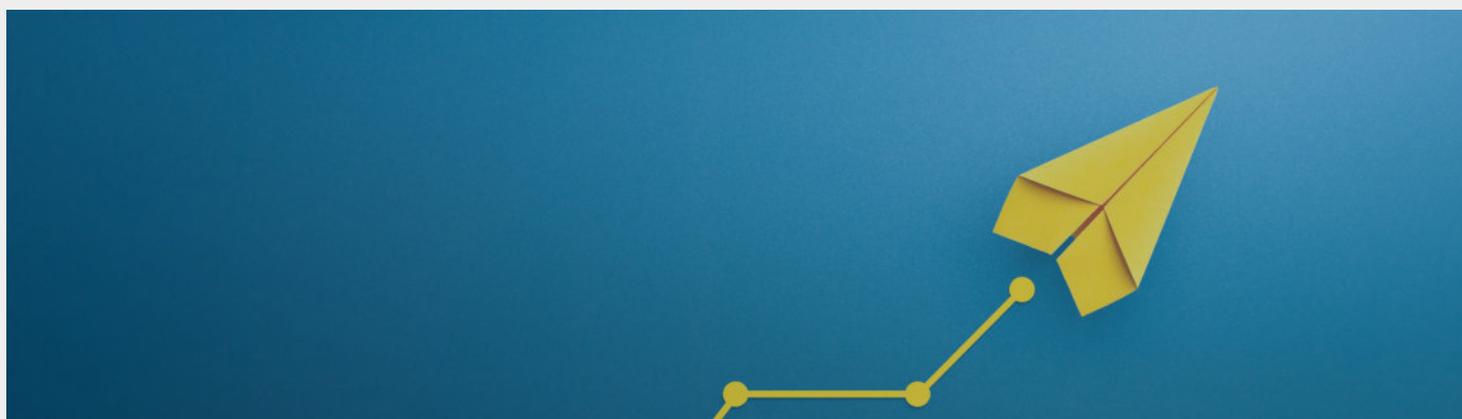


ZES unica

Special Economic Zone
of Southern Italy

SINGLE SEZ STRATEGIC PLAN IN A NUTSHELL





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THE SINGLE SEZ: A NEW ROLE FOR SOUTHERN ITALY IN THE MEDITERRANEAN

THE SINGLE SEZ PROJECT

Decree Law No. 124 of September 19, 2023, converted into Law No. 162 of November 13, 2023 (the “Decreto Sud”), established the Special Economic Zone (SEZ) for Southern Italy, effective January 1, 2024. This SEZ includes the regions of **Abruzzo, Basilicata, Calabria, Campania, Molise, Puglia, Sicily, and Sardinia.**

The purpose of the law is to implement a cohesive and integrated policy to drive the economic development and growth of Southern Italy within a rational and long-term framework that facilitates new business establishment.

The creation of a single SEZ for all of Southern Italy offers significant advantages for enhancing the region’s competitiveness on an international level.

By unifying the previously fragmented zones, this new SEZ strengthens the local productive landscape, reducing potential competitive imbalances among companies operating in neighboring territories.

This streamlined approach, in contrast to the previous structure of eight separate SEZs, provides equal development opportunities across Southern Italy, benefiting both existing companies and new investors.

The formation of a single SEZ transforms Southern Italy into a vast, cohesive area that leverages internal economic diversification based on specialized production strengths. With its geographical diversity and variety of economic sectors, Southern Italy becomes not only more competitive but also better equipped to meet diverse production and strategic needs for investors.

THE STRATEGIC PLAN

The development policy for the Single SEZ is outlined in the Strategic Plan, a three-year program that operates in synergy with other planning tools, including European initiatives such as the NRRP and Structural Cohesion Funds, as well as national programs like the Development and Cohesion Fund.

As mandated by law, the Strategic Plan was first submitted for approval to a Technical Secretariat and then to the SEZ Steering Committee, which issued a favorable opinion on July 26, 2024.

The Plan was officially adopted on 31 October 2024 by a DPCM (Decree of the President of the Council of Ministers) and its approval was announced in the Official Gazette, General Series no. 11 of January 15, 2025.

The Plan is published on the website of the ZES Mission Structure:
<https://strutturazes.gov.it>.

