



WHY PORTUGAL



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RECENT TRACK RECORD

NEW TECHNOLOGY – BASED OPERATIONS

SIEMENS

Expands its Lisbon Tech Hub for cybersecurity, artificial intelligence and robotics.



Opens a technology center for automated mobility in Braga



Opens a technology center in Lisbon for engineering, security, customer support and research to support EMEA operations



Mercedes-Benz

Opens a Digital Delivery Hub in Lisbon



Opens an IT development centre in Porto



Opens center of excellence in Lisbon to develop state-of-the-art Smart City lighting solutions.



Opens an automotive software engineering centre entitled Critical TechWorks, a JV with the Portuguese CRITICAL Software



Strengthens R&D capabilities with new engineering design centre in Porto



Volkswagen

New software development center for Volkswagen Group IT and MAN Truck & Bus AG in Lisbon



ZUMTOBEL

Opens a new group wide software competence centre for lighting technologies in Porto



Opens a new Customer Experience (CX) Centre for the EMEAR region, in Lisbon



Opens a Global Digital and Analytics Center in Lisbon

“With the offices in Portugal, we are integrating a **key location for development of digital services**. At the same time, we will **benefit from a growing and dynamic environment with young talents who fit our DNA perfectly.**”

- Christoph Grote, Senior Vice-President BMW Group Electronics

STRATEGIC LOCATION

**Nearest
European**
country to the US
and Canada



Same time
zone as UK
and Ireland



1 hour difference
from Central European
Time



**BRIDGE
TO
PORTUGUESE-
SPEAKING
MARKETS**

**260 MILLION
PEOPLE**

**ACCESS
TO
EUROPEAN
MARKETS**

**500 MILLION
PEOPLE**



EU Member
since 1986



Euro currency
Founding member



**UN and OECD
Member**



Stable Democracy



Political Stability

RISK PERCEPTION

CHOOSE A SAFE LOCATION

Condé Nast
Traveler

Violence and politically-related instability are practically nonexistent in Portugal.

April 2020



SAFETY

Global Peace Index 2020

#3

Source: Institute for Economics & Peace | 163 countries



POLITICAL & SOCIAL STABILITY

Political Stability and Absence of Violence/Terrorism 2019

#7

Source: The World Bank - Worldwide Governance Indicators | 214 countries;
Ranking exc. Micro-states (pop. under 0.5 million)



OPERATIONAL RISK

Very low risk 2019

Food security; Governance; Socio-economic
vulnerability; Population affected by Natural Disasters

Source: European Commission - Disaster Risk Management Knowledge Centre



INFRASTRUCTURE

Logistics Performance Index 2018

#23

Source: The World Bank | 160 countries

* Percentage of population affected by natural disasters in the last 12, 24, 36 months (CRED 2019) 4/22



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A GREEN LOCATION

WORKING TOWARDS SUSTAINABILITY

The
Good
Country

#3

PLANET & CLIMATE
INDEX RANKING

Source: goodcountry.org, 149 countries

eurostat 

#6

EU-28 COUNTRY WITH THE LARGEST SHARE
OF ENERGY FROM RENEWABLE SOURCES
(% OF GROSS FINAL ENERGY CONSUMPTION)

Source: Eurostat, 2018



#17

CLIMATE CHANGE PERFORMING INDEX 2021
HIGH-PERFORMING COUNTRY

Source: CCPI 2021, 61 countries

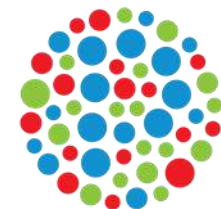


TOP

RANKS ON THE TOP OF COUNTRIES THAT
GENERATE THE MOST WIND AND SOLAR
ELECTRICITY SURPASSING NEW ZEALAND AND
SCANDINAVIAN COUNTRIES

