



REGIONE CAMPANIA

 Sviluppo Campania

FSC Fondo per lo Sviluppo
e la Coesione



AUTOMOTIVE



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THE AUTOMOTIVE SECTOR IN CAMPANIA



High international profile, innovation and low environmental impact technologies. The automotive sector has historically been operative in Campania region and nowadays has reached a level capable of guaranteeing a complete automotive supply chain: vehicle bodywork, mechanical parts, accessories and engine.

Campania's automotive production system is made up of a large number of international companies around which operates a system of small and medium-sized enterprises: in the supply of materials, machining and equipment and design, along the supply chain, in the design and testing of parts, in the construction of components, in the creation of systems, in the subcontracting of mechanical parts and in maintenance; small and medium-sized enterprises organically integrated in the supply subsystem, capable of product and process innovation. At the same time, there is an innovation ecosystem committed to the edge of possible technological breakthroughs, which includes a small but vital system of start-ups and academic spin-offs and research centres from which this system very often draws its inspiration.



The main players in the supply chain are characterised by their high international profile and high rates of product and process innovation, mainly related to the development of smart mobility solutions, i.e. high-tech and low environmental impact.

In the automotive supply chain, **445 companies** were active in Campania as at 31 December 2021.





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ENTERPRISES





Tab. 1 – Distribution of enterprises– Automotive chain – Campania region - Years 2019-2021

Year	2019	2020	2021
Total	471	456	455

Source: data Infocamere 2021

With respect to company size, which we see shown below in Tables 2 and 3 and Figs. 1 and 2 (distribution by class of employees and value of production), figures for the automotive supply chain in Campania region show a clear prevalence of Micro and Small enterprises (up to 49 employees), with a few Medium-sized enterprises.



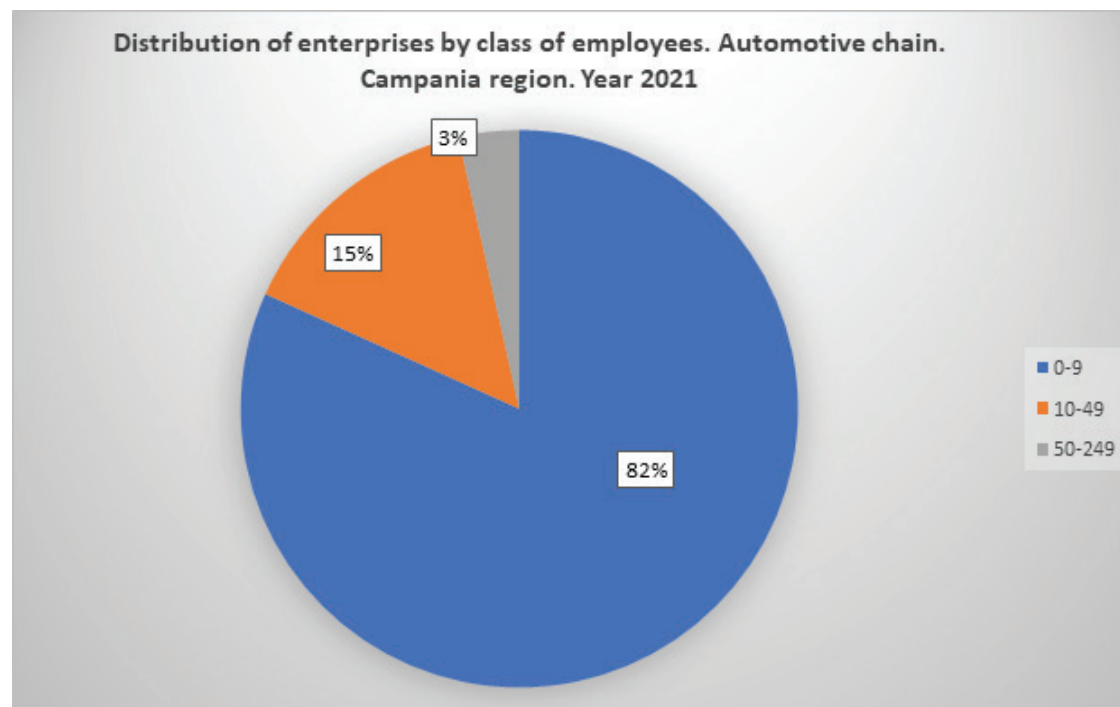


Tab. 2 – Distribution of enterprises by class¹ of employees. Automotive chain. Campania region. Year 2021

Class of Employees	Micro 0-9	Small 10-49	Medium 50-249	Large 250 - oltre	Total companies
Total for class	372	67	16	0	455

Source: data Infocamere 2021

Fig. 1 - Distribution of enterprises by class¹ of employees. Automotive chain. Campania region. Year 2021



Source: data Infocamere 2021

¹ EU MPPI classification



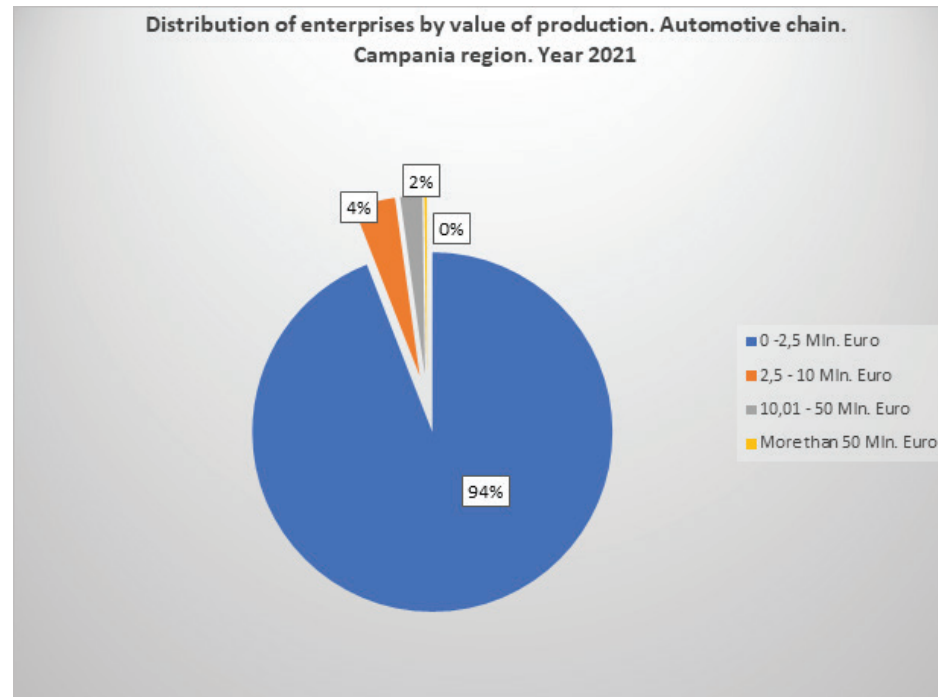


Tab. 3 - Distribution of enterprises by value of production. Automotive chain. Campania region. Year 2021.

