

AIP

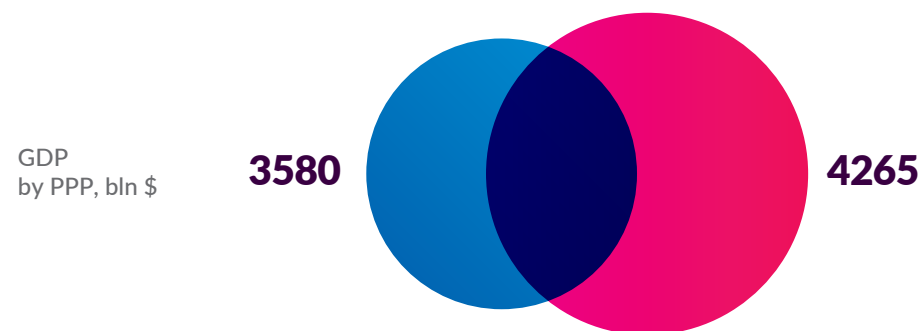
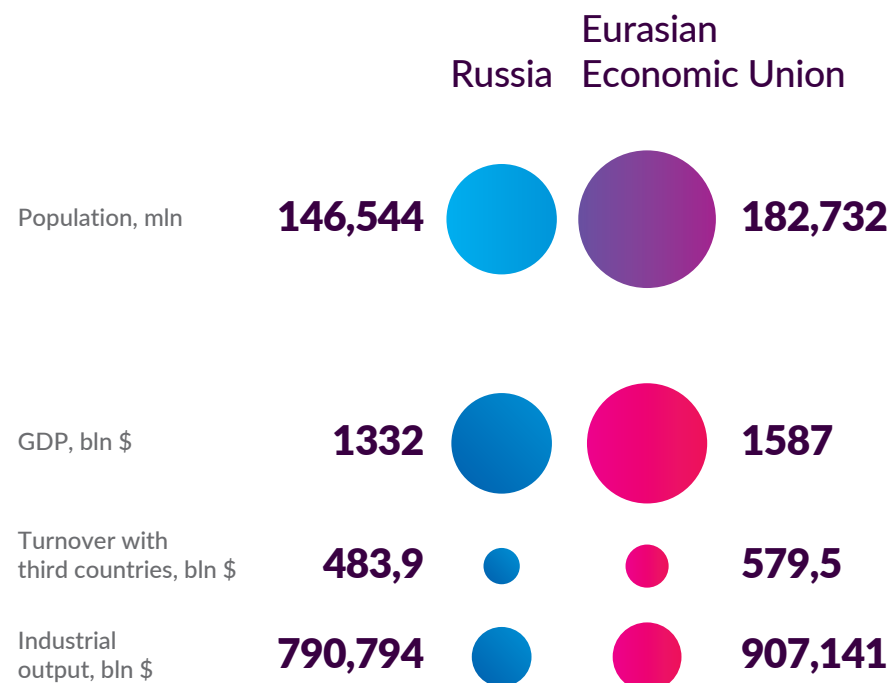
ASSOCIATION
OF INDUSTRIAL
PARKS OF RUSSIA

