

Aerospace



- 1** Executive summary

- 2** Tuscany Overview

- 3** Facts and Figures

- 4** Why invest in Aerospace in Tuscany?

- 5** Skills and Talents

- 6** Innovation

- 7** Partnership and success Cases

- 8** Events and Initiatives

Aerospace guidelines

1



invest in tuscany

2 Tuscany Overview

- The Italian pride and beauty
- Region centrality in Italy and Europe



3 Facts and Figures

- Aerospace as a relevant Key Sector in Italy



4

Why invest in Aerospace in Tuscany?

- Great expertise in the Aerospace industry
- Highly innovative culture and industrial value chains



5

Skills and Talents

- Worldwide top ranked universities (Pisa-Florence-Siena)
- Vast pool of local talents, availability of qualified and technical experts



6

Innovation

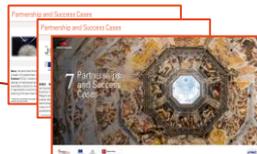
- Public and Hybrid centers of excellence and research laboratories
- Abundance of startups and university spin-offs



7

Partnership and Success Cases

- Public and Private funding/collaboration fostering innovative projects
- Several partnership success cases between local players and multinationals



8

Events and Initiatives

- Inspiring sector specific appointments promoted by Tuscany
- Projects and initiatives to foster networking between local realities (i.e. companies/universities...)



2 Tuscany Overview



About us: Invest in Tuscany is the regional referral system to attract foreign direct investments in Tuscany. It acts as **the point of reference for national and international companies** that want to invest in Tuscany, providing assistance and promoting investment opportunities.



Mission: to connect Tuscany to the international business community, assisting potential investors to build and develop their business in Tuscany. In particular, Invest in Tuscany provides useful and strategic information, it supports investors in the analysis and evaluation of the territory, it assists companies that intend to establish or expand in Tuscany in every stage of the investment process.



Services offered:

- **Pre-establishment support.** Invest in Tuscany gives information to help understanding the local economy, through the research of regional macroeconomic data, trend analysis of growth and foreign trade.
- **Support during the settlement.** Support in the search of possible locations through the network of corporations belonging to the regional production districts, incubators, technological parks and real estate brokers.
- **Post-establishment support.** Facilitating business growth: the office provides support to corporations that have started an activity in Tuscany. Invest in Tuscany provides fast track procedures in obtaining permits for expansion and support in the identification of possible local partners.

More info: www.investintuscany.com

Tuscany heritage



- ▶ Midway down the Italian peninsula, **Tuscany** is distinguished by its **wonderful landscape**: rolling hills, snowcapped mountains of the Apuan Alps, dramatic cypress trees, vineyards, silvery olive groves and miles of coastline on the Tyrrhenian Sea.



- ▶ The region has a modern and **dynamic economy** ensured by a well established manufacturing industry, advanced industrial technologies, sectors of excellence and thanks to the strength of "**made in Tuscany**".



- ▶ It's worldwide celebrated for its unique concentration of **Medieval** and **Renaissance art and culture** testified by plenty of museums, peculiar traditions and by the architecture of villages, towns and cities scattered all over the territory, first among them **the capital Florence**.
- ▶ Tuscany is a **land of excellence**, creativity, knowledge and ancient craft that are passed on from generation to generation. **Artisan traditions of Tuscany** are worldwide recognized as a synonym of high quality.

The heart of Italy and Europe

TUSCANY IN KEY FIGURES¹



Capital City: Florence
Area: 22,994 km²
3.66 Mln inhabitants (2024)



+344k Companies
+8.8k Local units of foreign and Italian multinational
+1.6 Mln People employed



137.9 €Bn of GDP (2023)
63.1 €Bn in Export (2024)
37,682 € GDP per capita (2023)

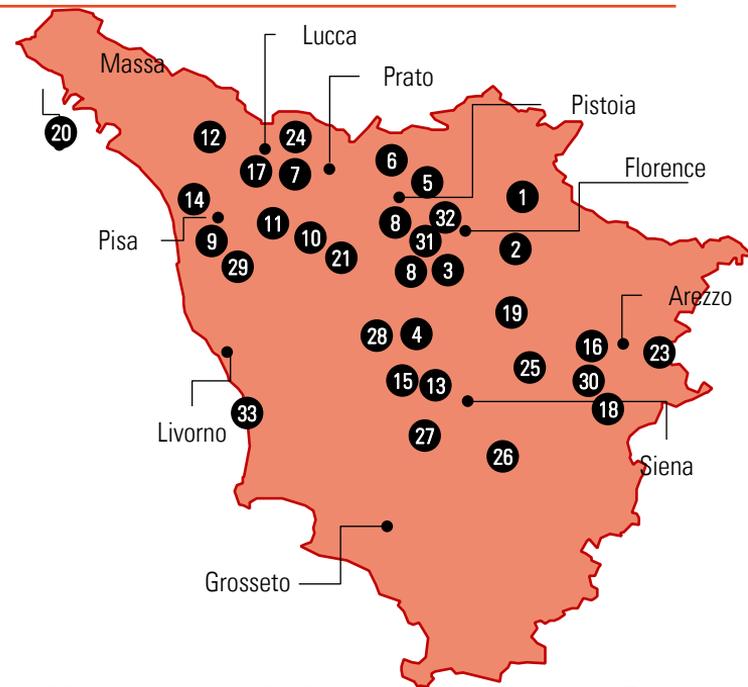
- ▶ **3 main logistic centres**
(Livorno, Arezzo, Prato) 
- ▶ **Major Italian highway (A1)**
connecting Milan-Rome-Naples 
- ▶ **EU "Scandinavian-Mediterranean Core Network Corridor"** linking Baltic Sea-Southern Italy-Malta 
- ▶ **1 main commercial port** (Livorno) with direct link to major Mediterranean ports 
- ▶ **2 national ports** (Piombino, Carrara) 
- ▶ **2 International Airports**
(Florence and Pisa)
- ▶ **High-speed train**
- 1:30h from Florence to Rome
- 1:40h from Florence to Milan



