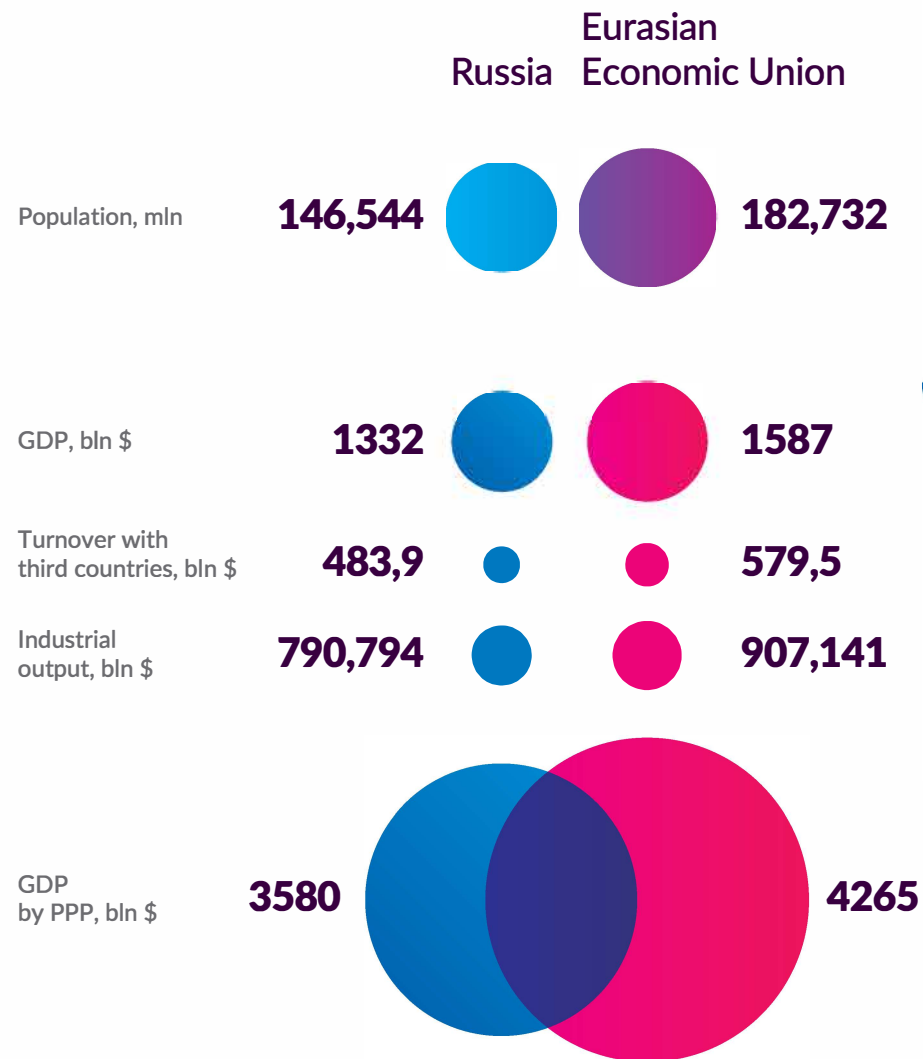


AIP ASSOCIATION
OF INDUSTRIAL
PARKS OF RUSSIA

LOCALISATION OPPORTUNITIES IN RUSSIA

Annual review 2016

Russia is the gate of the Eurasian Economic Union

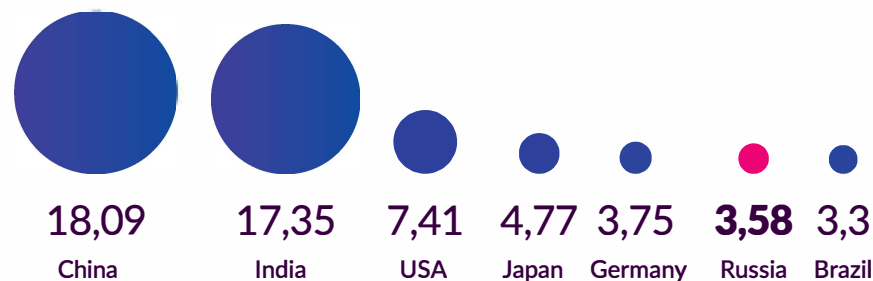


- Domestic demand is still growing
- Export potential
- Natural resources
- Short-term growth drives



