

High-Tech Eco-Systems

We are Parkmakers

SEPTEMBER 2023



CTP Presenters



Jaromír Černík
Director Asia

- 20 years of experience in M&A, greenfield and financial service industry serving clients from Hong Kong, Chinese Mainland, Asia Pacific and Europe
- Board Member at Qupital, a fast-growing data-driven lending platform for companies in Hong Kong
- Vice President at Summer Capital Management Company, a private equity investor in Hong Kong
- Chief Representative and Regional Director of CzechInvest in Hong Kong managing direct investment and greenfield projects into Europe

“We are looking forward to long-term successful partnerships.”



Bert Hesselink
Group Client Relationship Director

- 20 years of international experience in commercial real estate
- Translates rapidly changing tenants needs into business opportunities
- Lectures at the MBA in Real Estate program at the University of Economics in Prague



Cees Admiraal
Innovation Manager

- 30 years of experience in creating high-tech business ecosystems
- Flagship project High Tech Campus Eindhoven
- Newly appointed Innovation Manager at CTP to develop new and transition existing CTParks to high-tech campuses in CEE and Western Europe

We are Parkmakers

At CTP we don't just build buildings—we build vibrant sustainable business ecosystems of the future for people: our clients, their employees, and the communities where we work and live. As a result, we accelerate local and regional economic development, contributing to overall socio-economic prosperity.



CTPARK NETWORK
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The Largest Park Network in CEE

The CTPark Network is the largest integrated system of business parks in CEE. With over 11.0 million sqm, over 200 locations, and a 20.7 million sqm landbank for client expansion, the CTPark Network supports our clients' growth anywhere in the region.