Source: Connect4Climate, 2018

COMPETITIVENESS & BUSINESS ENVIRONMENT

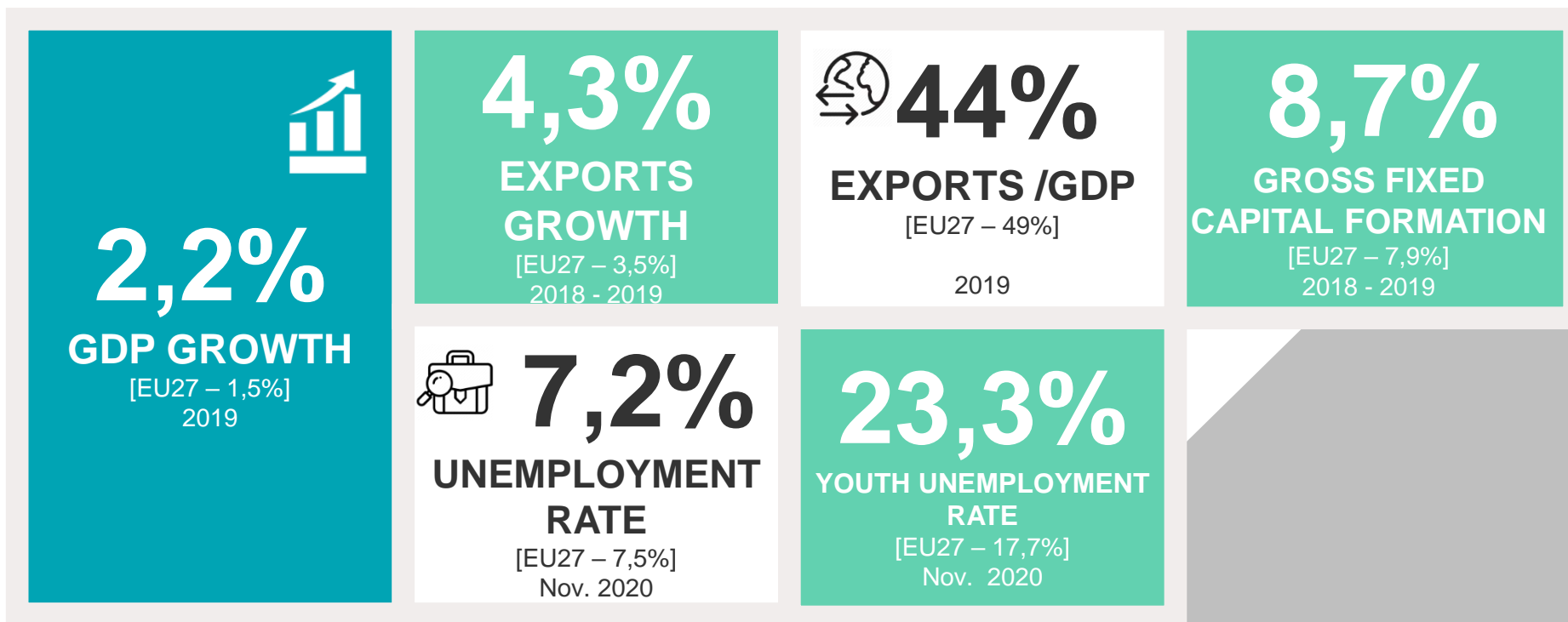


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ECONOMIC GROWTH

ON THE RIGHT TRACK



Source: INE – Statistics of Portugal, Eurostat, PORDATA



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TOP EXPORT MARKETS

TOP CLIENTS



93,477 Mn€
(Jan-Dec 2019)

GOODS & SERVICES

TRAVEL 19,7%

MOTOR VEHICLES, OTHER TRANSP. EQUIP. 10,4%

MACHINERY, APPLIANCES 8,9%

TRANSPORT 8,0%

OTHER BUSINESS SERVICES 5,0%

COMMON METALS 4,8%

PLASTIC, RUBBER PRODUCTS 4,5%

AGRICULTURE 4,3%

MINERAL FUELS 3,9%

CHEMICALS 3,5%



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RECENT INVESTMENT TRACK RECORD