0 -2,5 Mln. Euro	2,5 –10 Mln. Euro	10,01-50 Mln. Euro	More than 50 Mln. Euro	Total
428	17	9	1	455

Source: data Infocamere 2021

Fig. 2 - Distribution of enterprises by value of production. Automotive chain. Campania region. Year 2021.



Source: data Infocamere 2021



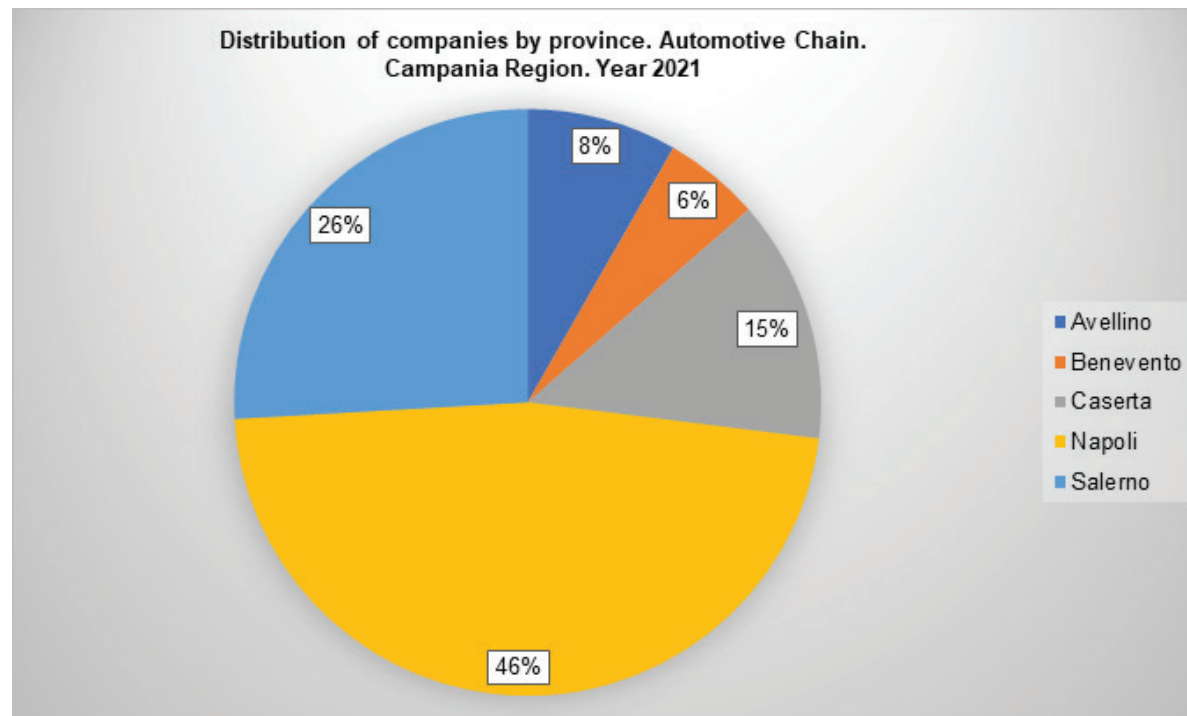


Tab. 4 – Distribution of enterprises by province. Automotive Chain. Campania region. Year 2021

Avellino	Benevento	Caserta	Napoli	Salerno	Total
34	29	66	211	115	455

Source: data Infocamere 2021

Fig. 3 - Distribution of companies by province. Automotive Chain. Campania Region. Year 2021



Source: data Infocamere 2021

The provinces of Naples (46%), Salerno (25%) e Caserta (15%) account for around 90% of companies in the automotive sector.





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INCENTIVES AND FINANCING²



² "Source: [incentivi.gov.it](https://www.incentivi.gov.it) / [mise.gov.it](https://www.mise.gov.it) / [invitalia.it](https://www.invitalia.it) - febbraio 2023"



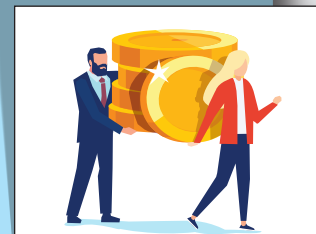
Development Contracts

from the Fund established by Decree-Law No. 17 of 2022 to support green transition, research and development in the automotive sector. The resources amount to 323,6 million euro. The MISE has announced the terms and modalities of the facilitation measure with a directorial decree dated 10 October 2022.



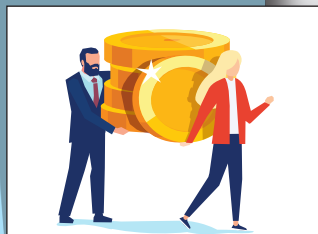
Agreements for innovation

under the Fund established by Decree-Law No. 17 of 2022 to support industrial research and experimental development projects with a significant technological impact aimed at setting up, converting and upgrading to innovative and sustainable forms of production. The resources amount to EUR 225 million. The MISE has announced the terms and modalities of the subsidised measure with a directorial decree of 10 October 2022.



Tax credit 4.0

Supports companies for technological and digital transformation to improve skills in 4.0 technologies



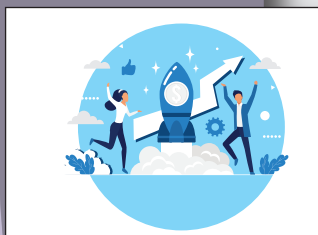
Contribution exemption

Extended for the year 2023, the hiring bonus for workers from companies in crisis is a contribution exemption granted to employers who hire with permanent contracts employees from companies in crisis.



**Nuova Sabatini
Sud MISE, MEF -
Interministerial
Decree 22 April
2022**

It finances export-related activities and for interventions subordinated to the preferential use of domestic products over imported products. Investments must be directed for the creation of a new establishment; expansion of an existing establishment; diversification of the production of an establishment through additional new products; transformation of the production process of an existing establishment; acquisition of assets of an establishment.