GDP by purchasing-power parity 2015 – **3,58** trln \$
6th in the world

Projected growth for 2020 – **4** trln \$



Natural resources

Oil **1** place in the world, **534** mln tonnes,
 Gas **2** place in the world, **633,4** bln.m³
 Steel **5** place in the world, **71,1** mln tonnes
 Aluminium **2** place in the world, **3,601** mln tonnes
 Wood **25%** of world reserves

Average cost of construction

manufacturing premises (m²) **550** \$

Average salary in Russia

engineers **600** \$
 technical staff **400** \$

Cost of energy

Grid connection (for 1 MW) **262725** \$
 Energy consumption (for 1 kWh) **0,04** \$
 Gas consumption (for 1 m³) **0,06** \$
 Water consumption (for 1 m³) **0,46** \$

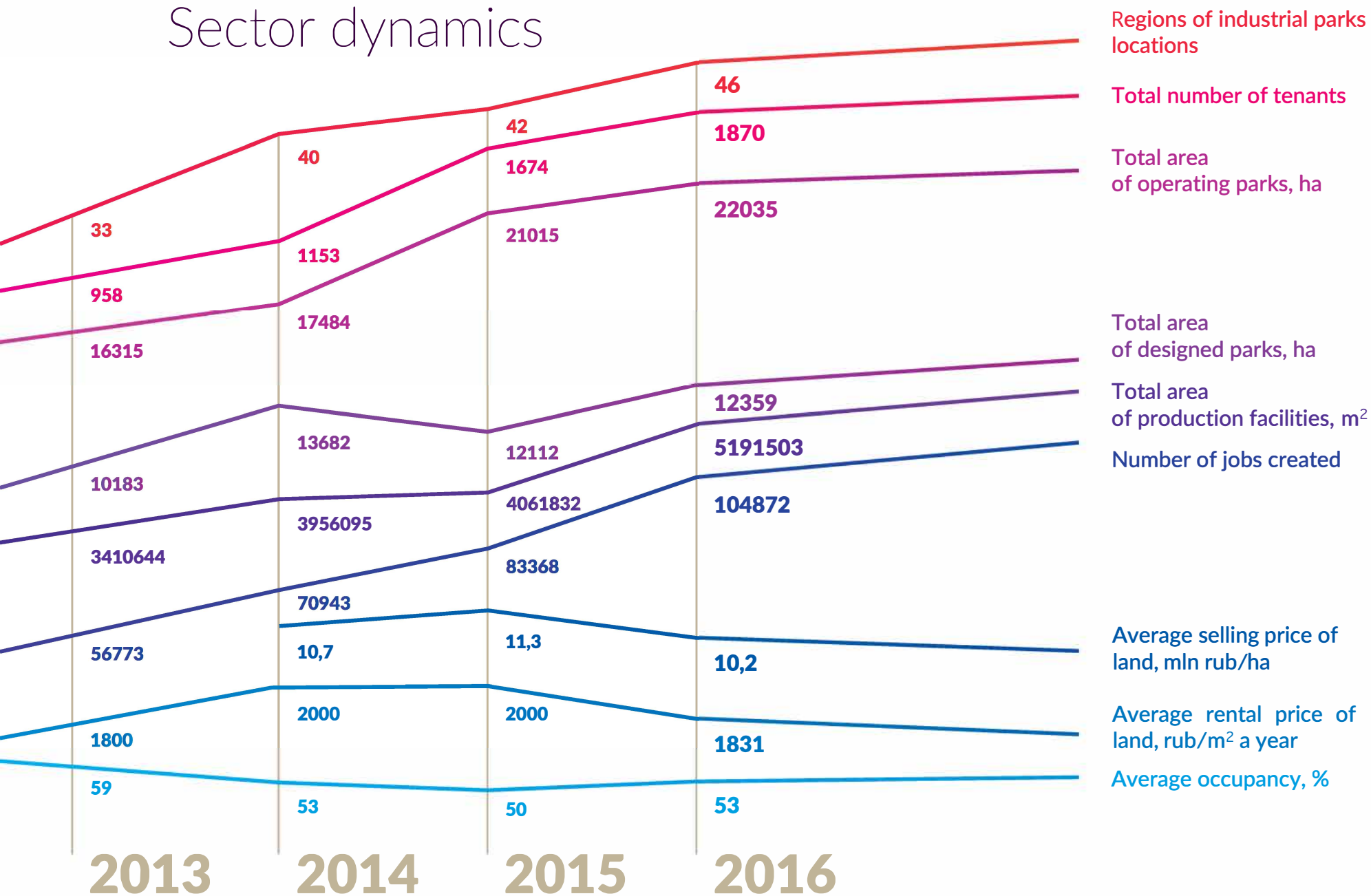
Export potential

Export growth of 28% in 2013 - 2016: 498 bln\$,
 19,4 bln\$ of them - agricultural production