INDUSTRIAL INVESTMENT: NEW & EXPANSION

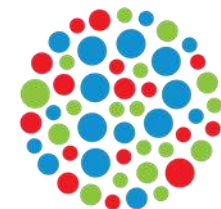


RELEVANT MERGERS & ACQUISITIONS





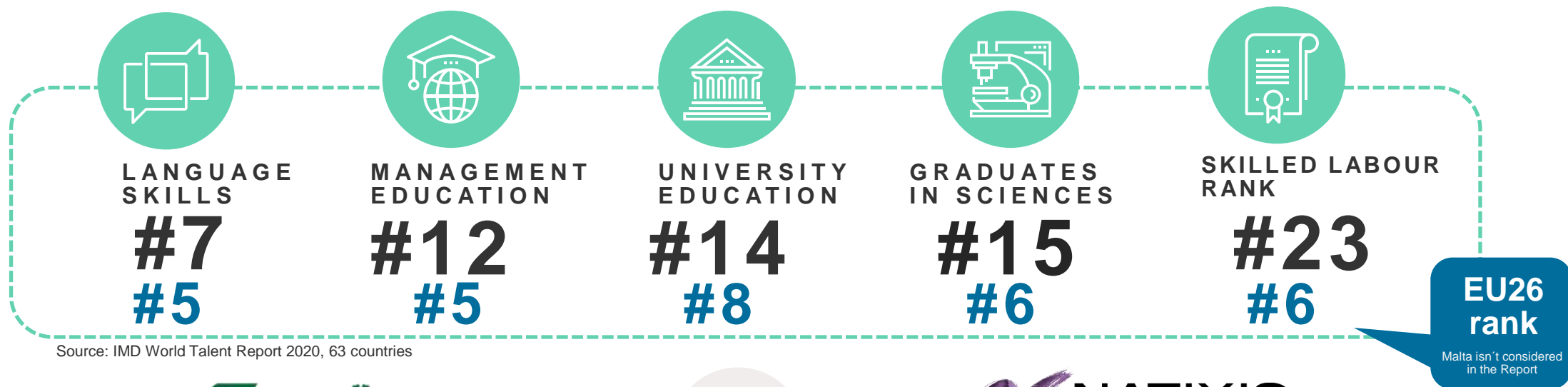
COMPETITIVE ADVANTAGES



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TALENT

INTERNATIONAL BENCHMARKING



*"There is an **openness to business** and a lack of ego. Some nearshoring centres are getting saturated and losing that humility. In Lisbon our **people pride themselves in doing do really good work**. We are looking for creativity and some thinking that is a bit different."*

Jawazil Lavia VP Global Business Services - Digital & Commercial at Carlsberg Group



*"The evolution of Natixis in Portugal into an **Innovation Hub** is the result of the team work we have built during these 3 years, and reflects the bank's involvement with the country. We have a long-term commitment and our ambition is to continue to grow and develop. Internally, **we have become a reference for the company worldwide**, as a source of new ways of working, **innovative solutions and disruptive projects**. Porto became Natixis' second hub in Europe, just after Paris. Our mission is to continue to innovate, aiming to transform traditional banking"*

Nathalie Risacher,
Former Country Manager of Natixis in Portugal

TALENT

OUR KEY ASSET



396 909 STUDENTS

2019/2020

+3%
Change YoY



ENGINEERING & IT

90 121



MATHS & SCIENCES

22 932



**FINANCE, BUSINESS
ADMINISTRATION & LAW**

84 911



81 138 GRADUATES

2018/2019

+2%
Change YoY



ENGINEERING & IT

16 630



MATHS & SCIENCES

4 940



**FINANCE, BUSINESS
ADMINISTRATION & LAW**

10 808

Source: Ministry of Education; Engineering also includes Manufacturing

DID YOU KNOW?

3rd HIGHEST RATE OF ENGINEERING
GRADUATES IN EUROPE

3 PORTUGUESE UNIVERSITIES IN THE
FINANCIAL TIMES RANKING – MASTER IN
FINANCE 2020

14,1% FOREIGN STUDENTS IN HIGHER
EDUCATION (2019/2020)