In recent years, the acceleration of supply chain shortening has reshaped production models, counteracting the rapid globalization trends of previous decades.

This shift favors localized production, aligning with the new paradigm where supply security and strategic autonomy are increasingly crucial for sustainable, long-term growth—especially in a context less susceptible to sudden geopolitical and economic changes.

The need for shorter production chains, strategic re-shoring, and diversified sourcing is now prominent.

In this evolving scenario, Southern Italy has the potential to become an economic and logistical hub of international significance, leveraging its strategic position as a natural bridge between the East, North Africa, and Europe.

The Strategic Plan identifies a pathway to strengthen existing assets and create new opportunities for businesses. The investments made will help harness the underutilized wealth of professional skills and talent in Southern Italy, positively impacting both employment levels and job quality.

Unleashing the economic potential of the South will also yield immediate benefits nationwide, given the strong production interdependencies across Italy's 20 regions.

Southern Italy's output is deeply integrated into the value chains of Central and Northern Italian companies, meaning that policies supporting Southern development have a direct and immediate impact on the productive landscape throughout Italy.



PRODUCTION CHAINS

The Plan outlines a strategy to attract investments that, by strengthening key productive sectors, promotes interventions aimed at maximizing economic and social impacts on the area, with lasting effects on growth and employment.

The Strategic Plan was developed considering quantitative and qualitative data and information on the productive structure of Southern Italy.

It highlights current specialization patterns and identifies and engages with the economic development trajectories of the future.

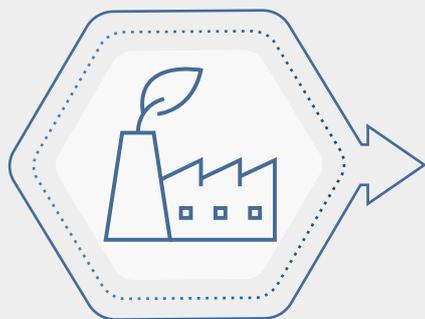
To select the main strategic production chains, two methodological steps were taken.

First Step: based on the industrial specialization index of the regions, five strategic production chains were identified as needing reinforcement: Agribusiness & Agroindustry, Tourism, Electronics & ICT, Automotive, and Quality Made in Italy.

Second Step: Then, to fully capture Southern Italy's economic potential, the Plan selected additional socio-economic parameters to identify the most dynamic productive sectors, specifically: **competitiveness of production chains; international projection; labour market; skills; planning; technological frontier.**

Based on the aforementioned parameters four further production chains were selected for strengthening: Chemicals & Pharmaceuticals, Marine & Shipbuilding, Aerospace, and Railways.

The following is a brief description of the **nine strategic supply chains to be strengthened.**



Agribusiness & Agroindustry

In terms of economic size, the Agribusiness & Agroindustry sector employs over half a million people across Southern Italy and includes more than 60,000 enterprises. The total added value generated in this sector across the South is approximately €17.3 billion.



The agri-food system supports the vitality and resilience of large portions of the region through numerous high-quality and excellent productions (such as wine, cereal products, fruits and vegetables, and dairy products). These industries are also strongly integrated with the region's cultural and tourism landscape.

Tourism

With its extensive and stunning coastline, lush mountain ranges, and rich historical and monumental heritage, including numerous UNESCO World Heritage sites, the “Mezzogiorno” (ie. Southern Italy) holds great potential as a prime tourism destination.

The tourism sector in the South generates approximately €6.36 billion and employs over 256,000 people.

Tourism in Southern Italy could drive substantial growth in GDP and employment, benefiting industries such as construction and manufacturing through related activities. Cultural tourism, a key factor in the sector's appeal, is emblematic of the region's overall attractiveness.

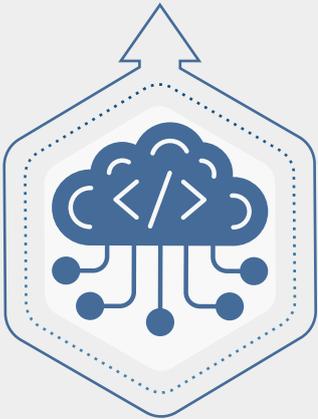
To enhance this, the Plan proposes several strategic actions: strengthening major cultural destinations by promoting sustainable, year-round tourism and increasing the appeal and competitiveness of ‘minor’ cultural sites through supra-regional business networks or thematic networks that elevate local excellence.

