



# BolognaSystem2009

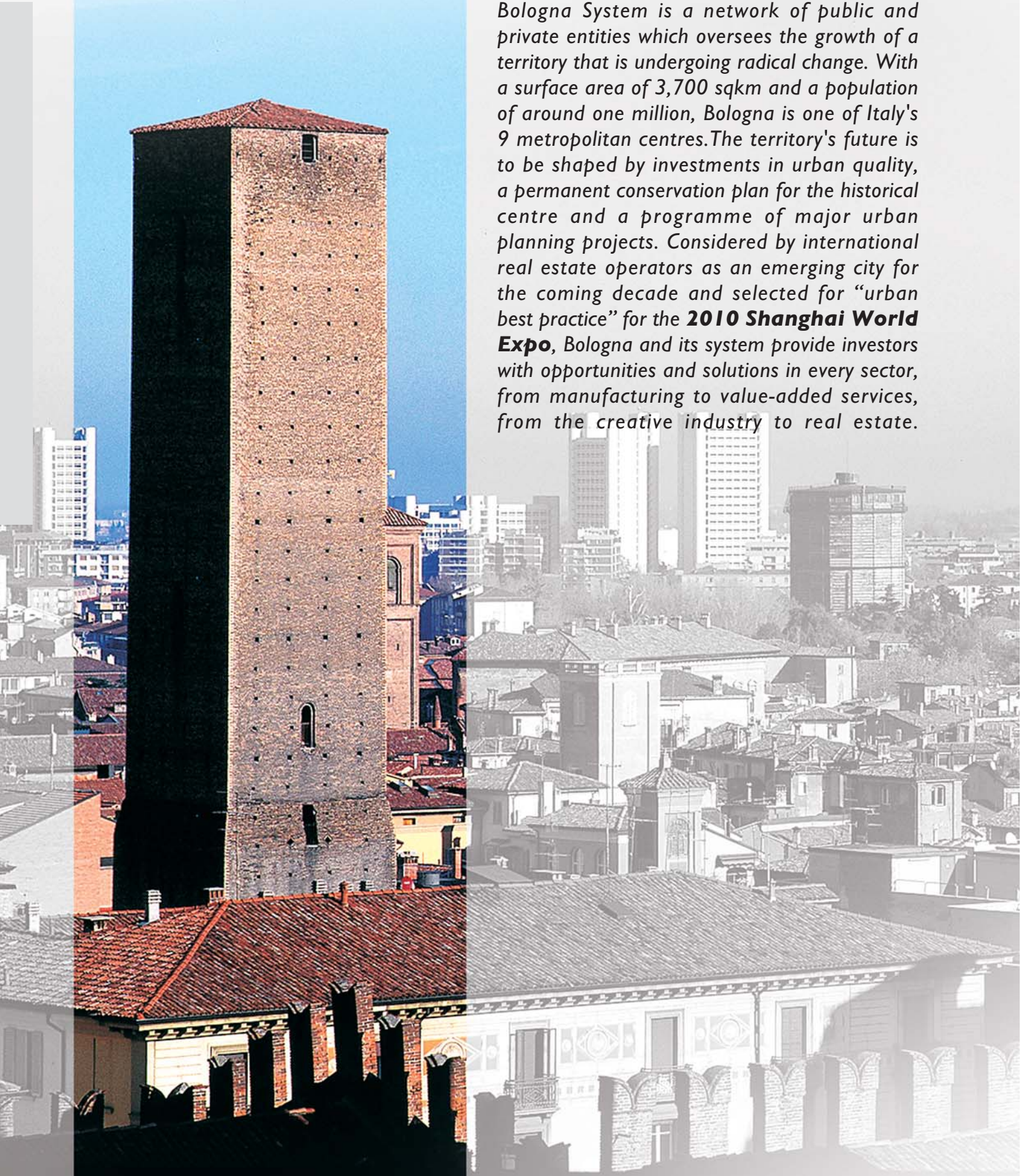
Doing business  
Improving life

I T A L Y

# Bologna System



*Bologna System is a network of public and private entities which oversees the growth of a territory that is undergoing radical change. With a surface area of 3,700 sqkm and a population of around one million, Bologna is one of Italy's 9 metropolitan centres. The territory's future is to be shaped by investments in urban quality, a permanent conservation plan for the historical centre and a programme of major urban planning projects. Considered by international real estate operators as an emerging city for the coming decade and selected for "urban best practice" for the **2010 Shanghai World Expo**, Bologna and its system provide investors with opportunities and solutions in every sector, from manufacturing to value-added services, from the creative industry to real estate.*



# Location

## Where is Bologna

Bologna is strategically situated at the heart of freight and passenger traffic transiting between Europe and the Mediterranean.

