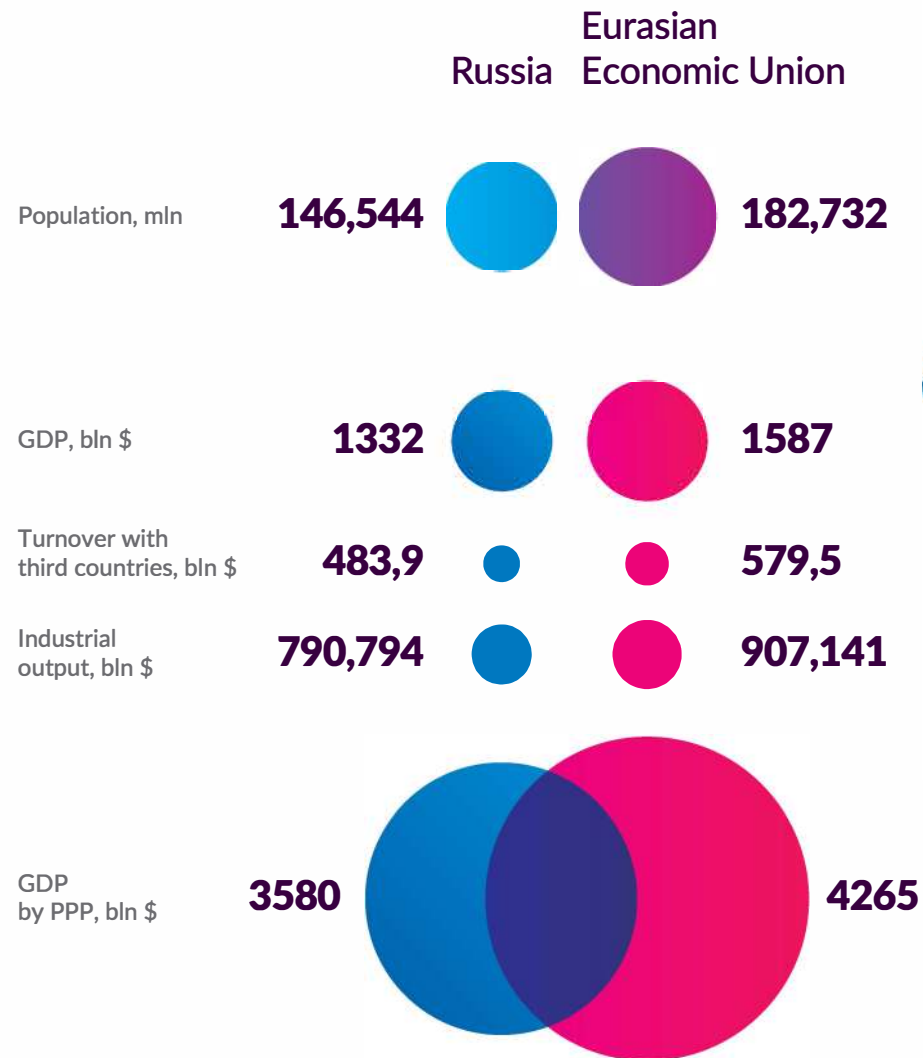


AIP ASSOCIATION
OF INDUSTRIAL
PARKS OF RUSSIA

LOCALISATION OPPORTUNITIES IN RUSSIA

Annual review 2016

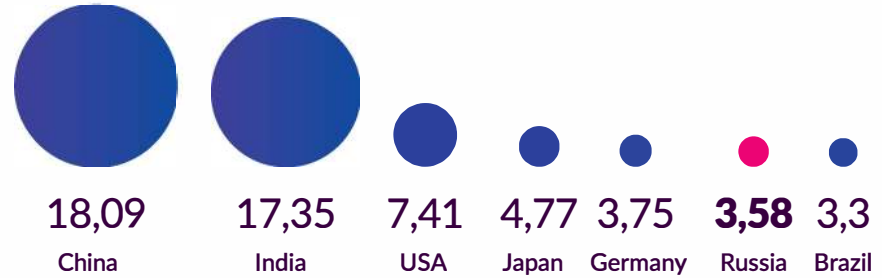
Russia is the gate of the Eurasian Economic Union