LOCALISATION OPPORTUNITIES IN RUSSIA

Denis ZHURAVSKIY

Association of industrial parks of Russia, CEO

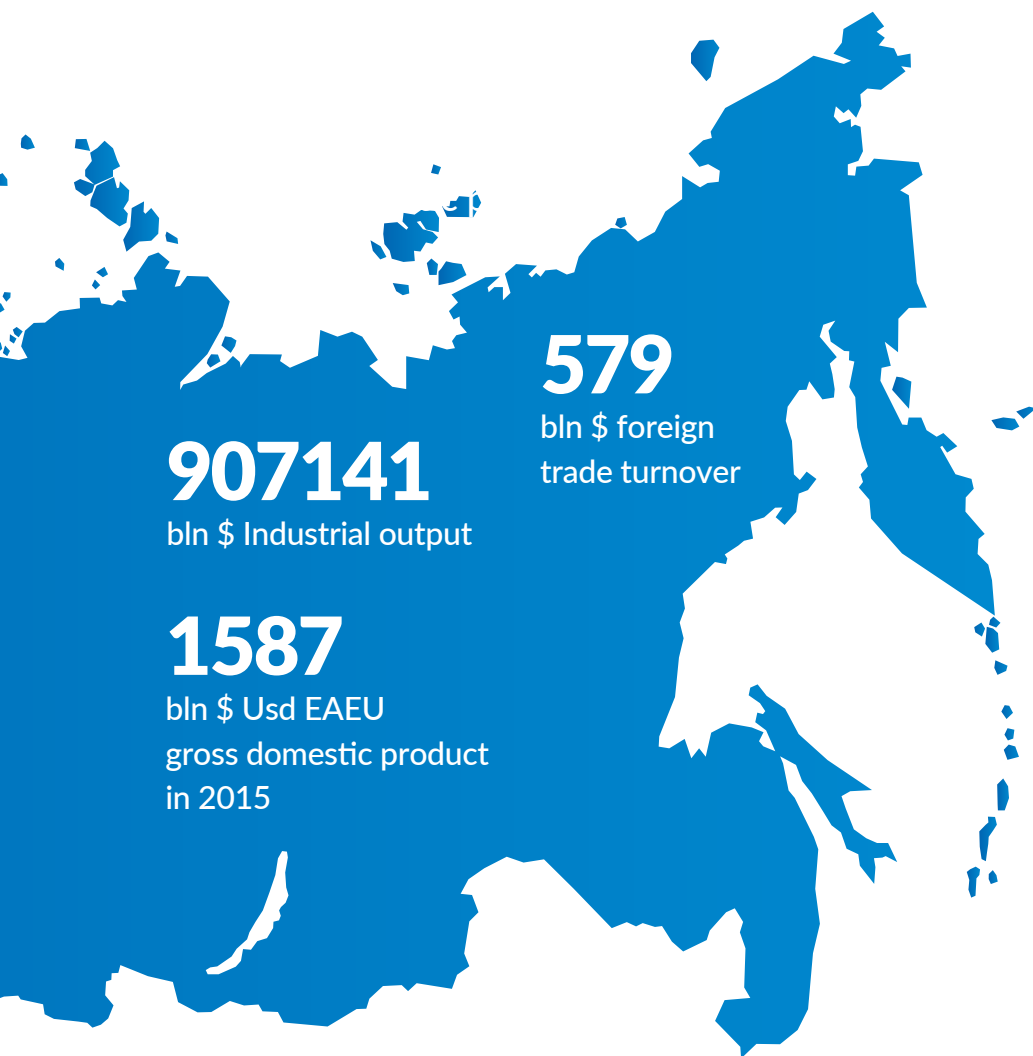
Russia is the gate of the Eurasian Economic Union



4

reasons for doing business in Russia

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



Export potential

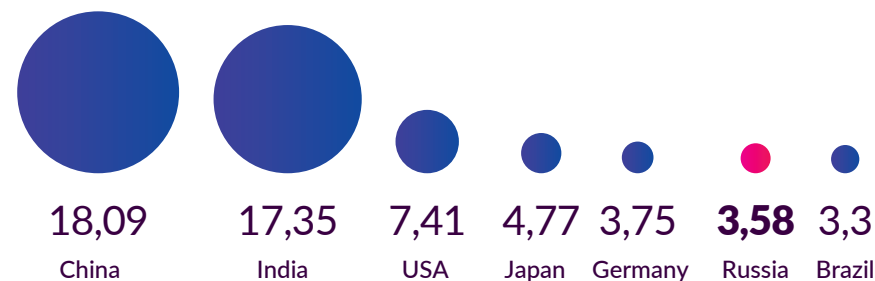
Export growth of 28% from 2013 to 2016, 498 billion US dollars, 19,4 \$ bln of them - agricultural production.