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 the **biggest national motorway and railway hub** and an ideal point of access to Italian markets. It is soon to become a transit point for the trans-European intermodal corridor I and will be within easy reach of corridor V. Not surprisingly, Bologna is the cultural, administrative and commercial capital of the Emilia-Romagna region, and one of the areas with the highest social and economic 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

# Economy

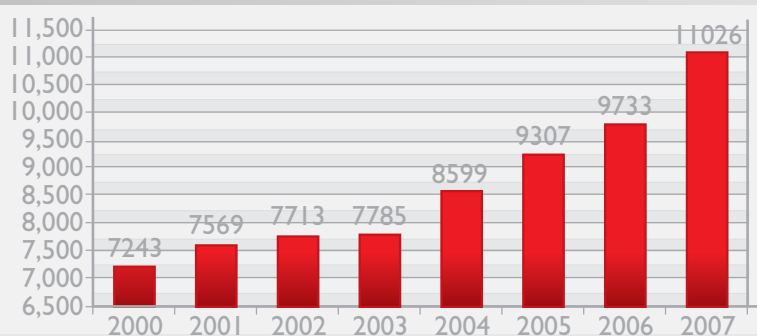
## A Solid and Competitive Economy

With the quality of its life, productive system, human resources and environment, Bologna ranks second for per-capita income (over 35,600 euros in 2007), it has an unemployment level of around 2.5% and it is the number one metropolitan area in Italy for the standard of its health services. Its social fabric supports its economic-productive system: 88,000 businesses including 12,000 manufacturing companies totalling almost 11 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: 9.7 registered patents per 1,000 active businesses in 2007. 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% percent 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 reinforcing an already high entrepreneurship rate of one company per 10 inhabitants.



### MAIN ECONOMIC INDICATORS

2007	Bologna	Italy
PER-CAPITA GDP (EURO)	<b>35,618</b>	<b>25,861</b>
EMPLOYMENT RATE	<b>2.5%</b>	<b>6.1%</b>
NUMBER OF BUSINESSES	<b>88,049</b>	<b>5,174,921</b>
ENTREPRENEURSHIP RATE (COMPANIES PER 100 INHABITANTS)	<b>9.13</b>	<b>8.68</b>
MANUFACTURING COMPANIES	<b>11,559</b>	<b>628,468</b>
EXPORT (BILLIONS OF EUROS)	<b>11</b>	<b>352.2</b>
POPULATION	<b>964,074</b>	<b>59,619,290</b>



**Exports in 2007: 11 billion euros (+12.5% compared to 2006); 7 billion euros in specialised and high-tech products.**

In 2007 Germany was the number one market for Bolognese exports (1.2 billion euros), followed by the United States (1 billion euros), France (1 billion euros), Spain (749 million euros), the United Kingdom (581 million euros) and the Russian Federation (500 million euros)

## The Knowledge Economy

Founded in 1088, the University of Bologna is the oldest in the western world. With 72 departments, 85 master's degrees, 92,000 students, 16,000 graduates in 2007 (of which 4,436 in technical-scientific fields), the Alma Mater Studiorum is internationally renowned for excellence. The University's research, along with regional and national research centres (a network of 22 laboratories, 13 of which in Bologna), such as ENEA (the National Agency for New Technologies, Energy and Environment), CNR (the National Research Council) and Cineca (Italy's foremost calculus centre), brings together over 4,500 researchers who help to make Bologna **a point of reference for innovation and technological development**. The Bologna University registered 74 patents in 2007.



The role of business is equally significant: in 2006, 288 (+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, specialising 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 for the University providing new space for the departments of engineering, astronomy, chemistry and a number of administrative centres. The two districts will be built into the fabric of the city in accordance with the Bolognese tradition of integration between the city and its university.