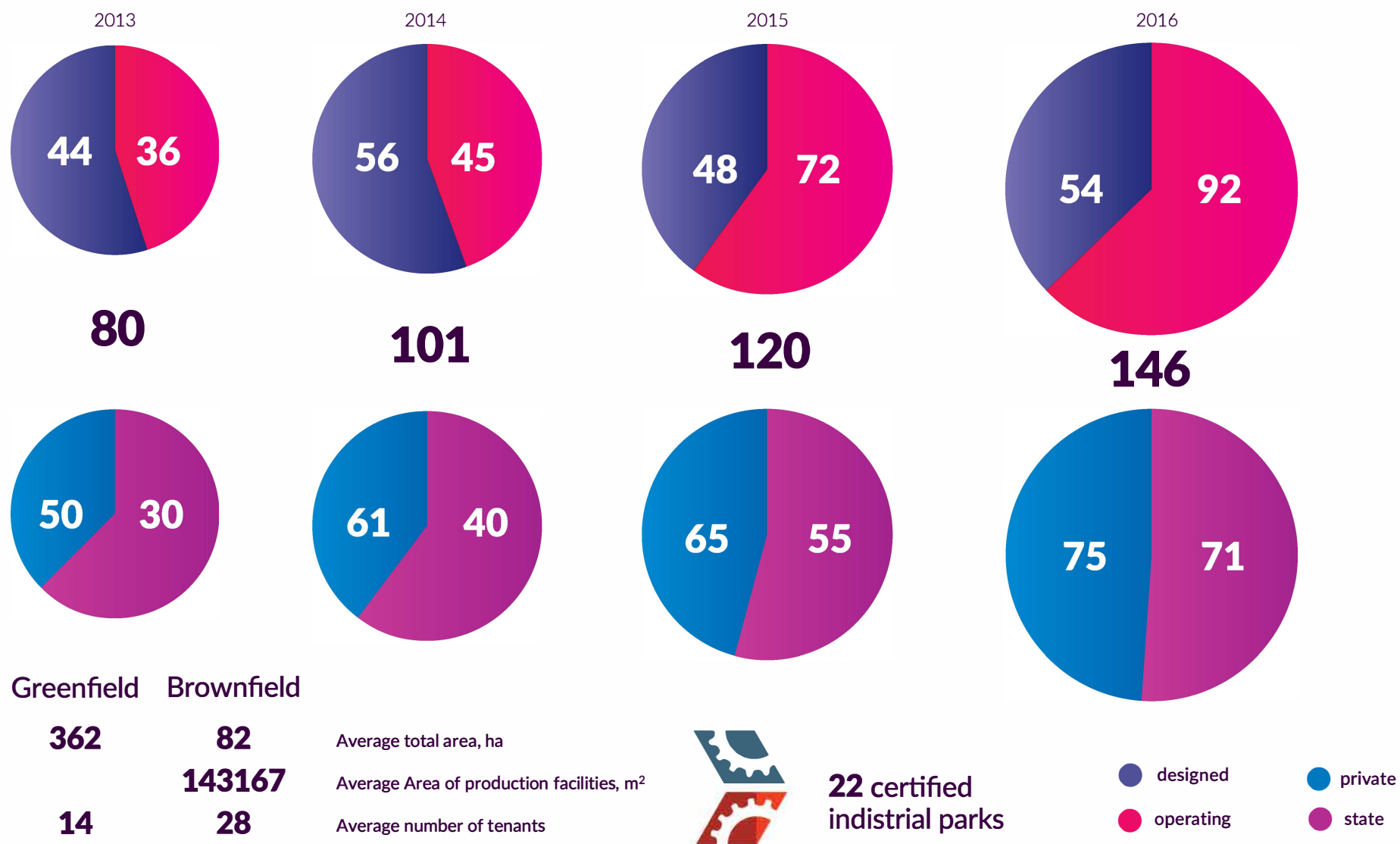
Domestic Demand

7th biggest consumer market in the world.
 The volume of public procurement in Russia in 2015 is estimated at 25 trln RUR (only for localised production). Automotive market in Russia – 1,6 mln. vehicles in 2015 (7th place in the world)

Sector dynamics



Industrial parks in Russia sector development



National Standard of industrial park

Areas of application

- 1 Industrial parks**
for maintaining quality standards
- 2 Investors**
As a site selection tool
- 3 Authorities**
while selecting projects for government support
- 4 Investment banks**
for project evaluation

Key sections



Annual Review of industrial parks 2016 as well as majority of state support measures consider industrial parks which meet requirements of the National Standard of the Russian Federation "Industrial Parks. Requirements" GOST R 56301 - 2014. All represented industrial parks are divided into two main types:

1. OPERATING industrial park an industrial park which has all the mandatory features of the industrial park provided in the National Standard of the Russian Federation "Industrial Parks. Requirements" GOST R 56301 - 2014.

2. DESIGNED industrial park an industrial park where one or a few essential characteristics, specified in the National Standard of the Russian Federation "Industrial Parks. Requirements" GOST R 56301 - 2014, are not ready, but it provided the project documentation approved by the state examination.

Certification of industrial parks

**Since September 2015
until June 2016 already
18 industrial parks
successfully proved
the compliance
with requirements
of the National Standard**



On 1 September 2015 the system of voluntary certification of the Association of Industrial Parks was initiated according to the National standard GOST R 56301 - 2014 "Industrial Parks. Requirements." It captured the system of AIP industry certification requirements for industrial parks developed by the sector participants proved in the previous five years.

Terms of the new system of voluntary certification of AIP are registered with Rosstandart on 10 August 2015, No RU.M1370.04IAYAO.

According to the document and current Russian legislation, the certification authority is the Association of Industrial Parks.

Purpose of the certification is to provide reliable and systematic information about industrial park to interested parties, which may include potential investors, state authorities, financial institutions, as well as other sector participants.

Certificates are issued only for operating industrial parks. The certificate confirms that

an industrial park meets all the mandatory requirements of the Russian National Standard GOST R 56301 - 2014 "Industrial Parks. Requirements". Normative legal acts determining criteria for industrial parks within support system for development of industrial infrastructure, which is performed by the Ministry of Industry and Trade, Ministry of Economic Development and Fund for the development of single-industry towns are based on the National Standard.