**Contribution
exemption
"Decontribuzione
SUD"**

The European Commission extended the exemption until the 31 of December 2023. The facility provides for a 30 per cent contribution exemption in favour of private employers based in Campania. It concerns all the jobs except for agricultural and financial sector.

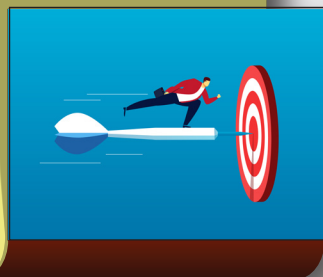
**Contribution
exemption**

Extended for the year 2023, the hiring bonus for workers from companies in crisis is a contribution exemption granted to employers who hire with permanent contracts employees from companies in crisis.



Green New Deal

grants and subsidised financing for the ecological and circular transition of enterprises. The MISE has earmarked EUR 750 million - from the Fund for Sustainable Growth (FCS), managed by Mediocredito Centrale, and the Revolving Fund for Business Support and Research Investment (FRI), managed by Cassa Depositi e Prestiti.



Bonus investimenti Sud 2023

a tax credit ranging up to 45% of the expenditure incurred, in favour of small, medium and large enterprises that purchase new capital goods intended for production facilities located in southern Italy or disadvantaged regions.





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ZES - SPECIAL ECONOMIC ZONE



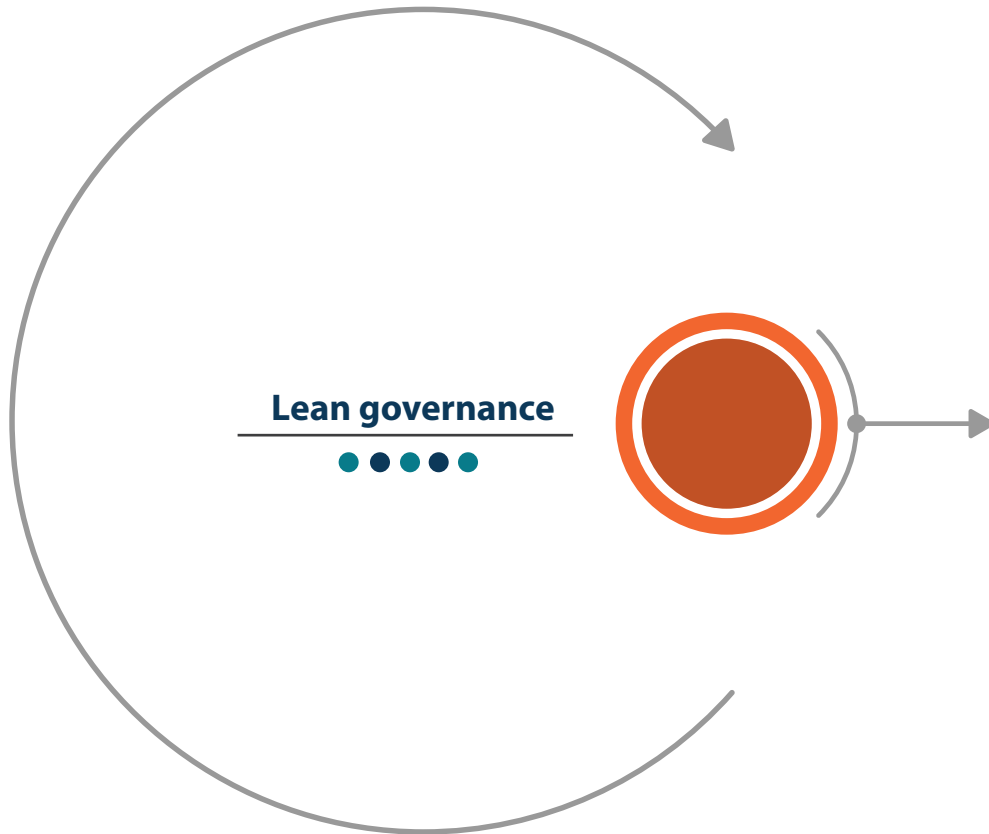
The ZES, **Campania's Special Economic Zone**, according to the Regional Strategic Plan, **covers 37 of the 550 municipalities in the region**, an area populated by **2,043,800 inhabitants** (35% of the regional population), made up of **26 'strategic' areas** where there are production facilities, ports, interports, industrial development areas (ASI), and PIP areas.