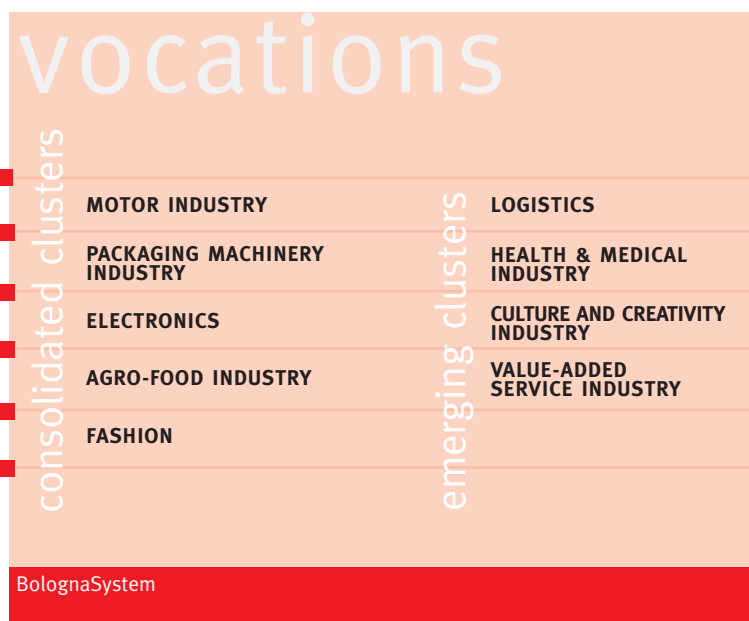
# Vocations

## The Territory's Vocational Clusters

The economy of Bologna is characterised by 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 - automatic machinery, motor industry, electronics, fashion, agro-food - owe their success to the ongoing innovation of production lines, industrial processes and services, and to the fact of 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. Furthermore, thanks to its strategic geographical location, **Bologna offers numerous logistical advantages**. The health and medical industry and the culture and creativity industry, in particular cinema



and music, are the two main emerging clusters. Both are part of the knowledge economy and, as well as manufacturing, both rely heavily on research, innovation and know-how. Bologna's development policy is based on the support and enhancement of the value-added services 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 office and commercial districts.



Bologna

# The most relevant clusters:

## 1

### MOTOR INDUSTRY

- Over 8,000 employees
- Exports: 1,526 million euros
- Number of companies: 140
- One of the 'Motor Valley' centres: 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, which include some well-known names: Lamborghini, Ducati, Malaguti
- Numerous small- and medium-sized companies producing components and spare parts for cars and motorbikes. Some names: Marzocchi, Tecnotrasmissioni, Paioli Meccanica, Sinteris, Verlicchi

## 2

### PACKAGING MACHINERY INDUSTRY

- 9.5% of the sector's worldwide trade volume represented by the packaging industry.
- 216 active companies with more than 6,300 employees, most notably SACMI, IMA and G.D
- Exports: over 2.2 million euros
- Production, of which 80% aimed at 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

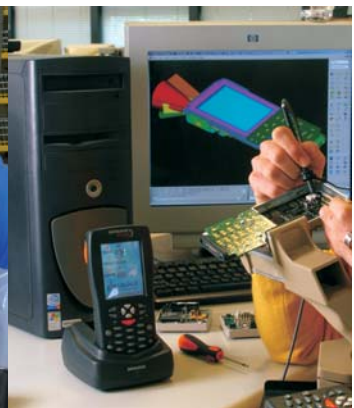
### ELECTRONICS

- 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, Marposs, Arcotronics, Schneider Electric
- Exports: 1,134 million euros, equal to 38% of the regional total and 3.5% of the national total

## 4

### AGRO-FOOD INDUSTRY

- Number of businesses: 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: 213 million euros
- Specialisation in dairy products, vegetable preserves and meat processing, fresh bakery products and fruit and vegetable processing and preservation



## 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: 957 million euros (+10% compared to 2006)
- Centergross, one of Europe's main wholesale commercial districts

## 6

### LOGISTICS

- Number of businesses: 3,500
- Bologna is home to the main global logistic operators, including TNT, Prologis, Schenker, and companies capable of offering systems, machinery and logistic devices
- Annual volume of freight handled in Bologna's logistical hubs (Airport, Freight Village, Centergross and CAAB) amounts to over 7,700 thousand tonnes

