PORTUGAL IS A BUSINESS OPPORTUNITY

Why choose Portugal?
Strategic location

Portugal is the European nearest country to the U.S.
3-hour distance between Brazil and Russia.
Same time as UK and Ireland.

Why choose Portugal?

<table>
<thead>
<tr>
<th>Attractive Consumer Market</th>
<th>Million Inhabitants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portugal</td>
<td>10,6</td>
</tr>
<tr>
<td>Iberian Market</td>
<td>51</td>
</tr>
<tr>
<td>European Market</td>
<td>494</td>
</tr>
<tr>
<td>Portuguese Speaking countries</td>
<td>220</td>
</tr>
</tbody>
</table>

Great and privilege economic relations between Portugal and Brazil, Angola and Mozambique.

Daily flights to major European cities.
Qualified Workforce

- Flexible labour law
- High-standard education
- Wide availability
- Partnerships with world-class US institutions

Portugal has a highly skilled and educated workforce. Portugal ranks on Top within the EU countries in number of PhDs per 1,000 inhabitants.

40% of students in tertiary education are enrolled in engineering, sciences and health. The increase rate in the last 3 years is about 30%.

Portuguese are known for commitment to work which places us below the EU average regarding working days lost per year.

Language skills: English, French and Spanish are the most spoken languages. English is universally taught from 1st grade.
Competitive Costs

Portugal is still cost competitive according to international recognized sources. There was a decrease of -1.2% in hourly labour costs in 2012 Q1 (Euro 27 rose by +2.0%).

In terms of real estate – industrial space - and within 53 countries/cities worldwide, Portugal/Lisbon is the 8th less expensive location.

Portugal also has one of the lowest monthly minimum wage in Europe (485€).
Technological Infrastructures

Telecommunications have been a major priority in Portugal. The country has now 95% coverage of broadband infrastructures. The net increase in the broadband penetration growth for Portugal is above the OECD average (Dec 2010).

The percentage of fiber connections in total broadband is already 6% for Portugal, ahead of countries such as Netherlands, Finland, France, Spain, Italy, Poland, Austria Germany or Belgium.

The Internet is also well developed. Portugal is a United Nations case study in terms of e-Government and its availability of public services on-line.

FULLY DIGITALIZED

Why choose Portugal?
Portugal offers a dynamic real estate market. High quality space, well designed and energy efficiency oriented has boomed and rent prices are competitive comparing the other European countries.

Portugal is ahead of countries such as France and Spain in terms of cost. The figures are shown for Lisbon. If we considered Porto area, prices can lower 25%.
Business friendly environment

Why choose Portugal?

MULTI-CULTURAL

Portugal is very open to foreign cultures: the availability of international schools, the safety record and quality of life attract expatriates.

As a result Portugal is ranked #2 in the Migrant Integration Policy Index 2011.

“Portugal is unique in attracting young graduates and executives.” Carlos Brazão, Cisco Portugal

EASE OF DOING BUSINESS

- Major public services are on-line;
- Portugal is considered by the United Nations, a case study in e-Government;
- Average time to set up a firm is less than 1-hour
Our decision is a result of the recognition of the hospitality and the commitment of the Portuguese Government, of the multilingual skills of the local population as well as its professionalism and ability, and proven success in innovation areas.”

Chris Dedicoat, Senior Vice-President for Europe, Cisco

One of our main strategic lines was always to shorten distances with the academic world and to bet in strong innovation, investigation and development in Portugal thus taking advantage of the Portuguese engineer’s excellence.

João Picoto, Chairman of Nokia Siemens Networks Portugal
ICT in Portugal
ICT in Portugal

AN OVERVIEW

Some reference players

- Industry Turnover: 13,729 Mln€
- Industry Value Added: 5,344 Mln€
- Sector workforce: 72,531
- ~10,700 companies
- Main activities: hardware, software, Telecommunications, ERP, SSC, BPO, security, business process management, compliance.
- Exports increase in 2010 by 24.6% mainly optical and electronic equipment.
- Germany, Spain, France and UK are the main customers.

Source: INE, 2009
Portugal is the 37th most technologically advanced country in the world (out of 155 countries). [Measuring the Information Society 2012, ITU]

### ICT Development Index (IDI) 2011

**Access**
- In the ACCESS sub-Index, which evaluates the basic level of access and infrastructure development, Portugal ranks #32.

<table>
<thead>
<tr>
<th>Economy</th>
<th>Rank 2011</th>
<th>IDI 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Korea (Rep.)</td>
<td>1</td>
<td>8.56</td>
</tr>
<tr>
<td>Sweden</td>
<td>2</td>
<td>8.34</td>
</tr>
<tr>
<td>Denmark</td>
<td>3</td>
<td>8.29</td>
</tr>
<tr>
<td>Iceland</td>
<td>4</td>
<td>8.17</td>
</tr>
<tr>
<td>Finland</td>
<td>5</td>
<td>8.04</td>
</tr>
<tr>
<td>Netherlands</td>
<td>6</td>
<td>7.82</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>7</td>
<td>7.76</td>
</tr>
<tr>
<td>Japan</td>
<td>8</td>
<td>7.76</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>9</td>
<td>7.75</td>
</tr>
<tr>
<td><strong>Portugal</strong></td>
<td>37</td>
<td>6.05</td>
</tr>
</tbody>
</table>

**Use**
- In the USE sub-Index, which reflects ICT uptake and use, as well as intensity of use, Portugal #37 out of 155 countries.