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)

GDP by PPP (purchasing-power parity) - **3,58 trln.\$**
(**6th** in the world in 2015)

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

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

Average salary in Russia

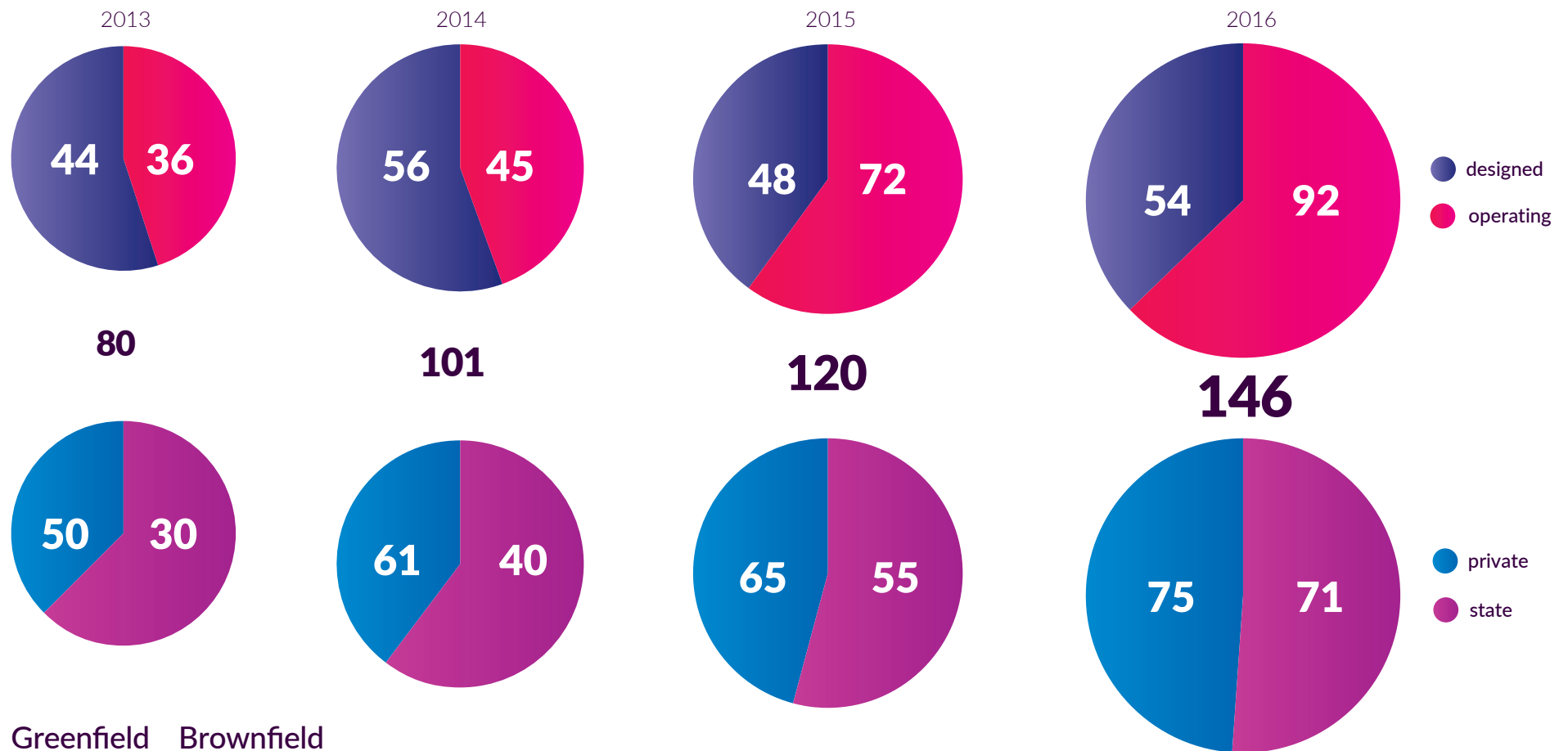
engineers **600 \$**
technical staff **400 \$**