## 7

### HEALTH & MEDICAL INDUSTRY

- Over 15 public and 14 private hospitals
- A total of nearly 7,000 beds
- 80% of all artificial limbs produced in Italy are made in Bologna
- Exports: 112 million euros. Bologna ranks third in Italy for export value

## 8

### CULTURE AND CREATIVITY INDUSTRY

- Over 150 creative companies specialising in the production of films, videos and documentaries, and 375 operating in the field of music
- Bologna is home to the Cineteca, which is recognised internationally for its work in restoration and conservation, with 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 more than 370 music-related companies and associations
- Bologna is nationally renowned for classical music, with its Municipal Theatre Orchestra and Mozart Orchestra, as well as for the popularity of jazz

## 9

### VALUE-ADDED SERVICE INDUSTRY

- 24,000 businesses (+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

# Transformations

## The Main Urban and Infrastructural Projects

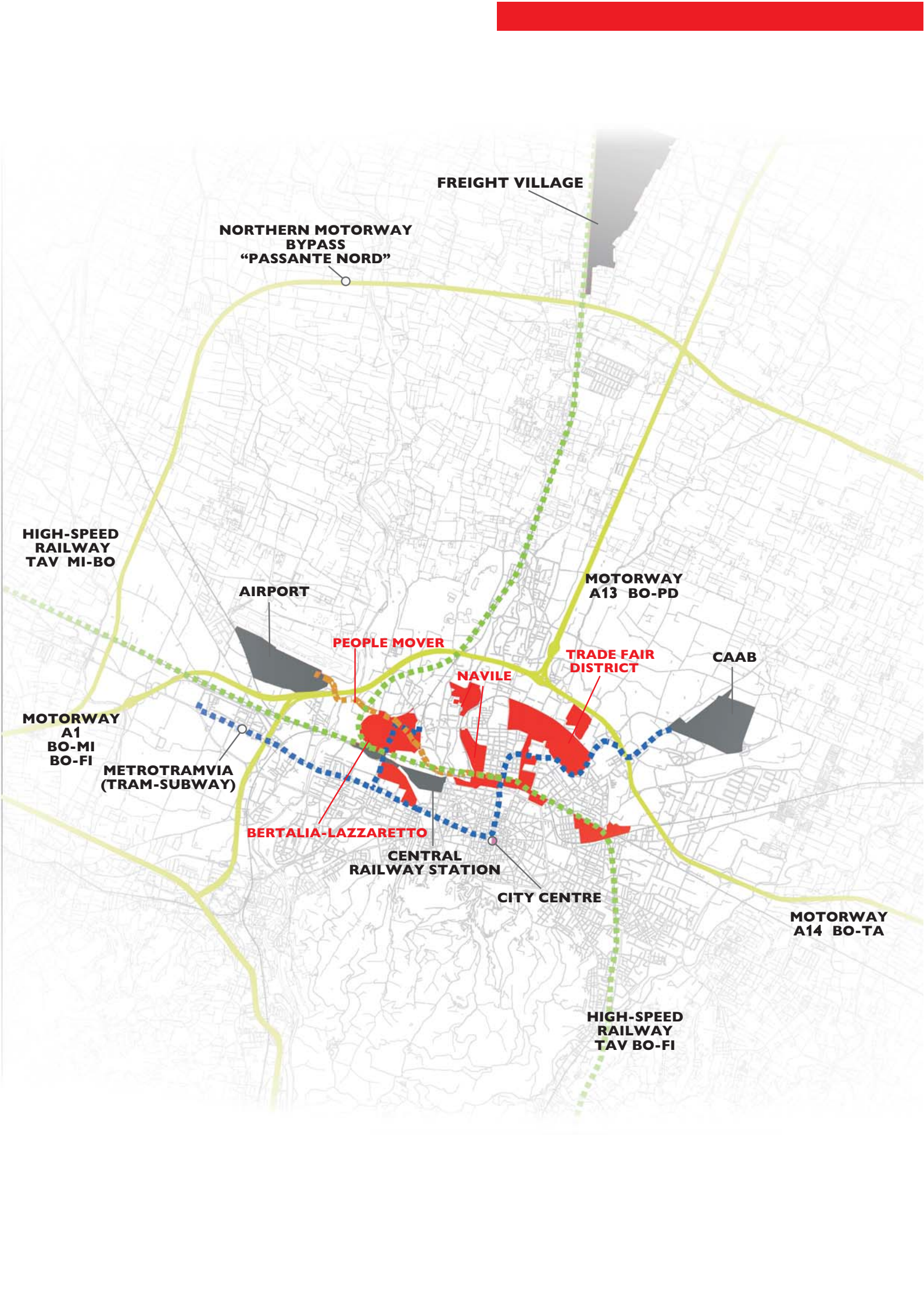
With the inauguration of the Bologna-Milan high-speed rail connection and other important national infrastructural projects which are currently in progress in Bologna - such as the high-speed Bologna-Florence rail link (to be inaugurated in December 2009), improvements to the Bologna-Florence section of the motorway (Valico Variant) and the new 40 km motorway (the Northern Bypass) - the metropolitan area of Bologna is set to greatly enhance its competitiveness and appeal.

