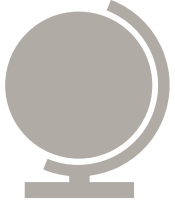


Abstract geometric lines in the top left corner, consisting of several overlapping, irregular polygons and lines in a light beige color.

L'ECOSISTEMA NORD- OVEST DEI SEMICONDUTTORI

April 11, 2025

ITC-ILO - Viale Maestri del Lavoro 10, Torino



GLOBAL MARKET

€1 trillion by 2030*



ITALIAN PRODUCTION

€7,4 billions*

< 1%



PIEDMONT SUPPLY CHAIN

turnover approx. €1.7 billion 24.3% of
the total italian market*

** All data are referred to E&Y Report for production value of year 2022*

MICROELECTRONICS MARKET

SIZE OF MICROELECTRONICS COMPANIES

ITALY



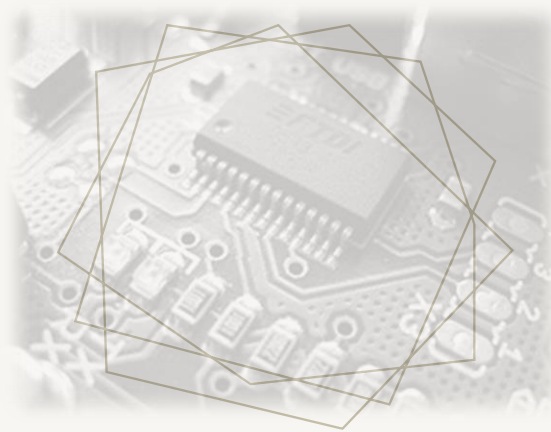
1.900 COMPANIES

36.000 employees

Average turnover 3.9M€

Turnover per employee 205K€

Average number of employees 19



PIEDMONT



181 COMPANIES

7.000 employees

Average turnover 9,4M€ (+241%)

Turnover per employee 243K€ (+19%)

Average number of employees 38 (+100%)