#7 PROFICIENCY INDEX 2020
PORTUGAL IS HIGH PROFICIENCY IN ENGLISH

4 MOST SPOKEN FOREIGN LANGUAGES:
ENGLISH, FRENCH, SPANISH AND GERMAN.

Source: OECD, Financial Times, PISA rankings

INNOVATION

PORTUGAL IS A TOP COUNTRY PROVIDING TECHNOLOGICAL SERVICES

WORLD
ECONOMIC
FORUM



INNOVATION
CAPABILITY

#31



RESEARCH &
DEVELOPMENT

#34



RESEARCH
INSTITUTIONS
PROMINENCE

#27

EU-28 Countries

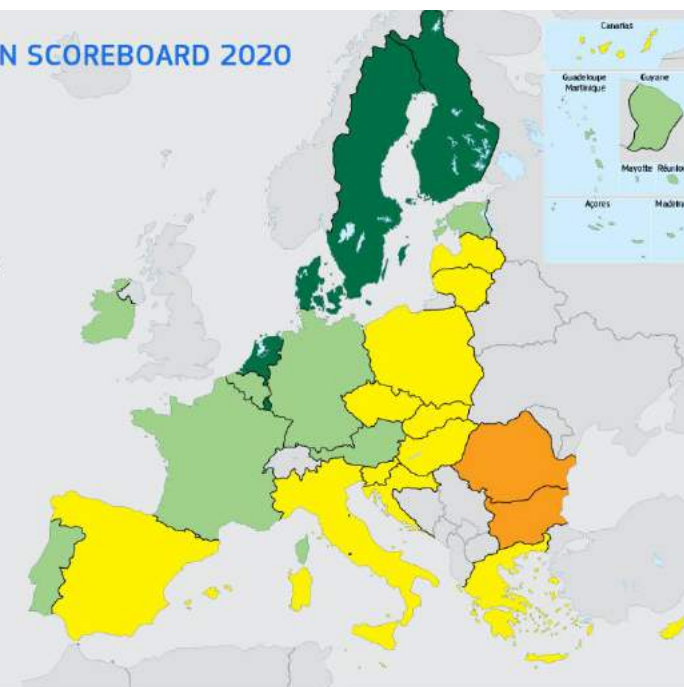
STRONG
INNOVATOR
2020

#12

EUROPEAN INNOVATION SCOREBOARD 2020

Innovation performance groups

- Innovation Leader
- Strong Innovator
- Moderate Innovator
- Modest Innovator



WORLD
ECONOMIC
FORUM

GLOBAL
COMPETITIVENESS
REPORT 2019
(141 COUNTRIES)



BOSCH



Today, the company has one of the largest dedicated R&D teams in Portugal, with over 500 highly qualified engineers working both on hardware and software solutions in Aveiro, Braga and Ovar. In this way, **Bosch stands not only for Made in Portugal but also for Invented in Portugal.**

July, 2017



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INFRASTRUCTURE

AN INTEGRATED TRANSPORT SYSTEM FOR EFFICIENT LOGISTICS

Portugal is the **21st**
country in the world
with **better**
infrastructures

WORLD
ECONOMIC
FORUM
GLOBAL
COMPETITIVENESS
REPORT 2019
(141 COUNTRIES)



**4 INTERNATIONAL
AIRPORTS IN THE
MAINLAND**



**2.562 KM
OF NETWORK**



**6 INTERNATIONAL
SEAPORTS**

SINES – DEEP SEA WATER PORT
PORTO – SECOND LARGEST PORT



**3.122 KM
OF MOTORWAY
LENGTH**

8# IN MOTORWAY
DENSITY IN OECD

Airport
connectivity

#30

Railroad
density

#31

Efficiency of
seaport services

#36

Quality of
Roads

#8

ALL MAINLAND SEAPORTS ARE CONNECTED TO THE RAIL
NETWORK ONWARDS TO **SPAIN AND CENTRAL EUROPE**

TELECOMMUNICATIONS

BROADBAND & CONNECTIVITY



EIB
DIGITALISATION INDEX

#8

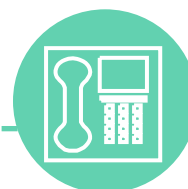
Source: EIB Digitalisation Index 2020, EU28



DIGITAL
PUBLIC SERVICES

#9

Digital Economy and Society Index 2019, EU28



COMMUNICATION
TECHNOLOGY

#11

IMD World Talent Report 2019, 63 countries

FTTH/B***
Coverage 78,7%
(EU28 39,4%)

Rural FTTP
Coverage 53%
(EU28 18%)

FTTH Council Europe,
2020



RESILIENT TELECOM INFRASTRUCTURE DURING LOCKDOWN



DATA TRAFFIC

+52%



USAGE OF OVER THE TOP (OTT) SERVICES

+45%



MOBILE DATA TRAFFIC

+26%

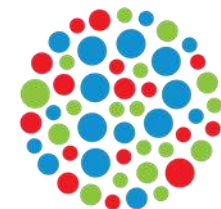
“Our experience so far has been very smooth, the network providers really stepped up”
Peter Villanyi, VP Global Business Services, ConvaTec

53% workforce working remotely**

Vodafone placed 100% of its call centres working remotely in 4 days

Source: ANACOM: *weekly growth, 16-22 March. **Survey by the University of Porto. ***FTTH/B – Fiber to the Home/Business; FTTP – Fiber to the Premises.

