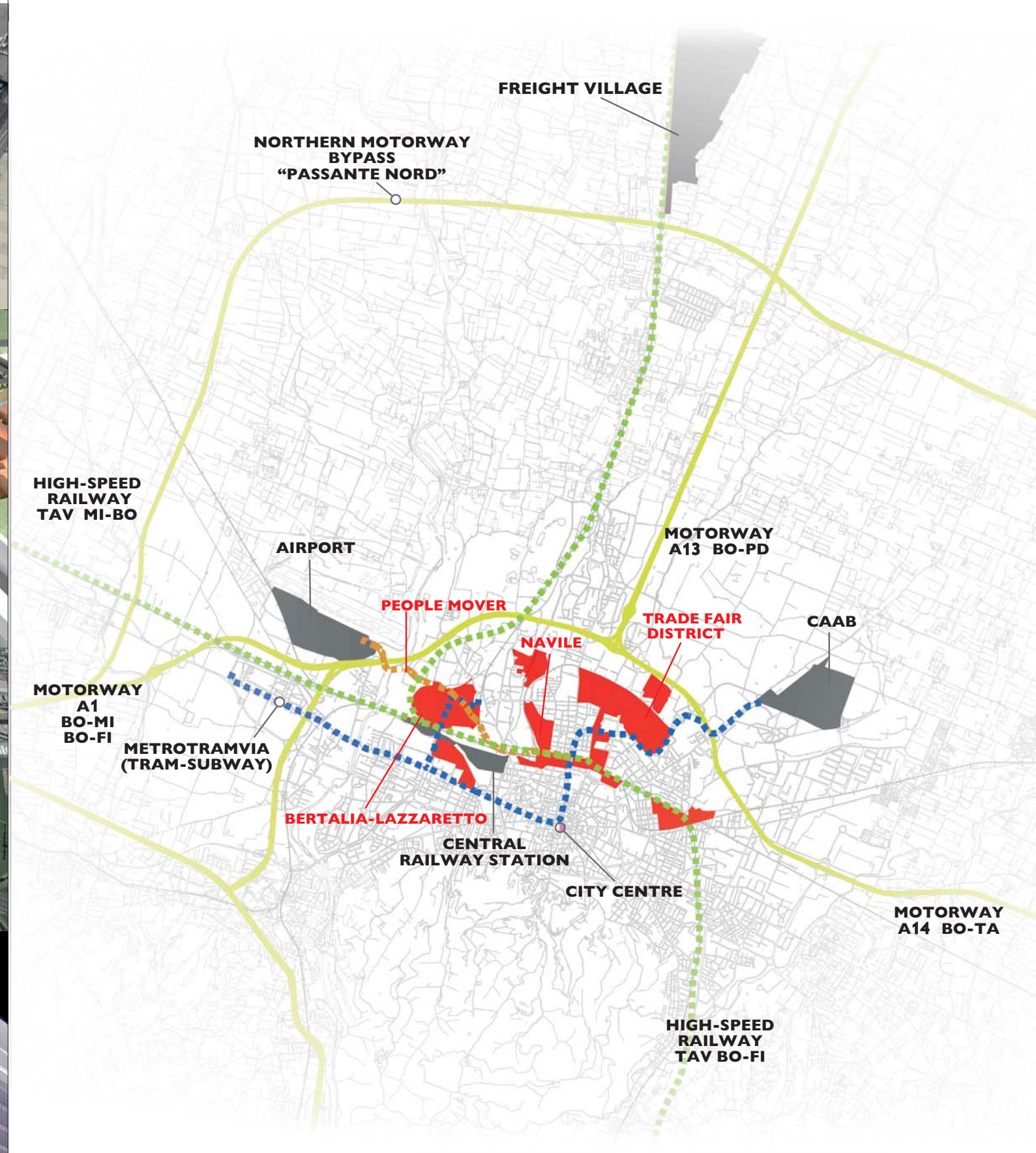
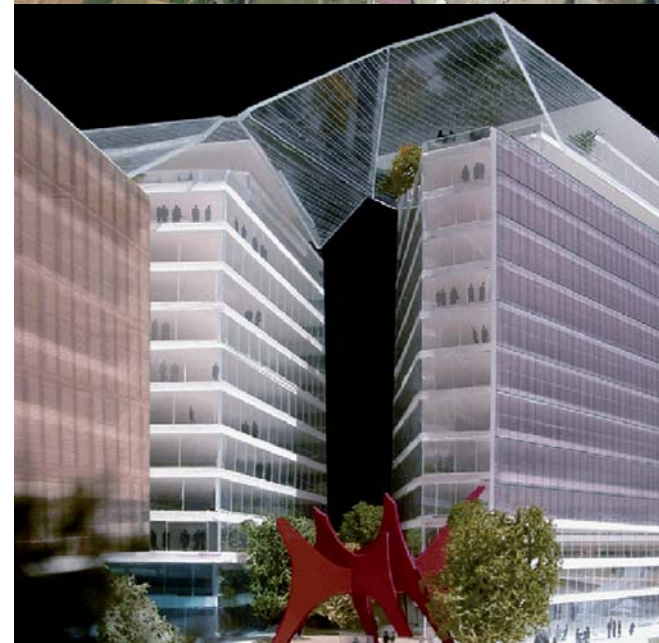
## The main urban and infrastructural projects

