



**invest in tuscany**

**Invest in Pisa  
Invest in Intelligence**

**Pisa Municipality**

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Regione Toscana



**Le ali alle tue idee**

- The **Pisa** area in **Tuscany** offers companies the opportunity of fitting into a **unique environment**, which ensures:
  - the capacity to recruit highly qualified **skills**,
  - **partnership** opportunities with universities and research centres acknowledged worldwide,
  - support **services** to facilitate their settlement,
- in a **localization** which is
  - competitive in terms of **costs**,
  - easily **accessible** and
  - renowned for its **quality of life**

- Rich and diversified economic environment
- Accessibility and connectivity
- Skills in the scientific-technological and economic-managerial fields
- Scientific partnerships with universities and research centres
- Excellent levels in such as: Engineering, ICT, Life Sciences and Energy sectors
- Competitive costs
- Quality of life
- Services assisting in settlement and suitable spaces



Region Toscana



EUROPEAN UNION



TOSCANI

Le ali alle tue idee

- The **Pisa** area in Tuscany is an ideal **localization** for the **activities** of:
  - Research & Development
  - Engineering & Design
  - Technical Support
  - Customer Relationship Management
  - Manufacturing
  - Data Centre

Invest in Pisa

# Economic fabric

- The **Pisa** area represents an important **productive pole** in Tuscany's economy, second only to that of Florence
- with a strong specialization in the fields of **light vehicles** – including a world leader in Piaggio (3 000 employees) – and **pharmaceutical drugs** – including Baxter, Octopharma, Guidotti (Menarini), Abiogen Pharma, Farmigea, Laboratori Baldacci...,
- reference sites of **large** international **groups** such as Continental (car components, 1 000 employees – including a R&D centre) or Saint-Gobain (glass, 300+ employees)
- ... and in the city of Pisa itself, a substantial concentration of research, development and technical support activities...  
Linked to **information and communication technologies**

- The Pisa Province boasts **50 sites** controlled by **foreign companies**, with a great diversity of sectors and activities, and the presence of several world leaders
- *Manufacturing & Logistics* – automotive (Continental), building material (Knauf, LafargeHolcim), glass (Gerresheimer, Saint Gobain), chemistry (Caparol-Daw, McPhy), mechanics (DAB Pumps-Grundfos, Pentair Water, Smith Bits-Schlumberger, United Technologies), consumption electronics (Linn), pharmaceutical drugs (Baxter, Octopharma), food (Carlsberg, Heineken), leather (Kering)...
- *Services, ICT & R&D* – engineering (Altran, Aarhus Geophysics), software (IOS Trading, Aspen Technology), electronics (AMS, Dialog Semiconductor, Ericsson, Maxim Integrated), call centers and shared service centers (Experian, Vodaphone)...

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# Accessibility



- **Pisa** exhibits an excellent network of **transport** infrastructures which facilitates the city's accessibility
  - a nearby **international airport** (less than 5 km from downtown Pisa), Tuscany's top airport and among the top 10 airports in Italy
    - with daily flight connections to London (5 days), Paris (2 days), Bruxelles/Charleroi (1 day)... and Rome (3 days)
  - another international airport in Florence, 85 km from Pisa
  - **railway connections** enabling one to be in less than: 3 hours in Rome and 3 and a half hours in Milan (and only 1 hour from Florence)
  - a **highway network** enabling one to reach in less than 4 hours the other major Italian cities: Milan, Rome, Turin, Venice...

- **Flight connections**

- **Pisa's "Galileo Galilei" airport**, the top airport in Tuscany and among the top 10 airports in Italy in terms of passenger traffic (only 1,5 km away from the city)
  - 4 683 811 passengers (2014 – a rise of 4,6%)
  - **regular flights to the main Italian and European cities**
    - London, Paris, Munich, Berlin, Amsterdam, Charleroi, Madrid, Barcelona, Valencia, Dublin, Istanbul...
    - Rome, Cagliari, Palermo, Catania, Bari...
  - **seasonal flights to New York (USA) and many other European cities**
  - closeness to the city centre,  
railway connection with Pisa's station
- **Florence's "Amerigo Vespucci" airport** (85 km away)
  - 2 251 994 passengers (2014)