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, have always been key aspects of the city's development. With such objectives in mind, the city has implemented a fifteen-year plan to provide new production areas in accessible locations, the enhancement of multi-service facilities such as the G. Marconi Airport, the CAAB (third agro-food centre in Italy for volume of produce handled and second for number of clients), the Trade Fair (second in Italy for number of visitors, 1.3 million per annum) and the Interporto (Freight Village). Access to and communication between these multi-service facilities shall be provided by **new infrastructural developments** such as the People Mover and the metropolitan tramway, and the enhancement of the local public rail transport.

Approval is also pending for a new commercial development plan for 9 major commercial and office locations close to the metropolitan railway stations.

Lastly, **Bologna will undergo significant urban changes**. In some cases, substantial areas of the city will be requalified, while 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), from the redevelopment of abandoned railway sites (e.g. Ravone) to Bologna's new Central Station and the redevelopment of ex-military areas to important projects connected with administrative and leisure developments financed by private investors. The overall investment forecast for Bologna is set to exceed 25 billion euros by 2015.





FREIGHT VILLAGE

NORTHERN MOTORWAY  
BYPASS  
"PASSANTE NORD"

HIGH-SPEED  
RAILWAY  
TAV MI-BO

AIRPORT

MOTORWAY  
A13 BO-PD

PEOPLE MOVER

TRADE FAIR  
DISTRICT

CAAB

MOTORWAY  
A1  
BO-MI  
BO-FI

METROTRAMVIA  
(TRAM-SUBWAY)

NAVILE

BERTALIA-LAZZARETTO

CENTRAL  
RAILWAY STATION

CITY CENTRE

MOTORWAY  
A14 BO-TA

HIGH-SPEED  
RAILWAY  
TAV BO-FI

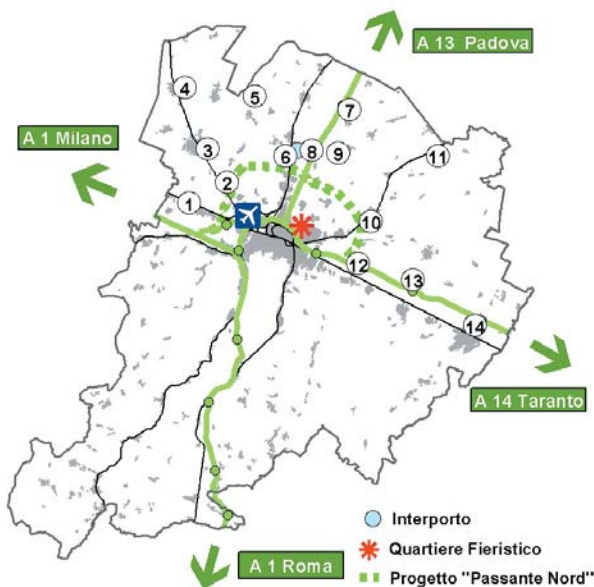
# Expanding

## Expanding Production Areas

Alongside the infrastructural and urban transformations, the metropolitan area of Bologna will offer many new localisation opportunities over the coming years. Out of 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 compliance with environmental regulations. The land that is available for new development amounts to 4.5 million sqm, all of which is served by the motorway and railway networks and the main hubs. More specifically, the areas of production are connected to the existing infrastructure (motorway junction, railway, airport) as well as to the planned Northern Bypass. The new areas will be administered by means of a management model that aims to reduce and prevent air, water and ground pollution, safeguarding health and safety and improving the overall conditions of the territory's environment.