Tuscany: the new industrial engine of Italy



- | | | |
|---|--|---|
| 1 Leo France
<i>Metal accessories</i> | 12 Kedrion Biopharma
<i>Pharma</i> | 23 Gsk
<i>Pharma</i> |
| 2 Fendi
<i>Bags</i> | 13 Diagnostica Senese
<i>Diagnostic</i> | 24 Banci
<i>Textile & logistics</i> |
| 3 Yves Saint Laurent
<i>Bags</i> | 14 Saint-Gobain Glass
<i>Glass</i> | 25 Lem Industries
<i>Metal accessories</i> |
| 4 Celine
<i>Bags</i> | 15 Marchesini
<i>Packaging machinery</i> | 26 Menarini
<i>Pharma</i> |
| 5 Ferragamo
<i>Fashion</i> | 16 Chimera Gold
<i>Metal accessories</i> | 27 Zcs
<i>Automation & robotics</i> |
| 6 Microtex
<i>Special textile</i> | 17 Sofidel
<i>Paper industry</i> | 28 IMA Automation Atop
<i>Automotive components</i> |
| 7 Marine Industrie
<i>Textile</i> | 18 Ilapak
<i>Packaging machinery</i> | 29 Leonardo
<i>Drones</i> |
| 8 Molteni
<i>Pharma</i> | 19 ABB E-Mobility
<i>Charging stations</i> | 30 Diakont
<i>Electromechanical</i> |
| 9 Pharmanutra
<i>Nutraceutical</i> | 20 The Italian Sea group
<i>Shipyard</i> | 31 Kering
<i>Fashion</i> |
| 10 Mastrotto
<i>Leather goods</i> | 21 Nuti Ivo
<i>Leather goods</i> | 32 Baker Hughes
<i>Turbomachinery</i> |
| 11 Essity
<i>Paper napkins</i> | 22 Chimet
<i>Metal refining</i> | 33 INEOS Inovyn
<i>Chemical sector</i> |



Between 2016 and 2022, 140 FDI investment operations in Tuscany generated more than 9,000 jobs with over €3bn in capital invested¹

Tuscany ranks 5th (and the only Italian region) among the Mid-sized European Regions of the Future 2025 for FDI Strategy²

3 Facts and Figures



Key sectors and main figures



AEROSPACE: the aerospace sector in Tuscany is an industrial and scientific excellence, comprising companies, research institutes and universities.



AGRIBUSINESS: culture and territory, tradition and high quality of products and raw material. International leadership.



FASHION: excellent expertise in products and processes. Top worldwide players were born and are still located in Tuscany: Gucci (Kering), Ferragamo, Prada, Cavalli, etc.



DIGITAL & ICT: excellent research centers and universities, vast pool of talent, competitive costs.



LIFE SCIENCES: Tuscany boasts the 3rd national district while Italy is 2nd in Europe in terms of Pharma production.



YACHTING: worldwide leadership. Top companies rooted in Tuscany: Azimut | Benetti, Sanlorenzo, Italian Sea Group, Overmarine Group, Rossinavi, Codecasa, Baglietto Next Yacht Group.



SMART INDUSTRY: Tuscany is a center of excellence for robotics; Automation and Mechatronics sectors are growing both in terms of total turnover and exports.



TRANSPORT & MOBILITY: presence of international players and multinationals; the region keeps on attracting investments and the key subsectors are growing fast.