#1 CEE	10 COUNTRIES
11.0 MIL SQM GLA	740+ EMPLOYEES
20.7 MIL SQM LANDBANK	93% OCCUPANCY
	200+ LOCATIONS
	1,000+ CLIENTS

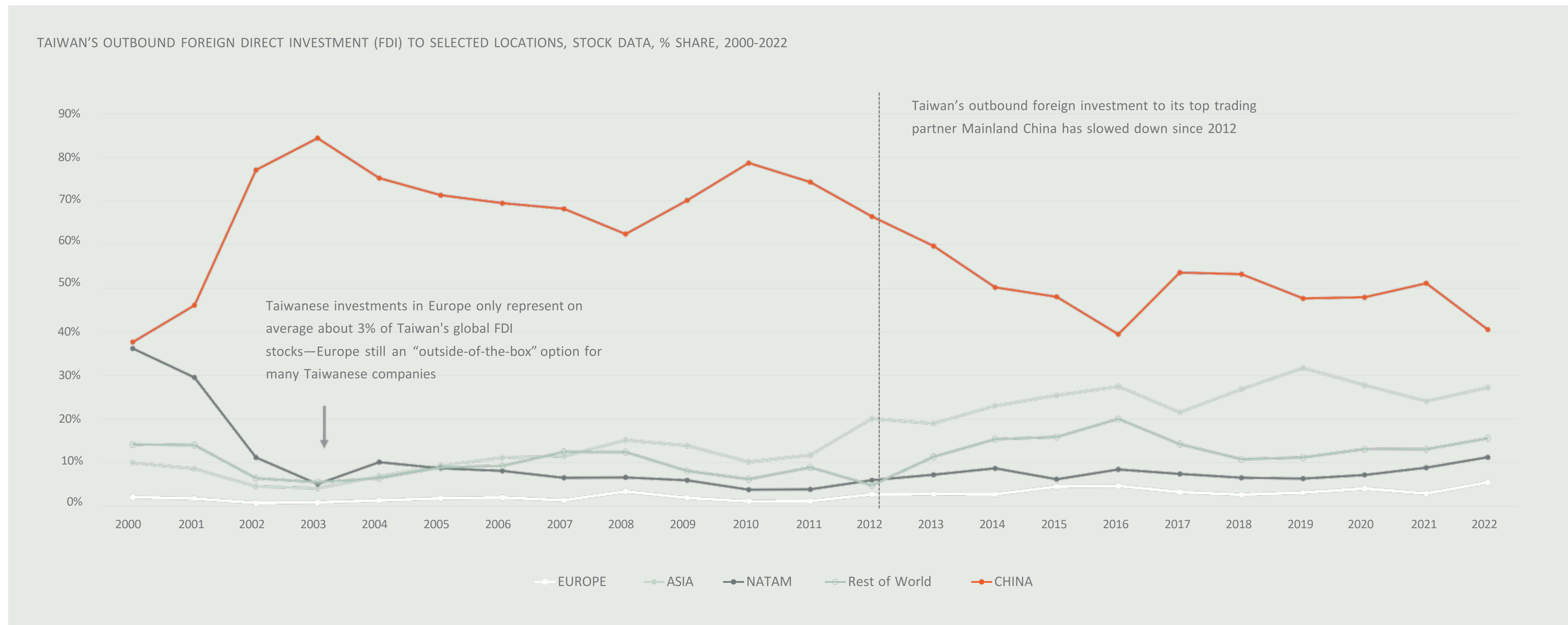


Where Taiwanese companies invest in Europe



Taiwanese investment current trend

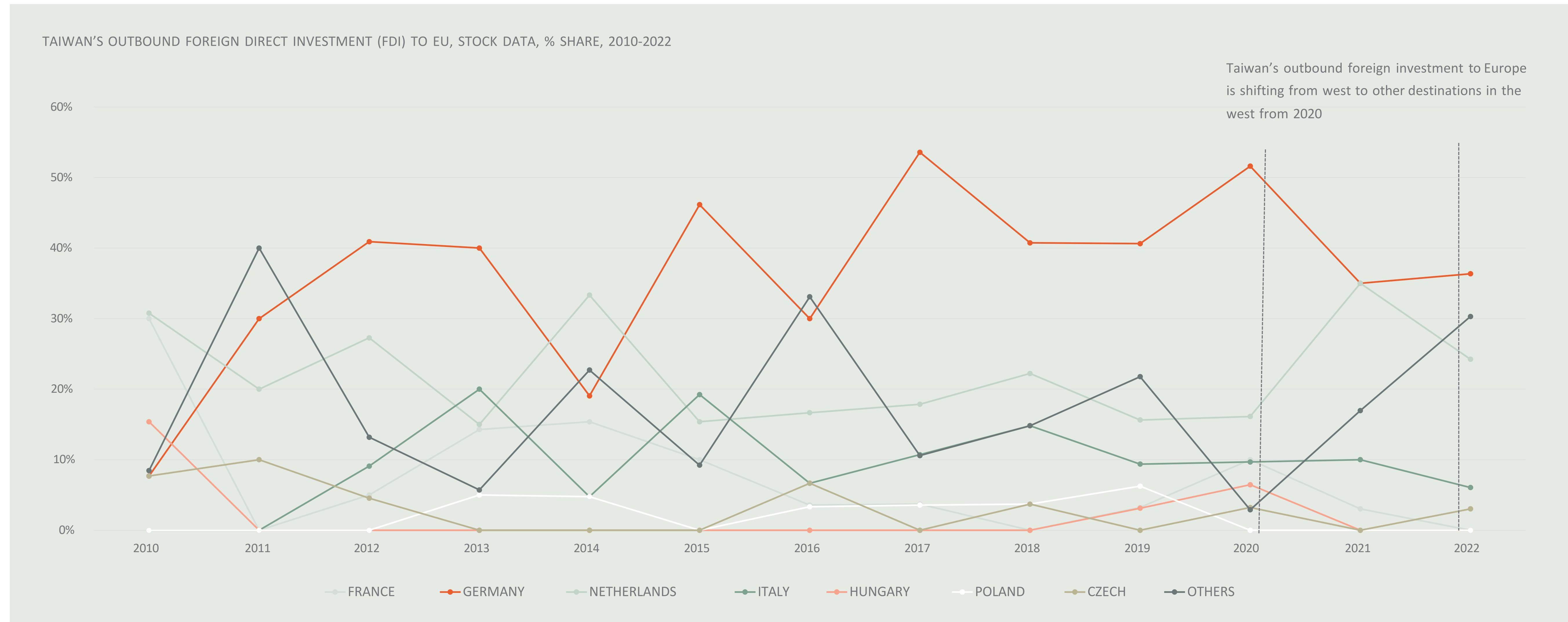
To China slowing down, To foreign destinations going up



