INVESTMENT OPPORTUNITIES
IN THE YAROSLAVL REGION
About the Yaroslavl Region

Location
North of the Central federal district of the Russian Federation

Population
1 272 000

Climate
Temperate continental

Average temperatures

<table>
<thead>
<tr>
<th>JANUARY</th>
<th>JULY</th>
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<tbody>
<tr>
<td>-11.2°C</td>
<td>+16.6°C</td>
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</tbody>
</table>

Administrative Divisions

- Cities: 3
- Municipal districts: 17
- Urban settlements: 11
- Village settlements: 69

Area
36 200 km²

Water: 3.9 km²
Agricultural lands: 11.3 km²
Forests: 17.2 km²
Distance to the largest cities

- KOSTROMA: 80 km
- IVANOVO: 110 km
- VOLOGDA: 200 km
- MOSCOW: 280 km
- KIROV: 690 km
- ST.PETERSBURG: 800 km
Logistics Infrastructure of the Yaroslavl Region

LOGISTICS ADVANTAGES

- The Northern Railway
- Yaroslavl and Rybinsk river ports
- Logistics infrastructure
- TUNOSHNA international airport
- Cargo customs terminals
The Yaroslavl Region is one of the highly developed areas of the Russian Federation. Approx. 300 of the Yaroslavl Region companies are federally significant and are leaders among their peers.

Leading sectors:
- Engineering
- Oil refinery
- Food, beverages and tobacco production
- Building materials manufacturing

Driving force of the economic growth:
- Transport vehicle and equipment
- Chemicals
- Leather products and foot-wear manufacturing
- Automobile components and parts
- Machinery and equipment manufacturing

Potential for manufacturing:
- Transport and communication companies
- Machinery and equipment production

QII 2015 yoy:
- IPI: 109,1%
- Agricultural production index: 106,2%
- New apartments: 124,3%
- dispatched goods: 112,8%

New apartments dispatched goods
04
In 2012-2013 the Yaroslavl region reported population growth

The Yaroslavl Region Population

1,272 thousand
as of 01/01/2014

Urban population
81.9% 1,041.6 thousand

Rural population
18.1% 230.2 thousand

Working-age population
750 thousand

Males
51.3% 385 thousand

Females
48.7% 365 thousand

Mean age of the population
41.2

Males
37.7 years

Females
44.1 years

Gender Composition

55.4% Females

44.6% Males
Professional Education and Training in the Yaroslavl Region

The Yaroslavl Region is home to over 100 colleges, universities and research facilities.

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<thead>
<tr>
<th>Colleges and Technical Schools</th>
<th>Universities</th>
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<tbody>
<tr>
<td>Colleges</td>
<td>Federal universities</td>
</tr>
<tr>
<td>Technical schools</td>
<td>State and non-state universities</td>
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<td></td>
<td>Branches of federal universities</td>
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<td></td>
<td>Military academy</td>
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<td>28</td>
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<td>22</td>
<td>37</td>
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</tbody>
</table>

University students in 2012-2013: 46,9 thousand

Main universities:
- Yaroslavl State University named after P.G.Demidov
- Yaroslavl State Medical Academy
- Yaroslavl Teachers’ Training University
- Yaroslavl State Agricultural Academy
- Rybinsk State Aviation Technical University named after P.A.Soloviev
- Yaroslavl branch of Moscow State University of Economy, Statistics and IT (MESI)
- International Academy of Business and New Technologies (MUBiNT)
Joint Projects of Investors and Educational Institutions in the Yaroslavl Region

- **KOMATSU**
  - Technology for tractor assembly
  - Technology for robot welding
  - Powertrain
  - Nondestructive ultra sound quality control
  - Welding technology

- **Takeda**
  - Chemistry laboratory assistant
  - Chemist for spectral analysis
  - Laboratory assistant in microbiology
  - Biotechnology machine operator

- **NOVARTIS**
  - Sponsor of new chemical analysis laboratory
  - Students internship in USA and China

- **Yaroslavl State Technical University**
  - Training program on Pharmaceutical Safety in Clinical Practice
  - Scholarship program

- **Yaroslavl State Medical Academy**
  - Training and academic mobility center

- **Rybinsk State Aviation Technical University**

- **Technical school #21**

- **Yaroslavl Chemical Technical School**

- **Yaroslavl State University**
The largest part of capital investment in 2014 was made by

- Manufacturing Companies: 50.4%
- Transport and Communication Companies: 17.2%

In 2014 regional companies, including SMEs, invested

- $2.2 B
- 94.4% to the relevant period of 2013 (in current prices)
Investment potential of the Yaroslavl Region

Foreign investment in 2014: $220 M

Investment ratings of the Yaroslavl Region:

- Expert rating agency: 3B1
- FitchRatings (rus): AA-

Foreign Investment Structure:
- FDI: 19.6%
- Portfolio: 15.6%
- Other: 64.8%
FDI in the Yaroslavl Region