- **Railway network**

- main station right in the city centre
- **direct** connections with other **cities in Tuscany and Italy**
  - Florence (1h/1h15 min), Livorno (15/20 min)...
  - Rome (2h30/2h50) , Genoa (1h45/2h15), Turin (4h00/4h15)...
- connections through **high-speed** trains with Milan (3h10/3h20), Bologna, Venice, Rome, Naples... – via Florence

- **Highway network**

- **North-South** highways:
  - A12-E80 Genoa-Pisa-Livorno + Civitavecchia-Rome
  - A15-E33 La-Spezia-Parma + A1-E35 Parma-Milan
- **East-West** highway:
  - A11-E76 – Pisa-Florence

# Accessibility – area



From Pisa	Flight time	Frequency
London (G+H+S)	2h15	5+/dd
Paris (B+O)	1h40	2/dd
Bruxelles-Charleroi	1h50	1+/dd
Madrid	2h25	1/dd
Amsterdam	1h55	3/weekly
Frankfurt (H)	1h40	3/weekly
Malta	1h15	2/weekly
Istanbul	2h40	4/weekly
Rome	1h00	3+/dd
Bari	1h25	1+/dd

Source: Pisa Airport (2014-15 Winter)

From Florence	Flight time	Frequency
London (G+C)	2h20	3/dd
Paris (CDG+O)	1h40	6/dd
Bruxelles	2h00	1/dd
Munich	1h15	3/dd
Amsterdam	2h15	2/dd
Frankfurt	1h40	3/dd
Zurich	1h20	3+/dd
Geneve	1h15	1-/dd
Rome	0h50	3/dd
Catania	1h30	1/dd

Source: Florence Airport (2014-15 Winter)



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# Accessibility – by road

(railroad/road)



City	Hours of travel	Frequency
Florence	1h00/1h15	50/dd
Rome FB/IC	2h30/3h30	8/dd
Rome R+AV	2h30/3h20	25+/dd
Milan IC	4h00/4h10	8/dd
Milan R+AV	3h10/3h20	20+/dd
Turin FB/IC	3h50/4h15	2/dd
Genoa FB/IC	1h45/2h30	14/dd
Bologna R+AV	2h05/2h20	20+/dd
Venice	3h10/3h40	18/dd
Naples R+AV	3h40/4h20	18/dd

Source: Trenitalia (2015)

City	Distance (km)	Hours of travel
Milan	285	3h10
Rome	345	3h55
Florence	100	1h30
Turin	335	3h45
Venice	350	3h55
Bologna	185	2h25
Genoa	165	2h25
Trento	395	4h00
Naples	550	5h30
Bari	785	7h30

Source: Mappy (2015)



Le ali alle tue idee

- **Pisa** is a 5 hour drive (by truck>12T) from the other major Italian cities: Milan, Turin, Venice, Bologna and Rome
- Pisa benefits in fact from an excellent **highway network**:
  - North-South highways: A12-E80 Genoa-Livorno (+ Civitavecchia-Rome) and A15-E33 La-Spezia-Parma + A1-E35 Parma-Milan
  - East-West airway: A11-E76 Pisa-Florence
- Pisa's airport boasts a **Cargo Village** for air freight
  - with a handling capacity of 30 000T, 4 200 square meters of warehouses, 6 950 square meters of handling/car parking service areas by the air-side and 7.300 square meters of a handling/car parking service area by the land-side
- Pisa is located near 2 of the top 6 Italian **ports**:
  - Livorno's Port (the 6<sup>th</sup> Italian port), 25 km from Pisa,
  - Genova's Port (the 2<sup>nd</sup> Italian port), 165 km away

# Accessibility – by road



City	Distance (km) from Pisa	Hours (by truck >12T)
Milan	285	4h10
Rome	345	5h05
Florence	100	2h00
Turin	335	5h00
Venice	350	5h10
Bologna	185	3h00
Genoa	165	3h05
Naples	550	7h40
Bari	785	10h00

Source: Mappy (2015)