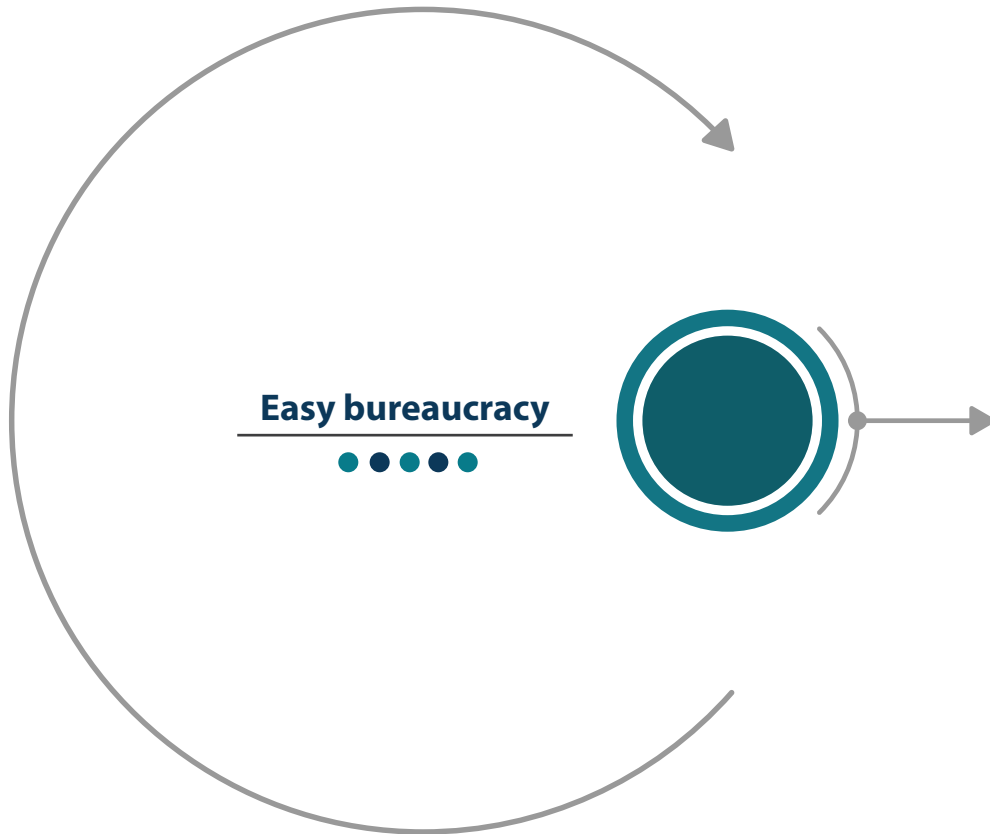
BENEFITS SETTLEMENT IN ZES





The ZES is managed by an Extraordinary Commissioner with special powers as the main interlocutor for investments.



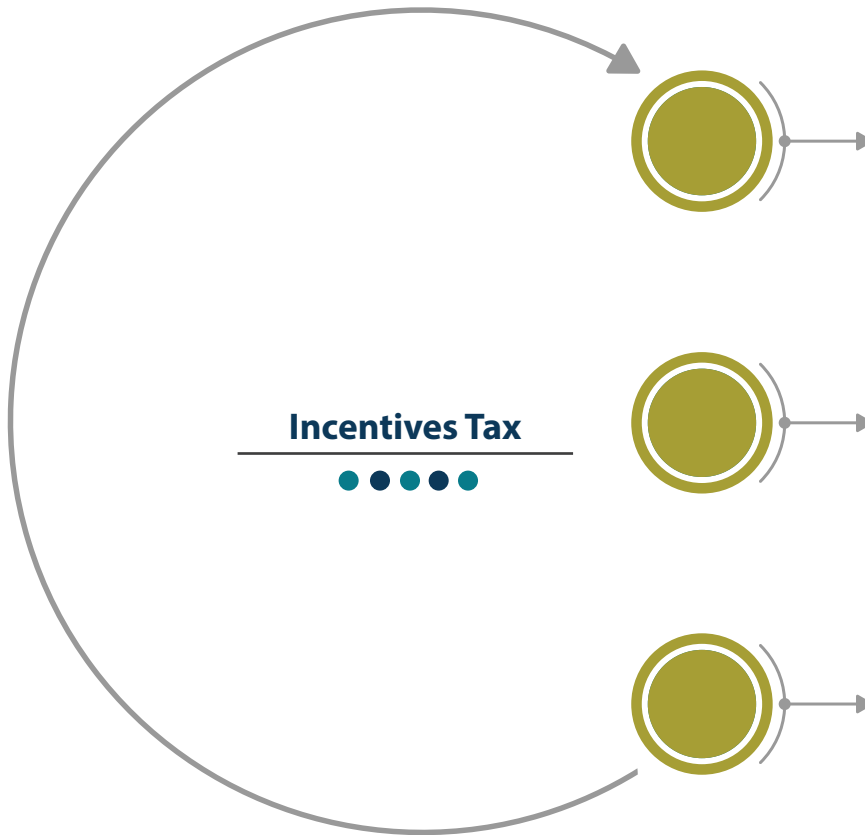


Easy bureaucracy



Investment programmes enjoy a simplified and speeded-up administrative process thanks to reduced procedural deadlines, a single authorization and a dedicated desk.





Incentives Tax



25% credit of the investment (productive and real estate), for large companies, 35 per cent for medium-sized companies and 45 per cent for small companies, up to EUR 100 million for productive investments and investments in real estate, (also through leasing contracts);

Income tax for activity in ZES reduced by 50%, starting from the tax period in which a new activity is undertaken and for the following six tax periods;

Partial contribution exemption for private sector employers for the period 2021-2029. The relief is 30% of social security contributions payable until 31 December 2025; 20% of social security contributions payable for the years 2026 and 2027; 10% of social security contributions payable for the years 2028 and 2029.





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IMPORT/EXPORT. AUTOMOTIVE SUPPLY CHAIN. CAMPANIA REGION. YEAR 2021



The total value of exports 2021 of the Campania region in the automotive sector, for the product classes listed, amounts to just under **one billion Euro**, slightly down compared to 2020

The product classes that contribute most to exports are "**motor vehicles**" and "**parts and accessories for motor vehicles and their engines**".

Imports exceed €1.1 billion, growing compared to 2020.