Association of industrial parks of Russia

Association of industrial parks is a sector non-profit organization established in 2010, uniting the majority of industrial parks of Russia as well as service suppliers in sphere of production localization and industrial construction

The Association members are 125 entities, representing 89 industrial parks in 45 regions of the Russian Federation. Along with facility management companies of industrial parks the Association also unites regional development corporations, consulting, design and construction companies, equipment suppliers. Together we enforce business to create the best opportunities for industrial investors in Russia. Our activity is aimed to develop competences for professional facility management of industrial sites as well as for keeping high standards of industrial parks based on the best Russian and international practices and experience.

Annually AIP holds more than 20 industry events and permanently represents members' interests in government authorities, international associations, on investment platforms. The Association is copyright holder of the sector review «Industrial parks in Russia» - annual analytical publication since 2010, the first and the only comprehensive source about all industrial parks of the country. The Association also regularly conducts other specific industry surveys in the area of industrial parks and investments and publishes analytical materials.

For foreign investors interested in expansion and localisation of production lines, AIP is an «entry point» and procedure guide in Russia

AIP is an official registered body for certification of industrial parks in compliance with the Russian National standard "Industrial Parks. Requirements" GOST R 56301 -2014 in accordance with the rules of the voluntary certification system of AIP, registered on 10 August 2015 by Rosstandart in the Unified Register of registered voluntary certification systems № ROSS RU.M1370.04IAYA0.



Attraction investors to industrial parks and SEZ

strategic marketing of the industry on domestic and international platforms

development of business contacts in international investment community

promoting information about AIP members' services

providing potential investors with initial information about localisation capabilities in Russia

Lobby

advocacy for common interests of AIP members in expert and public councils under state authorities

formulation of proposals on amendments to normative legal acts

special products and programs - elaboration and launch together with development institutions

Centre of expertise for industrial infrastructure and localisation

methodological assistance, experience exchange on basis of the Association

certification of industrial parks

industry consulting

Products

Industry events more than 20 own events per year

International foreign
business-missions,
investor guide seminars

Study tours to industrial parks

Workshops

Sector conferences

Study seminars and lectures

Expert consultancy on industrial parks creation and localisation of production

Site selection and support
for localization investment projects

Pre-project documentation
for industrial parks

Branding, corporate identity and
marketing materials for industrial parks

Fund raising

Sector analytics

Annual Review of industrial
parks of Russia

Weekly monitoring of industry
news and events

Investors guide for localisation
of production in Russia

Guidelines for the establishment
of industrial park

Summary of sectoral laws
and regulations

Collection of industry best practices

Certification of industrial parks

for compliance with the Russian National
Standard «Industrial Parks. Requirements»