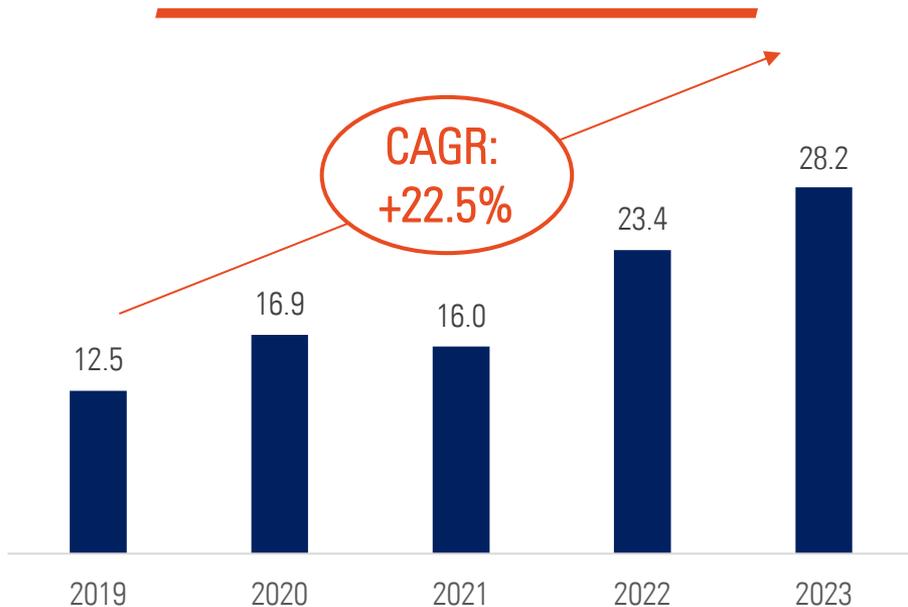
AEROSPACE INDUSTRY in Tuscany¹



1. Source: ToscanaSpazio, 2025.

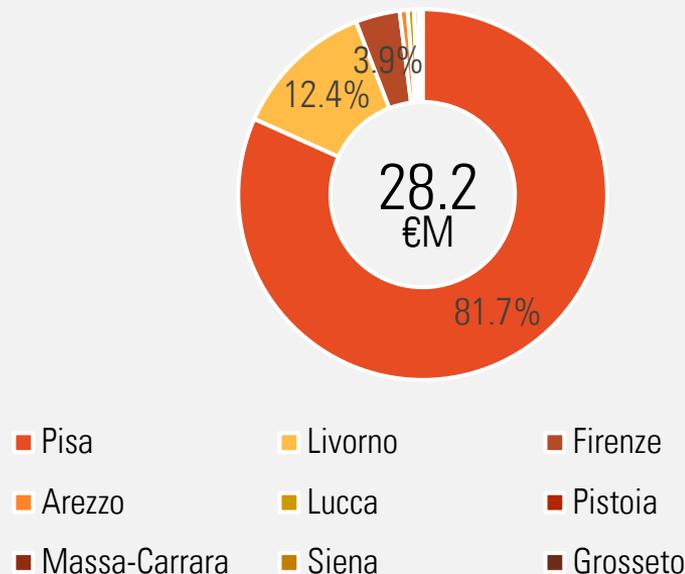
Aerospace taxonomy and relevance

TUSCANY'S AEROSPACE EXPORT¹



Tuscany's aerospace exports grew at an average rate of **+22.5%** (CAGR) over the period 2019-2023, compared to the national average of +4.8%.

TERRITORIAL DETAIL OF EXPORT¹



4 Why invest in Aerospace In Tuscany?



Aerospace: a growing market



The global scenario

- The aviation industry has experienced a significant recovery after the severe downturn caused by the 2020-2021 pandemic. Air passenger revenue **reached \$646 billion in 2023**, up 48% compared to 2022, and approximately **4.7 billion air passengers** are projected for 2024, compared to 4.5 billion in 2019.
- To meet the increasing demand, **airlines are investing in their fleets**: aircraft deliveries increased in 2023 compared to 2022 (1,390 units, +12% year-on-year)
- The **Asia-Pacific, Europe, and North America regions** are the top three global markets for new aircraft demand.
- The year 2024 has witnessed unprecedented activity in the field of **space exploration and development**. The combined effect of new geopolitical tensions and rapid industrial and technological advancements has significantly accelerated the ongoing '**space race**' among major global powers, and the new Trump Administration in the US could bring a significant shift in national and global space policy, as well as in the role of the private sector within the industrial ecosystem
- Recent geopolitical tensions and the uncertainty and instability of the international landscape have also led several countries to revise their defense strategies, thereby supporting the **growth of the defense industry** as well (e.g., military aircraft)

Aerospace: potential market in Italy



- ▶ Italy ranks **third in the EU for the number of companies (198) and employees in the sector (over 49,000)**¹, with an ecosystem that includes large system integrators, SMEs, and start-ups across the aerospace supply chain (design services, aeronautical systems, engine production, component manufacturing, assembly, maintenance, and support services)
- ▶ In **1964**, Italy launched **its first satellite using domestic technology**, becoming the **third country** to do so after the USA and Russia
- ▶ Italy, along with Germany and France, is **the third-largest contributor to the European Space Agency's budget**, accounting for 17% of the total²
- ▶ Italy actively participates in numerous ESA missions and programs and plays a leadership role in the development of key components for the Lunar Gateway, the Orion capsule, and the Lunar Habitation Module, critical elements of the infrastructure that will enable future lunar mission

Leading Factors

Aerospace Leading Factors



Aerospace is an Italian **booming sector**: Italy ranks 3rd in the EU and 7th globally for the **number of citations in Aerospace Engineering** (227,000 citations from 1996 to 2022) and it is 3rd in the EU and 5th globally in **Space and Planetary Sciences** (over 1.6 million citations from 1996 to 2022)¹



Openness and welcoming to **foreign companies investments** and projects as testified by the large number of **international companies** and **multinationals** in the region.