Le ali alle tue idee

Invest in Pisa

# Skills – Training



- **Pisa** represents the heart of the **2<sup>nd</sup> largest employment reservoir** in Tuscany, after Florence, with 180 000 active employees, to whom one might add the 75 000 employees of the area near Livorno
- The **qualitative profile** of the employment reservoir is high, as it boasts 17% of people having a **high study qualification** in Tuscany (11% of the regional population altogether)
- Pisa's pole exhibits the highest regional concentration of graduates in scientific subjects, including:  
60% of **engineering** graduates, 46% of **biology** graduates and 35% of **medicine** graduates in the whole of Tuscany
- It represents 2,2% of all Italian graduates, 3,4% in chemistry-pharmacy, 3,4% in engineering, 4,6% in the scientific field

# Skills – Training



Subjects	Graduates – Pisa	% Pisa/Italy	% Tuscany/Italy
<b>Total</b>	<b>6 762</b>	<b>2,2%</b>	<b>6,0%</b>
<b>Engineering</b>	<b>1 232</b>	<b>3,4%</b>	<b>5,5%</b>
<b>Scientific subjects</b>	<b>379</b>	<b>4,6%</b>	<b>7,7%</b>
<b>Defence &amp; Security</b>	<b>136</b>	<b>23,3%</b>	<b>23,3%</b>
<b>Chemistry-Pharmacy</b>	<b>289</b>	<b>3,4%</b>	<b>7,3%</b>
<b>Medicine</b>	<b>883</b>	<b>2,8%</b>	<b>8,0%</b>
Agrarian sciences	192	3,3%	7,6%
Geology-Biology	389	2,8%	7,3%
Economics-Statistics	843	1,8%	5,0%
Jurisprudence	385	2,0%	5,7%

Source: MIUR (2015 – 2013 data)



Le ali alle tue idee

- Pisa boasts an excellent **university and research system**, acknowledged worldwide – holding significant positions in the various international rankings:
  - Academic Ranking of World Universities (ARWU, Shanghai Jiao Tong University), QS World University Rankings, Times Higher Education World University Rankings...
- structured around **Pisa's University** (founded in 1343), the **Normal Higher School** (1810) ("**Normale**") and **Sant'Anna's Higher School** (1987), as well as important research centers, among them the centers in Pisa's Research Area belonging to **CNR** and **ENEL's CRT**
  - in particular, in the fields of Engineering, IT, Electronics & Robotics, Energy, Life Sciences...

# Training & R&D



UNIVERSITÀ DI PISA



Area della Ricerca di Pisa

**CNR-Pisa**

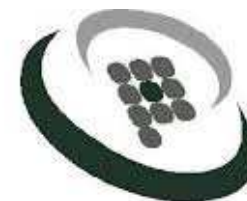


**Scuola Superiore  
Sant'Anna**

di Studi Universitari e di Perfezionamento



**Servizio  
Sanitario  
della  
Toscana**



**POLO TECNOLOGICO**



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- In Shanghai Jiao Tong University's **Academic Ranking of World Universities (2014)**,
  - **Pisa's University** ranks: between the 150<sup>th</sup> and the 200<sup>th</sup> place in the world
  - **Pisa's Normal High School** ranks: among the top 400 universities worldwide
- In **Times Higher Education's World University Ranking (2014)**,
  - **Pisa's Normale High School** is : 63<sup>rd</sup> in the world, 1<sup>st</sup> in Italy
  - **Pisa's University** is: between 301<sup>st</sup> and 350<sup>th</sup> in the world, 10<sup>th</sup> in Italy
- In **QS (Quacquarelli Symonds) World University Ranking (2014)**,
  - **Pisa's University** is: 245<sup>th</sup> in the world, being the only Italian university ranked "QS Stars" (4\*)