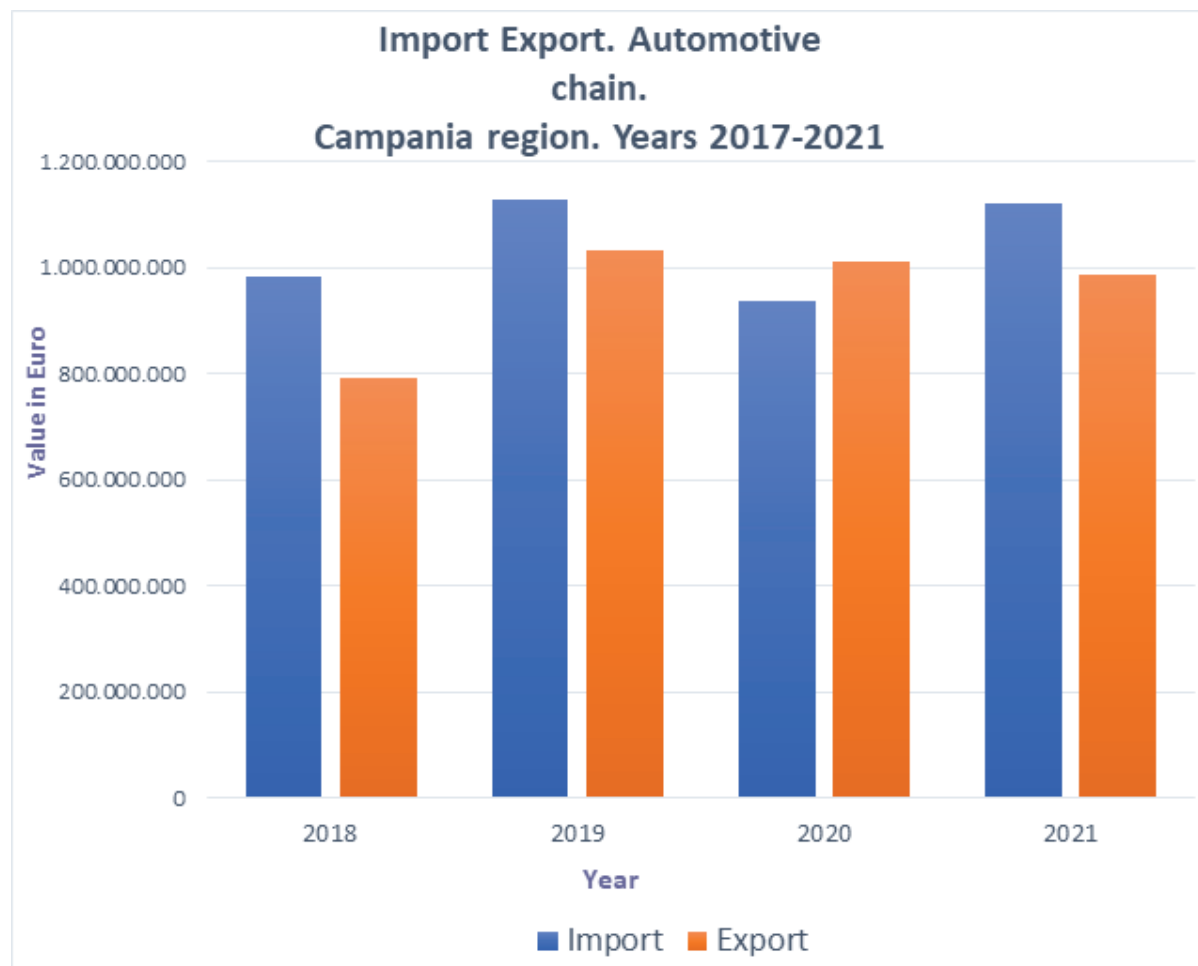
Tab. 5 - Import-Export value. Automotive Chain. Campania region. Years 2018 – 2021

	IMPORT				TREND IMPORT 2020-21	EXPORT				TREND EXPORT 2020-21	BALANCE IMPORT/EXPORT 2021
	2018	2019	2020	2021		2018	2019	2020	2021		
TOTAL	981.684.754	1.126.745.824	936.562.519	1.120.016.088	▲	790.015.663	1.030.715.842	1.009.530.294	987.600.721	▼	-132.455.367

Source: Coeweb Istat Data Warehouse foreign trade statistics. Cumulative data 2021



Fig. 4 - Import-Export value. Automotive Chain. Campania region. Years 2018 – 2021



Source: Coeweb Istat Data Warehouse foreign trade statistics. Cumulative data 2021





TRAINING AND INNOVATION FOR THE AUTOMOTIVE SUPPLY CHAIN IN CAMPANIA



TRAINING AND HUMAN RESOURCES



Campania boasts a large intangible cultural heritage of researchers and developed skills. This places the region in a position not far from other benchmark regions in terms of research and qualified training in the transport (Lombardia, Piemonte) and logistics (Piemonte, Liguria).

As far as courses provided by Higher **Technical Institutes** are concerned:
At the Istituto Tecnico Superiore Manifattura Meccanica, MA.ME. in Ercolano (NA):

01

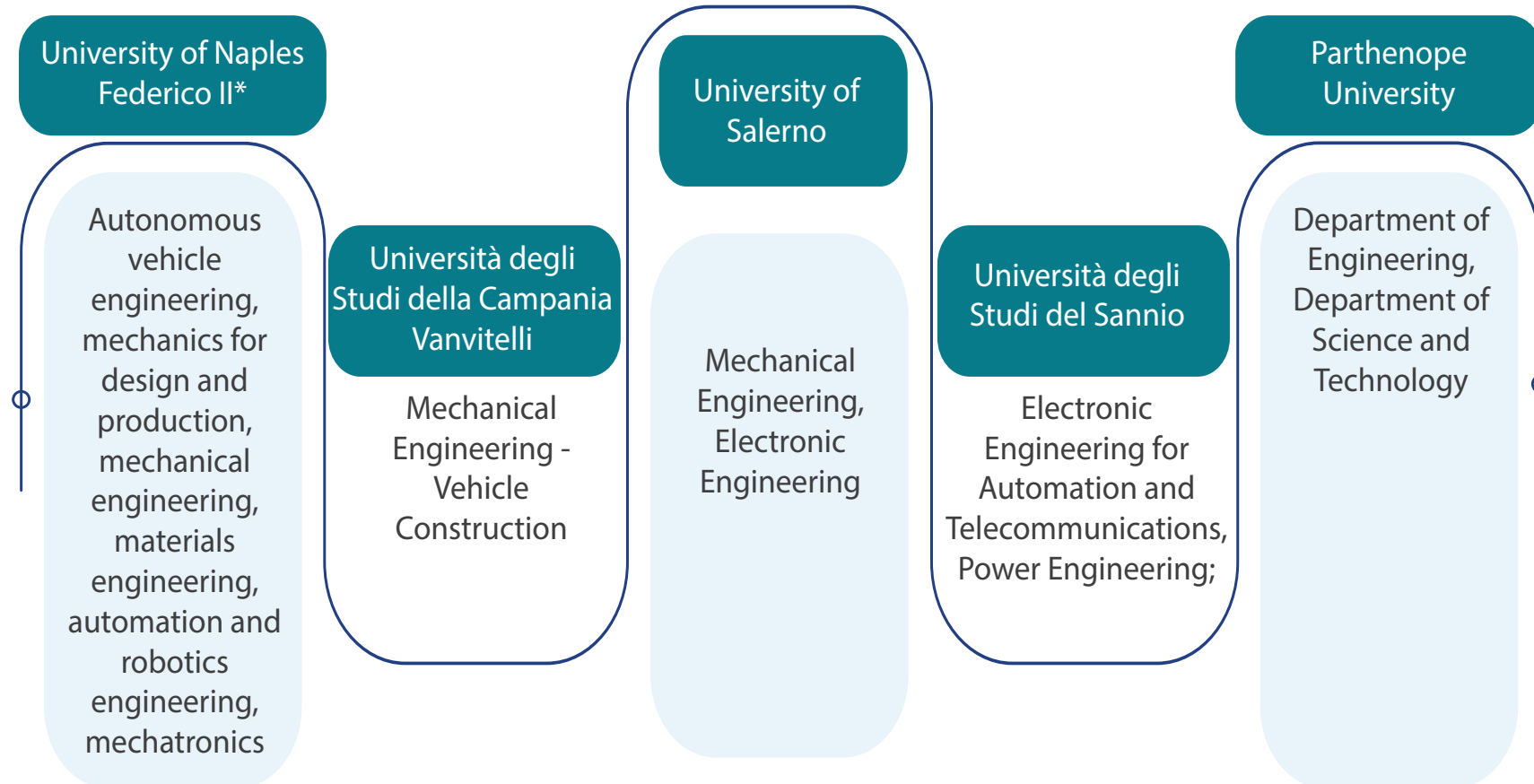
Superior technician for the innovation of mechanical processes and products.
Designer of composite structures for the automotive and aerospace industries

