



# WHY PORTUGAL?

Isabel Ucha  
CEO, Euronext Portugal  
Board Member, Euronext NV



**EURONEXT**

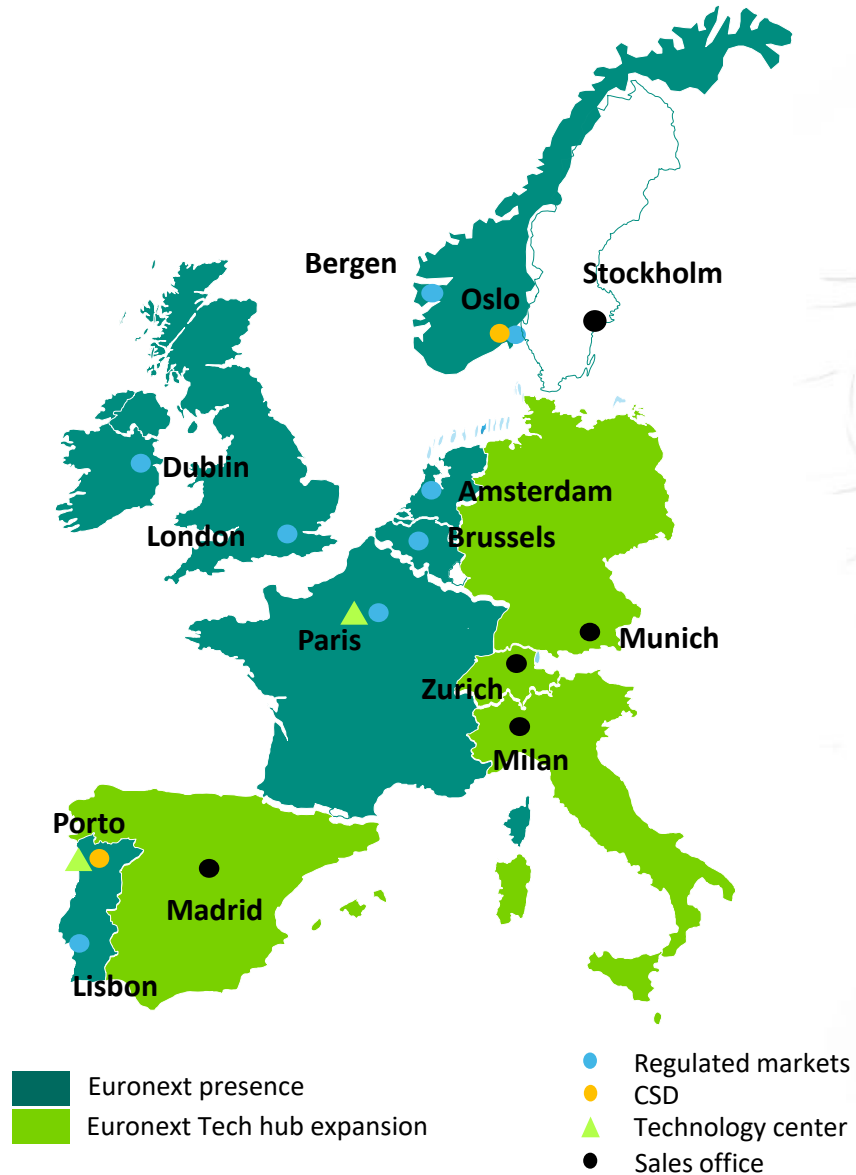


aicep Portugal Global

# EURONEXT – THE LEADING MARKET INFRASTRUCTURE IN EUROPE

## SUSTAINABLE FINANCE

Euronext as a stakeholder and a partner



# COMPETITIVENESS & BUSINESS ENVIRONMENT



**EURONEXT**



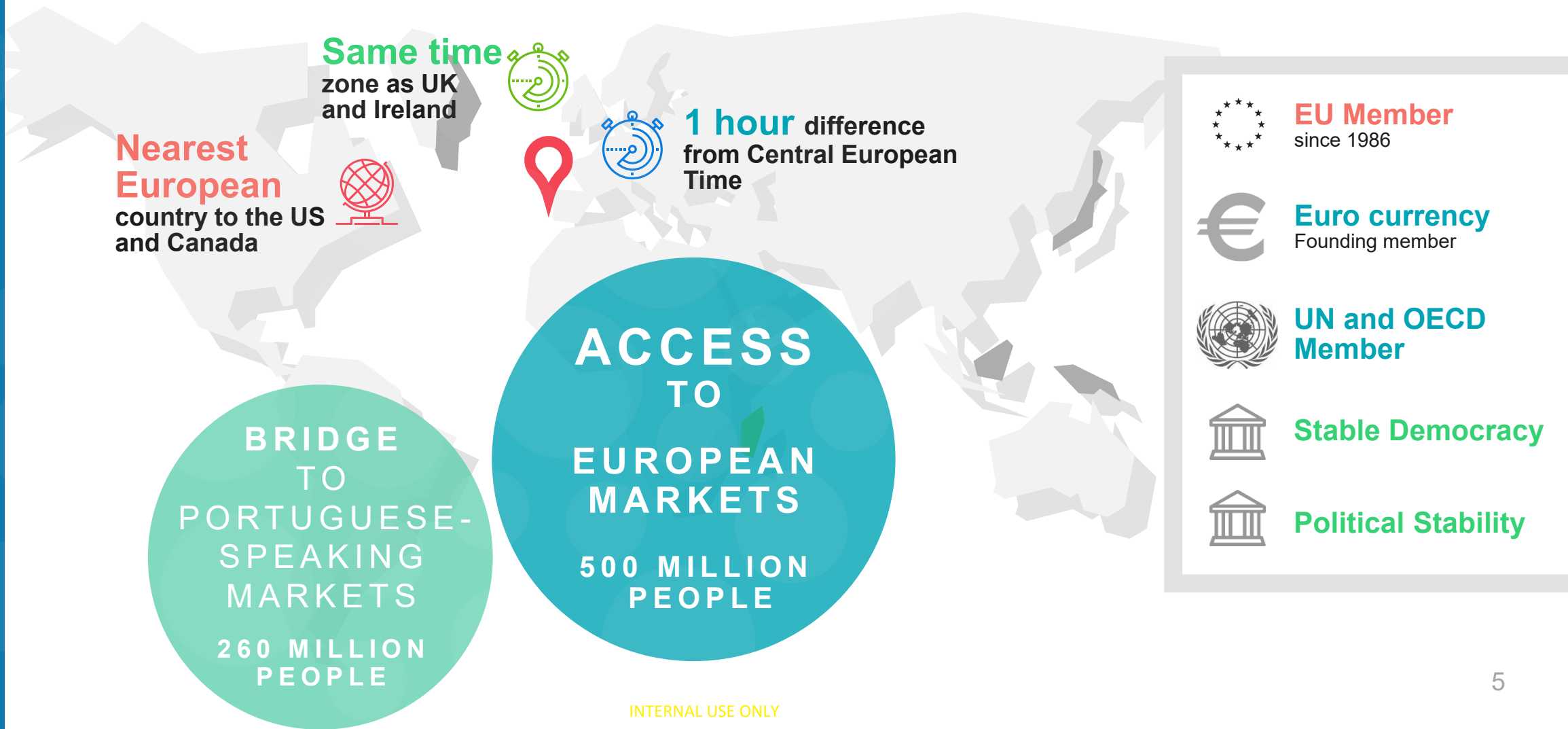
aicep Portugal Global

# EURONEXT TECH CENTER

March 2017

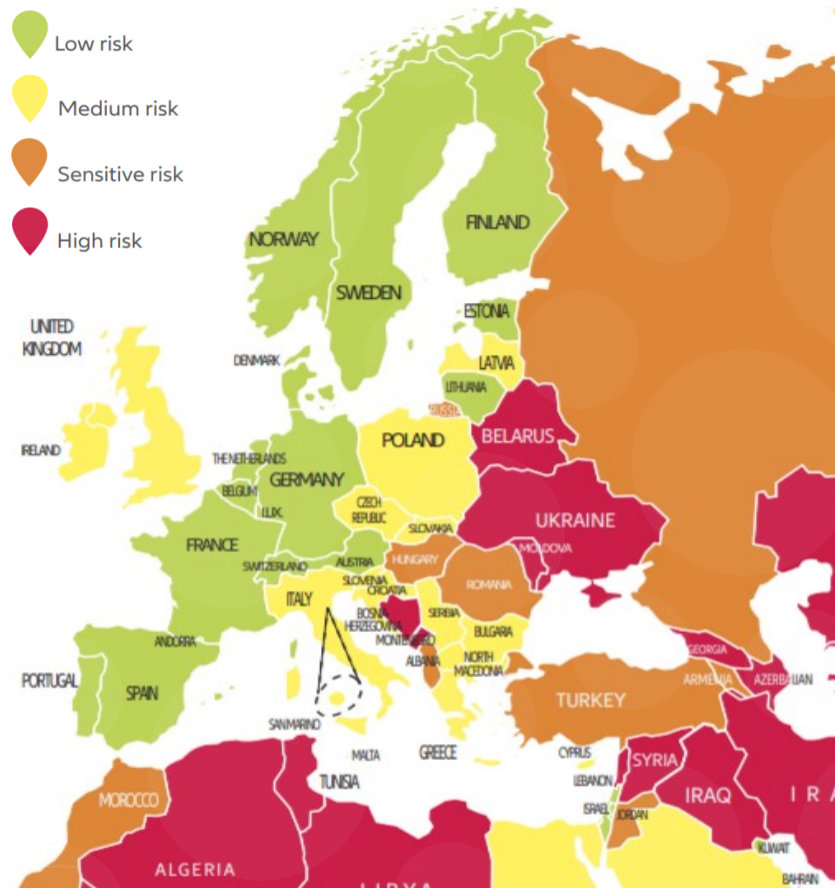


# STRATEGIC LOCATION



## CHOOSE A SAFE LOCATION

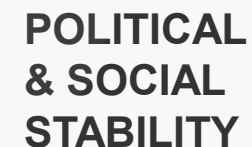
## Q4 2020 - Euler Hermes



# Global Peace Index 2020

## #3

Source: Institute for Economics & Peace | 163 countries



## 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)



## Very low risk 2019

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

Source: European Commission - Disaster Risk Management Knowledge Centre