Electronics & ICT

In Southern Italy, the Electronics and ICT sectors together contribute €13 billion in added value, with around 80% stemming from the electronics industry. In terms of employment, Campania, Apulia, and Sicily account for approximately 70% of the workforce in these sectors.

Sicily has a long-standing reputation in ICT, hosting companies with international and national leadership positions, particularly in semiconductor microchip manufacturing.

This specialization, concentrated in the Etna Valley, includes advanced prototypes for innovative applications in electric mobility and telecommunications. Abruzzo shares this specialization with Sicily, focusing on electronic boards and semiconductors. Apulia, specifically Bari, has attracted 16 ICT multinationals in recent years, creating around 5,000 new jobs. Additionally, important ICT companies are present in Cosenza and Cagliari.

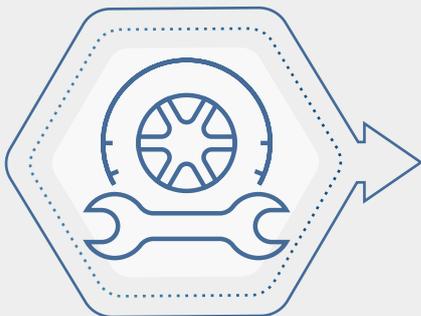


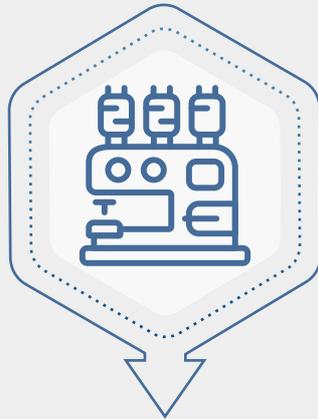
Automotive

Within Europe, Italy holds a significant role in automotive manufacturing, ranking fourth in vehicle production and second, after Germany, in the production of automotive components.

The Italian automotive sector is valued at €17.6 billion and employs nearly half a million people.

In Southern Italy, 85% of vehicles are produced, with key manufacturers located in the Val di Sangro, Melfi, and Pomigliano d'Arco areas. Macchia di Isernia hosts a large assembly facility, supported by a robust network of component suppliers (for bodywork, parts, accessories, engines, as well as design, testing, and maintenance), comprised of SMEs working alongside major national and international players, primarily in Abruzzo, Campania, Basilicata, Apulia, and Molise.





“Quality Made in Italy “(Fashion & design)

The fashion industry, driven by the textile sector, has maintained a strong subcontracting model in the South, where intermediate firms provide inputs and processing, including some high-value services, to companies in Northern Italy.

In Abruzzo, the textile industry emerged in the late 1960s around Teramo, evolving from artisanal hemp processing into a structured industry producing high-value goods. Campania’s fashion system is highly diversified, including micro and small enterprises as well as dynamic firms connected to international luxury brands, positioned in advanced market segments.

Apulia also has a well-developed fashion sector, albeit with smaller-sized enterprises.

The South boasts a longstanding tradition in furnishings, known for craftsmanship and design quality. Kitchen and home furniture manufacturing is particularly concentrated in the Apulia-Basilicata region, around Matera, Altamura, and Santeramo in Colle (BA), forming an export-driven “triangle of upholstered furniture.”

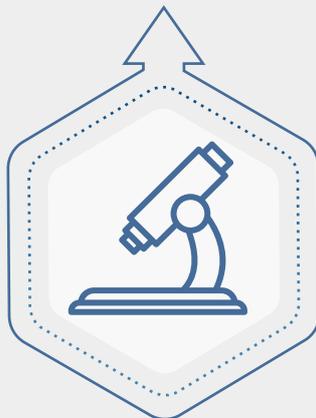
Chemicals & Pharmaceuticals

This sector is well-established across Southern Italy, with a value of €11.9 billion and a workforce of 308,000.

Abruzzo is a key area, featuring comprehensive supply chain coverage, supported by university collaborations (L'Aquila, Chieti-Pescara, Teramo) and research centers that foster spin-offs and technology transfer.

Campania ranks as the leading southern region and seventh nationally in R&D employment, driven by pharmaceutical companies with a strong focus on innovation. Apulia, particularly Bari and Brindisi, shows significant export activity, while SMEs operate in Salento. Sicily, especially the Catania area, is home to SMEs and large international companies.