02

Higher technician for the innovation of mechatronic processes and products.
Automotive and aerospace production systems automation



With reference to university training, for illustrative purposes we list some courses provided by **universities in Campania**:



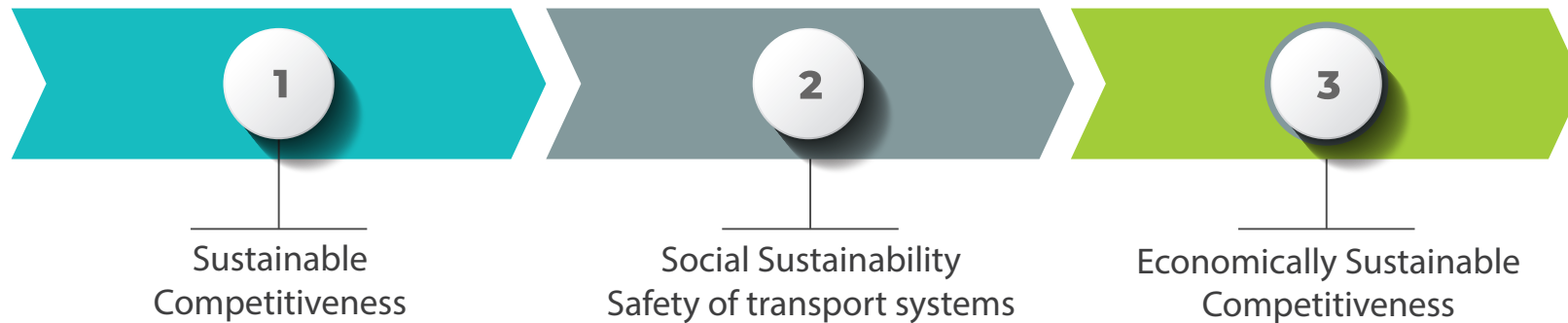
***FS Mobility Academy:** a high-level training course on mobility and integrated transport aimed at young graduates in engineering and economics, born from the partnership **between the FS Italian Group and the University of Naples Federico II**. The multidisciplinary course aims to train highly specialised professionals with a systemic vision in the field of integrated mobility, as well as to promote scientific research related to sustainability and methodologies and techniques for the development and management of intermodal transport systems.



RESEARCH CENTRES



The Fiat Research Centre (FRC) is an applied research centre for the automotive industry, based at the Pomigliano d'Arco plant; FRC develops research and innovation along the three main axes of sustainability



**CENTRO
RICERCHE
FIAT**

The FRC participates in the "European "Green Vehicle Initiative" and "Factories of the Future", the Public Private Partnerships that focus public and private research on topics of direct and significant relevance for Europe in relation to industry competitiveness and employment in the sector.



The Consiglio Nazionale delle Ricerche (CNR) is the largest public research institute in Italy. - In Campania, the CNR has several local research centres in projects related to the sector:

1

Istituto di Scienze Applicate e Sistemi Intelligenti 'Eduardo Caianiello' (ISASI), based in Pozzuoli (NA). The institute's research is transversal and applicable in various fields such as aerospace, cultural heritage, health, new materials, intelligent manufacturing processes, artificial intelligence, bioinspired systems and functionalised research.

2

Istituto di Scienze e Tecnologie per l'Energia e la Mobilità Sostenibili (STEMS)
based in Naples.

3

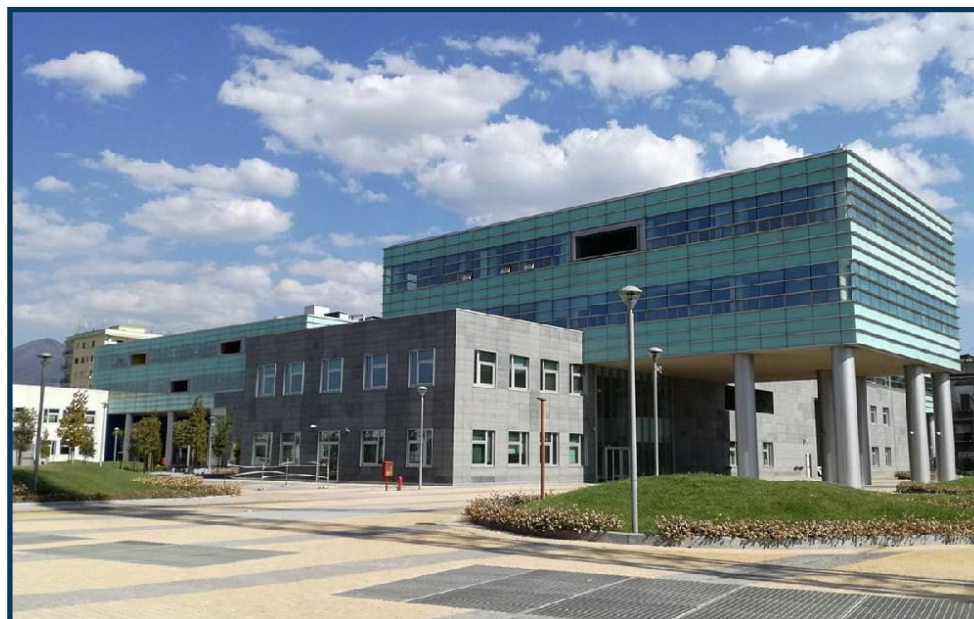
Institute for Mediterranean Studies (ISMed), based in Naples, which deals, among other research areas, with the project 'The strategic and operational management of sea-land logistics: supply chain analysis and integrated innovative solutions



COMPETENCE CENTRES



Campania Region is home to **MediTech**, Mediterranean Competence Centre 4 Innovation is the multiregional Competence Centre, active in Apulia and Campania, created as a facilitator of the adoption of the enabling technologies of Industry 4.0 by SMEs and the Public Administration and is a tool for the dissemination of culture and innovation practices in the production of goods and services in the national territory, particularly in the Mediterranean basin. Meditech counts on the collaboration of 5 universities in Campania, 3 universities in Apulia and 21 cutting-edge industrial players; the automotive sector is represented by Adler Plastic, Bosch Centro Studi Componenti Per Veicoli and Tecnologie Diesel.