# Logistics Performance Index

# #23

Source: The World Bank | 160 countries

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

**INTERNAL USE ONLY**

# QUALITY OF LIFE

## GREAT PLACE TO LIVE



WORLDS' BEST  
QUALITY OF LIFE  
COUNTRY FOR  
EXPATS

#3

Source: InterNations, Expat Insider 2021



THE WORLD'S  
HEALTHIEST  
PLACE TO LIVE  
2020

#2

Source: money.co.uk/ 2020



GLOBAL PEACE  
INDEX 2020

#3

Source: Institute for Economics and Peace, 163 countries

PORTO #1 | LISBON #3  
EUROPEAN FAMILY LIVING  
RANKING 2020

### PORTO – Best Small City

MONOCLE Magazine Small Cities  
Index 2021

“Porto citizens are known for their hard-working and matter-of-fact attitude yet being business-oriented here doesn't come at the cost of a sense of community and enjoying a glass of wine with colleagues over lunch.”

### LISBON - 2020 European Green Capital

EUROPEAN COMMISSION

“The Jury felt that Lisbon – that started its journey towards sustainability during a period of economic crisis – can be an inspiration and a role-model for many cities across the EU, demonstrating clearly that sustainability and economic growth go hand in hand.”

### BRAGA - Portugal's happiest city and one of the best places to live in Portugal.

Report on the Quality of Life in  
European Cities, 2020

“Braga makes the list of the 10 “happiest” cities, alongside Zurich, Gdansk, and Oslo, with about 97% of residents saying they are very satisfied with life in their cities”

7

“GOOD WEATHER, A STABLE POLITICAL CLIMATE, a highly-qualified labour force and IMMIGRANT FRINDLY ENVIRONMENT all make Lisbon a good place to start up a company satellite office.”

Cloudflare CTO John Graham-Cumming (Essential Business, Aug 2020)

Europe's Leading  
Destination 2020



World's Leading  
Destination 2019



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

**Bloomberg**

“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.”

