



# FROM CONCEPT TO CAR

The complete automotive district

Forum Global Automotive Suppliers Expo  
Stuttgart, June 13, 2012



CAMERA DI COMMERCIO  
INDUSTRIA ARTIGIANATO E AGRICOLTURA  
DI TORINO

TORINO  
2015  
9<sup>TH</sup> WORLD  
CHAMBERS  
CONGRESS  
B I D



CENTRO ESTERO INTERNAZIONALIZZAZIONE  
PIEMONTE *Agency for Investments, Export and Tourism*  
Promoted by Regione Piemonte and Chambers of Commerce



PIEMONTE: THE COMPLETE AUTOMOTIVE DISTRICT

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**100%**  
designed in Piemonte

*Ferrari 430 (Pininfarina)*



**100%**  
designed in Piemonte

*Fiat 500c Abarth*



**100%**  
designed in Piemonte



**100%**  
designed in Piemonte  
*Bluecar (Pininfarina)*

# Automotive cluster

## Piemonte automotive cluster



From Concept to Car

# Initiative

From Concept to Car (FCTC) provides foreign buyers with valuable support in outsourcing activities. It offers the opportunity to contact over **150 high-level suppliers**, chosen from over 1,400 companies on the strength of their technical, qualitative and logistic capabilities.

## Best International Project 2009

6th World Chambers Congress



From Concept to Car

# Ownership & Management

## Project Owner



## Torino Chamber of Commerce

- + 200,000 member companies
- + Services to foster the local economy

## Project Management



## PIEMONTE Agency

- + International experience since 1976
- + 100 professionals

The reference point to find:

-  Business opportunities and suppliers in the area
-  A quality business destination

# Team

## A dedicated team

- + 8 full-time professionals
- + 18 contact offices worldwide
- + 3 consultants abroad

## Provides free-of-charge support to international vehicle manufacturers and Tier 1s in:

- + Finding top potential suppliers
- + Organizing B2Bs, in Torino or abroad
- + Coordinating collection of RFQs
- + Ensuring smooth communications
- + Investing in Torino

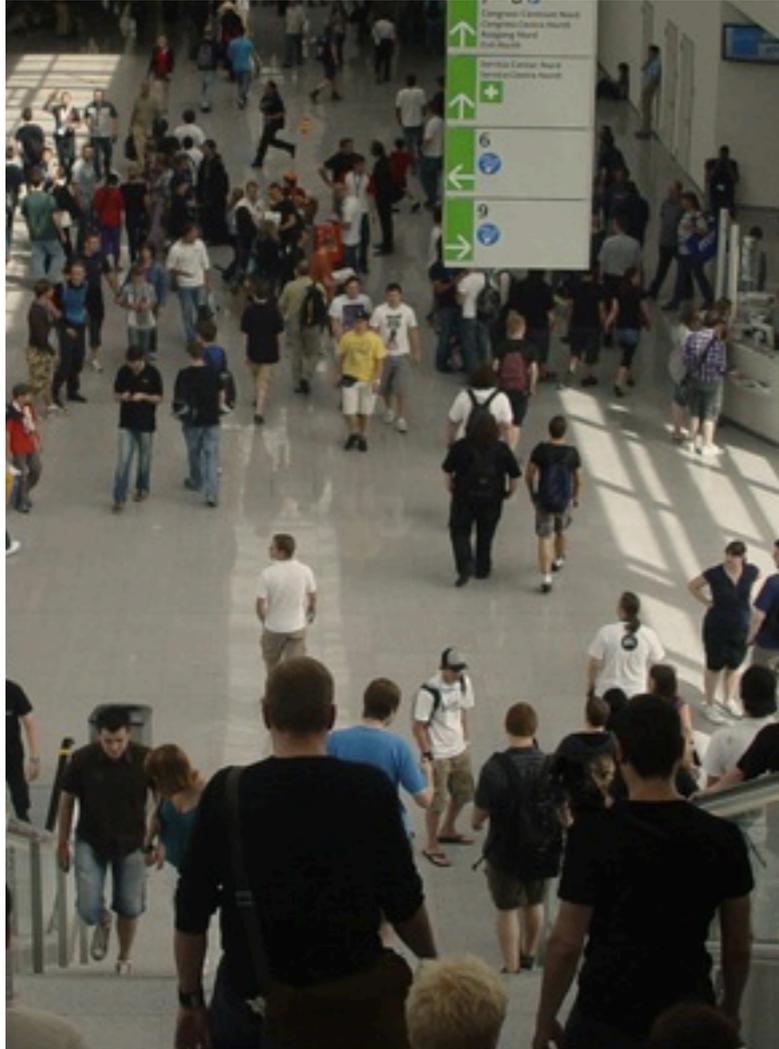
# Participants

## Selection criteria

- + Core business in automotive
- + Language knowledge
- + Quality certification
- + Technical and technological know-how
- + Innovation capability



# Achievements



+ Save money in scouting



+ Save effort in screening



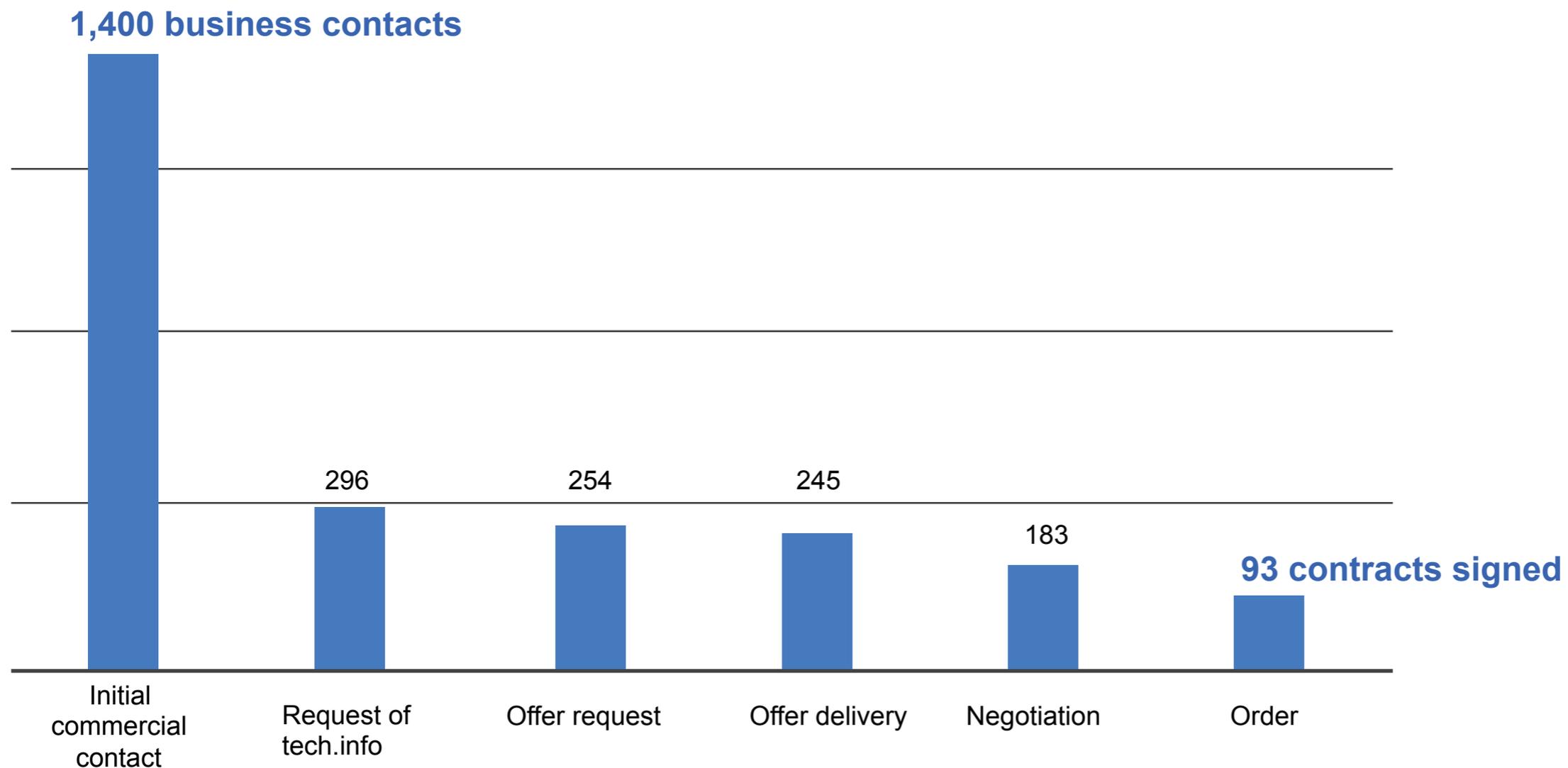
+ Save time in organizing  
B2B activities