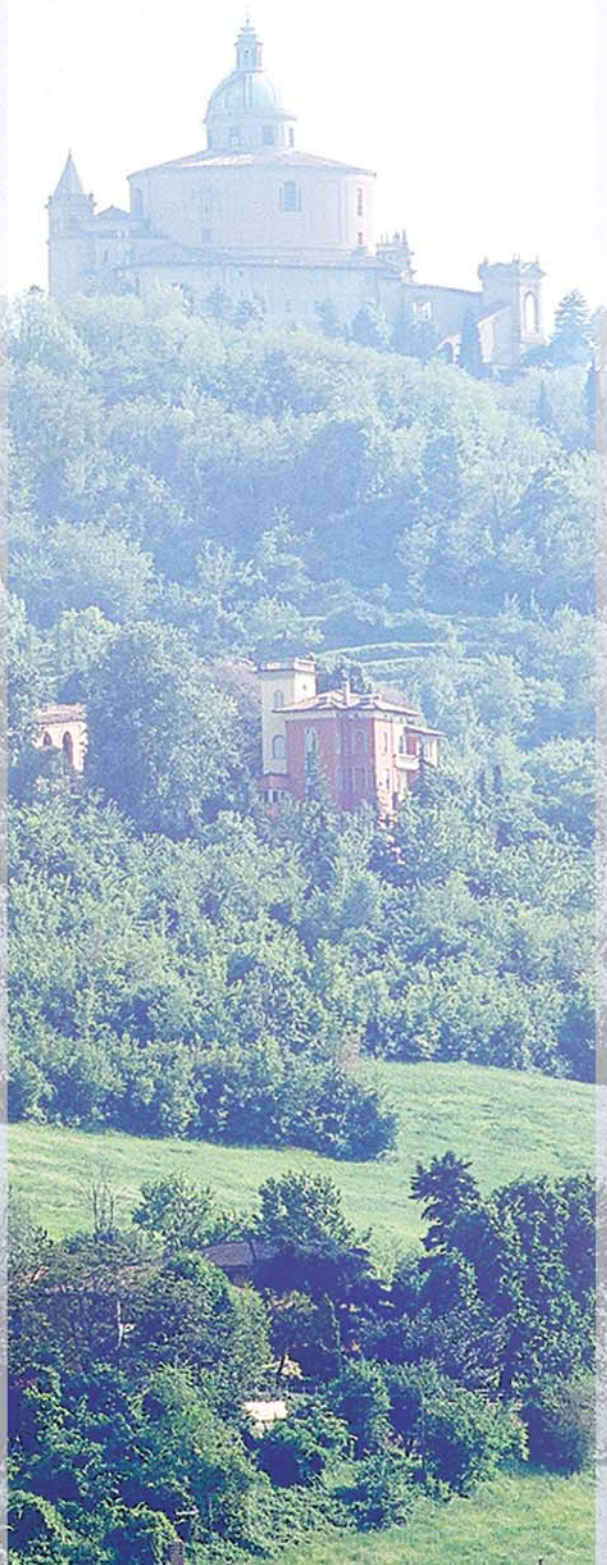
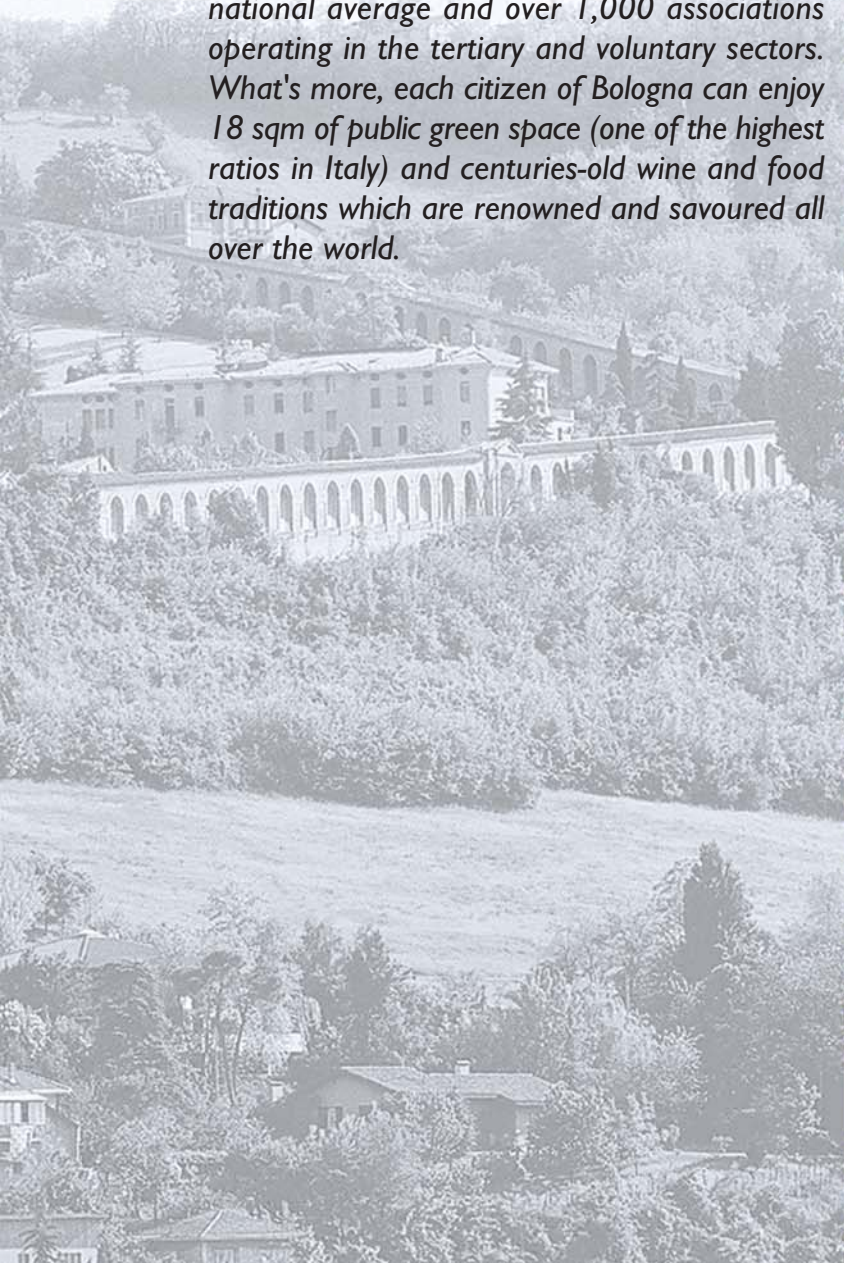
AREA	LAND SURFACE AREA (sqm)			
	Denomination	Total Surface Area	Available for development	Available for construction
1	Martignone	1,040,000	760,000	115,000
2	Tavernelle	1,090,000	760,000	266,000
3	Il Postrino di San Giovanni	480,000	350,000	98,000
4	Beni Comunali	1,240,000	560,000	212,000
5	Pieve di Cento	980,000	260,000	90,000
6	Interporto-Funo-Stiatico	1,470,000	520,000	182,000
7	Altedo	1,290,000	400,000	140,000
8	Bentivoglio	720,000	-	-
9	Cà De Fabbri-Minerbio	1,160,000	150,000	52,000
10	Cento di Budrio	950,000	600,000	-
11	Molinella	1,140,000	500,000	160,000
12	Ponte Rizzoli	1,090,000	230,000	88,554
13	San Carlo	2,470,000	500,000	120,000
14	Imola	7,500,000	1,550,000	720,000



AREA	Denomination	DISTANCE-KMS					
		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

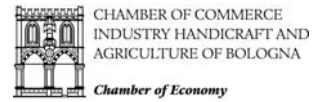
# Bologna System

*With its strategic location, stable economy, a modern and efficient public administration, the University and its research institutes, well established and emerging sectors, as well as all its urban-infrastructural transformations, Bologna is a growing and vibrant area with excellent opportunities for investment despite the international economic downturn. Bologna competes with Europe's most advanced areas thanks to its ability to marry exemplary socio-economic growth with high standards of living. The metropolitan area of Bologna is characterised by high social and health standards, a 3.1% female unemployment rate against the 7.9% national average and over 1,000 associations operating in the tertiary and voluntary sectors. What's more, each citizen of Bologna can enjoy 18 sqm of public green space (one of the highest ratios in Italy) and centuries-old wine and food traditions which are renowned and savoured all over the world.*



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Institutional Partner



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Partner



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Sponsor