Apr 15, 2019

INTERNAL USE ONLY

# 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

INTERNAL USE ONLY

## DID YOU KNOW?

**3<sup>rd</sup>** HIGHEST RATE OF ENGINEERING  
GRADUATES IN EUROPE

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

**15%** FOREIGN STUDENTS IN HIGHER  
EDUCATION (2019/2020)

**#7** PROFICIENCY INDEX 2020  
PORTUGAL IS VERY HIGH PROFICIENCY IN ENGLISH

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

Source: OECD, Financial Times

# INFRASTRUCTURE

AN INTEGRATED TRANSPORT SYSTEM FOR EFFICIENT LOGISTICS



**#21** IN THE WORLD WITH BETTER INFRASTRUCTURES

GLOBAL COMPETITIVENESS REPORT 2019 (141 COUNTRIES)



**3,122 KM OF MOTORWAY LENGTH**

**#8** QUALITY OF THE ROADS



**4 INTERNATIONAL AIRPORTS IN THE MAINLAND**

**#30** AIRPORT CONNECTIVITY



**6 INTERNATIONAL SEAPORTS**

**#36** EFFICIENCY OF SEAPORT SERVICES



**2,562 KM OF NETWORK**

**#31** RAILROAD DENSITY

# TELECOMMUNICATIONS

## BROADBAND & CONNECTIVITY



EIB  
DIGITALISATION INDEX

**#8**

Source: EIB Digitalisation Index 2020, EU28



ULTRA FAST  
FIXED BROADBAND  
TAKE UP\*

**#2**

\*min. 100 Mbps; Digital Economy and Society Index 2020



COMMUNICATIONS  
TECHNOLOGY

**#5**

EU28 IMD World Digital Competitiveness  
Ranking 2020, 63 countries

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

Rural FTTP  
Coverage 53%  
(EU28 18%)

FTTH Council Europe,  
2019



### RESILIENT TELECOM INFRASTRUCTURE DURING INITIAL LOCKDOWN\*



DATA TRAFFIC

**+52%**



USAGE OF OVER THE TOP (OTT) SERVICES

**+45%**



MOBILE DATA TRAFFIC

**+26%**

Data Traffic  
Jan. '21  
**+87%**  
than pre-  
pandemic  
ANACOM

# OPEN FOR INVESTMENT

KEARNEY

2021

FDI CONFIDENCE  
INDEX

**#20**

Source: AT Kearney, The 2021 FDI  
Confidence Index



2020  
68 Countries

2<sup>ND</sup> MOST OPEN  
COUNTRY FOR FDI  
OECD FDI RESTRICTIVENESS  
INDICATOR

**#2**

Source: OECD International Direct  
Investment Statistics: OECD FDI  
regulatory restrictiveness index

Forbes

2019  
161 Countries

BEST COUNTRIES  
FOR BUSINESS

**#25**

Source: FORBES, Best Countries for  
Business Rank 2019



THE WORLD BANK

2019  
190 Countries

TRADING ACROSS  
BORDERS

**#1**

Source: The World Bank, "Doing  
Business Report 2019"

# RECENT TRACK RECORD

## NEW TECHNOLOGY – BASED OPERATIONS



Software development and IT solutions, located in Lisbon



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



Digital Transformation; software development; IT solutions. Office in Lisbon



Opens an IT development centre in Lisbon



Engineering centre, security, customer support and research, located in Lisbon



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



Launched a Tech Center in Porto to develop solutions for Evs, Autonomous Driving and Cybersecurity.



Opens an IT Hub in Lisbon for software development, business analytics and data science.



Opening of a design lab in Porto to support their global client base.



New development center that will work as a Global Delivery Center



Development, design, videogaming lab located in Lisbon



Opens a software development centre in Lisbon based on blockchain technologies

“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

# RECENT INVESTMENT

## TRACK RECORD

### INDUSTRIAL INVESTMENT: NEW & EXPANSION



**BorgWarner**

Auto components



Aluminium systems



**DS Smith**  
Packaging



Auto components



**SAINT-GOBAIN**  
Abrasives



**Schreiber**  
Dairy



**SIEMENS Gamesa**  
RENEWABLE ENERGY  
Wind turbines



**STELIA**  
Aero structures



**TRYBA**  
CONCEPTEUR - FABRICANT - INSTALLATEUR  
tryba.com  
Window manufacturer



**DENSO**  
Crafting the Core  
Auto components

### RELEVANT MERGERS & ACQUISITIONS

**APG Asset Management, Swiss Life AM and Korean National Pension Service** acquires a majority stake in the Portuguese toll road operator Brisa



**Allianz Capital Partners** acquires a majority stake in Galp Gas Natural, a natural gas distribution manager in Portugal