** All data are referred to E&Y Report for production value of year 2022*

WHO WE ARE



ALPIS

AL LEANZA

P IEMONTESE

I NDUSTRIA

S EMICONDUTTORI

ALPIS



Electronic components assembly process



PCB assembly processes



Polymeric packaging machines



Materials LASER treating: diecing, drilling, etching



Lead frame and polymeric packaging processes



Testing machines for microelectronics

Turnover of the ALPIS Alliance: **270M€**

Employees of the ALPIS Alliance: **1.300**

ENHANCED COOPERATION WITH INSTITUTIONS AND TRAINING AND RESEARCH ORGANIZATIONS

Business is not enough: companies should closely cooperate with institutions



**Politecnico
di Torino**

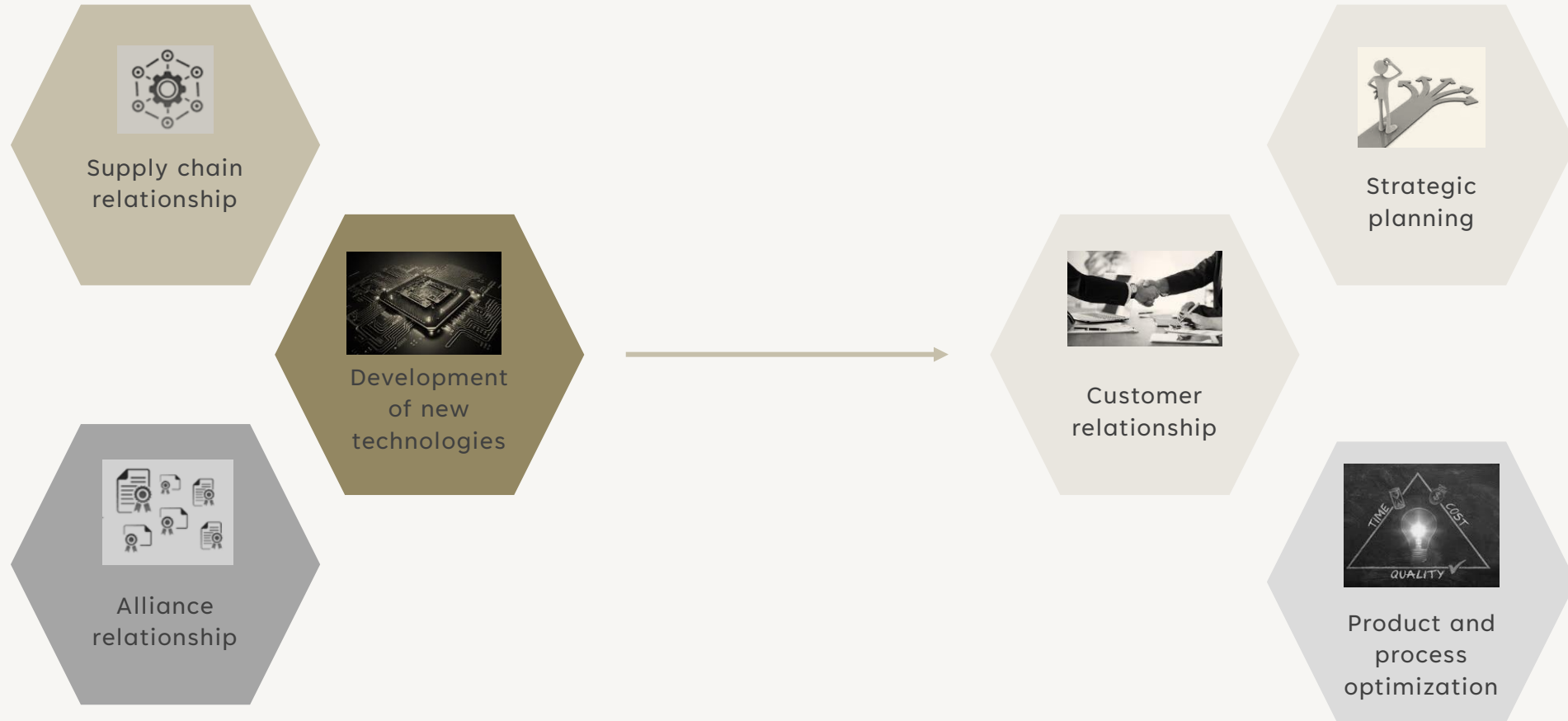


**UNIVERSITÀ
DI TORINO**

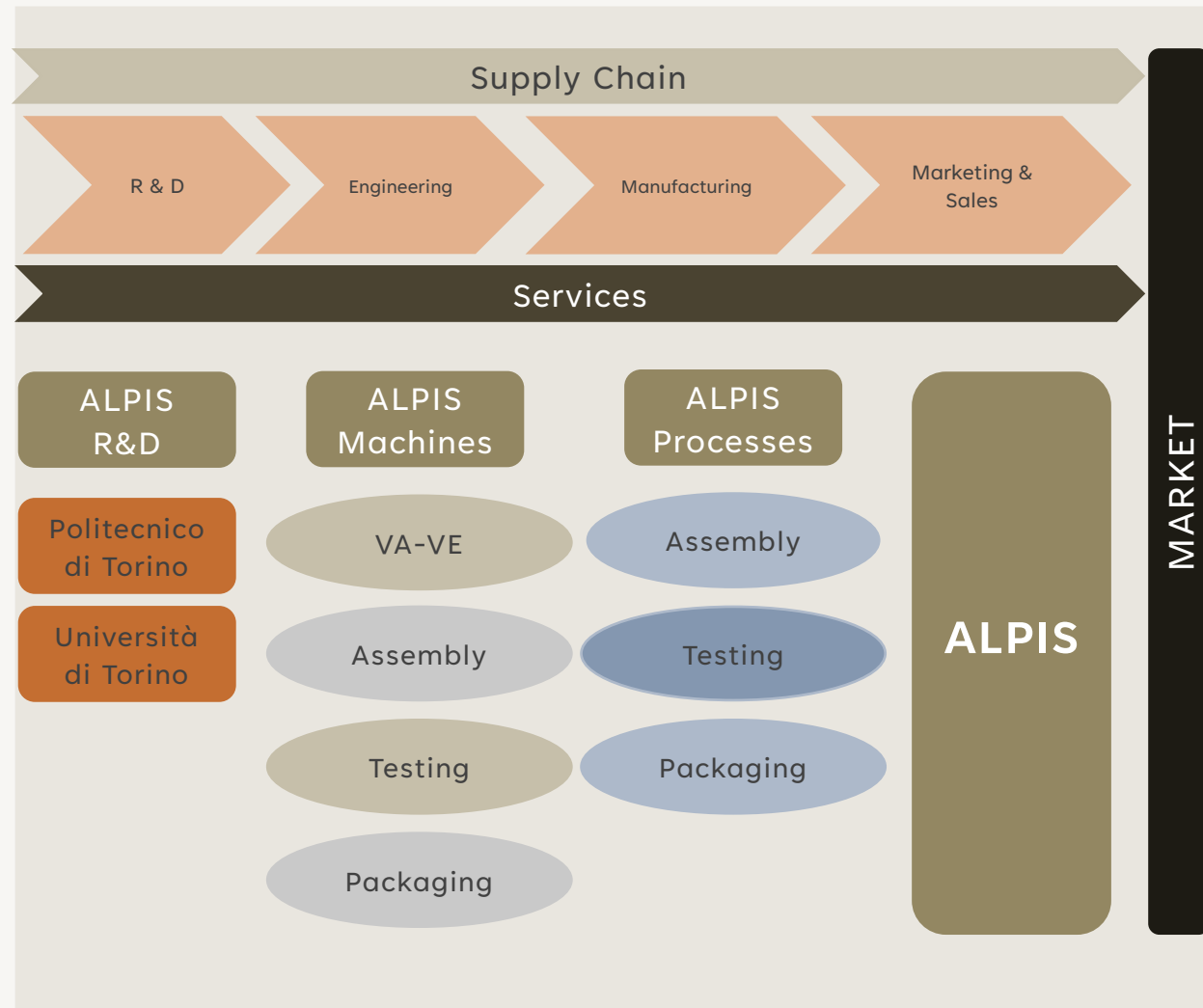


UPO UNIVERSITÀ DEL PIEMONTE ORIENTALE

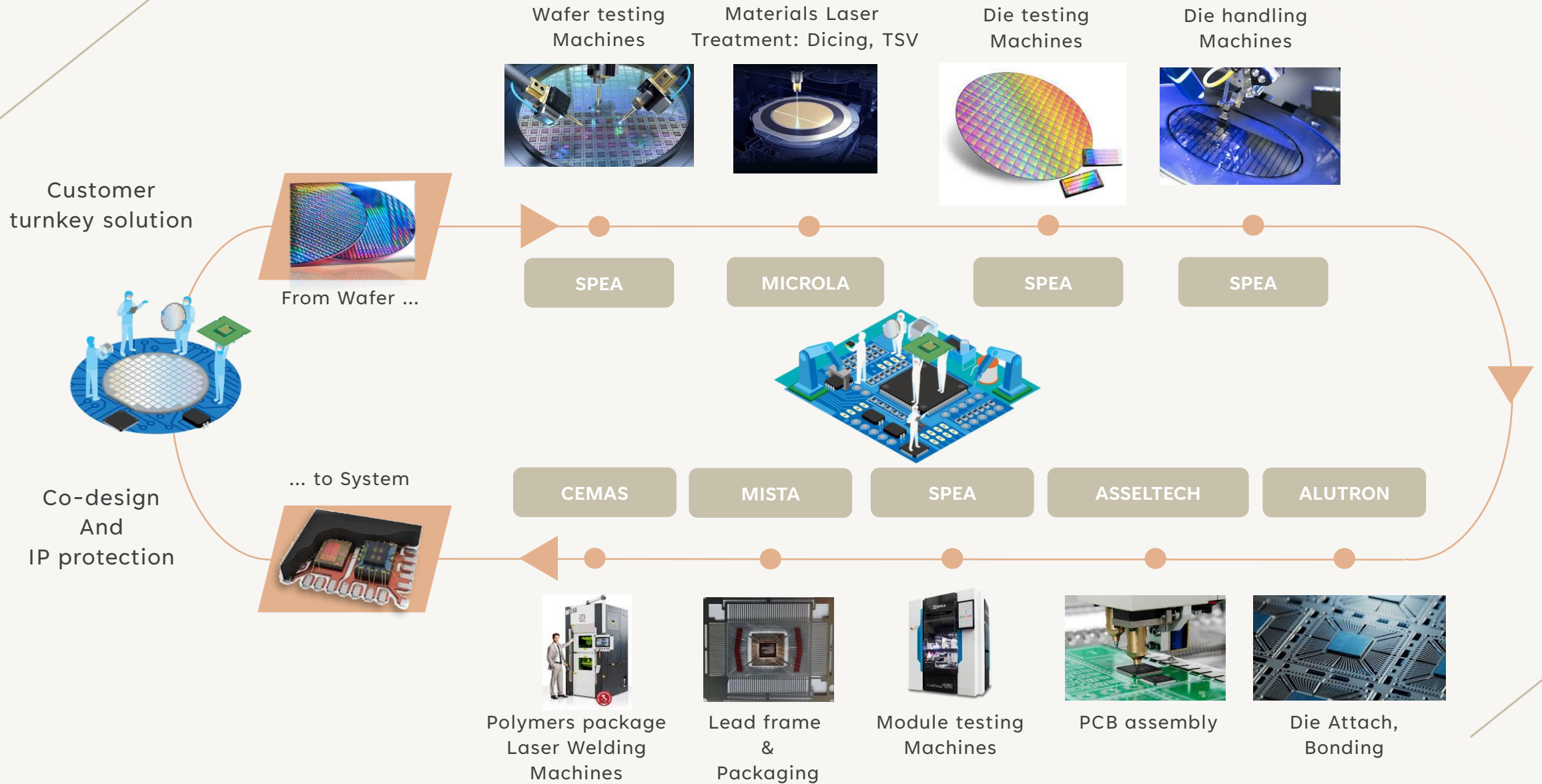
SUPPLY CHAIN STRATEGY TO FACE MICROELECTRONICS CHALLENGES



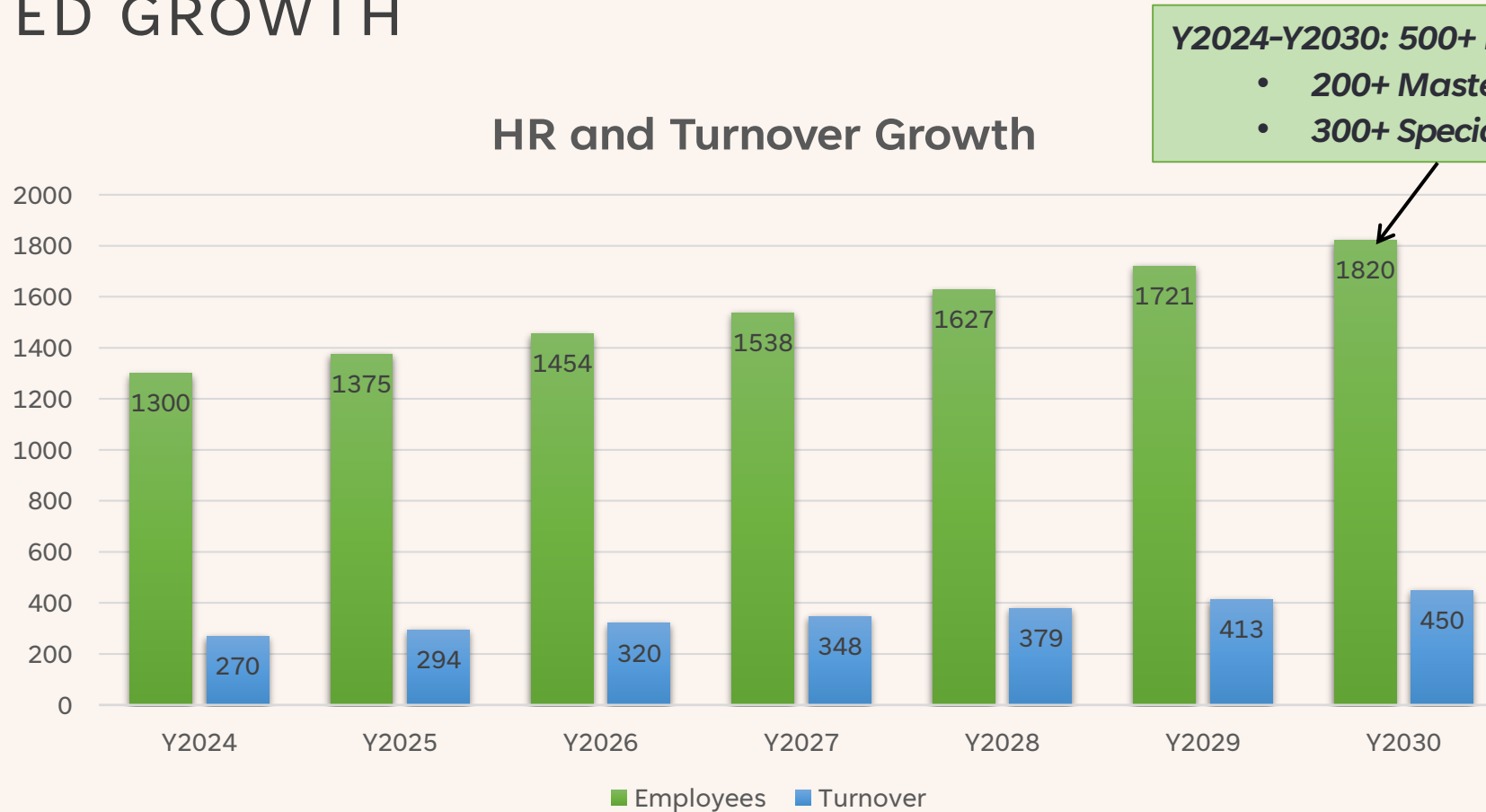
SUPPLY CHAIN STRATEGY TO FACE MICROELECTRONICS CHALLENGES



ALPIS ECOSYSTEM



EXPECTED GROWTH



Y2024-Y2030: 500+ employees – 200+ Master Degree and 300+ specialists

New skills development, up-skilling and re-skilling require to be strongly supported by institutions

CONTINUOUS IMPROVEMENT



Strengthening public-private
partnerships



ALPIS experience replicability
and extension



Promoting the excellences of the
territory



IP protection by a single entity

ALPIS



THANK YOU