Resources

**AIP members
consolidated point
of the industry**

Professional expert team

**Partners from
investment community
of EU and ASIA**

**Support by government
authorities of Russia**

**Internet resources:
Regular audience and
active promotion**

**Geo-Information System
for Industrial Parks**

**Brand and positive
reputation of AIP in
business-community**

Industrial parks of Russia 2016



Profiles of industrial parks and SEZ in Russia in 2016

Parks	AIP member	Status	Type	Area, ha (m2)	Electric power	Gas	Railway connection	Land selling	Land rental	Building rental	Build-to-suit	e-mail	web-site
Republic of Bashkortostan													
Agidel Veles Zubovo PromCentre Ufimsky Khimterra	•	operating	brownfield	223,9 (52465)	28,5	•	o	o	•	•	•	smolyagin.i@bashkortostan.ru	www.kr02.ru
	•	operating	brownfield	83 (17899)	1,23	•	o	o	•	o	o	ind.park-veles@yandex.ru	
	•	operating	greenfield	37,3	10	•	•	o	•	•	•	ObletsovNK@rushydro.ru	
	•	operating	brownfield	11,7 (48480)	10,7	•	•	o	o	•	•	promcentreufa@mail.ru	www.promcentreufa.ru
	•	operating	greenfield	298,6	55	•	o	•	•	•	•	karabanova.an@bashkortostan.ru	www.kr02.ru
Khimterra	•	operating	brownfield	8	2,6	•	•	o	•	•	•	fominin.dl@bashkortostan.ru	www.kr02.ru
Republic of Dagestan													
Tyube Foton Avrora	•	operating	greenfield	171,8	126	•	•	o	o	•	•	kpndukip@mail.ru	www.kpndr.ru
	o	operating	greenfield	13,8 (2800)	15	•	o	o	o	•	•	mr.sagidzagirov@mail.ru	www.lp-photon.ru
	o	designed	greenfield	66,6		•	o	o	•	•	•	info@oaokrd.ru	
Republic of Karelia													
Nadvolst'y	o	designed	greenfield	17,4	5	o	o	o	•	•	•	evghkharitonov@mail.ru	
Republic of Tatarstan													
A Plus Park Alabuga Kazanskiy Silicon Kamskiye Polyany KIP Master M-7 SEZ PPT Alabuga Sokury Technopolis Khimgrad Tyulyachi Chelny Aktanysh Vyatka Drozhzhanev Kukmor Novosheshminsk Razvitiye Chistopol	•	operating	greenfield	36 (16000)	12,5	•	•	o	•	•	•	mshumilova@aplusdevelopment.ru	www.alabugapark.ru
	•	operating	brownfield	72 (28982)	30,5	•	•	•	•	•	•	prigen@kack.ru	www.kackpark.ru
	o	operating	greenfield	230	25	•	•	•	•	•	•	ktv@kamapark.ru	www.kamapark.ru
	•	operating	brownfield	181 (1222978)	30,328	•	•	o	•	•	•	ftzakirov@kamaz.ru	www.kipmaster.ru
	o	operating	greenfield	39,5	6,2	•	•	o	•	•	•	info@m7park.ru	www.m7park.ru
	•	operating	greenfield	1983	416	•	•	•	•	•	•	invest@sezalabuga.ru	www.alabuga.ru
	•	operating	greenfield	13,4	o	•	•	•	•	•	•	sokuryuk@yandex.ru	
	•	operating	brownfield	131 (361715)	40,68	•	•	•	•	•	•	hingrad@inbox.ru	www.hingrad.ru
	•	operating	greenfield	33	13,2	•	•	•	•	•	•	sozdanie.park@mail.ru	www.tulachi.su
	•	operating	greenfield	100	4	•	•	o	•	•	•	shchelny888@gmail.com	www.ipcheln.ru
	•	designed	greenfield	13,3	o	•	•	o	•	•	•	linar.fattakhov@tatar.ru	
	•	designed	greenfield	80	4,5	•	•	•	•	•	•	Darzenanov1977@mail.ru	www.vyatkapark.ru
	•	designed	greenfield	19,1	o	•	•	o	•	•	•	egor.tamavskiy@tatar.ru	
	•	designed	greenfield	20	4	•	•	•	•	•	•	chulpan.hanafina@tatar.ru	