# Facts and figures

## FCTC sales funnel 2003-2011

+ 90 million € turnover (generated + expected)

+ 7 million € of public investment



From Concept to Car

# Our reach



# Innovation avenues

- + Powertrain: diesel & hybrid engines
- + E-mobility: vehicles, ITS and infrastructure
- + New materials: plastic and rubber
- + New technologies in production: flexibility and energy efficiency

From Concept to Car

# Powertrain diesel & hybrid engines

Recognized world-wide as powerhouse for engine development, especially diesel engines.

Reaching to key market players present in the region:



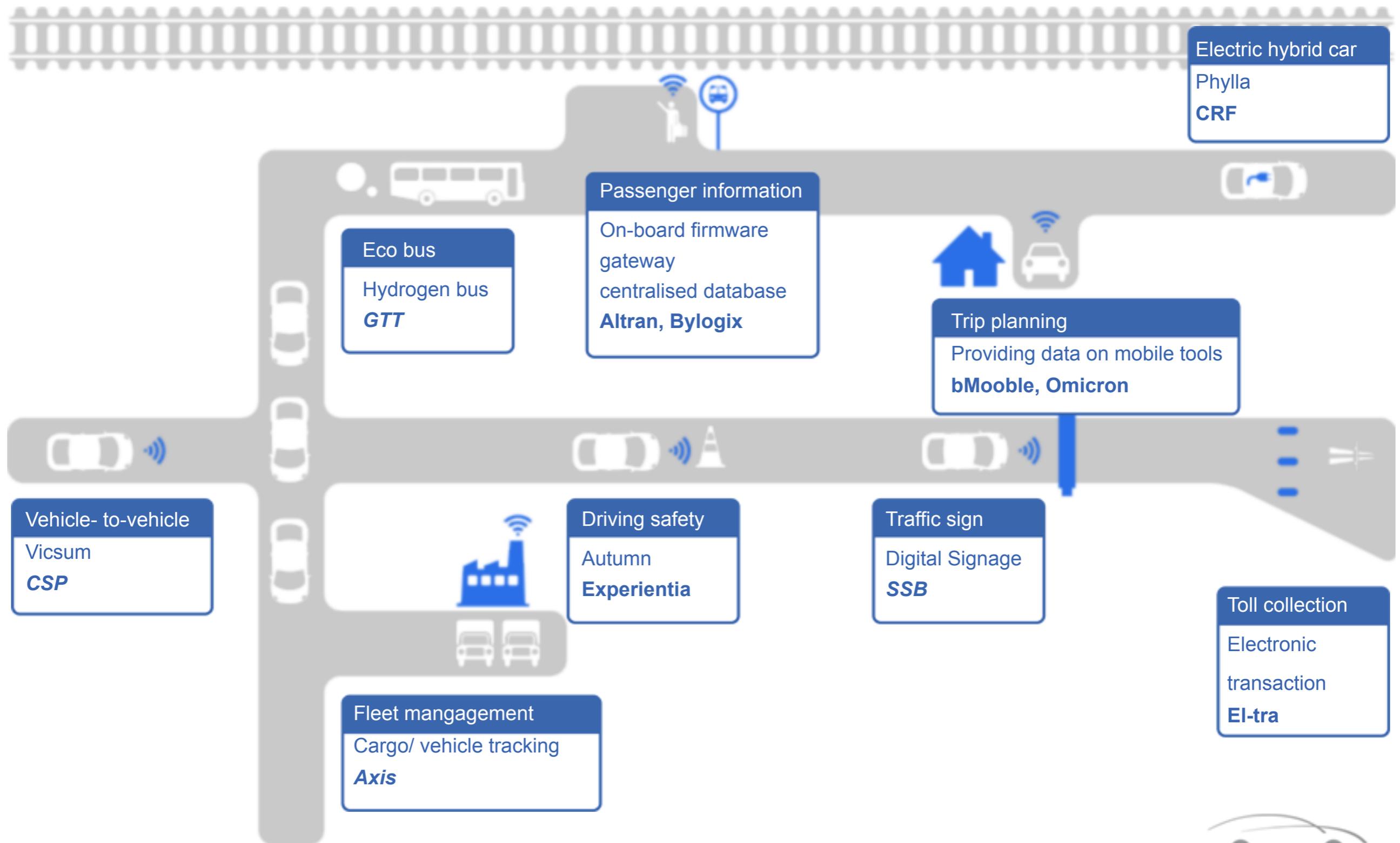
# Powertrain diesel & hybrid engines

Key industry players success is based on the support of a pool of local companies specialized in:

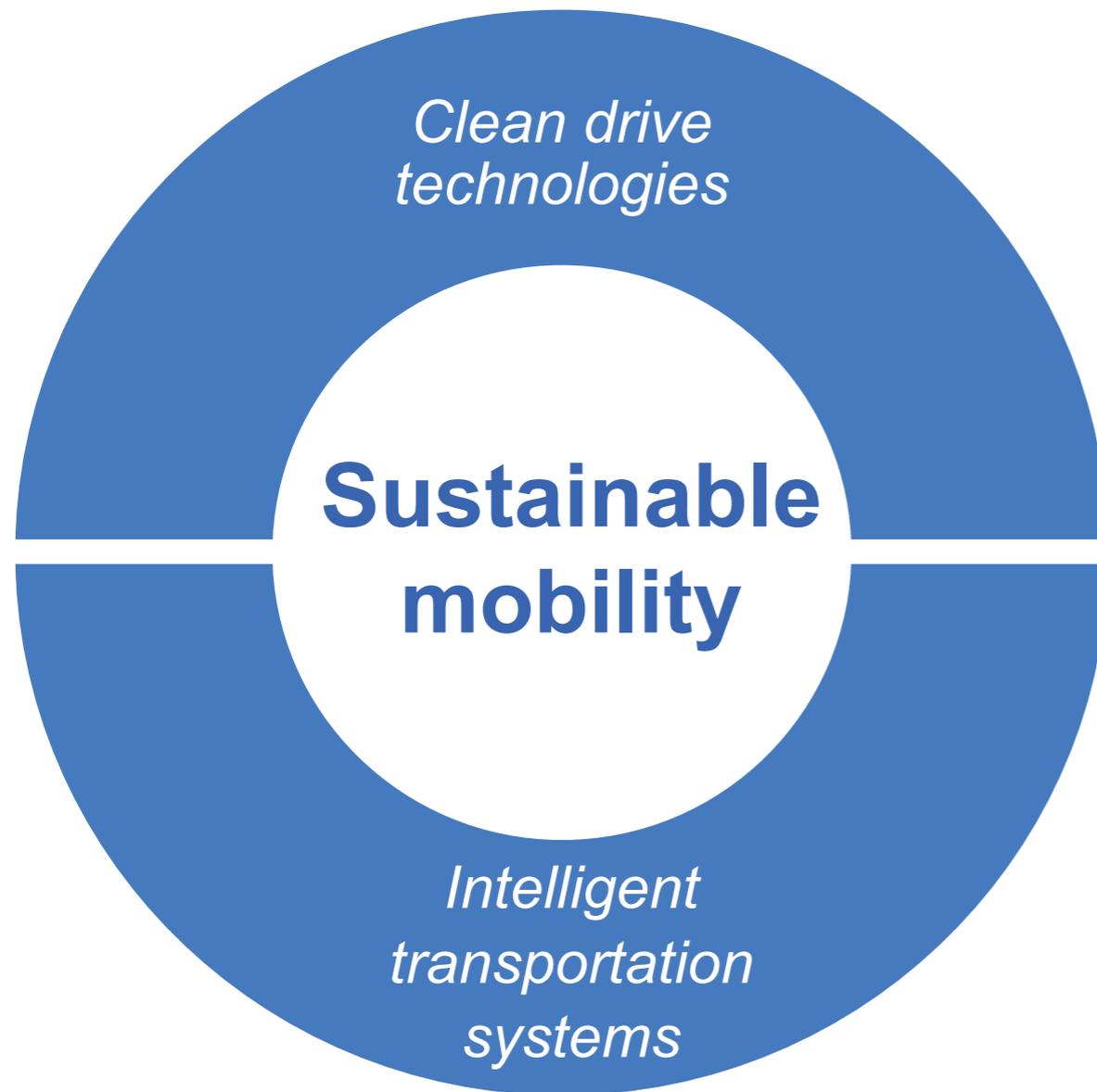
- + Engineering
- + Prototyping
- + Testing
- + Equipment
- + Manufacturing



# e-mobility ecosystem



# e-mobility ecosystem



- + Natural gas technology
- + Fuels and energy
- + Hybrid fuel cell
- + Electric drive
- + Hybrid drive

- 
- + Road management
  - + Traveller information
  - + Demand management
  - + Incident and hazard response
  - + Electronic financial transactions
  - + Commercial vehicle management
  - + Public transportation management

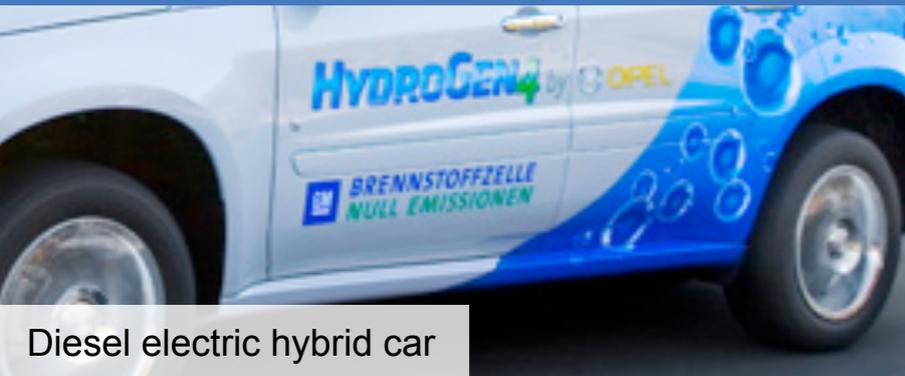
# Clean drive technologies

The term refers to the family of technologies that contribute to reducing or eliminating the emissions related to using transportation means.

By extension, they include those technologies that make vehicles lighter, more effective and safer.