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\$

INDUSTRIAL PARKS IN RUSSIA

sector development



Greenfield Brownfield

362

82

Average total area, ha

143167

Average Area of production facilities, m2

14

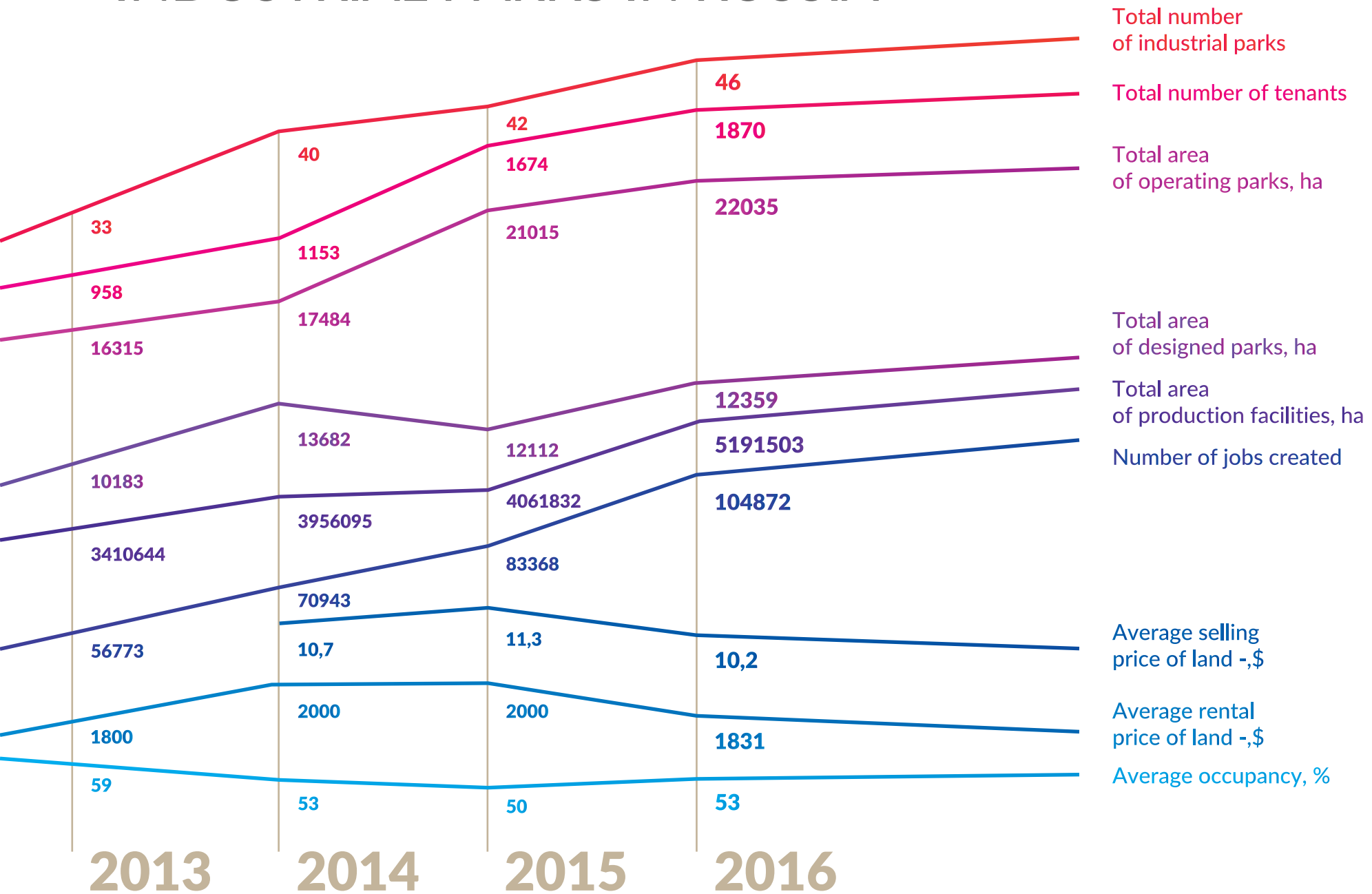
28

Average number of tenants



22 Certified industrial parks

INDUSTRIAL PARKS IN RUSSIA

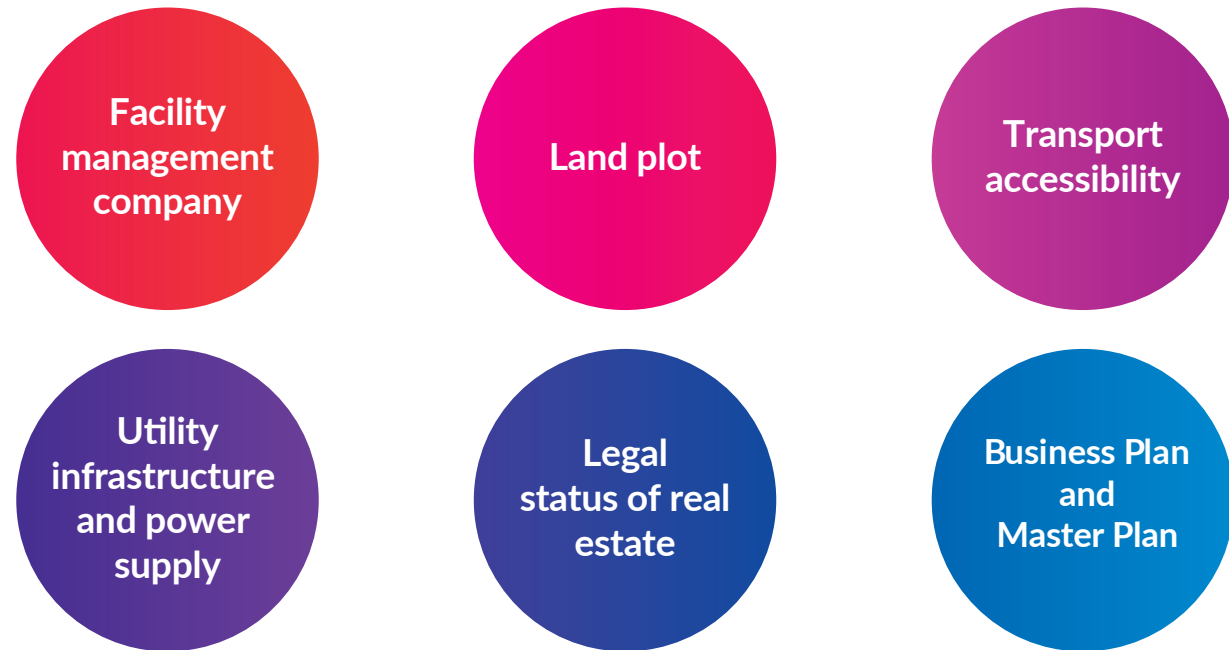


NATIONAL STANDARD OF INDUSTRIAL PARK IN RUSSIA

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 which has all the mandatory features of the industrial park provided in the National Standard.

2. DESIGNED

industrial park where one or a few essential characteristics, specified in the National Standard, are not ready, but it provided the project documentation approved by the state examination.