# Students & graduates (1)



- **Pisa's University** boasts (2013/14):
- **50 363 registered students**
- **6 238 graduates**, 207 PhD's, 333 graduates with Master's Degrees and 355 graduates with 2<sup>nd</sup> level Masters' degrees, among them:
  - 275 in Biology;  
408 in Agrarian, Food, Agro-environmental and Veterinary Sciences
  - 112 in Chemistry, 225 in Pharmacy,  
1 112 in Medicine
  - 154 in Physics, 102 in Mathematics
  - 102 in Information Technology, 528 in Information Engineering
  - 258 in Energy Engineering, Systems, Land and Construction,  
620 in Civil and Industrial Engineering
  - 1 004 in Economics & Management, 492 in Law



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# Students & graduates (2a)



- **Sant'Anna's Higher School** boasts (2013/14)
- 800 students in **university and post-university education**
  - 282 ordinary (= undergraduate) students, 342 PhD students, 62 graduates/per year
  - **Ordinary university programs:**
    - Industrial and Information Engineering: 65 (21 graduates); Medical sciences: 56 (10), Agrarian and bio-technology sciences: 23 (6)
    - Economic & Management sciences: 33 (8); Legal sciences: 44 (9), Political sciences: 31 (8)
  - **Post-university programs** (only in English):
    - MD Computer Science & Networking: 47 (9); MD Embedded Computing System: 16; GM Computer Science & Technology 10 (1)
    - MD Economics: 39 (20); MD Innovation Management: 31 (13); GM International Studies and Transnational Governance: 9 (3)



# Students & graduates (2b)



- **Sant'Anna's Higher School** boasts (2013/14)
- 800 students in university and post-university education
  - **Advanced courses** (1<sup>st</sup> and 2<sup>nd</sup> level Master's degrees):
    - Clinical ultrasonography & nephrology: 10; Cardiac Surgery: 12; Theory & practice of vascular access in patients on haemodialysis: 20
  - **Phd's**:
    - Agro-biosciences: 29 (3 PhD); Agro-biodiversity: 22 (8); Translational Medicine: 28 (6); Management – Innovation, Sustainability and Healthcare: 35 (6); Bio-robotics: 90 (27); Innovative Technologies: 16 (13); Emerging Digital Technologies: 35
    - Politics, Human Rights and Sustainability: 41 (10); Individual Person and Legal Protections: 32 (9); Economics: 16 (4)
- 1000+ participants in **higher education courses**



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# Students & graduates (3)



- The **Normale High School** (2014/15) boasts:
- 504 students (2014/15)
  - 278 ordinary (= undergraduate) students, 226 postgraduate students; respectively:  
136 and 90 in Sciences (Mathematics, Physics, Biology) and  
142 and 136 in Humanities
- 52 undergraduate students who have **qualified** (2013/14)
  - 31 in Sciences  
21 in Humanities
- 43 **PhD** students who have qualified (2013/14)
  - 15 in Sciences  
28 in Humanities



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Invest in Pisa

# Operating costs

# Costs



- **Pisa** is a competitive localization in terms of **operating costs**
- The **cost of work** in Tuscany is in fact lower than the Italian average (CNEL, 2012 data)
  - it is the lowest among the 11 regions of Italy's Centre-North
  - the cost of work in Lombardy and Lazio is 10% higher
- **Office rentals** are likewise moderate
  - 120 EUR/square meters/per annum on average (108/156 – data: OCO Global, 2015)
    - compared to: 425 EUR/square meters/per annum in Rome and 475 EUR/square meters/per annum in Milan (Cushman & Wakefield, 2014)
- **2 incubators** might host start ups and R&D activities:
  - Incubator of Pont-Tech – Pontedera / CERFITT;
  - Incubator of Navacchio's Technological Pole



# Work – Cost



Region	Employees' remuneration per single unit of employment	Index 100 = Toscana
Piedmont	41 005.1	108.2
Liguria	39 892.6	105.2
Lombardy	43 139.5	113.8
Trentino Alto Adige / Südtirol	40 893.2	107.9
Veneto	39 335.3	103.7
Friuli-Venezia Giulia	40 790.5	107.6
Emilia-Romagna	39 585.5	104.4
<b>Tuscany</b>	<b>37 914.8</b>	<b>100.0</b>
Lazio	42 539.2	112.2