# Clean drive technologies

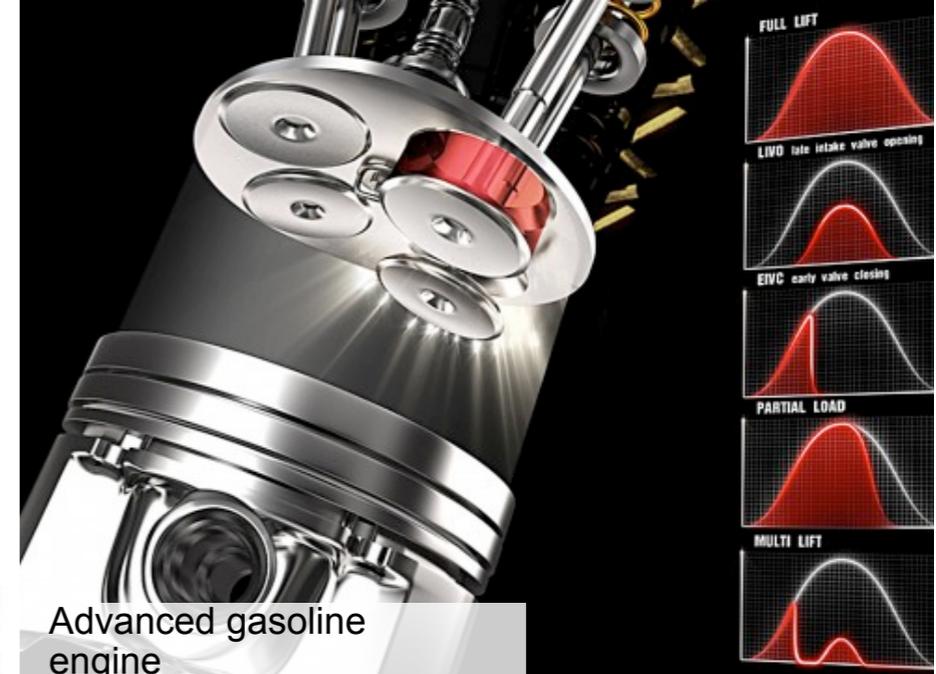
The most advanced solution



Diesel electric hybrid car



Advanced diesel engine



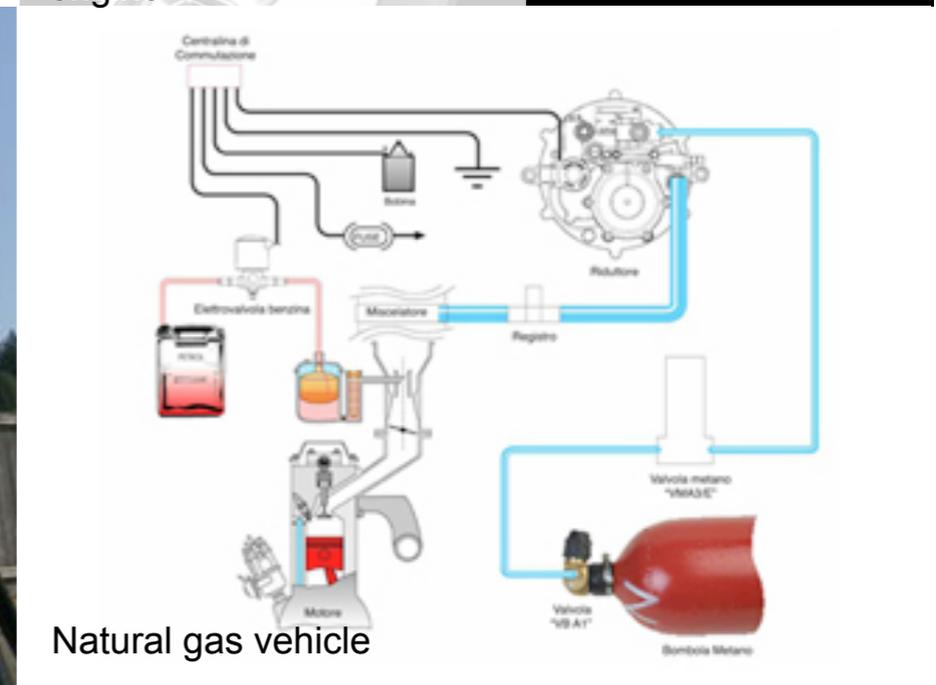
Advanced gasoline engine



Fuel cell



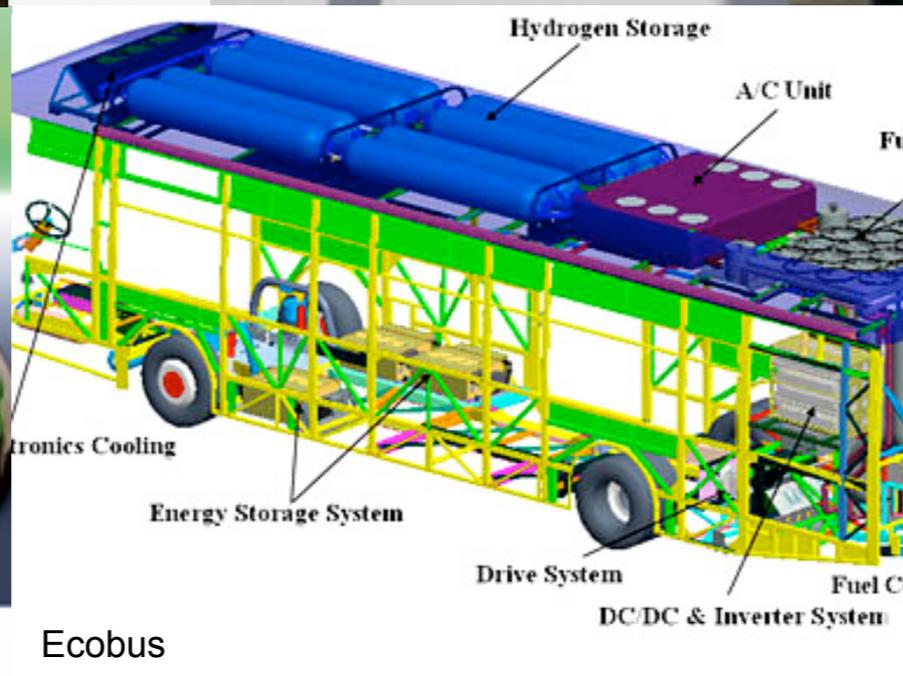
Biofuel



Natural gas vehicle



Innovative car layout



Ecobus



Electric hybrid car

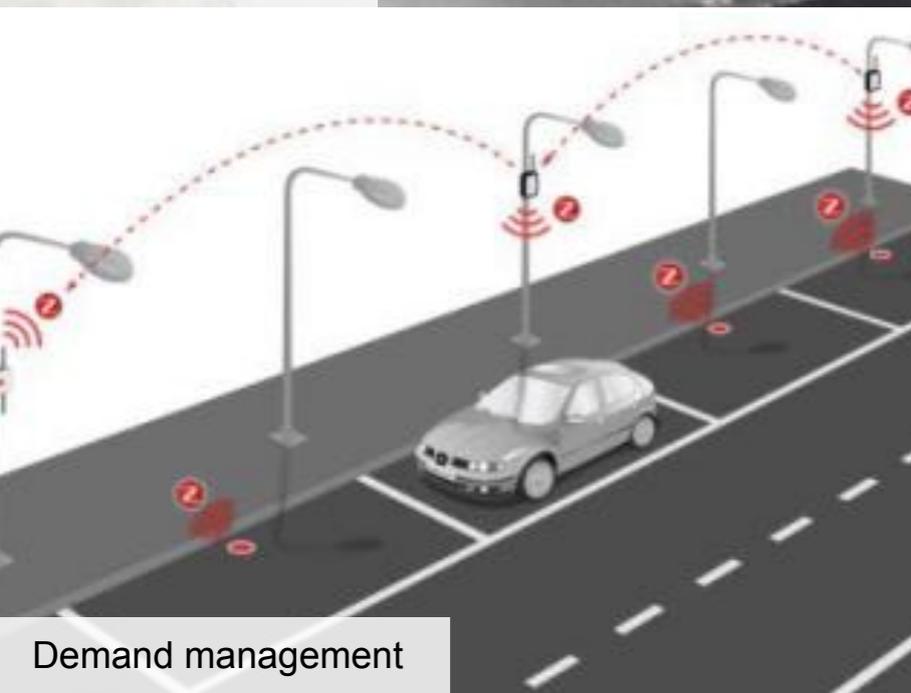
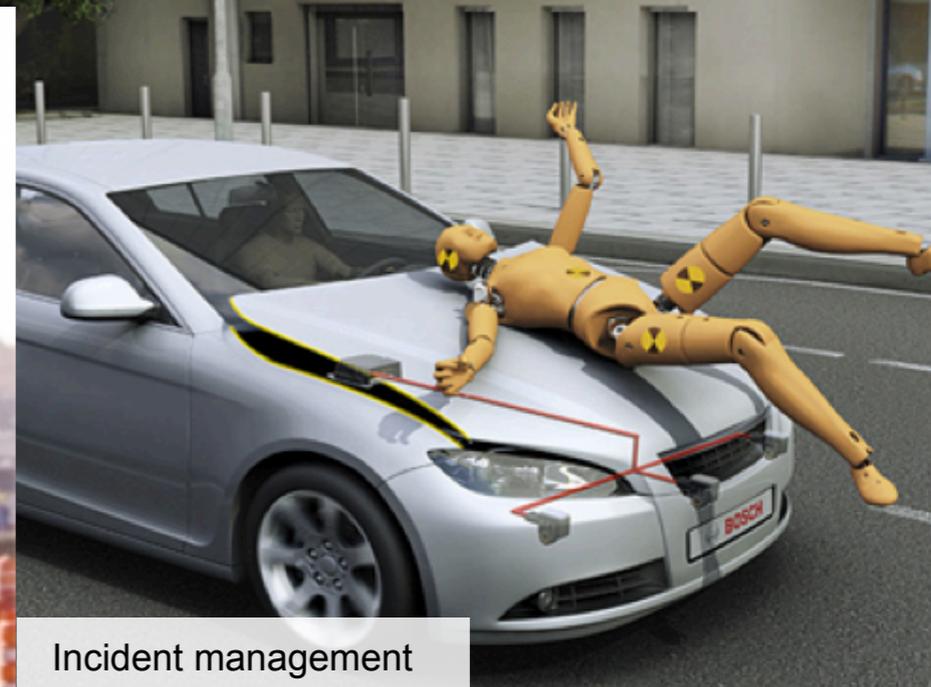
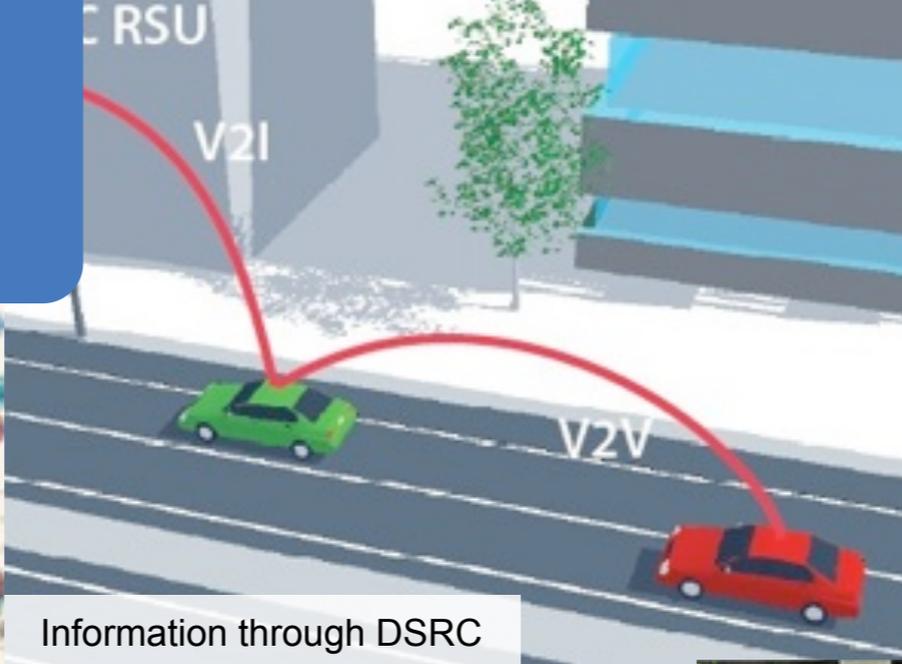
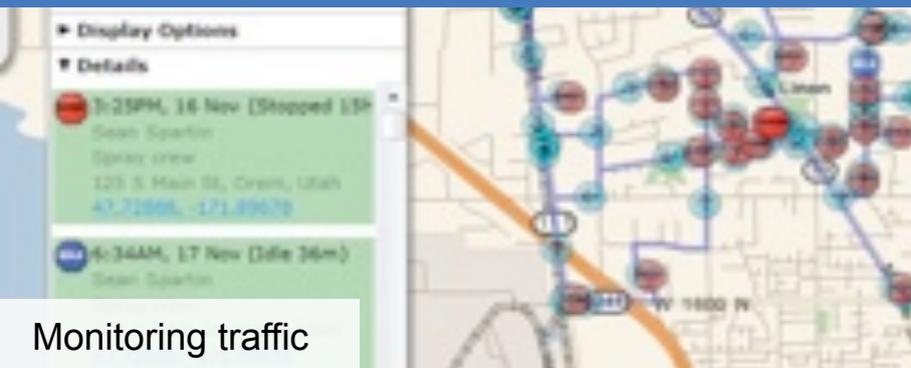
# Intelligent Transportation System (ITS)

The term ITS refers to efforts to use information and communications technology to find solutions to the transportation problem.

It leverages electronics, communications, and information processing technologies to improve all facets of transportation.

# ITS

An integrated offering



# e-mobility and innovation

- + 30 companies are working on EV/HV development with own projects or with OEMs
- + 25% companies are developing innovative products/technologies
- + Cooperation activities between FCTC and European Clusters for joint innovative projects  
(Mov'eo, Pôle du Vehicule du Future, Bayern Innovativ)

# Other important projects

+ Hysyrider (2006)

+ A-Trix (2007)

+ H-due (2008)

+ H-ergo (2009)

+ PHYLLA (2009)