**Partners Group Holding** acquires Rovensa Group, a producer of crop nutrition, protection and biocontrol products



**Cellnext Telecom** acquires NOS Towering from Portuguese mobile operator NOS and OMTEL

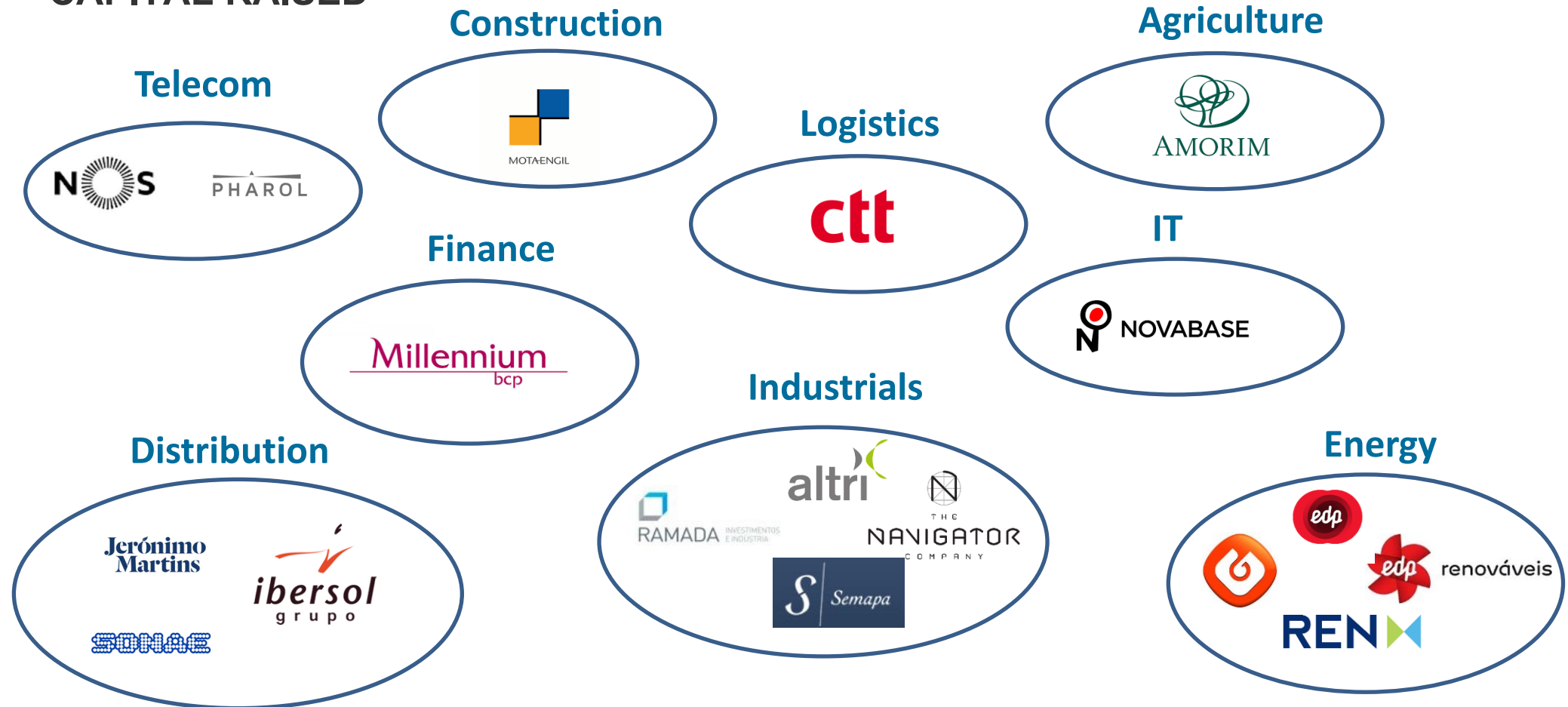


**Ardian** acquires Frulact, an innovative producer of natural fruit-based and plant-based ingredients for the F&B industry.