System of innovation poles and top ranked universities. Tuscany boasts of a multitude of **young talents** and **highly specialized experts** in technological and scientific fields. Prolific synergies between university system and industrial district testified by a lot of **spin-off** examples and local **startups**.



Tuscany's Leading Factors

Tuscany hosts a **strong Aerospace District** with **leading companies** such as Leonardo and Thales, supported by **prestigious universities** (Pisa, Florence, Siena) and **advanced research centers**. The collaboration between industry and academia fosters innovation and sector growth.



Tuscany offers strategic airports, technology hubs, and specialized laboratories, along with regional and national funding for R&D. The aerospace sector **integrates with mechanics, electronics, and ICT**, providing innovative and multidisciplinary solutions.



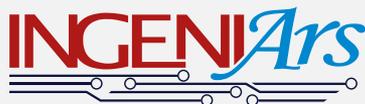
Thanks to its geographic position, Tuscany is well-connected to global markets and focuses on emerging technologies such as **nanosatellites, advanced materials, and green propulsion**. The region's **growing emphasis on the space economy** makes it a strategic hub for future investments.



Foreign & local players in the Aerospace supply chain



Leonardo Helicopters
Leonardo Space





Key Figures (2023)¹

15.3 €Bn
Turnover

53,566
People
Employed

2.2 \$Bn
R&D spend



150
Countries in which it
operates

1.4 €Bn
EBITA



Key Figures (2023)

>70
Plants

33,306
People
Employed

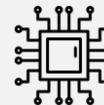


A global industrial group that builds technological capabilities in Aerospace, Defence & Security and plays a prominent role in major international strategic programmes

Company Business



Helicopters



Electronics
Defence &
Security



Aircraft



Aerospace

Brands Included

AGUSTA

TELESPAZIO
a LEONARDO and THALES company

SELEX
Sistemi Integrati

MBDA

ThalesAlenia
Space
a Thales / Leonardo company



Key Figures (2023)¹

18.4 €Bn
Turnover

80,900
People
Employed

1,108 €M
R&D expenses



68
Countries in which it
operates

2,132 €M
EBIT



Key Figures (2023)

7
Plants

3,200
People
Employed



A world leader in providing services for aerospace, defense, transportation, and security market.

Company Business



Defense & Security



Digital Identity



Aerospace



Space



Transport

Brands Included

Some of main brands:

THALES

ThalesAlenia
Space
a Thales / Leonardo company

gemalto
security to be free

SafeNet
The Foundation of Internet Security

GUAVUS
a Thales company

 Key Figures (2023)¹

62 €M
Turnover



5
Plants in Italy



SITAE L premises:

- SITAE L headquarters are based in **Mola di Bari** (Apulia), devoted to Design, Engineering and Manufacturing activities
- The operative office is located in **Ospedaletto, near Pisa**, for design and production of Propulsion Systems
- The operative office is located in **Forlì** (Emilia-Romagna) for design and development of Small Satellite Platforms
- Corporate offices are located in **Milan** (Lombardy) and **Rome** (Latium)

At Sitael's Pisa facility, there is the largest vacuum chamber in Europe, the third largest in the world in terms of size, but the first in terms of vacuum level (creating conditions as close as possible to those in space).

Company Business



Small Satellites



Advanced Propulsion



Avionics



EMC Test Service

Brands Included



5 Skills and Talents

Students & main university systems



invest in tuscanY

4 major University Poles¹



University of Florence



UNIVERSITÀ DI PISA

University of Pisa



University of Siena



Sant'Anna School of Advanced Studies



+116,000
STUDENTS
IN TUSCANY²

11,757

Industrial & Information
Engineering²

3,431

Mathematics &
Informatics²

14,704

Economics &
Statistics²

Aerospace Majors



CONSORZIO NAZIONALE INTERUNIVERSITARIO PER LE
TELECOMUNICAZIONI



DIPARTIMENTO DI INGEGNERIA CIVILE E
INDUSTRIALE DELL'UNIVERSITÀ DI PISA



DIPARTIMENTO DI INGEGNERIA
DELL'INFORMAZIONE DELL'UNIVERSITÀ DI
PISA

ISTITUTO DI SCIENZA E TECNOLOGIE
DELL'INFORMAZIONE DEL CONSIGLIO NAZIONALE
DELLE RICERCHE



SCUOLA SUPERIORE S.ANNA
- ISTITUTO DI BIORBOTICA



1. Source: Toscana Open Research (Regione Toscana), 2025; 2. Source: Evoluzione degli iscritti per classe di laurea (Toscana open Research), 2025.