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 \$**

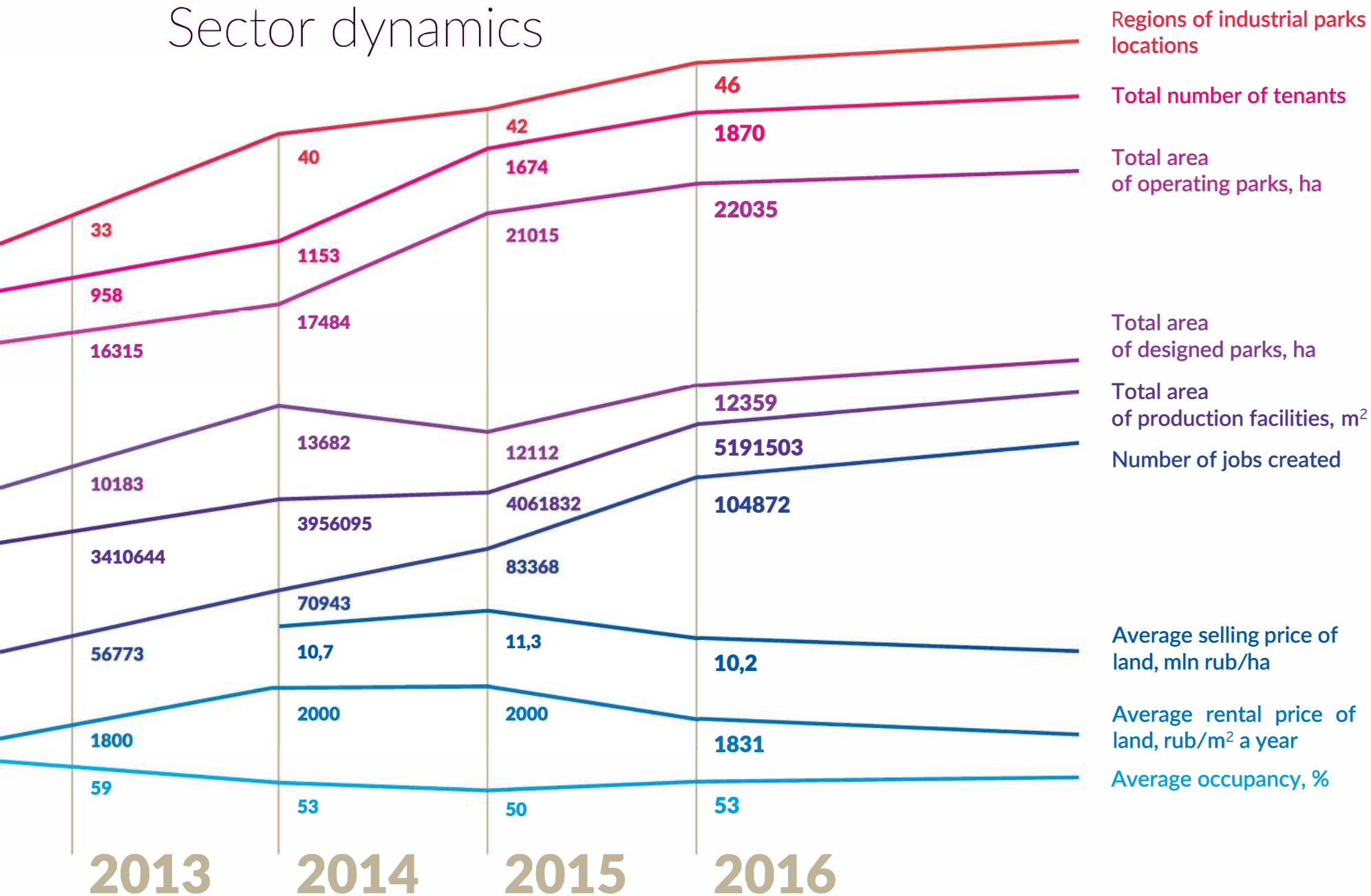
Export potential

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



Greenfield Brownfield

362

82

143167

14

28

Average total area, ha

Average Area of production facilities, m²

Average number of tenants



22 certified industrial parks

● designed

● operating

● private

● state

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.M1370.04IAYA0.