Basic chemical production is also significant in Basilicata (Val Basento), Apulia (Brindisi, Taranto), Sicily (Priolo Gargallo in Syracuse), and Sardinia (Sarroch in Cagliari). In Sicily, the biotech sector is notable, with strong partnerships between public and private research institutions, as seen in the high-tech biomedical district (Biotec Sicilia) based in Catania.



Naval & Shipbuilding

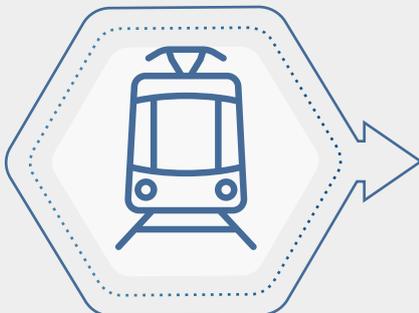
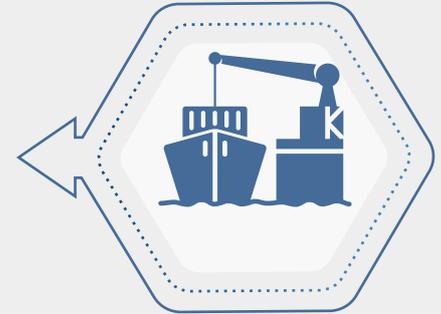
This sector employs about 70,000 people in the South, generating nearly €4 billion in added value.

Campania hosts major logistics businesses around the ports of Naples, Castellammare, and Salerno, while Gioia Tauro and Taranto ports are also significant.

Apulia, with its 865 km of Adriatic and Ionian coastlines, offers extensive development opportunities for inland-back-port connectivity, with a network of ports stretching from Manfredonia to Taranto.

Shipbuilding also contributes to the offshore wind energy industry, with strategic infrastructure investments in ports like Taranto and Brindisi.

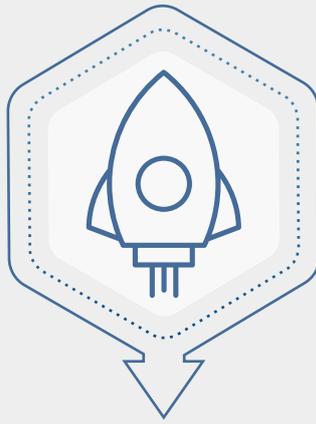
Sicily's maritime sector is concentrated around Messina, Palermo, and Catania.



Railway

Southern Italy contributes 11.2% of the national railway workforce and 9.8% of its added value, with over 60,000 employees and €3.7 billion in turnover.

The South hosts critical railway facilities in Naples, Reggio Calabria, and Monopoli, along with manufacturing and assembly plants in Apulia and Calabria, and train maintenance workshops of the Italian railway network (RFI).



Aerospace

The aerospace industry in the South has an added value exceeding €2 billion, employing around 40,000 workers, mainly located in Abruzzo (Fucino area), Campania (Naples), and Apulia (Foggia, Brindisi, Grottaglie).

The industry is organized as a production district, creating a competitive ecosystem where large specialized companies collaborate with SMEs.

These SMEs support high-tech component manufacturing, keeping pace with technological advances required in aerospace.

The Campania Aerospace Technology District and the Italian Aerospace Research Centre (CIRA) contribute significantly to technology transfer through partnerships with ASI, ESA, INAF, and local universities.

Production sites also exist in Abruzzo (L'Aquila, Chieti), Calabria (Lamezia Terme), Sardinia (Decimomannu, Capo San Lorenzo, Sassari), and Sicily (Catania).

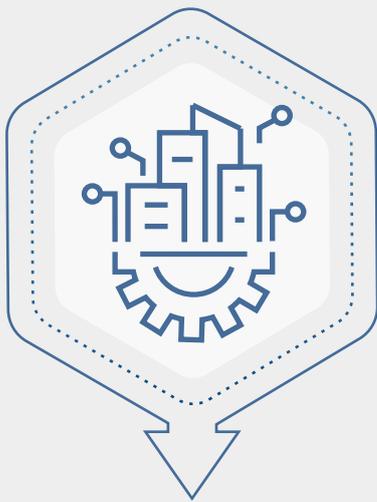
Additionally, space centers operate in Abruzzo (Fucino), Basilicata (Matera), Sicily (Scanzano), and Campania (Naples).