Top-ranked universities



University
of Florence



University
of Pisa



Scuola Normale
Superiore - Pisa



University
of Siena



Sant'Anna School of
Advanced Studies - Pisa



301-400

9-10

151-200

2-4

801-900

18-24

601-700

25-31

-

-



351-400

12

401-500

18

168

2

501-600

27

201-250

4



375

9

382

7

-

-

691-700

21

-

-

■ World Ranking¹ ■ Italian Ranking¹

- ▶ **Scuola Normale Superiore of Pisa stands among the first 200 universities worldwide and in 2nd position in Italy** according to the Times Higher Education (THE) World University Rankings 2025, whilst Sant'Anna School of Advanced Studies of Pisa ranks 5th at national level.²
- ▶ According to the 2024/2025 Censis classification³, the **University of Siena ranks 5rd among medium-sized Italian state universities** (from 10,000 to 20,000 enrolled students) and 1st in Tuscany (3th in Italy in the "Facilities" dimension - places in lecture halls, libraries and scientific laboratories). Among **state universities with over 40,000 enrolled students**, the **University of Pisa is 6th in Italy and 1st in Tuscany** (1st for services and 2nd for graduate employability), while the **University of Florence ranks 8th (2nd for Services and 4th for Employability, Communication and Digital Services, Internationalization).**

High-quality employment in Tuscan Aerospace industry

Inclination towards technology
and innovation



16.7%

Aerospace companies
with high R&D
content

83.3%

Aerospace companies
with medium-high R&D
content

Percentage of graduates in the workforce in Tuscan Aerospace industry by sector

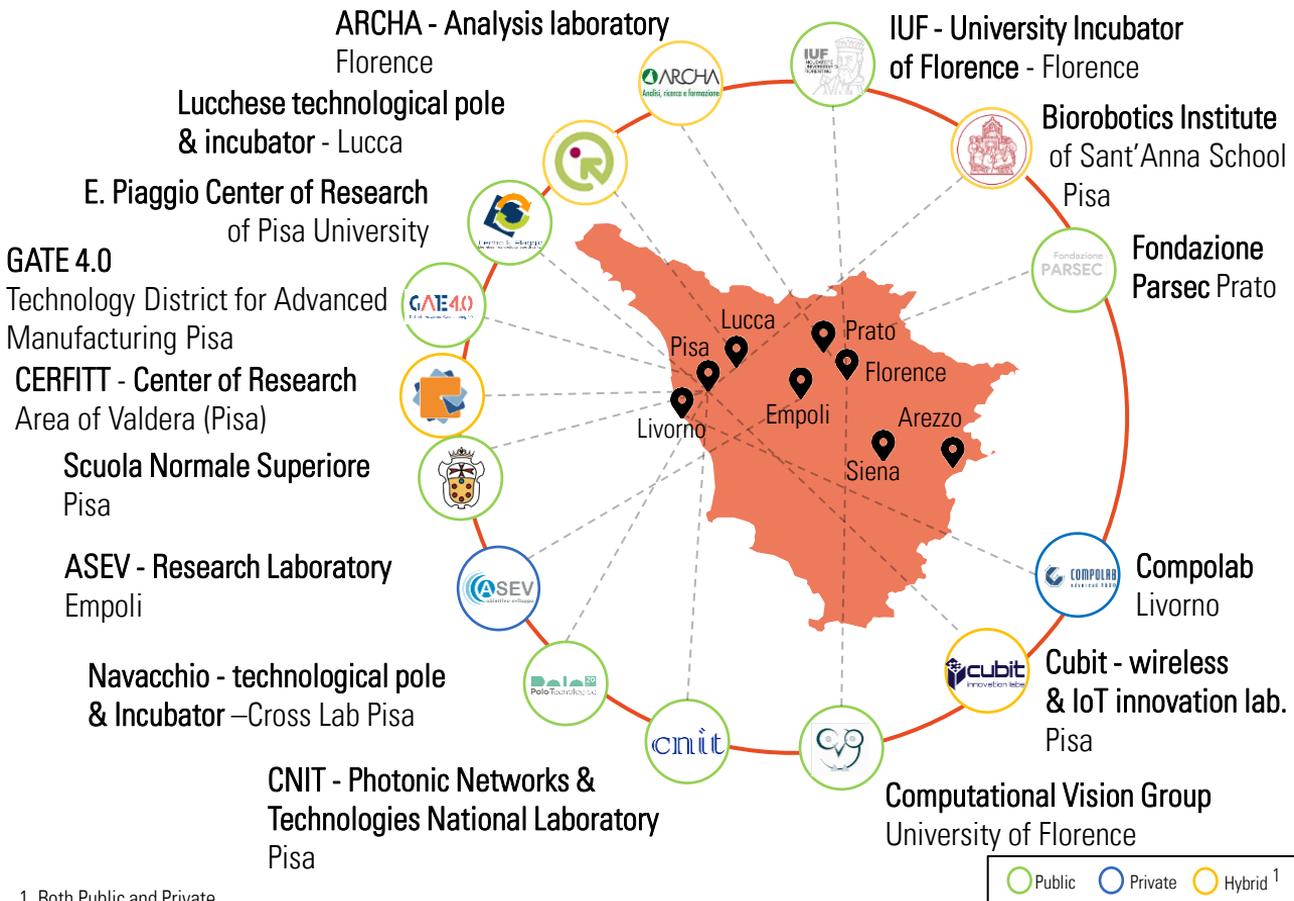
Experimental R&D in the field of natural sciences and engineering	70%
Manufacture of measuring, testing, and navigation instruments and devices	41%
Software production and management of IT infrastructures	32%