# CAPITAL MARKET

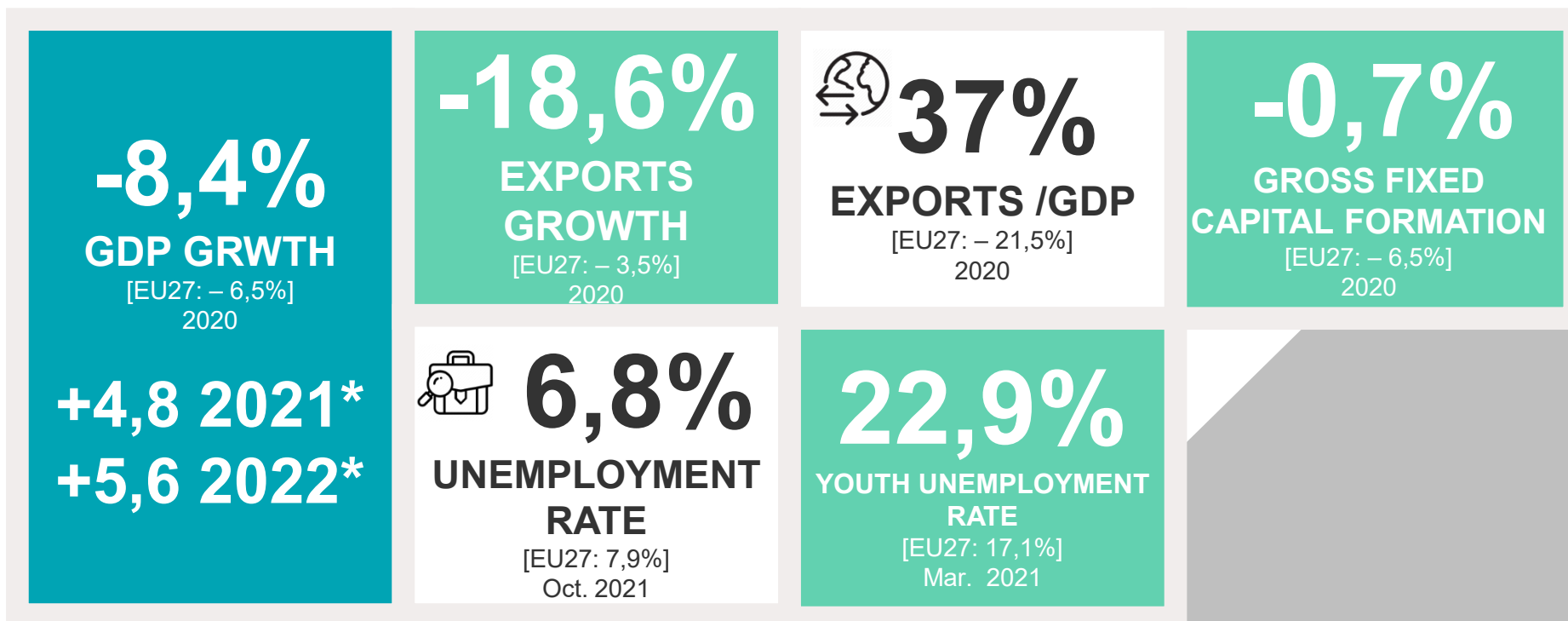
## CAPITAL RAISED



In 2020 and 2021 (Oct) ~ €3bln equity were raised by Portuguese companies

# MACROECONOMIC

## OVERVIEW: COVID-19 IMPACT



Source: INE – Statistics of Portugal, Eurostat, PORDATA

# EU FINANCIAL SUPPORT

Sumário Executivo



**Figura 1. Calendarização 2021-30: Financiamento das Medidas de Investimento Económico e Social**



**61,2**  
**Mil M€**  
**2021-2029**  
**Overall Financial**  
**Envelope**

**16,4**  
**Mil M€**  
**Resilience and**  
**Recovery Plan**



# THE RIGHT CHOICE. THE RIGHT TIME.



PORTUGALGLOBAL.PT

[aicep@portugalglobal.pt](mailto:aicep@portugalglobal.pt)

## Disclaimer

This document is provided for informational purposes only. All information contained in this document was compiled in good faith by AICEP using sources of public information considered reliable, although its accuracy cannot be guaranteed. It partially reflects but does not disclose completely nor substitute knowledge of the full legislation governing incentives in Portugal. AICEP is available to assess specific business plans and to determine how specific investments may qualify for incentives packages and what, if any, type of packages may be applicable to the investment. The dissemination or copy, in total or in part, of this document is not allowed without permission.



**EURONEXT**



aicep Portugal Global

# RECOVERY AND RESILIENCE PLAN

Sumário Executivo



Figura 2. As Componentes do PRR e os Investimentos Associados