CLUSTER & LEADERS



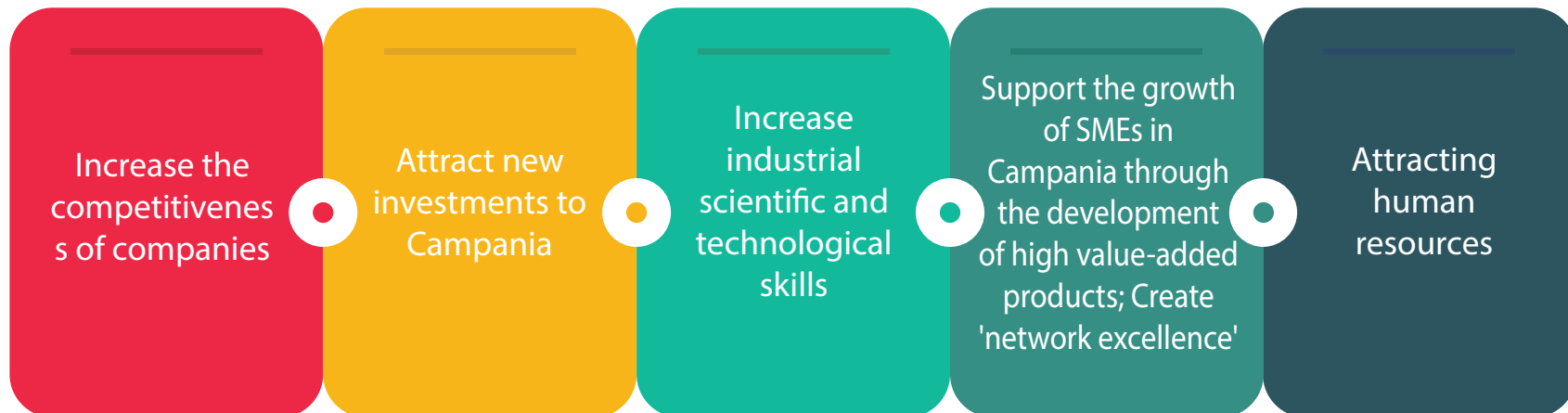
Dattilo Scarl

A limited liability consortium company with equal shares between the automotive and railway supply chains (38% each) and a 10% share of the logistics supply chain.

The members of Distretto DATTILO include the main industrial players in Campania for the automotive supply chain represented by the ANFIA association, which gathers the main road vehicle manufacturers, including large groups such as FIAT and Adler.

Dattilo's mission is to promote R&D, training and scientific dissemination activities in the advanced logistics, automotive and railway sectors.

DATTILO's mission in the area of surface transport (automotive, rail, logistics) is to:



Atena scarl

Atena is the High Technology District in the environment and energy sectors. It coordinates and supports participation in industrial research and experimental development programmes to attract resources and stimulate the advancement of the production system's level of technological competitiveness, creating new opportunities for industrialisation. It proposes interdisciplinary training paths that integrate research, higher education, innovation and competitiveness. It is an active part of a network of collaborations recognised at European and world level.

It unites companies, universities and research institutes for sustainable development.

Best Practice

Borgo 4.0

The Technology Platform for Sustainable and Safe Mobility Borgo 4.0 is a supply chain project promoted by ANFIA and realised with the involvement of a public-private partnership coordinated by the managing body ANFIA Automotive and consisting of 54 companies in the sector and 3 public Research Centres, with the participation of 5 Campania Universities and the CNR. By integrating research, development, innovation and technology transfer actions with the experimentation of new technologies for autonomous and connected driving, the project gives life, in the Irpinian village of Lioni (Avellino), to the first example in Italy of a technology experimentation laboratory in various complementary fields, where large and small companies in the automotive and telecommunications sectors work in synergy to develop new solutions, materials and intelligent components for the mobility of the future.