High productivity (value added per employee): Share of Aerospace companies showing values above the regional industry median, by sector

Manufacture of measuring, testing, and navigation instruments and devices	100%
Software production and management of IT infrastructures	86%
Experimental R&D in the field of natural sciences and engineering	80%

6 Innovation

Network of research centers & incubators



Innovation Ecosystem



Tuscany hosts a **large number of research institutes**. The key to foster innovation is the strong connection between companies, universities, and public institutions. In terms of innovation, **Pisa**, in particular, is considered a **global center of excellence in robotics field**. It's one of the highest density of researches worldwide: in about 2 square kilometers there are 3 universities, 22 centers of research, the largest **CNR** (National Research Council) area of Italy, the **INFM** (National Institute for Nuclear Physics) and the **European Gravitational Observatory**. **ToscanaSpazio**, with 27 members, represents **over 70% of the aerospace sector** in Tuscany.

1. Both Public and Private.

ESPI's presence in Tuscany

Relationship with Italian stakeholders



Italian government



ESPI's activities in Florence

- Florence hosts an **ESPI Centre of Excellence for Global Engagement in Space Policy**, a hub dedicated to craft the global space revolution through reflection, engagement and education activities such as: Research activities, Engagement – Italian Community; Engagement – International community; Education activities – incl. scholarships and summer school
- Development of the first "**Florence Space Debate**" by May/June 2026, "Space for prosperity, Peace and Future Generations", as the leading space policy event in Europe with global reach, bringing the dynamics of the global space revolution on the table, in an attractive and interactive format, also providing a forum for the young and future leaders
- Ongoing establishment of a network of ESPI hubs in **Brussels** (EU), **Florence** (International & EDU), **London** (Finance & Business, beyond EU) complementing the work of the Institute's **Vienna** headquarter
- Organization of the second **Space Policy Summer School** in Florence, in collaboration with the **European University Institute** (EUI) in August 2025

ToscanaSpazio: overview



The not-for-profit association ToscanaSpazio was established in December 2011 with the mission to create a wide network of companies and research institutions throughout Tuscany able to:



- Guide, promote and increase the value of cultural, training and research activities
- Share and develop the knowledge of its members, thus keeping the valuable technical, scientific and business know-how in the Aerospace sector within Tuscany
- Promote the development and growth of excellence within the sector in Tuscany
- Enhance the complementary nature of groups
- Create synergies, encourage participation of members and affiliates in public and private funding instruments.

Today, ToscanaSpazio has **27 members**, including **16 small and medium-sized enterprises**, **4 large industries**, and **7 research organizations**, including departments from the three Tuscan universities (Florence, Pisa, Siena), the Institute of Information Science of the CNR, the CNIT, and the Institute of Biorobotics of the Scuola Superiore Sant'Anna.

ToscanaSpazio members work on almost all the most important fields in the Aerospace sector, including:

- Telecommunication and Navigation
- Space and Earth observation
- Onboard systems and equipment
- System integration in space and avionics
- Microwave and Radiofrequency systems
- Formation and Technology transfer
- Production, testing, and maintenance
- Mechanical components
- Electrical Power Supplies
- Space Life Sciences
- Aeronautical design
- Propulsion/Motors
- Special materials and Structures
- Space transportation
- Operational bases

Technologies for the Aerospace industry (1/5)



Compolab is a multipurpose hub for engineering, R&D, systems and subsystems integration¹:

- CAE/FEA/MBD/EM/Digital Twin simulation.
- Applications: combustion chambers, thermal structures, compressors, drones, CubeSats, space solar panels.
- Test design and flow diagram; design of specific test machines, electronic test benches aimed at product or process in R&D activities.
- Composite drone assembly, development of CubeSat and micromechanical components.
- Aerospace downstream segment design and subsystem integration capabilities for: electronics, mechanics, software, and simulation engineering.
- Cross-sector projects using methods and skills from aerospace technologies.

The latest project is **POIANA**, led by Compolab and funded by Italy's Ministry of Enterprises and Made in Italy (MIMIT) for the **development of an aerostatic platform for agricultural and naturalistic applications**.

The project (€62M) aims to develop an innovative remote monitoring system for large areas, by aerospace technologies, the achievement of TRL 5 allows partner companies to undertake, on solid and verified bases, the path towards the definitive engineering of the research results and to reach the commercialization of a monitoring product and service over a large area that is extremely innovative and rich in application potential in many fields, with characteristics of great operational flexibility, observation permanence for prolonged periods, relocatability, very low acquisition and management costs

1. Source: Compolab.

Technologies for the Aerospace industry (2/5)



The University of Pisa is leading the **Italian Space Agency's project EXCITE (EXtended Cubesat for Innovative Technology Experiments)**, aimed at validating in orbit several innovative technologies for small satellites. EXCITE will serve as a testbed for technologies from several domains of interest for future satellite platforms: **on-board propulsion** (chemical: monopropellant for orbital maneuvering and electric: pulsed plasma for fine and proximity control), **management of intense heat fluxes** in a limited volume with pulsating heat pipes, **high-performance processing on COTS platform for IoT and VDES**, and **compact steerable beam microwave antennas**. The mission is based on a custom CubeSat 12 U platform: several critical high-performance subsystems (power generation, thermal control, structure, and deployable elements) will be entirely designed and manufactured by the EXCITE team. The mission includes **4 Tuscan SMEs** as industrial partners: Aerospazio Technologie, CRM Compositi, IngeniArs, and MBI. The consortium is an excellent example of a regional-scale initiative that leverages CubeSat technology for local development.