Technologies to be Promoted

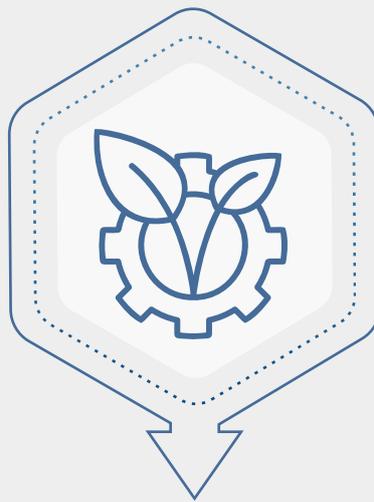
The Plan emphasizes the development of cross-cutting technologies to build a modern and innovative industry that can compete in high value-added segments, consistent with the STEP technology sectors, i.e. the platform for strategic technologies for Europe as defined in Regulation (EU) 2024/795.

STEP technologies encompass digital technologies, deep tech innovation, clean and resource-efficient technologies (Cleantech), and biotechnology (Biotech).

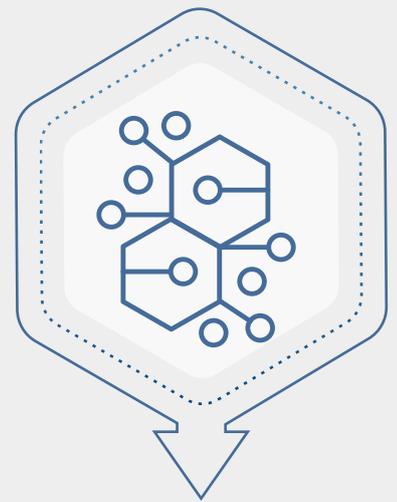
These technologies present extraordinary opportunities, benefiting nearly all production chains and contributing to the economic and territorial development where they are implemented. In line with this strategy, the Plan prioritizes investments in:



**Digital
Technologies**



**Clean and Resource
-Efficient Technologies
(Cleantech)**



**Biotechnology
(Biotech)**

These sectors are critical for competing with major international players.

THE TOOLS

SINGLE AUTHORIZATION AND INVESTMENT INCEN- TIVES



Administrative Simplifications

In the ZES area, productive investments can benefit from a simplified and expedited procedure, which culminates in the issuance of the Single Authorization.

Single Authorization is an administrative simplification tool designed to ensure clear, uniform, and efficient procedures with faster completion times.

The time required to issue this authorization is notably short: if there are no suspensions or involvement of “sensitive” interest administrations, the procedure concludes within a maximum of 60 days from the submission date.

On average, the Single SEZ dedicated Unit issues authorizations in around 50 days.

Furthermore, once the Single Authorization is issued, the formal decision concluding the services conference—if necessary—constitutes an adjustment to urban planning instruments and declares the intervention as being of public utility, with urgency and non-differentiation.

Administrative simplification is also facilitated through a digital one-stop shop, which serves as a centralized portal for submitting Single Authorization applications.

It’s important to note that each of the 8 regions within the Single SEZ may propose additional protocols or agreements for simplified procedures and special regulatory frameworks.

These proposals can be submitted to the Minister for European Affairs, the South, Cohesion Policies, and the NRRP, as well as to the Minister for Public Administration and the Minister for Institutional Reforms and Regulatory Simplification, as outlined in Article 14, paragraph 4 of Decree-Law No. 124 of September 19, 2023.



Investment incentives

To attract both domestic and foreign capital, a variety of investment incentives (including grants, contributions, tax credits, bonuses, and depreciation) have been introduced, funded through regional, national, and EU resources.

The primary instrument is the tax credit for investments within the Single SEZ, supporting private investments in capital goods.

Companies that acquire new capital goods for production facilities in Southern Italy regions are eligible for this tax credit, with the percentage varying by enterprise size and investment location.

The credit applies to investments included in an initial project for acquiring or leasing new machinery, equipment, or facilities for existing or new production structures, as well as purchasing land and acquiring, constructing, or expanding buildings essential to the investment.

For buildings and land, the value cannot exceed 50% of the total investment value.