**Skills**
- The SKILLS sub-Index measures the country’s level of human capacity and its ability to absorb and take advantage of ICTs. Portugal made a gain by moving up 2 places, and ranks #33 out of 155.

Source: Measuring Information Society 2012, ITU
Portugal’s improvement has been quite strong and sustainable in the recent years. Major progress was achieved in computer and Internet access and use as well as broadband subscriptions.
Portugal has made major investments in **broadband coverage**, particularly for next generation access. As a result, it is well ahead of the European averages for the coverage of fixed line standard and NGA services. It has **the fifth highest Total NGA Coverage** of UE27+ Iceland and Norway, 74.5%, and **the third highest rural figure at 33%**.
Total DSL coverage is quoted at 99%.
Portugal has an extensive cable network with the fourth-highest Docsis 3 coverage in UE27+ Iceland and Norway, at 74%.
This is now backed up with the fifth biggest FTTP network with 41% coverage.

Source: European Commission DG Communications Networks, Content & Technology, Broadband Coverage in Europe in 2011
Portugal Telecom is a global telecommunications operator. It is the national leader in every sector where it operates. It employs 72,300 people with operating results of 6,147 Million Euros (2011), of which 85% comes from international markets.

Portugal Telecom’s international footprint spreads to countries like Cape Verde, Mozambique, Timor, Angola, Kenya, China, Brazil, S. Tomé and Príncipe and Namibia.
ICT in Portugal

With offices in Portugal, USA, UK, Romania, Brazil, Singapore and Mozambique, Critical has been one of the most forward looking company in Portugal. Industries served: Aeronautics, aerospace, defense, transportation, manufacturing, telecom, energy, Government and health. Critical Software is the only company in Portugal to hold level 5 (highest) CMMI (Capability Maturity Model Integration) certification.

Did you know that Critical has developed a solution for the countries of the Schengen area, enabling the control of circulation of all citizens?

Over its 22-year history, Novabase has become the Portuguese leader in IT. In 2011, it showed a turnover of 229.6 million euros, 19.9% generated outside Portugal. Novabase has operated in 33 countries on 5 continents and now has over 2,000 employees. The company currently has offices in Portugal, Spain, Germany, France, the Middle East and Angola.

The Viva Portal will be available to all users of the Lisbon Metropolitan area transportation system.
ICT in Portugal

The EDIGMA Displax® Interactive Window allows the transformation of any glass, any display or even any surface into an interactive one, ideal for entertainment, commerce, and education.

SISCOG develops products and systems for resource planning and management in railway companies. Systems developed by SISCOG are in daily use in important European companies such as the London Underground and the national railways of Finland, Norway, Denmark, and The Netherlands.

SISCOG – Always together with the most advanced and sophisticated European railways…
ICT in Portugal

**Altitude Software**
Altitude Software is a global leader in customer center solutions, recognized for its agility and payback by 800 customers in 60 countries.

**YDREAMS**
Leading company in the creation of interactive spaces and products, through a combination of technology, creativity and design. It has worked with corporations like Coca-Cola, Nokia and Vodafone.

**Alert Life Sciences Computing**
The solutions of this company, which creates software for paperless clinical environments, are implemented in hospitals all over the world.
ICT in Portugal

Based in Ericeira, the famous surfing beach in the outskirts of Lisbon, and with subsidiaries in California and in Bolonha, NFIVE is the absolute leader in printing software and codification of identification and it controls 75% of the global software market for identification cards.

Portugal is the world leader in biometric identification solutions. “MasterGuardian®, Proudly made in Portugal”, was the first alarm company to use this technology.
The Portuguese engineering company is recognized for its leadership in projects for the European Space Agency (ESA), particularly in the Galileo program. Its portfolio includes critical software for Satellite Navigation and Communication systems, as well as for the most advanced Command and Control Centers for the management of highway infrastructures and maritime surveillance.

Who said that solutions do not drop out of the sky?

NDrive launched the first GPS in the world with aerial images.
ICT in Portugal

New circum navigation

The Magellan, a laptop especially developed for the use of school children, is being distributed in all Portuguese public schools. It is an extremely resistant machine that has an internet access safety control system. The laptops are being exported to Venezuela, Brazil, Angola, Argentina and Cape Verde.

The company – J.P. Sá Couto – is one of the world’s largest OEM deploying educational platforms. Currently operates in more than 60 countries, having delivered over 3 million laptops worldwide.

TIME IS MONEY:
ELECTRONIC PAYMENT
IN GAS STATIONS, CAR
PARKS AND HIGHWAYS

SOME KEY PLAYERS
ICT in Portugal

WeDo Technologies

WeDo Technologies is a worldwide leader in revenue and business assurance, providing software and expert consultancy, to intelligently analyze large quantities of data from across an organization helping to negate or minimize operational or business inefficiencies. WeDo Technologies works with some of the world’s leading blue chip companies from the retail, energy and finance industries, as well as 140 telecommunications operators from more than 80 countries, through more than 450 highly-skilled professionals.