In the coming years, the metropolitan area will undergo radical urban and infrastructural changes which will greatly increase the city's appeal and competitiveness at an international level. None of this will jeopardise the chief characteristic of the city's whole development, however: the conservation of the historical centre and the protection and optimisation of the city's natural heritage, the area of the hills in particular.

The plan to develop Bologna's metropolitan area, which will come to fruition over a period of fifteen years, includes the possibility of new areas of production in accessible locations, the enhancement of multi-service facilities such as the G. Marconi Airport, the CAAB (third agro-food industry centre in Italy for volume produce handled and second for number of clients), the Bologna Trade Fair (second in Italy for number of visitors, 1.3 million per annum) and the Freight Village. These multi-service facilities shall be made accessible and interconnected by means of infrastructural developments such as the People Mover, the metropolitan tramway and the enhancement of the local public rail transport. In addition, a development plan aimed at commerce is currently in the process of being approved, which will provide 9 new large-scale facilities destined for commercial use and new rental opportunities in the areas surrounding the metropolitan railway stations.

Lastly, Bologna will undergo numerous urban changes. In some cases, substantial areas of the city will be requalified, in others whole new districts will be built. Projects range from the Navile (410,000 sqm) to the new residential-university complex of Bertalia-Lazzaretto (730,000 sqm), the redevelopment of abandoned railway sites (for example Ravone), Bologna's new Central Station, the redevelopment of ex-military sites and requalification of the Viale Berti Pichat compartment to important projects connected with administrative and leisure developments financed by private investors.

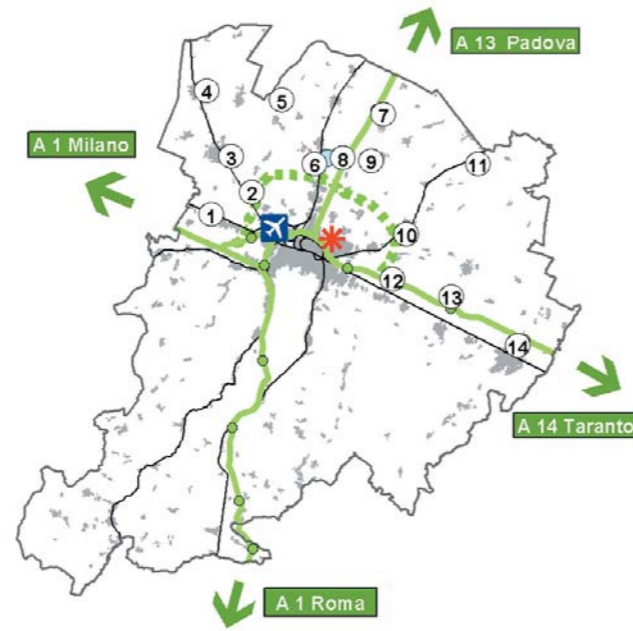
Add to this national public works which will affect Bologna, such as the High Speed (in December 2008 the Bologna-Milan stretch will be inaugurated; in 2009 the Bologna-Florence stretch), the enhancement of railway lines heading towards the Brenner (Bologna-Verona), the enhancement of the motorway between Bologna and Florence (Valico variant) and the new 40 km motorway (Northern Motorway Bypass), the sum total of investments predicted for Bologna for 2010 shall exceed 20 billion euros.