An additional budget of €1.6 billion for 2024 has been allocated for the tax credit, supplementing the €1.8 billion already earmarked.

This incentive is complemented by a tax credit specifically for primary production sectors, such as agriculture, fishing, and aquaculture, to support capital goods acquisitions in these industries.

Contribution reliefs primarily target groups traditionally on the labour market margins, including youth, the unemployed, and women.

While some of these incentives are national, they are generally more substantial in the South.

Bonus ZES UNICA per il Mezzogiorno (Single SEZ Bonus for Southern Italy): Available to private employers who hire non-managerial staff on open-ended contracts between September 1, 2024, and December 31, 2025.

It provides a full exemption from social security contributions (excluding INAIL premiums) up to €650 per month per worker, for a maximum of 24 months.

Other employment incentives are aimed at the whole country but have a higher intensity in the single SEZ.

“Bonus Giovani” (Youth Bonus): Targets private employers hiring individuals under 35 on open-ended contracts or converting fixed-term contracts to permanent ones.

“Bonus Donne” (Women’s Bonus): Supports private employers hiring disadvantaged female workers on permanent contracts.

Self-Employment Incentive: For unemployed individuals under 35 who start businesses in strategic sectors for new technology, digital, and ecological transition, from July 1, 2024, to December 31, 2025.

Additional tools encourage the establishment and growth of businesses in the South:

“Resto al Sud 2.0” (Stay in the South 2.0): Aims to create new entrepreneurial and professional ventures in the Mezzogiorno. It supports young people under 35 who are socially vulnerable, unemployed, inactive, or beneficiaries of the Guaranteed Employability of Workers (GOL) program.

“Fondo Cresci al Sud” (Grow in South Fund): Focuses on acquiring stakes, mainly minority stakes, in SMEs within the Single SEZ area.

This fund promotes growth and competitiveness through acquisitions and aggregation, encouraging private equity investments and IPOs.

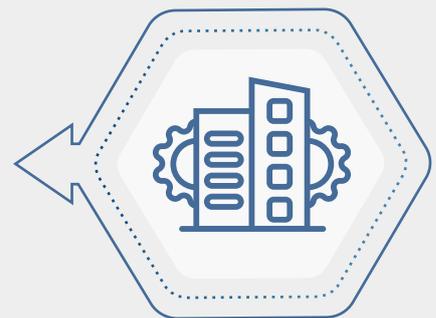
Several other incentives are available nationwide but are enhanced in the South, such as development contracts, zero-interest loans for new businesses, Smart&Start Italia, “Nuova Sabatini”, and “Brevetti+”.

Customs Free Zones

The Single SEZ also allows for the establishment of customs free zones, enhancing the competitiveness of Southern ports, particularly those focused on transshipment, creating a favorable environment for investment and positioning these ports as global logistics hubs. In these zones, companies can store non-EU goods without paying customs duties (duties and VAT), perform simple handling without specific authorization, or, with authorization, engage in inward processing (more complex processing), end-use, and temporary admission regimes.

These zones reduce operational costs and optimize production and logistics. Deferred duty payment until goods are released for consumption enables better cash flow management, allowing companies to reinvest resources strategically.

This virtuous cycle around customs free zones can increase goods traffic and create jobs, particularly in logistics and manufacturing.



INVESTMENTS AND PRIORITY INTERVENTIONS FOR THE DEVELOPMENT OF THE SINGLE SEZ

The success of the Single SEZ relies on an integrated network of ports, retro-port areas, and industrial zones, aiming to coordinate infrastructure policies within a comprehensive development strategy for Southern Italy.

Strengthening port and rail infrastructures is essential to establishing a large, modern trade and production platform at the heart of the Mediterranean, connected to Europe through the TEN-T high-speed corridors.

This transition from a localized territorial perspective to a broader southern macro-area approach, with consideration for the unique insular features of Sicily and Sardinia, calls for planning on a larger scale.

This includes integrating the varied infrastructure and mobility systems of different regions, each characterized by differing levels of network complexity and accessibility.

To foster the development of the Single SEZ, it is crucial to identify actions that harmonize plans and programs at multiple territorial scales and timeframes.

Integrated and coordinated planning is needed to respect each region's specific network layout, needs, and planning objectives, applying tailored approaches per region.