Green-car technologies with  
photovoltaic solar cells and  
hydrogen fuel



Hysyrider



A-Trix



H-due



H-ergo



Phylla

# New materials & technologies

## Materials

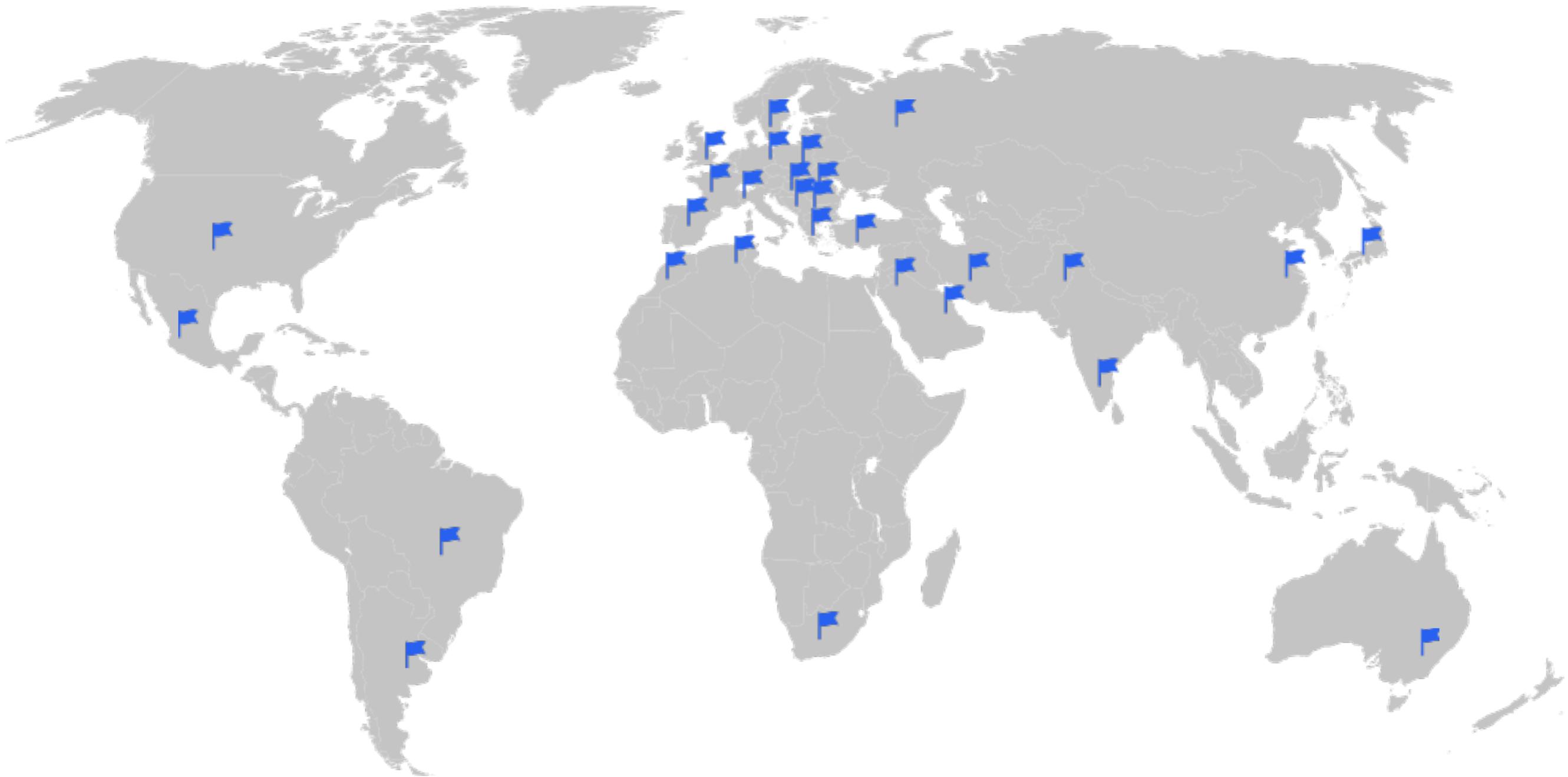
- + New sound damping material
- + Plastic substituting steel
- + Plastic components for cost and weight reduction
- + Composite materials

## Technologies

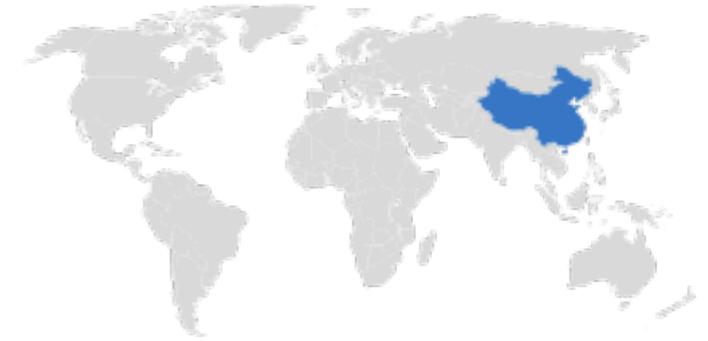
- + New production technologies
- + New testing mechanisms

From Concept to Car

# Worldwide presence



# Presence in P.R.China



- + Since 2008 FCTC desk in Hefei
- + Since 2011 FCTC desk in Changchun
- + Since 2011 two Chinese OEMs representative based at PIEMONTE Agency



20 companies with offices and plants in China:

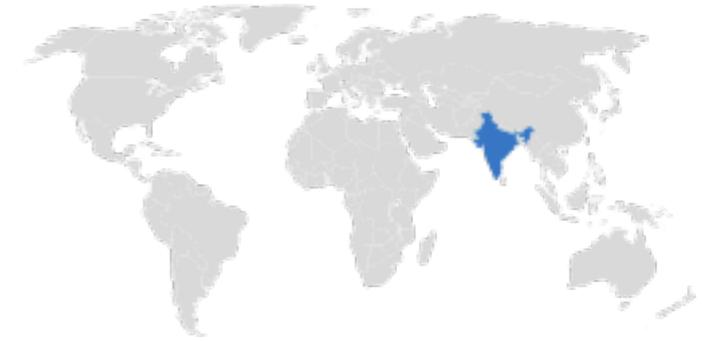
- + 5 Styling and engineering suppliers
- + 4 Automation and production equipment manufacturers
- + 11 OE components manufacturers  
(electric/electronics, engines, suspension, transmission, exteriors)

# Presence in P.R.China



Company	Ownership	Representative	R&D	Sales	Logistic	Production
ABB SpA	Own	-	Yes	Yes	Yes	Yes
Bitron SpA	Own	-	Yes	Yes	Yes	Yes
Blue Engineering SRL	Joint Venture	-	Yes	-	-	-
Comau SpA	Own	Yes	Yes	Yes	Yes	Yes
Comau SpA PWT Machining & Assembly	Own	Yes	Yes	Yes	Yes	Yes
Eltek SpA	Joint Venture	-	-	-	Yes	-
Fibet SpA	Own	-	Yes	Yes	Yes	Yes
Fonderie 2A SpA	Own	-	-	-	-	Yes
Gefit SpA	Joint Venture	-	Yes	Yes	-	Yes
Idea Institute SpA	Own	-	Yes	Yes	Yes	Yes
Mecaprom TCO Italia SRL	Own	-	Yes	Yes	-	-
Meccanotecnica Umbra SpA	Own	-	-	-	-	Yes
Mollificio Valli SRL	Joint Venture	-	-	Yes	-	Yes
Ocap SpA	Own	-	-	Yes	-	Yes
Oerlikon Graziano SpA	Own	-	-	Yes	Yes	Yes
Pininfarina SpA	Own	Yes	-	-	-	-
Rototech SRL	Own	-	-	-	-	Yes
Sila Holding Industriale SpA	Own	-	-	-	Yes	Yes
Tecnocad Progetti SpA	Own	-	-	Yes	-	-
Zanini	Own	-	-	Yes	Yes	Yes