Cubit was founded in 2007 by the Department of Information Engineering of the University of Pisa, **Polo Navacchio**, together with some highly innovative Italian companies with aim of creating a unique range of technological services in a constantly evolving market. **Cubit's Fluid Dynamics Division** was involved – together with the University of Pisa and SkyBox Engineering S.r.l. – in the preliminary aerodynamic design phase at transonic conditions of a groundbreaking aircraft within the **European PARSIFAL Project (PrandtlPlane ARchitecture for the Sustainable Improvement of Future AirLanes)**. Funded under HORIZON 2020, it aims to evaluate the impact on the aviation world of a new concept aircraft called PrandtlPlane, which is a box-wing type aircraft that ensures a significant increase in the number of passengers and payload capacity compared to a conventional aircraft of the same size.²

Technologies for the Aerospace industry (3/5)



Aerospazio Tecnologie is a small company based in Rapolano Terme, in the Siena area, with a strong background in propulsion and testing.

The company's core business is represented by the specialized market of the **Electric Propulsion test services**. In this market Aerospazio acts as an independent SME providing services at commercial conditions to some of the main European EP primes.

A **large Vacuum Test Facility complex** has been developed at Aerospazio so as to allow high fidelity characterization of high power Xenon electric thrusters.

Aerospazio's clients include the European Space Agency, the Italian Space Agency, NASA, Thales Alenia Space, EADS Astrium Space Transportation, Leonardo Group, and others.¹



IngeniArs is a **spin-off of the University of Pisa**, specialized in the design, development and marketing of **electronic and ICT systems and innovative services with high technological content** in the fields of aerospace, telemedicine, artificial intelligence and cybersecurity. Recently, it celebrated its 10th anniversary by inaugurating a new office in Porta a Mare in Pisa.

IngeniArs is an example of Tuscan excellence in the aerospace sector, demonstrating the value of synergies between university, research and industry.²

Technologies for the Aerospace industry (4/5)



Founded in **Livorno** in 2001, **Flyby** is a leader in the development of advanced software solutions for defense and security, energy management and healthcare solutions. Thanks to its state-of-the-art technologies in remote sensing and the latest artificial intelligence and advanced analysis systems, the company provides its services in many countries, through its companies based in Italy and the UK and Italy. Flyby adopts different approaches – physical modelling, AI, Machine Learning and advanced analytics methods – together with multi-disciplinary skills **to create and develop solutions for fast interpretations of videos provided by any contemporary imaging system.**

FlySight operates in the sector of **Defense&Security and Civil Infrastructure Management**, with a team specialized in designing and developing state-of-the-art software in the field of C4ISR (Command, Control, Computer, Communication for Intelligence Surveillance and Reconnaissance) systems, ensuring the best user experience in any mission critical scenario.¹



Kayser Italia is a private independent aerospace system engineering company, primarily involved in the **design, development, manufacture and testing of systems and components** used for scientific and technological research activities on board of **space platforms**, including the International Space Station (ISS).

Located in the countryside of **Livorno**, Kayser Italia has contributed and played a significant role in the completion of more than 50 space missions with over 100 payloads, always providing high quality products and services and delivering great levels of performance, leading to scientific, economic and programmatic accomplishments.²

Technologies for the Aerospace industry (5/5)



SpaceDyS is a spin-off of the Celestial Mechanics Group of the **University of Pisa**, which develops **software for the orbital determination of natural and artificial objects orbiting near the Earth** and provides also services in the field of **Flight Dynamics**.

It is a worldwide leader in the activities of **Impact Monitoring**, thanks to the NEODyS (Near Earth Objects Dynamics Site), which provides daily data on the probability of impact monitoring in the next century.

Since 1 September 2011 SpaceDyS has been responsible for the operational services and maintenance through an agreement Service Level Agreement directly signed with ESA. NEODyS provides data of all NEAs and to their probability of impact. Furthermore, it provides qualified researchers for the NEO Coordination Centre, which is located at ESRIN in Frascati (Rome), one of the ESA facilities.

Since 2016, SpaceDyS has been prime of an important project, which is the Migration of the services of NEODyS to ESA.¹



Established in 2017 and located in Cascina (**Pisa**), **Sky Eye Systems** has a specific know-how in the development of a new family of **Mini and Small Tactical Unmanned Aircraft Systems (UAS)**, with a weight spanning from 25 to 150 kg, for the military or civil market.