	•	designed	greenfield	8	0,65	•	•	•	•	•	•	ishakova.luiza@tatar.ru	
	•	designed	greenfield	24,6	8	•	•	o	•	•	•	prompark@yandex.ru	www.prompark16.ru
	o	designed	greenfield	292	4,5	•	•	o	•	•	•	T.Bilyalov@tatar.ru	www.chistopolinvest.ru
Republic of Khakassia													
Chernogorskiy	o	designed	greenfield	46,9	2,89		•	o	•	•	o	oep306@rambler.ru	www.npomnapk19.pф
Udmurt Republic													
Razvitiye	•	operating	brownfield	28	30	•	o	•	•	•	•	secretar@most-dvip.ru	www.most-dvip.ru
Chechen Republic													
Groznskiy	o	designed	greenfield	13,5		o	o	•	•	o	•	rusdakeev@gmail.com	
Chuvash Republic													
Cheboksary Kanash	o	operating	greenfield	23,1	11	•	•	o	•	•	o	rci21@mail.ru	
	o	designed	greenfield	37,4	10,2	•	•	•	•	•	o	invest@develop21.ru	
Krasnoyarsk krai													
Divnyi Krasnyi Yar	o	operating	brownfield	20 (122000)	4,62	•	•	•	•	•	•	pdv1910@yandex.ru	www.divniypark.ru
	•	operating	brownfield	14,7 (71832)	31,522	•	•	o	•	•	•	red-yar@mail.ru	www.kr-yar.com
Stavropol krai													
Nevinnomyssk SKIP Master Budenkovskiy Georgievskiy	•	operating	greenfield	804,4	80	•	•	o	•	•	•	info@razvitie-stav.ru	www.razvitie-stav.ru
	•	operating	brownfield	28,2 (123795)	4,65	•	•	o	•	•	•	bronnikova@mszap.ru	www.kipmaster.ru
	•	designed	greenfield	60	135	•	•	o	•	•	•	info@razvitie-stav.ru	
	•	designed	greenfield	103,7	0	o	•	•	o	•	•	info@razvitie-stav.ru	www.razvitie-stav.ru
Khabarovsk krai													
Avangard Dalnergonash	•	operating	greenfield	47	11,5	•	•	o	•	•	•	gros@da-development.com	www.ip-avangard.com
	•	operating	greenfield	20,1 (47998)	6,58	•	•	•	o	•	•	pochta@vmkcapital.ru	www.prompark.com
Belgorod region													
Volokonovskiy Severniy	o	operating	brownfield	12,8 (30320)	2,2	•	•	o	•	•	•	l@prompark.com	www.belprompark.ru
	•	operating	greenfield	33,4 (80000)	9,5	•	•	•	o	•	•	prompark.bel@mail.ru	
Vladimir region													
Oka Stavrovskiy Strunino Kameshkov Paratsels	o	operating	brownfield	8,4 (36314)	3	•	•	o	•	•	•	andreev@ip-oka.ru	www.ip-oka.ru
	•	operating	brownfield	50,2 (37060)	50	•	•	•	o	•	•	info@oastato.ru	www.prompark.ru
	o	operating	greenfield	61	21	•	•	o	•	•	•	office@promzemlya.com	www.promzemlya.com
	o	designed	greenfield	93,8	15	•	•	•	•	•	•	33park@mail.ru	www.industrial-park33.ru
Paratsels	o	designed	greenfield	186,2		•	•	•	•	•	•	p.panfilov@vladinvestcorp.ru	www.vladinvestcorp.ru
Parks	AIP member	Status	Type	Area, ha (m2)	Electric power	Gas	Railway connection	Land selling	Land rental	Building rental	Build-to-suit	e-mail	web-site
Vologda region													
Sheksna Sokol	o	operating	greenfield	2000	90	•	•	o	•	•	o	secretary@invest35.ru	www.invest35.ru
	o	designed	greenfield	160,2	40	o	•	•	•	•	o	secretary@invest35.ru	www.invest35.ru
Voronezh region													
Maslovskiy Perspektiva	o	operating	greenfield	598	34	•	•	o	•	•	•	vinikorp@mail.ru	www.vinikorp.ru
	•	operating	greenfield	146,4	10,45	•	•	•	•	•	•	andrey@perspektiva-psp.ru	www.perspektiva-psp.ru