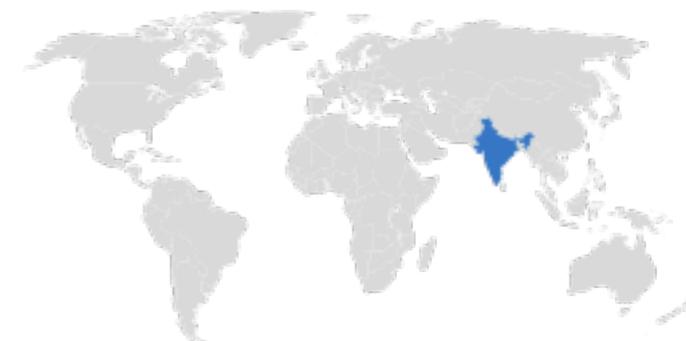
# Presence in India



18 companies with offices and plants in India:

- + 3 Styling and engineering suppliers
- + 1 Automation and production equipment manufacturers
- + 14 OE components manufacturers  
(engines, exhaust, suspension, transmission, interiors, exteriors)

# Presence in India



Company	Ownership	Representative	R&D	Sales	Logistic	Production
Beestudio SAS	Joint Venture	-	Yes	-	-	-
Comau SpA	Own	Yes	-	Yes	Yes	Yes
Cornaglia SpA	Joint Venture	-	-	-	Yes	Yes
Cultraro Automazione Engineering SRL	Joint Venture	-	-	-	-	Yes
Dott. Gallina SRL	Joint Venture	-	-	Yes	Yes	Yes
Fonderie 2A SpA	Joint Venture	-	-	-	-	Yes
General Cab SRL	Own	-	-	Yes	Yes	Yes
Idea Institute SpA	Joint Venture	-	Yes	-	-	Yes
M.T.M. SRL	Joint Venture	Yes	-	Yes	Yes	Yes
MA SpA	Joint Venture	-	-	-	-	Yes
Mecaprom TCO Italia SRL	Own	-	Yes	Yes	-	Yes
Meccanotecnica Umbra SpA	Joint Venture	-	-	-	-	Yes
OCAP SpA	Own	-	Yes	Yes	Yes	Yes
Oerlikon Graziano SpA	Own	-	Yes	Yes	Yes	Yes
Officine Meccaniche Piemontesi SRL	Own	-	-	-	-	Yes
Saturno SpA	Joint Venture	-	-	Yes	Yes	Yes
Sila Holding Industriale SpA	Joint Venture	-	-	-	Yes	Yes
Zanini SpA	Joint Venture	-	-	Yes	Yes	Yes

# Presence in Russia



10 companies with offices and plants in Russia:

- + 1 Styling and engineering suppliers
- + 3 Automation and production equipment manufacturers
- + 6 OE components manufacturers  
(engine, transmission, interiors)
- + 12 companies have partnership agreements and concrete plans for localisation in short-medium term  
(exhaust, transmission, electric/electronics, interiors, exteriors)

# Presence in Russia



Company	Ownership	Representative	R&D	Sales	Logistic	Production
Av-El SpA	Own	-	-	Yes	-	Yes
Comau SpA	Own	Yes	-	Yes	-	-
E. Sassone SRL	Joint Venture	Yes	-	Yes	Yes	-
Fonderie 2A SpA	Joint Venture	-	-	-	-	Yes
Gefit SpA	Own	-	-	Yes	Yes	-
MA SpA	Own	-	-	Yes	Yes	Yes
Mecaprom TCO Italia SRL	Own	-	Yes	Yes	-	-
Saturno SpA	Joint Venture	-	-	Yes	Yes	Yes
Sigit SpA	Joint Venture	-	-	Yes	Yes	Yes
Six Tau SpA	Joint Venture	-	-	-	Yes	Yes

# Presence in NAFTA



12 companies with offices and plants in NAFTA area:

- + 3 Automation and production equipment manufacturers
- + 9 OE components manufacturers  
(engines, suspension, transmission, interiors)

# Presence in NAFTA



## USA

Company	Ownership	Representative	R&D	Sales	Logistic	Production
ABB SpA	Own	-	Yes	Yes	Yes	Yes
CO.MEC SRL	Own	-	-	Yes	-	-
Comau SpA PWT MACHining & Assembly	Own	Yes	Yes	Yes	Yes	Yes
Dott. Gallina SRL	Own	-	-	Yes	Yes	Yes
Eltek SpA	Own	-	-	Yes	Yes	Yes
GEFIT SpA	Own	-	Yes	Yes	-	-
Meccanotecnica Umbra SpA	Own	-	-	-	-	Yes
MPE SRL	Own	-	-	Yes	Yes	Yes
Oerlikon Graziano SpA	Own	-	-	Yes	-	-
Sistemi Sospensioni SpA	Own	-	Yes	Yes	Yes	Yes

## Mexico

Company	Ownership	Representative	R&D	Sales	Logistic	Production
MPE SRL	Own	-	-	-	Yes	Yes
Saturno SpA	Joint Venture	-	Yes	-	Yes	Yes

# Presence in Mercosur



18 companies with offices and plants in Mercosur area:

- + 3 Styling and engineering suppliers
- + 2 Automation and production equipment manufacturer
- + 13 OE components manufacturers  
(electric/electronics, suspension, interiors, exteriors)

