

Social Dialogue for the Future of Manufacturing



Industry 4.0 in Italy

The national plan

"Industria 4.0" national plan

2017-2020 Strategic guidelines



Key guidelines

Complementary guidelines



Innovative investments

- Stimulate **private investments** in new equipment and I4.0 transformation
- Increase **private expenditure in R&D**
- **Patent Box** to spur investment in intangible assets
- **New corporate finance** (non bank lending, VC and PE) for better allocation of capital to innovative firms



Skills

- Spread the I4.0 culture through "*Scuola Digitale*"¹ and "*Alternanza Scuola Lavoro*"¹
- Develop I4.0 skills through **Industrial PhDs** and **professional education**: "*Istituti Tecnici Superiori*"²
- Create **Competence Centers** and network of Digital Innovation Hubs
- **National Skill Strategy** with OECD



Enabling Infrastructures

- Ensure adequate network infrastructure – Ultra Broadband Plan with a "**Fiber to the factory**" approach
- Cooperate in the definition of IoT open **standards and interoperability criteria**



Public instruments at support

- Attract FDI and support large investments in 4.0
- Reinforce and support internationalization of Italian companies
- Strengthen the **productivity-salary taxation exchange** through lower taxation on "productivity benefits", negotiated in decentralized bargaining



Governance and awareness

- Generate interest on I4.0 opportunities and create a public-private governance

1. Work-related learning; 2. Italian professional institutes

Resources

Innovative Investments

+ 10 billion €

Private investments increase from 80 to 90 Bn € in 2017

+ 11,3 billion €

of private spending on R&D&I with focus in 4.0 technologies in 2017-2020

+2,6 billion €

Volume of early stage private investments mobilized in 2017-2020

Competences

200 000

University students and **3000** managers specialized on 4.0 themes

+100% students enrolled in Technical Institutes on 4.0 themes

~ 1,400

PhD with focus on 4.0 (vs. ~ 5,000 foreseen in NRP)

+ a number of

National competence centres

Enabling infrastructure

100%

of Italian companies with 30 Mbps coverage by 2020

50%

Of Italian companies with 100Mbps coverage by 2020

6 consortia

For IoT standards in addition to institutional tables starting from 2017

Public support tools

+0,9 billion €

Central guarantee fund reform and refinancing for 2017

+1 billion €

Development contracts focused on 4.0 investments

+0,1 billion €

Strong investments in digital chains for sale (Piano made in Italy)

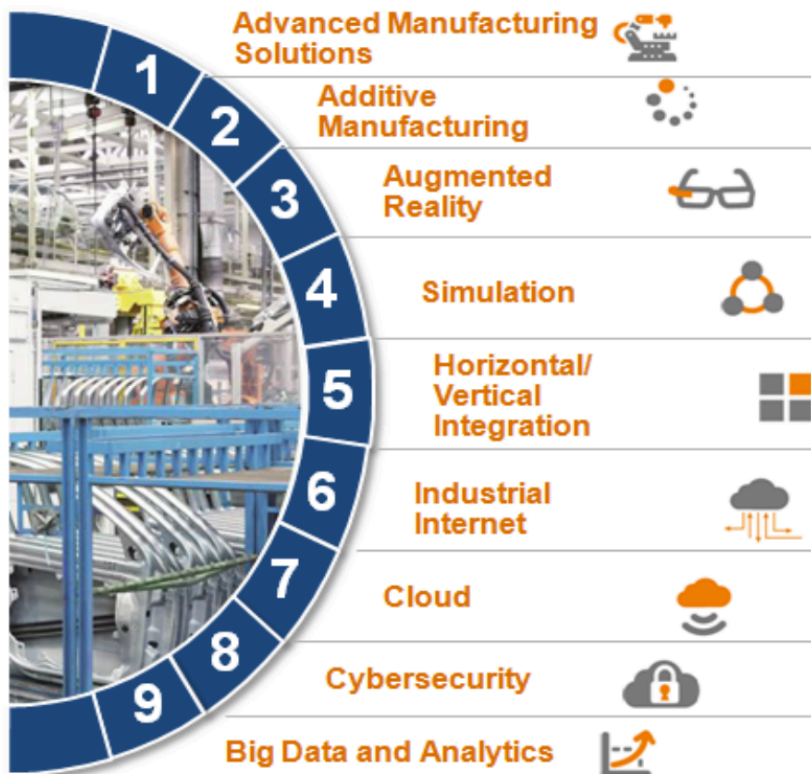
Salary exchange – productivity by RAL increase

Fiscal initiatives



Hyper-Depreciation and Super-Depreciation schemes

Innovative investments



Advantages in plan

Hyper-Depreciation

- Increase of rate for I4.0 investments

As is

140%



To be

250%

Super-Depreciation

- 1 year extension of the Super-Depreciation with a fixed rate (**140%**)
- extension to immaterial assets like software