Source: CNEL (2015, 2012 data) – OCO Global calculations



Le ali alle tue idee

- **Pisa** is a competitive localization in **western Europe** in terms of **operating costs** for a **manufacturing activity**
- The **cost of work** in **Italy** is in fact lower than the western Europe average (Eurostat) and
- the cost of work in **Tuscany** is lower than the Italian average (CNEL, 2012 data)
  - the cost of work in Lombardy, Piedmont, Liguria and Lazio is, in the industry sector, 10% higher than Tuscany's cost
- The **costs** associated with **industrial sites** are likewise moderate
  - estate
  - depots

# Work – Cost (Industry)



Country	Hourly Compensation Costs (USD, 2013)	Italy = 100
Switzerland	63.23	171.3
Belgium	54.88	148.6
Sweden	51.10	138.4
Denmark	51.07	138.3
Germany	48.98	132.7
Austria	44.37	120.2
France	42.85	116.1
Netherlands	42.26	114.5
Ireland	41.98	113.7
<b>Italy</b>	<b>36.92</b>	<b>100.0</b>
United States	36.34	98.4
United Kingdom	31.00	84.0
Spain	28.09	76.1

Source: Conference Board (2015, 2013 data) – OCO Global calculations



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# Work – Cost (Industry)



Region	Employees' remuneration per single unit of employment	Index 100 = Toscana
Piedmont	47.6	115.0
Valle d'Aosta	41.7	100.9
Liguria	46.0	111.1
Lombardy	46.7	113.0
Veneto	42.4	102.4
Friuli-Venezia Giulia	43.3	104.7
Emilia-Romagna	45.5	110.0
<b>Tuscany</b>	<b>41.4</b>	<b>100.0</b>
Lazio	50.2	121.3

Source: CNEL (2015, 2012 data) – OCO Global calculations



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Invest in Pisa

# Partnerships



- The Pisa area exhibits one of the highest **concentrations** of **skills** and **research networks** in Italy and in Europe
- **Public research** alone boasts more than 3 000 researchers
- It boasts **collaborations** with the most important and prestigious companies in the world – such as:
  - Acer, AMD, BMW, Ferrari, FIAT, Finmeccanica, General Electric (GE), Google, IBM, Intel, Microsoft, Ricoh, Samsung, Siemens, ST, Yahoo!...
- It is also at the origin of several **start up** companies with activities always strongly orientated towards applied research, development and design of new processes, products and services
- It has **attracted** even **leading** companies to the development of R&D activities in Pisa:
  - AMS, Dialog Semiconductor, ENEL, Ericsson, McPhy, Tiscali...

- Pisa's **university system** strongly hinges around the **research activities**
- Pisa's University
  - 1 800 researchers, 270 laboratories
- Sant'Anna's Higher School of Pisa
  - 110 between lecturers and researchers, 251 research fellows  
147 research collaborators
- Pisa's Normale High School
  - 170+ employees engaged in research activity, among them: 58 researchers
- National research Council (CNR)
  - 1 100 employees engaged in research activity
- Pisa's University Hospital

# Partnerships – Pisa University



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# Quality of life



Region Toscana



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# Quality of life



- **Pisa** can boast a **quality of life** acknowledged at world level, which enables companies to attract and retain key corporate skills
- It possesses an extraordinary **urban**, historical, cultural, artistic and architectural **patrimony**, as well as a rich diversity of **landscapes**, of land and sea... making it one of the top tourist destinations in Italy and in Europe
- It benefits from a safeguarded **environment** and a high air quality
- Pisa lastly exhibits an attractive **cost of life** with far lower **rental** prices than those of Milan or Rome
  - in Tuscany, an average of 628 EUR, compared to 838 in Milan and 875 in Rome

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# Support services



Region Toscana



Le ali alle tue idee

- The **Pisa Municipality** – in collaboration with the **Tuscany Region** and its agency **Tuscany Promotion** – offers free of charge information, liaison work and assistance in settling down and developing new companies within the territory
  - **information** on the territory, the sector, the infrastructures, the operating costs...
  - **liaison** with qualified service providers (advocates, accountants...), universities and research centres
  - **assistance** in searching for coworking offices/spaces..., incentives to R&D, hiring of qualified staff...



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