It is part of OMA Group: thanks to the high-level aeronautical competences acquired over the years, SES has become an incubator with high strategic value for OMA Group and for the territory and has played a central role in creating an ecosystem of technological innovation applied to the Unmanned sector.



7 Partnerships and Success Cases



Successful projects and investments (1/3)

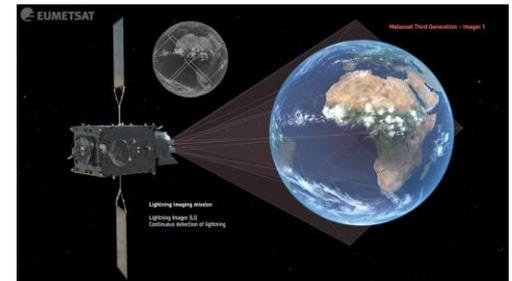
Leonardo S.p.A. - Pisa



Leonardo inaugurated in 2019 a **new facility in Pisa** dedicated to the **development and production of the AWHERE remotely piloted helicopter**. The opening of the plant, with a workforce of **60 people**, and the unveiling of the first helicopter with even more advanced capabilities represent two important milestones for AWHERE, a programme that has grown significantly over the years. Launched in 2012 as part of a joint venture with IDS S.p.A., Sistemi Dinamici S.p.A., this programme was fully acquired by Leonardo in 2016. The opening of the new plant in Pisa also expands Leonardo's presence in Tuscany, where the company designs and manufactures a wide range of products in the defense, security and space sectors with more than 1,800 employees at its existing sites in **Campi Bisenzio (Florence)** and **Montevarchi (Arezzo)**.¹

Leonardo's 'Lightning Imager' designed in Campi Bisenzio (Florence)

The Lightning Imager is an **Earth Observation instrument** made by Leonardo, in its factory in Campi Bisenzio (Florence), which, from over 36,000 kilometres from Earth, is able to 'see' the rapid glow of lightning in the Earth's atmosphere on board Meteosat Third Generation (MTG-I) satellites, of the European Space Agency (ESA) and Eumetsat and made by Thales Alenia Space (joint venture 67% Thales, 33% Leonardo).²



Successful projects and investments (2/3)

MicroHETSat developed by SITAEL S.p.A.



The MicroHETSat is an innovative satellite developed by Sitael S.p.A., recognised as **the first fully electric satellite and entirely designed and manufactured in Italy** for the European Space Agency (ESA) by SITAEL, Italy's largest wholly privately owned space company - part of Angel Holding. This project represents a unique and decisive milestone for Made in Italy in the space economy sector, which strengthens Italy's role at the international level in the production and launching into orbit of satellites that are entirely manufactured within the Italian supply chain.¹

Prato's bid to host the new Italian Space Agency's Research Center

The **Municipality of Prato**, together with the Tuscany Region, Tuscan universities, and the National Institute of Astrophysics (INAF), has applied to host the **future construction of an ASI research center (Curation Facility) dedicated to studying and analyzing extraterrestrial material**, primarily samples returned from Mars. Prato positions itself as the ideal candidate for hosting this internationally significant center, thanks to the extensive research work carried out over the years by the **Parsec Foundation**, which actively encouraged the municipal and regional administrations to submit the application.²

6 €M
Planned
investment

Successful projects and investments (3/3)

New subsidiary of Swedish Space Corporation (SSC) in Pisa



SSC (Swedish Space Corporation) is a leading global provider of advanced space services.

Initially pioneering scientific rocket launches in northern Sweden, SSC has grown into a full-service supplier of state-of-the-art space engineering, satellite and launch services to commercial and institutional customers worldwide.

In February 2023, SSC opened up a **new subsidiary in Cascina (Pisa)** - SSC Space Italy - to allow the company to target the growing Italian space market.

SSC Space Italy is a provider of engineering and scientific services to the space industry. As the Italian subsidiary of the SSC Group, it offers cutting-edge solutions to its clients, providing consultancy service to the space industry which can cover the entire space product development life cycle. The Italian subsidiary will offer the company's current services to an Italian market and will be a platform to expand its current offerings and reach new markets. ¹

8 Events and Initiatives



Aerospace reference appointments



ICAS is the most important aeronautics congress in the world, an opportunity for the entire Italian aeronautics industry (industries, universities, research centers, districts) to show the most important players on the planet the products made and research developed in Italy. From 9 to 12 September 2024, the **34th ICAS Congress - International Council of the Aeronautical Sciences** - was held in **Florence**. The event was attended by **over 1,500 experts** from all over the world, who discussed civil and military aeronautical technologies, the design of prototypes of aircraft, helicopters and other aircraft, green research and new solutions for the **aerospace sector**.¹



The **Earth Technology Expo 2024 (ETEX)** is a major event for the aerospace and technology sector that was held from 25 to 27 September 2024 at the Fortezza da Basso in Florence. This event is a meeting platform for innovators, experts, companies and institutions operating in the fields of technology, space, sustainability and smart cities. Aimed at a wide range of participants, including technology professionals, public administrators, researchers, students and citizens interested in technological innovations for the future. The Earth Technology Expo is a landmark for those who wish to explore how technology can improve the quality of life and address global challenges.²



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