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



○ operating parks
● designed parks

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	•	operating	brownfield	223.9 (52465)	28.5	•	o	o	•	•	•	smolyagin.i@bashkortostan.ru	www.kr02.ru
Veles	•	operating	brownfield	8.3 (17899)	1.23	•	o	o	•	•	•	ind.park-veles@yandex.ru	
Zubovo	•	operating	greenfield	37.3	10	•	•	o	•	•	•	ObletsovNK@rushydro.ru	
PromCentre	o	operating	brownfield	11.7 (48480)	10.7	•	•	o	•	•	•	promcenterufa@mail.ru	www.promcenterufa.ru
Ufimsky	•	operating	greenfield	298.6	55	•	•	•	•	•	•	karabanova.an@bashkortostan.ru	www.kr02.ru
Khimterra	•	operating	brownfield	8	2.6	o	•	•	•	•	•	fomin.dl@bashkortostan.ru	www.kr02.ru
Republic of Dagestan													
Tyube	•	operating	greenfield	171.8	126	•	o	o	•	•	•	kpdkkip@mail.ru	www.kipprd.ru
Foton	o	operating	greenfield	13.8 (42800)	15	•	o	o	•	•	•	mr.sagidzagirov@mail.ru	www.ip-photon.ru
Avrora	o	designed	greenfield	68.6		o	•	•	•	•	•	info@aokrd.ru	
Republic of Karelia													
Nadvolsty													
Republic of Tatarstan													
A Plus Park Alabuga	•	operating	greenfield	36 (16000)	12.5	•	•	o	•	•	•	mshumilova@aplusdevelopment.ru	www.alabugapark.ru
Kazanskiy Silicon	•	operating	brownfield	272 (28982)	38.5	•	•	•	•	•	•	prigen@ksc.ru	www.ksc.ru
Kamskiye Polyany	o	operating	greenfield	230	25	•	•	•	•	•	•	ktv@kamapark.ru	www.kamapark.ru
KIP Master	•	operating	brownfield	181 (1222978)	30,328	•	•	•	•	•	•	ftzkirov@kamaz.ru	www.kipmaster.ru
M-7	o	operating	greenfield	39.5	6.2	•	•	•	•	•	•	info@m7park.ru	www.m7park.ru
SEZ PPT Alabuga	•	operating	greenfield	1983	416	•	•	•	•	•	•	invest@sezalabuga.ru	www.alabuga.ru
Sakary	•	operating	greenfield	134		•	•	•	•	•	•	sokuryuk@yandex.ru	
Technopolis Khimgrad	•	operating	brownfield	131 (361715)	40.68	•	•	•	•	•	•	hingrad@inbox.ru	www.himgrad.ru
Tyulyachi	•	operating	greenfield	33	13.2	•	•	•	•	•	•	sozdanie.park@mail.ru	www.tulachi.ru
Chelny	•	operating	greenfield	100	4	•	•	•	•	•	•	ipcheln988@gmail.com	www.ipcheln.ru
Aktanysh	•	designed	greenfield	13.3		o	•	•	•	•	•	linar.fattakhov@tatar.ru	
Vyatka	•	designed	greenfield	80	4.5	•	•	•	•	•	•	Darzmanov1977@mail.ru	www.vyatkapark.ru
Drozhzhane	•	designed	greenfield	19.1		o	•	•	•	•	•	egor.tamavsky@tatar.ru	
Kukmor	•	designed	greenfield	20	4	•	•	•	•	•	•	chulpan.hanafina@tatar.ru	
Novosheshmink	•	designed	greenfield	8	0.65	•	•	•	•	•	•	ishkova.luiza@tatar.ru	
Razvitiye	o	designed	greenfield	24.6	4.5	•	•	•	•	•	•	prompark16.ru	www.prompark16.ru
Chistopol	o	designed	greenfield	292	8	•	•	•	•	•	•	T.Bilyalov@tatar.ru	www.chistopolinvest.ru
Republic of Khakassia													
Chernogorskiy													
Udmurt Republic													
Razvitiye													
Chechen Republic													
Groznskiy													
Chuvash Republic													
Cheboksary													
Kanash													
Krasnoyarsk krai													
Divnyy													
Krasny Yar													
Stavropol krai													
Nevnomysk													
SKIP Master													
Budenovskiy													
Georgievskiy													
Khabarovsk krai													
Avangard													
Dalennergomash													
Belgorod region													
Volokonovskiy													
Severniy													
Vladimir region													
Oka													
Stavrovskiy													
Strunino													
Kameshkovskoye													
Paratsels													
Vologda region													
Sheksna													
Sokol													
Voronezh region													
Maslovskiy													
Perspektiva													
Ivanovo region													
Kineshma													
Rodniki													
Irkutsk region													
MAKSIMAKS													
Kaliningrad region													
Khrabrovo													
Chernyakhovskiy													
Ecobaltik													
Kaluga region													
Vorsino													
Grabtsevo													
I-Park Lemminkainen													
Kaluga-Yug													
Obninsk													
SEZ PPT Kaluga Lyudinovo													
Rosva													
Veles Kaluga													
Ogor													
SEZ PPT Kaluga Borovsk													
Sosenskiy													
Kirov region													
Vyatskiye Polyany													
Konveyer													
Slobodino													

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													
Kurgan region													
Kurganskiy													
Leningrad region													
Greenstate													
Lvoberezhnyy													
M10													
Fedorovskoye													
Gatchina													
Doni-Verevo													
Kola													
Pikalevo													
Moscow region													
Bronitsy													
Dega Cluster Noginsk													
Kotolino													
Kotovo													
M4													
SEZ EME Dubna													
Stupino 1													
Stupino Quadrat													
Sheremetievo													
Yuzhniye Vrata													
Victoria													
Esipovo													
Papvino													
Podosolki													
Stupino													
Lipetsk region													
SEZ PPT Lipetsk													
SEZ PPT Lipetsk													
Nizhny Novgorod region													
ZMZ													
Oka-Polymer													
Novosibirsk region													
Biotechnological industrial park Koltsovo													
Novosib Industrial and logistic park													
Tver region													
Dve bashni													
Borovlyovo													
Raslovo													
Toms region													
Beryozovaya													
Severnaya													
Tula region													
Pervomayskiy													
Uzlovaya													
Tyumen region													
Bogandinskiy													
Borovskiy													
Chelyabinsk region													
Stankomash													
Yaroslavl region													
Novoselki													
Tutayev													
Ulyanovsk region													
DAAZ													
Zavolzhye													
Novoulyanovsk													
PSEZ Ulyanovsk													
UAZ													
Moscow													
Technopolis Moskva													
St. Petersburg													
A Plus Kolpino													
A Plus Pushkin													
A Plus Shushary													
Maryino													
Chukotka autonomous region													
Anadyr													