Tekever has unveiled the newest addition to its family of unmanned vehicles at the Aerospace and Defence Industries Association of Europe (ASD) convention in Portugal, the AR5 Life Ray tactical UAV (TUAV). The AR5 Life Ray is designed for maritime and near-shore surveillance, and search and rescue (SAR) missions. The UAV has a 9 metre wing span, a cruise speed of 120 km/h, and a 90 kg payload capacity to house multiple sensors and communications equipment.

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Take The Wind, founded in 2008, provides technology-enabled solutions and services to drive programs for well-being, active healthcare or problem prevention.

Our mission is to actively contribute to a new healthcare paradigm that supplies a better quality of life and well-being for everyone, regardless of their current health condition.

Founded in 2001, Vision-Box® is the leading provider of electronic identity solutions and automated border control systems that use ICAO compliant standards. The border control portfolio aimed at airports, airlines and Immigration authorities, includes solutions addressing different business scenarios, namely security check-points, self-boarding and automated border control smart biometric eGates. Covering the entire ID management life cycle, Vision-Box delivers for governments and issuing authorities solutions ranging from live biometric enrolment stations, document verification kiosks, digital document dispensers and personalization systems.
**E-\ example Consortium** aggregates the knowledge, products and services from over 30 Portuguese companies in the areas of learning and educational technologies.

**iGov2U** is a group of prestigious Portuguese enterprises who joined up with the purpose of creating a strong, effective and successful answer to the needs of governments in the area of e-Government.
ICT in Portugal

Aptoide is an Android marketplace for applications with multiple stores managed by our partners and clients. Aptoide offers the possibility for partners to create and manage their own store, choosing the content and the format that suits their targets. This unique approach to the apps marketplace ecosystem allows rapid growth founded on users’ collaborative work. It ensures greater diversity of applications and better capacity for dissemination and propagation of Aptoide among new users.

WIT-Software is a software company that creates applications and services for telecommunication and media companies. WIT provides technical consulting and software development for any company that wants to exploit the power of Mobile and Fixed Communications. The expertise on mobile technologies and software development allows us to deploy products and services for the mobile consumer and enterprise markets. We can provide enterprise application integration, develop application servers, client software for mobile phones, PC, game consoles and TV set top boxes. Our excellence in these areas has lead to strong strategic partnerships with companies like Vodafone Portugal, for whom we have been developing software products since day one.

PARTNERS PROGRAM

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Active Space Technologies offers high added-value products and services in the fields of thermo-mechanical engineering (thermal and structural analysis, fluid dynamics, design, high precision manufacturing and testing), electronics engineering (embedded systems, digital control), as well as Management Support services for technology transfer and development projects (project management, systems engineering, project coordination).

Active Space Technologies is a European based company positioning its services in the global markets of aerospace, defence, automotive, nuclear fusion, and scientific sectors.

UAVision specializes in finding creative and innovative engineering solutions to complex real-world problems, covering all stages of the production cycle, from concept to prototype, from the manufacturing process to the turnkey solution.

Business areas: AERONAUTICS, EARTHSCIENCE and INDUSTRIAL
ICT in Portugal

Founded in 2008, IT People Consulting provide services within the application development, data bases and integrated technologies, not only in turn-key projects but also outsourcing. They are highly focused in innovation, creating various types of applications for mobile devices (iOS, Androids, WP/Windows 8 and Blackberry), integrating them with augmented reality solutions through Next Reality platform.

The Portuguese start up COVII has launched in Las Vegas at CES 2013, the ViiHaptic software that turns any display of any size into an affordable multitouch screen.

Jan, 2013
LIFE is an award winning concept for an innovative executive aircraft cabin focusing on the use of natural and sustainable materials. It is the conceptual vision of Portuguese companies Almadesign, Amorim Cork Composites, Couro Azul, Inegi, Setsa, and Brazilian Embraer.
We are a Business Development Agency, focused on the development of a competitive business environment that contributes to the international expansion of the Portuguese Economy.

Increasing the country’s competitiveness, promoting large private investment and fostering the internationalization of Portuguese companies.

**Who are we?**

**Mission**

Focus on clients. We serve our clients in accordance to their requirements through various solutions and long-term relationships.

Selectiveness. We direct our activity towards projects and markets that make a better contribution to company competitiveness and the sustainability of the Portuguese economy.

Excellence. We seek to exceed expectations by means of a rigorous approach, effectiveness, enthusiasm and a willingness to innovate.
aicep Portugal Global: how can we help you?

1. Pre-Investment
2. Incentives Negotiation
3. Settling In
4. After Care

**Single point of contact**
in all phases: pre-investment, incentives negotiation, settling in and after care

**Dynamic approach**
focused on the client or investor

Promoting a **direct negotiation**
with companies, through which a tailored approach to incentives may be applied in order to define a global package that fully satisfies the investor's needs

**Government**
business entity, flexible, **free of charges** and streamlined services
www.portugalglobal.pt