Ivanovo region													
Kineshma Rodniki	o	operating	brownfield	102 (204000)	21,4	•	•	•	•	•	•	post@kineshma.ru	www.mip-kineshma.ru
	•	operating	brownfield	90,4 (300000)	50	•	•	•	•	•	•	volkovni@rodtext.nord-tex.ru	www.ip-rodniki.ru
Irkutsk region													
MAKSIMAKS	o	operating	brownfield	69 (116800)	49,64	o	o	•	•	•	•	id@tp38.ru	www.tp38.ru
Kaliningrad region													
Khrabrovo Chernyakhovskiy Ecobaltik	•	designed	greenfield	271	40	•	•	•	•	•	•	m.savinov@kgd-rdc.ru	www.kgd-rdc.ru
	•	designed	greenfield	1116	34	•	•	•	•	•	•	m.savinov@kgd-rdc.ru	www.kgd-rdc.ru
	o	designed	greenfield	32	2,75	•	•	o	•	•	•	karaf@bk.ru	www.ecobaltic.com
Kaluga region													
Vorsino Grabtsevo I-Park Lenninskainey Kaluga-Yug Obninsk SEZ PPT Kaluga Lyudinovo Rosva Veles Kaluga Ogor SEZ PPT Kaluga Borovsk Sosenskiy	•	operating	greenfield	1610	240	•	•	o	•	•	•	ilijna.indpark@gmail.com	www.indpark.vorsino.com
	•	operating	greenfield	706	76	•	•	•	•	•	•	shmelev@invest.kaluga.ru	www.invest.kaluga.ru
	•	operating	greenfield	134	16	•	•	•	•	•	•	Sergey.Speitskiy@lenninskainey.ru	www.lenninskainey.ru
	•	operating	greenfield	152	20,7	•	•	o	•	•	•	shmelev@invest.kaluga.ru	www.invest.kaluga.ru
	•	operating	greenfield	49	16	•	•	•	•	•	•	shmelev@invest.kaluga.ru	www.invest.kaluga.ru
	o	operating	greenfield	610,6	36	•	•	•	•	•	•	kaminskaya@arko.ru	www.oez.kaluga.ru
	•	operating	greenfield	785	56,6	•	•	o	•	•	•	shmelev@invest.kaluga.ru	www.invest.kaluga.ru
	•	designed	greenfield	110	o	•	•	•	•	•	•	Onishchik@veles-capital.ru	www.veles-kaluga.ru
	•	designed	greenfield	116	10	•	•	•	•	•	•	ogor-park@mail.ru	www.ogor-park.ru
	o	designed	greenfield	432	58	•	•	•	•	•	•	kaminskaya@arko.ru	www.oez.kaluga.ru
	•	designed	greenfield	22	10	•	•	o	•	•	•	shmelev@invest.kaluga.ru	www.invest.kaluga.ru
Kirov region													
Vyatskiye Polyany Konveyer Slobodino	o	operating	greenfield	96	11,9	•	•	o	•	•	o	prompochta@mail.ru	www.razvitie43.ru
	o	operating	brownfield	21,6 (24966)	2,76	o	•	o	•	•	•	marina_fufacheva@mail.ru	
	o	designed	greenfield	26	8	•	•	•	•	•	•	prompochta@mail.ru	www.razvitie43.ru

Parks	AIP member	Status	Type	Area, ha (m2)	Electric power	Gas	Railway connection	Land selling	Land rental	Building rental	Build-to-suit	e-mail	web-site
Kostroma region													
Volgorechenskiy Industrialnyy	o	designed	greenfield	2594,5	341	•	•	o	•	•	o	duma_volg@mail.ru	
	o	designed	brownfield	280 (173640)	191,88	o	•	•	•	•	•	investkostroma@yandex.ru	
Kurgan region													
Kurganskiy	•	operating	brownfield	24,8 (97592)	24	•	•	o	•	o	•	igor.sergeev@ite-ng.ru	www.ipark45.ru
Leningrad region													
Greenstate Levoberezhny M10 Fedorovskoye Gatchina Doni-Verevo Kola Pikalevo	•	operating	greenfield	112	26,6	•	•	•	o	•	o	liudmila.krasova@yit.ru	www.yit-greenstate.com
	•	operating	brownfield	160 (40000)	47	•	•	•	•	•	•	sergej-azizov@yandex.ru	www.parkind.ru
	o	operating	greenfield	400	29	•	•	o	•	•	•	nikolayarev@mcsm10.ru	www.mcm10.ru