# Expanding

## Expanding Production Areas

Alongside the infrastructural and urban transformations, the metropolitan area of Bologna will offer many new localisation opportunities over the coming years. Among the territory's 190 production areas, 14 new areas have been identified as having potential for strategic development owing to excellent accessibility, availability of land and respect for environmental regulations. The land that is available for new development amounts to 4.5 million sqm, all linked to the motor and railway networks and their respective points of transit. More specifically, the areas of production are connected to the existing infrastructure (motorway junction, railway, airport) as well as to the planned Northern Motorway Bypass. The new areas will be governed by a new management model aimed at reducing and preventing air, water and ground pollution, safeguarding health and safety and improving the overall conditions of the territory's environment.



# Bologna System

The strategic location, the growing economy, the role of the University and the research centres, consolidated and emerging clusters, along with the urban-infrastructural transformations, make Bologna a growing and vibrant area with excellent opportunities for investment. Bologna will be capable of competing with more advanced areas of Europe thanks to the ability of combining exemplary socio-economic growth with high standards of living. The metropolitan area of Bologna is characterised by high social and health standards, 3.5% female unemployment compared to the 8.8% national percentage and the presence of over 1,000 associations operating in the tertiary and non-profit sectors. Not forgetting that each citizen of Bologna can rely on 18 sqm of public green space (among the highest in Italy) and that the centuries-old wine and food traditions are famous and enjoyed all over the world.

AREA	LAND SURFACE AREA (sqm)			
	Denomination	Total Surface Area	Available for development	Available for construction
1	Martignone	1,040,000	130,000	51,000
2	Tavernelle	1,090,000	70,000	31,000
3	Il Postrino di San Giovanni	480,000	290,000	95,000
4	Beni Comunali	1,240,000	450,000	256,000
5	Pieve di Cento	980,000	60,000	27,381
6	Interporto-Funo-Stiatico	1,470,000	252,000	95,478
7	Altedo	1,290,000	267,000	93,462
8	Bentivoglio	720,000	99,000	35,690
9	Cà De Fabbri-Minerbio	1,160,000	164,000	78,169
10	Cento di Budrio	950,000	156,000	56,173
11	Molinella	1,140,000	68,000	27,256
12	Ponte Rizzoli	1,090,000	180,000	76,000
13	San Carlo	2,470,000	610,000	420,000
14	Imola	7,500,000	1,550,000	720,000



AREA	DISTANCE-KMs						
	Denomination	Motorway exit	Airport	Railway Station	Freight Village	Expo Centre	Bologna City Centre
1	Martignone	7	14	3	33	24	26
2	Tavernelle	8	9	1	18	23	25
3	Il Postrino di San Giovanni	14	15	3	19	28	30
4	Beni Comunali	27	26	3	30	39	41
5	Pieve di Cento	17	44	9	16	41	43
6	Interporto-Funo-Stiatico	5	19	2	3	16	18
7	Altedo	2	28	10	23	25	27
8	Bentivoglio	5	20	5	8	17	20
9	Cà De Fabbri-Minerbio	9	24	9	12	18	20
10	Cento di Budrio	11	25	6	34	19	19
11	Molinella	27	40	5	32	35	37
12	Ponte Rizzoli	9	24	2	32	16	20
13	San Carlo	2	33	3	40	26	30
14	Imola	9	44	inside the area	51	37	38