4 REASONS FOR DOING BUSINESS IN RUSSIA

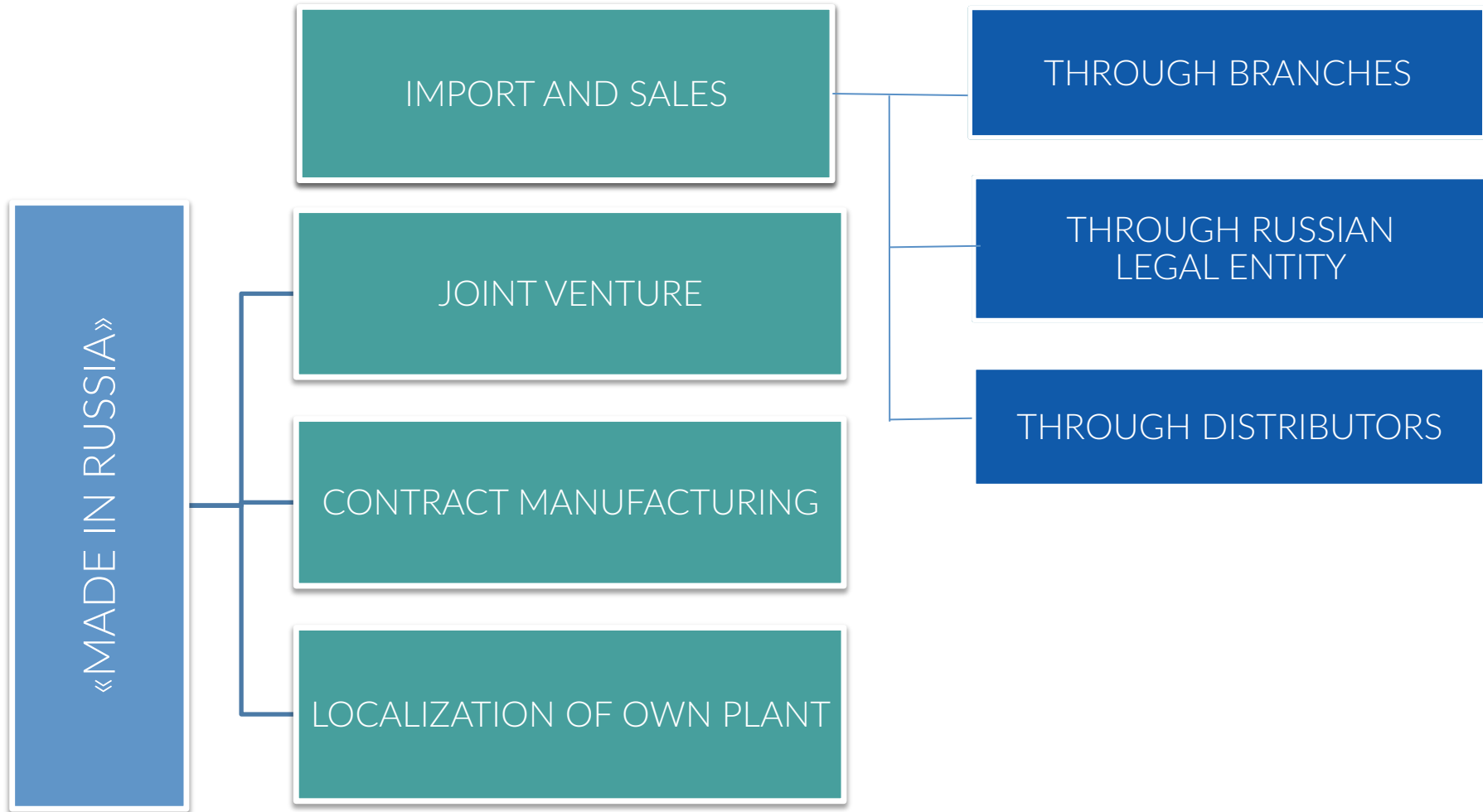
DOMESTIC DEMAND IS STILL GROWING

EXPORT POTENTIAL

NATURAL RESOURCES

SHORT-TERM GROWTH DRIVES

POSSIBLE WAYS OF OPERATING BUSINESS IN RUSSIA



LOCALIZATION OF OWN PLANT

Industrial parks

GREENFIELD

- engineering updated site for new construction
- easy to customize infrastructure
- most appropriate for big and medium size of business
- a large number of industrial parks in the territory of the Russian Federation
- tax benefit

BROWNFIELD

- already existing energy facilities, buildings and infrastructure
- fast solution for placing machineries and production lines
- most appropriate for medium and small size of business
- a large number of industrial parks in the territory of the Russian Federation
- tax benefit

Special economic zones

- established in accordance with Federal law sites
- tax and customs benefits
- special entering process
- reduced rates for real estate, and also rental rates

Investment sites

all the rest
(not defined option with wide variety of opportunities)



INDUSTRIAL PARK SERVICES

BASIC SERVICES

- Landplot selling
- Lanplot and building lease
- Built-to-Suite and Build-to-Lease
- Office premises for rent
- Power, gas, water supply

ADDITIONAL SERVICES

- Managing process of resident construction
- Technical Supervisor service for tenants facilities under construction
- Providing with access to infrastructure facilities
- Providing with communal services
- Power resources transportation
- Security service for territory and resident's facilities
- Garbage removal, disposal of waste, cleaning services
- Transport and logistics services

SPECIAL SERVICES

- Consulting services
- Law services
- Marketing and advertising
- HR-services
- Financial services (including fund raising for residents)
- Supply with component parts and raw materials



REDUCING TERMS AND DECREASE IN RISKS IN CASE OF IMPLEMENTATION OF INVESTMENT PROJECTS IN INDUSTRIAL PARKS


STAGE OF THE INVESTMENT PROJECT	Investment sites	Industrial park
Choice of a site, preparation of LOI	6 – 36 months	2 months
Engineering researches (geology, geodesy, archeology, historical and cultural examination)	6 months	0
Preparation of land management documentation (land surveying, PZZ, PDP, SPZ)	6 – 12 months	0 – 6 months
The existing engineering infrastructure with ready points of connection to networks	Up to 24 months	0 – 3 months
Preparation of a site for construction (mobilization, soil works, equalization)	6 – 8 months	2 – 4 months
Receipt of the construction license	6 – 12 months	6 months
Commissioning	1 – 6 months	1 month