Pharmaceuticals

Engineering and Automobile Components and Parts

Engineering Structures

Innovative Energy
Investment Sites and Industrial Parks in the Yaroslavl Region

Agency for Investment and Cluster Development

- Offers various types of assistance to those who wish to invest in the Yaroslavl oblast
- Develops industrial parks in the Yaroslavl oblast
- Establishes and develops investment infrastructure

Yaroslavl Industrial Park

- Establishes and operates industrial parks in the Yaroslavl oblast
- Maintains infrastructure for industrial park residents

Industrial park
1 NOVOSELKI
400 ha

Investment site
2 YUGOZAPADNAYA
100 ha

Investment site
3 ROSTOVSKAYA
200 ha

Investment site
4 KOPAEVO
160 ha

Industrial park
5 MASTER
34 ha

Industrial park
6 GAVRILOV-YAM
15 000 m²

Investment site
7 PROTECH
54 ha

Investment site
8 KARABIKHSKAYA
500 ha

Investment site
9 SLAVICH
220 ha
CONCEPT FOR CLUSTER DEVELOPMENT

OBJECTIVE

GROWTH OF REGIONAL COMPETITIVENESS AND INCREASE OF NUMBER OF REGIONAL COMPANIES IN DOMESTIC AND INTERNATIONAL MARKETS, BOOSTING THEIR OPERATING EFFICIENCY

GOALS
- Maintainance of congenial conditions for the cluster companies growth, life quality improvement in cluster location area
- Development of cluster infrastructure for innovation, production, transport, energetic, engineering, housing
- Maintainance of congenial conditions for attracting investment to the clusters location areas
- Conditions for attracting skilled personnel;
- Professional and post-educational training system implementation
- Small and medium business growth
- Cluster companies financial support from various sources
- Scientific, technical and industrial cooperation development
Pharmaceutical Industry and Innovative Medicine Cluster in the Yaroslavl Region

**Manufacturing, Storage, Transportation, Sale, Utilization**
- Legal and financial consulting companies
- Manufacturers of packaging
- Distributors
- Manufacturing facilities
- Transportation companies
- Investors
- Special service companies

**Agreements and Regulatory System**
- Concept for pharmaceutical cluster development in the Yaroslavl oblast

**Regional Healthcare System**
- Modernization of regional cardiology
- Regional healthcare system development in cooperation with Ranbaxy

**Cluster Companies**

**Human Resource**
- Post-educational programs in cooperation with Ranbaxy
- Center for educational projects at the Yaroslavl State Medical Academy
- Oriented schools in the Yaroslavl oblast

**Scientific Researches**
- Center for Clinical Researches, Pharmacology and Bioequivalence in Yaroslavl
- Center for Technologies Transfer at the State Pedagogical University in Yaroslavl
- Intellectual Dialogue - center for anti-infective drugs production in Yaroslavl

**Investment Volume**
- **TEVA** $329M
- **Takeda** $75.2M
- **Pharma** $332.2M
- **Pharma** $50.1M
The main goals of this cluster creation:

- Setting up congenial conditions for attracting of manufacturing companies to the Yaroslavl Region
- Modernization and R&D stimulation with local companies
- Congenial conditions creation for business
- New large projects for local businesses with federal funding
Tourism & Recreation Cluster in the Yaroslavl Region

The main goals of this cluster creation:

- Setting up congenial conditions for the increase of number of tourist infrastructure objects, their service potential growth;
- New local tourist projects creation and support; participation in expos, events for the region’s image and branding promotion; personnel education, analytical and methodical ware improvement;
- Management of the Yaroslavl Region tourist complex.

Cluster core

- World class resort area in Pereslavl district of the Yaroslavl Region
- Historical and cultural complex in the territory of Nekrasovskiy district of the Yaroslavl Region.
- The main goal of this project is to revive and preserve Vyatskoe village heritage.
- The project is aimed at preservation and popularization of Russian historical and cultural heritage. Various pavilions dedicated to cultural and historical aspects.

Investment project

- Investment project
  - Zolotoe Koltso
- Investment project
  - Yaroslavskoe Vzmorye
- Investment project
  - Vyatskoe
- Investment project
  - Russian Park

Investment volume

- $313.4M
- $244.4M
Cluster of energy and gas turbine engineering in the Yaroslavl region

State institutes for development

Preproduction planning centre of excellence

Centre of excellence for non-conventional materials

Centre of excellence for aerospace thermo-physics and power engineering

Cluster Core
**Informational Support**

- Consulting
- Investment project data base updating
- Information on vacant land plots offering
- Publication of priority projects information on the official site of the Yaroslavl oblast government. Presenting information on the projects at various international and national events.
- General assistance to investors

**Incentives (only for investment projects in the priority list)**

- Tax holidays and subsidies
- Reduced rent payments for governmental property usage
- Investment tax loans and guarantees

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**TAX INCENTIVES**

granted to investment priority projects for a period of 7 to 9 years (payback period)
THANK YOU FOR YOUR TIME!

Agency For Investment & Cluster Development

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