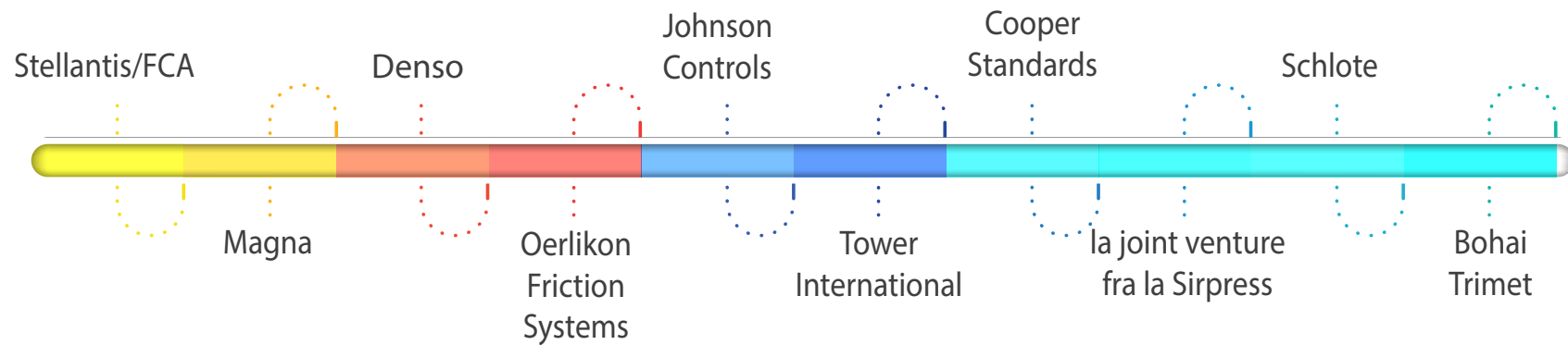




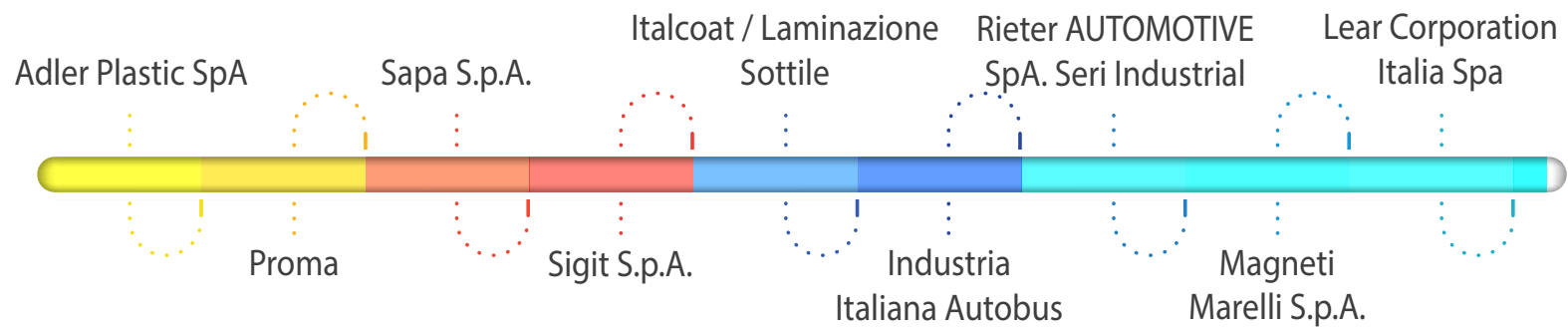
LEADING SECTOR COMPANIES PRESENT IN THE CAMPANIA REGION



Foreign companies



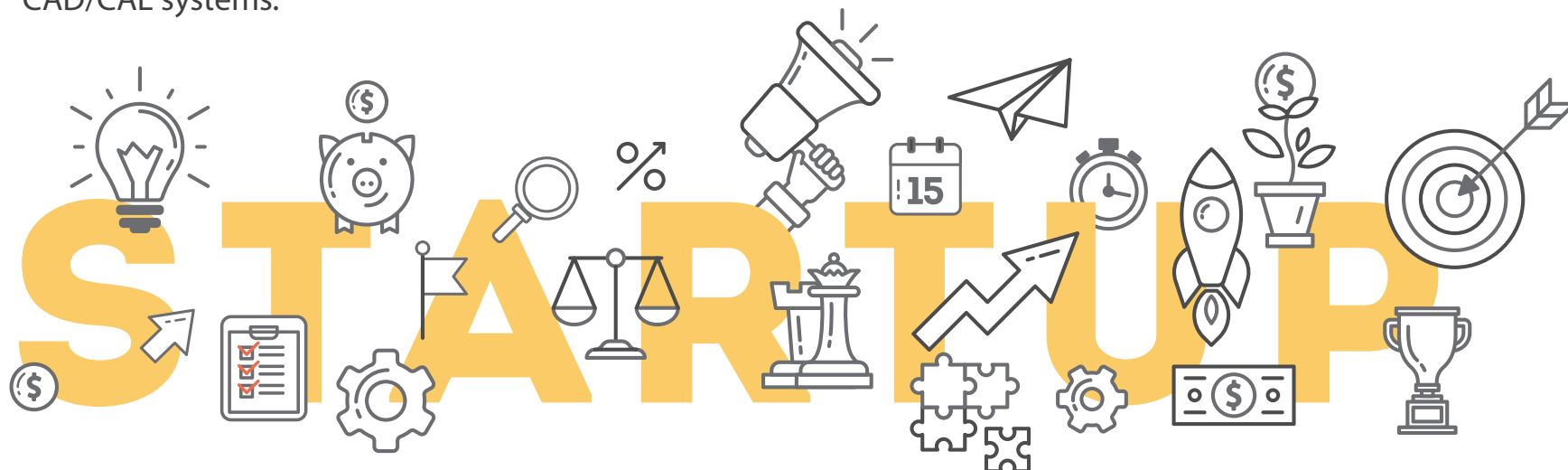
Italian companies



INNOVATIVE START-UPS AND SPIN-OFFS



Innovative start-ups are widespread throughout the territory, with a higher concentration in the cities of Naples and Caserta. **The birth of some of Campania's start-ups is due to the driving role of universities in technology transfer and the dissemination of innovation in the territory.** This is the case of several spin-off companies of the University of Salerno and the University of Naples, which originated in the various departments of Industrial Engineering and Transport Systems Engineering. The Campania spin-offs were born with different missions and, in line with trends in the automotive sector, they mainly deal with hybrid vehicles, with the aim of reducing consumption and emissions, and smart mobility, to develop innovative solutions linked to the connectivity trend. Specifically, the technologies developed by the Campania-based start-ups are many and range from energy conversion (be it electric, wind, photovoltaic or solar energy), to the use of 2D sensors, 3D and 3D printing, Vehicle Dynamics research, quasi-Monte Carlo simulations, Global Sensitivity Analysis, Multi-Agent MCDM Analysis, Hydrogen propulsion systems, V2V - Vehicle-to-Infrastructure, Hybrid, CAD/CAE systems.



MegaRide, the automotive start-up born as an academic spin-off of the Department of Industrial Engineering of the Federico II University and among companies of the Campania NewSteel incubator. In 2021, the company won the **14th edition of the Italian Master Startup Award**, a prize promoted by the **Italian Association of University Incubators** PNICube. In October 2022 it won the first edition of the Innovation section of the historic Barsanti and Matteucci Award, which has recognised excellence in the automotive industry since 2000,

eProInn s.r.l. (Energy and Propulsion Innovation): Spin-Off University of Salerno and ProLab (Department of Industrial Engineering). ProInn is also a partner of the start-up **Mazzanti Automotive Testing & Innovation Lab**, which was set up by **Mazzanti Automobili** (a leader in the Italian high-performance car sector with the production of handcrafted supercars, designed and built 'tailor-made' for the customer) and whose goal is innovation in the high-performance car sector.

The start-up Mazzanti Automotive Testing & Innovation Lab was formed in August 2020 and sees the union of Mazzanti with several companies from Campania, in addition to eProInn: ePowerIng, a spin-off from the University of Salerno specialising in the development of cutting-edge engineering solutions; NetcomGroup, a consulting company providing advanced and innovative engineering services; and **Bruno & Partners**, a company of business consultants.