LOCALIZED COMPANIES IN INDUSTRIAL PARKS

165 foreign companies from **25** countries localized production in the operating industrial parks that constitutes 10% of all resident companies of industrial parks of Russia

COUNTRY	NUMBER OF THE COMPANIES
Germany	50
Italy, Japan	14
Turkey, France	9
Finland, USA	8
China, Sweden	6
South Korea	5
Austria, Belgium	4
Great Britain, Denmark, Spain, Netherlands	3
India, Canada, Switzerland	2
Other	10



Special economic zones	44
Zavolzhye	16
KIP Master	14
Dega Klaster Noginsk	12
Sheremetyevo	11
Vorsino	11



ABOUT THE ASSOCIATION OF INDUSTRIAL PARKS



OUR PARTNERS



NON-COMMERCIAL ORGANISATION SINCE 2010

- 115 legal entities
- 80 industrial parks in 45 Russian region

FOCUS ON

- Lobby
- Investment support
- Special consulting

OUR TOOLS

- 20 events per year
- Guidance materials and analytics
- Geo – informational system of industrial parks in Russia
- Certification of industrial parks

FOR FOREIGN COMPANIES IN RUSSIA

- Entry point
- Reliable partner

WE TRANSMIT MOMENTUM

GEOINFORMATIONAL SYSTEM OF INDUSTRIAL PARKS

ГЕОИНФОРМАЦИОННАЯ СИСТЕМА
ИНДУСТРИАЛЬНЫХ ПАРКОВ И ТЕХНОПАРКОВ

НОВОСТИ О ПРОЕКТЕ

РУС

СЛОИ

ПАРКИ168 из 168

Индустриальные парки

Технопарки

Действует

Создается

Намерения

Площадь, га

Дополнительные фильтры

НазваниеПлощадь

Думиничи

Калужская область

131 Га

К-Агро

Калужская область

2251 Га

Коллонтай

Калужская область

25.1 Га

Маклаки

Калужская область

ИНфраСТРУКТУРА0 из 512

СТАТИСТИКА

Северный

Общая информация

Название паркаСеверный

Субъект РФБелгородская область

Тип площадкиИндустриальный парк

Тип паркаГринфилд

Сертификат АИПНет

Сертификат национального стандартаНет

Адрес паркаБелгородская область, Белгородский район, поселок Северный

Наименование Управляющей компании паркаАО "Дирекция по развитию промышленных зон"

Форма собственности УКГосударственная

Форма собственности активов недвижимого имуществаГосударственная

Тип парка по форме собственностиГосударственная

Название сайта паркаbelprompark.ru

Наличие концепции развитияЛа

1 Общая информация

2 Базовые услуги управляющей компании

3 Дополнительные услуги Управляющей компании парка

4 Транспортная доступность

5 Инфраструктура парка, земельный участок

5.1 Земельный участок

5.2 Производственная недвижимость

5.3 Электроэнергия в парке

5.4 Газообеспечение в парке

5.5 Тепловая энергия в парке

5.6 Водообеспечение

5.7 Очистные и канализационные сооружения

5.8 Связь в парке

6 Доступность трудовых ресурсов

7 Информация о резидентах

8 Государственная поддержка парка

Информационная поддержка

Ассоциация индустриальных парков

www.indparks.ru

AIP

ASSOCIATION
OF INDUSTRIAL
PARKS OF RUSSIA

ASSOCIATION OF INDUSTRIAL PARKS SERVICES

SITE SELECTION FOR LOCALIZATION OF PRODUCTION

- Comparative analysis of the regions, based on the objectives of the project
- Comparative analysis of the regions, based on the objectives of the project
- Comparative analysis of the regions, based on the objectives of the project

GR

- Ensuring cooperation with the authorities in accordance with the law
- Assistance in providing state support for investment projects
- Preliminary study of investment agreements
- Providing support to projects in the implementation phase

SPECIAL SECTOR CONSULTING

- Procedures for connecting to the utilities networks in Russia
- Land and land management regulation
- Issues of industrial construction (permits, approvals, involvement of partners)
- Exchange of experience, best practices
- Attracting international partners to implement projects in Russia