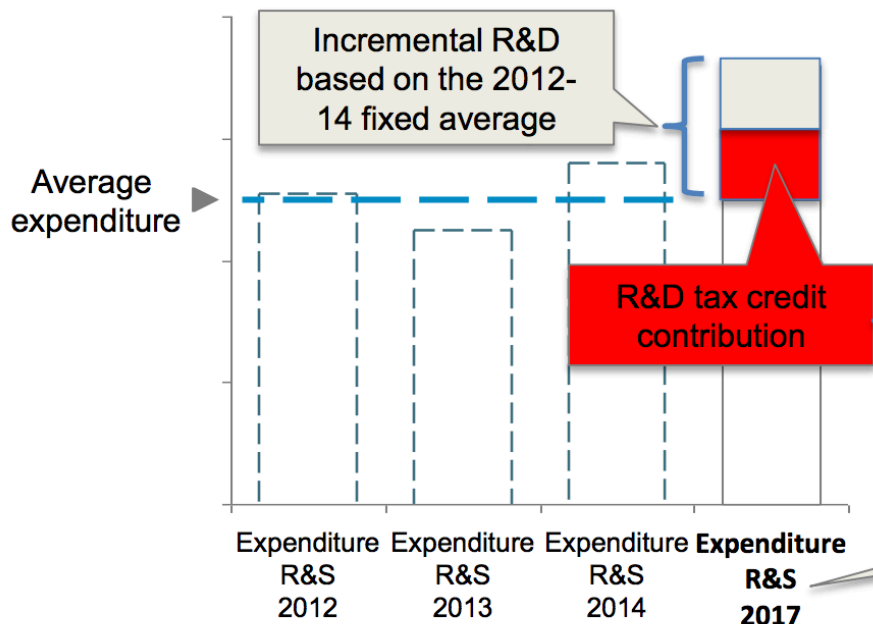
Deadline

- In order to guarantee a high appeal of Hyper and Super-Depreciation schemes, item delivery date is prolonged to **30/06/18**; however the order and a >20% deposit have to be placed within 31/12/17

Tax credit for research and development and innovation expenditures



Research and development and innovation expenditure – '17 example



Tax Credit calculation

	2016		2017
Credit for intramural expenditure	25%	↑	50%
Credit for extramural expenditure	50%	→	50%
Maximum tax benefit per taxpayer	5 €M	↑	20 €M

R&D tax credit regime valid until 2020



Digital Innovation Hubs and I4.0 Competence Centers

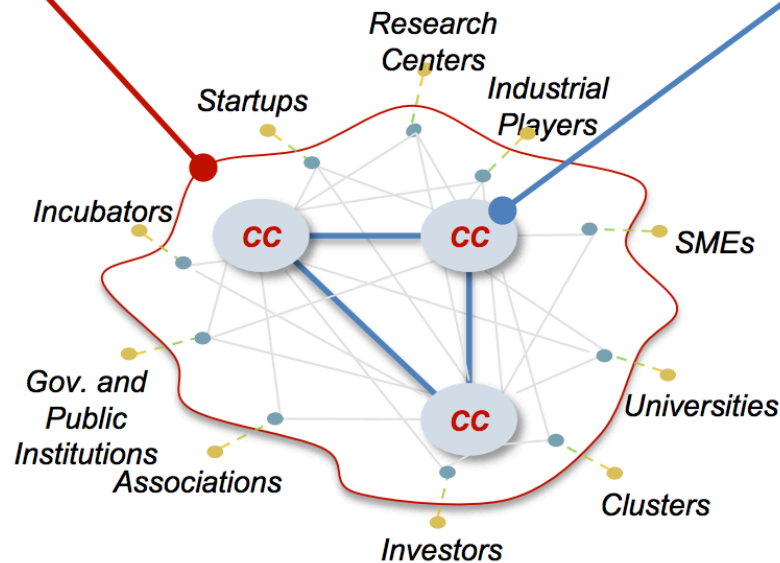
Digital Innovation Hubs

Features:

- Point of contact between companies, research centers and public – private investors
- Selected DIH located at *Confindustria's* and *R.E.TE. Imprese Italia's* branches

Mission:

- Awareness creation on I4.0 opportunities
- Support in developing innovative investment plans
- Orientation to I4.0 Competence Centers
- Support in accessing public and private financing solutions/investors
- Interactions with European DIHs



I4.0 Competence Centers

Features:

- Few and selected national Competence Centers
- Strong involvement of leading Italian universities and large private players
- Support of key stakeholders (e.g. research centers, startups,...)
- Competence Center focused on specific and complementary technology drivers
- Ad hoc governance and adequate managerial skills

Mission:

- I4.0 training and awareness
- Live demos on new technologies and access to I4.0 best practices
- Technical advisory on I4.0 for SMEs
- Launch and acceleration of technological development and innovative projects
- Trial support and "on-site" development of new I4.0 technologies
- Coordination with European CCs

Main criticism

- North-South dualism
 - Dimensional dualism
 - Absence of a "work 4.0" plan
 - Low process of implementation of Competence Centers
 - Weak institutional structure of CC
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