INVESTMENT SUPPORT



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ATTRACTIVE INCENTIVES



PRODUCTIVE INVESTMENT

TAX-CREDIT
FINANCIAL
SUPPORT



R&D INVESTMENT

TAX-CREDIT
FINANCIAL
SUPPORT



JOB CREATION

TAX
EXEMPTION
GRANT

EXPAT TAX REGIME

+ WORLD CLASS TALENT IN PORTUGAL



TARGET

Qualified Expatriates in
(I) high added-value
activities, (II) scientific,
artistic or technical
activities, and (III) upper
management positions



INCENTIVES FOR EMPLOYEES

Flat rate for Income tax
of 20% for 10 years

20%



ENTITY IN CHARGE

Tax Authority



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TECH VISA

ATTRACTING INTERNATIONAL TALENT

WHAT

Tech Visa is a certification program addressed to companies that wish to attract **HIGHLY QUALIFIED AND SPECIALIZED STAFF** from countries not included in the Schengen area.

TARGET

This program aims to ensure that highly qualified staff can access jobs created by **PORTUGUESE INCORPORATED COMPANIES OR STARTUPS**, in a **SIMPLIFIED WAY**.

WHERE

Tech Visa invites the interview candidates at the **Portuguese Embassies / Consulates** in the respective country of origin to obtain the residence visa.

20

BUSINESS DAYS to analyze the application

The certification allows a **REDUCTION OF THE RECRUITMENT PERIOD** from several months to a few weeks

~885

New jobs
(Residence permit issued until July 2020)

91%

in IT

QUALITY OF LIFE



WORLDS' BEST
QUALITY OF
LIFE COUNTRY
FOR EXPATS**

#1



GLOBAL
PEACE INDEX
2020*

#3

Source:

* Institute for Economics and Peace, 163 countries

** InterNations, Expat Insider 2019

Portugal is a good location for investments but also **A GREAT PLACE TO LIVE AND ENJOY**. Stable, sunny, with unique nature, rich leisure and cultural amenities, and with high quality healthcare facilities.

Bloomberg

The Unlikely Rise of the
Pastel de Nata, and Why It's
Suddenly Everywhere

Apr 15, 2019

"Culturally, Portugal is a must-try on an international travelers' bucket list, and budget Lisbon rents are creating a tech hub for millennials priced out of London and New York. "



Portugal puts itself on the tech map

Apr 16, 2019

"As an [American] engineer, I was impressed by the knowledge in engineering in Portugal. Additionally, the country's English skills are tremendous and I have had no problems integrating." Jane Hoffer

BBC

Living in a country that
thinks green

Apr 15, 2019

"Portugal was an early leader in investing in a full network of charging stations for electric cars, and has incentivised citizens to install solar power and renewable energy with lower rates and the opportunity to sell energy back to the grid."



WORLD'S LEADING DESTINATION

2019

EUROPE'S LEADING DESTINATION

2020

ONE-STOP SHOP AGENCY

We inform, connect & support



ENQUIRY HANDLING

Professional handling of investor enquiries, provide comprehensive and accurate information and data, benchmark reports with other locations.



FACT-FINDING VISITS

AICEP organizes and schedule site visits with local entities, including local authorities, universities, training centre, HR companies and peer companies.



SITE LOCATION

Provide different site proposals according to project specifications. Help setting up direct contacts with local entities.



INCENTIVES

AICEP will analyze your eligibility to innovation, R&D, production and employment incentives

TRADE & INVESTMENT PROMOTION AGENCY



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AICEP

Was awarded as Best to
Invest TOP IPA 2019
for Western Europe Region



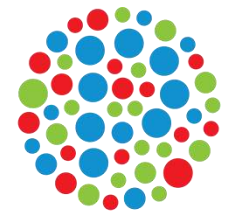
PORTUGALGLOBAL.PT

THE RIGHT CHOICE. THE RIGHT TIME.

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