# Presence in Mercosur



## Brazil

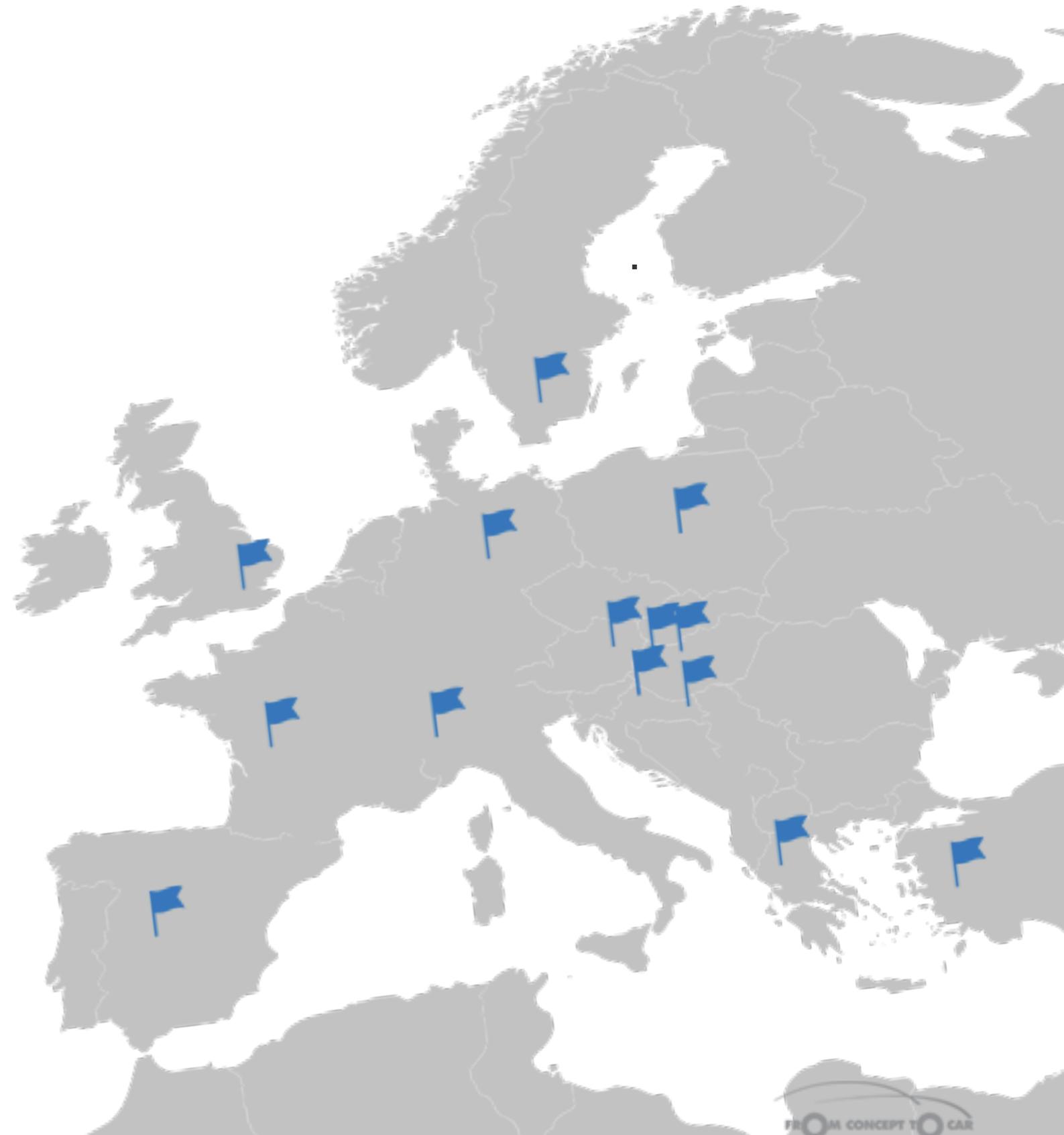
Company	Ownership	Representative	R&D	Sales	Logistic	Production
Bitron SpA	Joint Venture	-	Yes	Yes	Yes	Yes
Eltek SpA	Own	-	-	-	-	Yes
Idea Institute SpA	Joint Venture	-	Yes	-	-	Yes
M.T.M. SRL	Own	Yes	-	Yes	-	-
MA SpA	Own	-	-	-	-	Yes
Mecaprom TCO Italia SRL	Joint Venture	-	Yes	Yes	-	Yes
Meccanotecnica Umbra SpA	Own	-	-	-	-	Yes
OLSA SpA	Joint Venture	-	Yes	-	-	Yes
SILA Holding Industriale SpA	Own	-	-	-	-	Yes
Simpro	Own	-	-	Yes	Yes	-
Sistemi Sospensioni SpA	Own	-	Yes	Yes	Yes	Yes
Six Tau SpA	Own	-	Yes	Yes	Yes	-
Step SpA	Own	-	Yes	-	-	-
Zanini SpA	Own	-	-	Yes	Yes	Yes

## Argentina

Company	Ownership	Representative	R&D	Sales	Logistic	Production
A. Benvenuta SpA	Own	-	-	-	-	Yes
MA SpA	Own	-	-	-	-	Yes
M.T.M. SRL	Own	Yes	-	-	-	Yes
SILA Holding Industriale SpA	Own	-	-	-	Yes	Yes

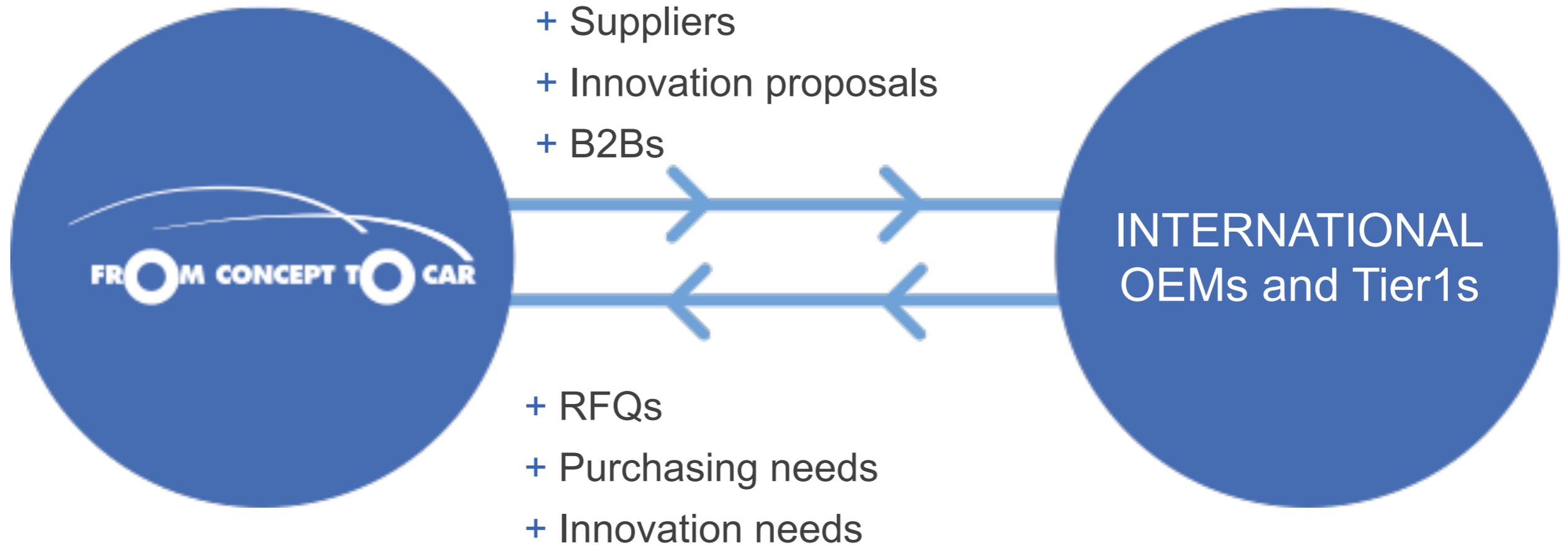
# Presence in Europe

Country	Companies present
Bulgaria	1
France	9
Germany	4
Greece	1
Hungary	5
Poland	16
Romania	4
Serbia	2
Slovakia	5
Spain	4
Sweden	4
U.K.	3



# Cooperation opportunities

## Mutual benefits



# Cooperation opportunities

## Turnkeys

Connection with skills from other clusters



**Mechatronics**



**ICT services**



**Sustainability**



**Aerospace**

Access to financial tools and technical support for investments in Piemonte





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ARRIVEDERCI A TORINO