The following priority areas have been established for investment and intervention:

- **Promoting competitiveness**

Strengthening competitiveness in the Mezzogiorno requires investments in technological innovation to boost productivity and enhance commercial and production networks. Objectives also include upgrading underutilized areas and strengthening digital connectivity and communication technologies.

- **Promoting interconnection**

Enhancing infrastructure is key to increasing the interconnection of Southern Italy's production systems with other Italian regions, Europe, the Mediterranean, and the Balkan countries. Investments in infrastructure for interconnection and sustainable multimodal mobility are therefore essential.

- **Promoting Sustainable Water and Waste Management**

Effective, efficient, and sustainable water and waste management is critical for the Mezzogiorno's growth. Priority actions include promoting sustainable infrastructure investments to protect water quality, managing waste collection, reuse, and recycling, and improving the efficiency, effectiveness, and quality of waste-related services.

- **Promoting Energy Transition and Environmental Risk Prevention**

The South of Italy holds significant potential for renewable energy, including solar, wind, and hydroelectric power. Key goals include reducing energy consumption and costs while enhancing environmental sustainability, diversifying energy sources, promoting energy independence, and optimizing the use of available resources.

IMPLEMENTATION OF THE STRATEGY

The governance structure established for the new Single SEZ involves multiple institutional actors with distinct roles under a unified directive, enhancing coordination and creating a stronger impact on regional development.

This governance model aims to enable inclusive growth in Southern Italy while respecting local specificities.

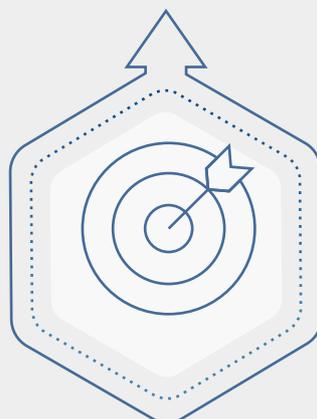
The Delegated Political Authority on SEZs exercises the functions of guiding and coordinating the Government's action on the implementation of the Strategic Plan of the single SEZ and, in this capacity, chairs the SEZ Steering Committee, which is responsible for policy-making, coordination, supervision, and monitoring. The Steering Committee, or Cabina di Regia, defines the SEZ strategy with full participation from the regions, UPI (Union of the Provinces of Italy), and ANCI (Italian Municipalities Association).

A Technical Secretariat, composed of representatives designated by the involved administrations and coordinated by the SEZ Dedicated Unit, supports the Steering Committee.

A central role is played by the SEZ Dedicated Unit (Struttura di Missione Zes), reporting directly to the delegated political authority on SEZ matters, with the task of preparing, updating and, if necessary, amending the Strategic Plan.

This body is tasked with preparing, updating, and amending the Strategic Plan as needed. It also oversees the implementation of the SEZ strategy, coordinates activities, monitors progress and manages the issuance of Single Authorizations.

Additionally, it acts as the contracting station for the NRRP projects under its jurisdiction, promotes the SEZ's appeal and manages institutional communication and outreach.



The SEZ Dedicated Unit ensures broad participation by coordinating activities with relevant ministries, regional authorities, and businesses. It works closely with the Inter-Ministerial Committee for the Attraction of Foreign Investments (CAIE), which leads national policy for attracting foreign direct investments (FDI).

To foster the Strategic Plan's implementation, the Dedicated Unit focuses on promoting and disseminating innovative development models centered on three key themes for Southern Italy's growth: human capital and research, infrastructure, and financial resources for enterprise growth.

It aims to strengthen technology transfer, tailored education, and training programs aligned with the needs of Southern Italy's industrial landscape, with the involvement of local universities and research institutions.

This broad approach to innovation—encompassing sustainability alongside technology transfer—seeks to fully leverage the country's cultural and intellectual assets.

Regarding **infrastructure and industrial areas**, a dialogue on specific topics will be initiated with the major industrial development consortia in southern Italy.

In order to accompany the development of southern enterprises in their growth and to ensure that they take full advantage of the opportunities offered to those wishing to invest in southern Italy, the SEZ Dedicated Unit will promote cooperation with the **European Investment Bank**, the main national and regional **financial institutions**, the **banking system**, and **private equity and venture capital operators**, also through their respective trade associations.