Source: BCI Global

Taiwanese investment to EU

In terms of the number of new investment projects (including offices, R&D, manufacturing, etc.) Germany and the Netherlands are the top investment destinations for Taiwanese companies in EU



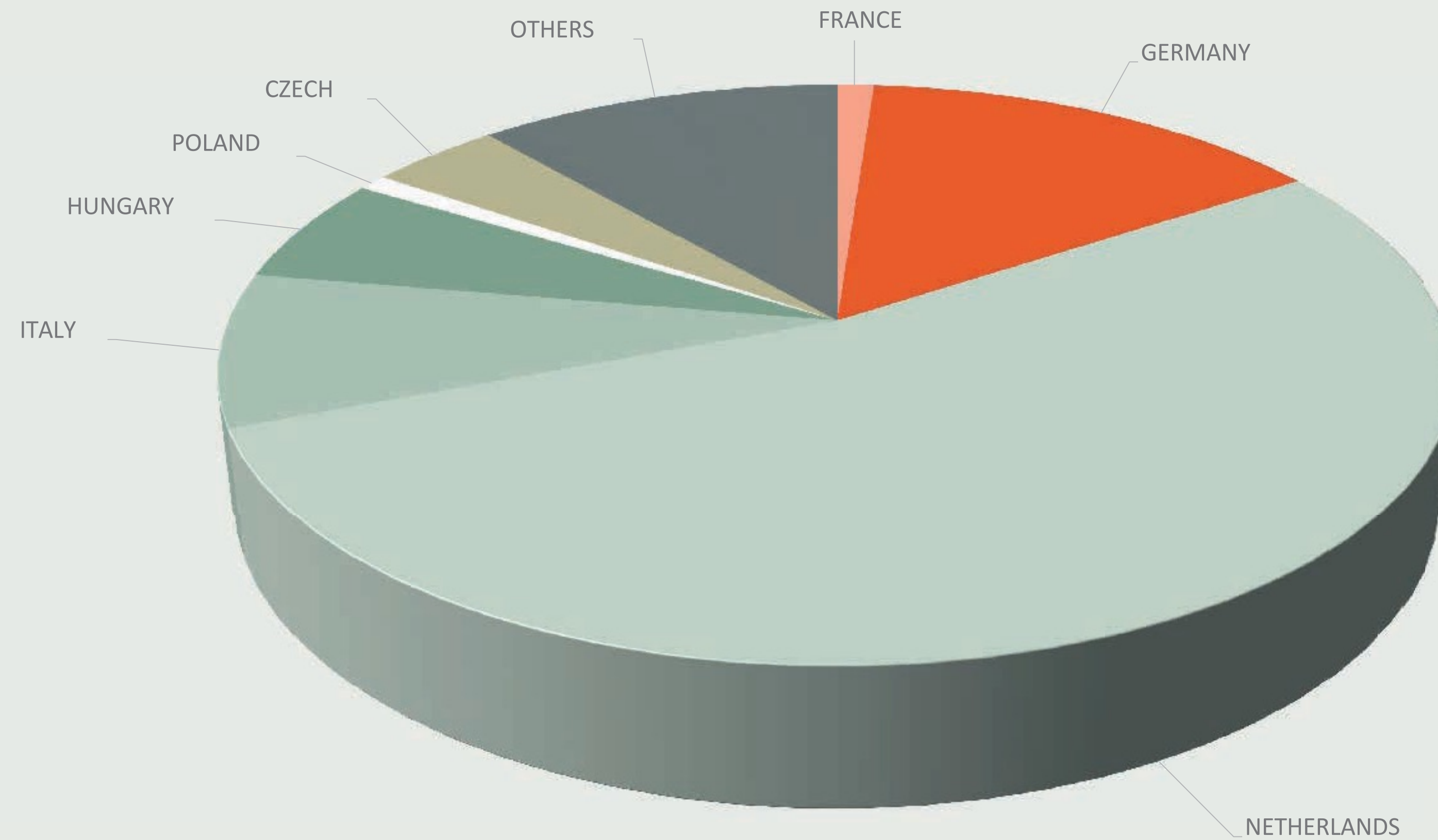
Source: BCI Global

WHERE TAIWANESE COMPANIES INVEST IN EUROPE

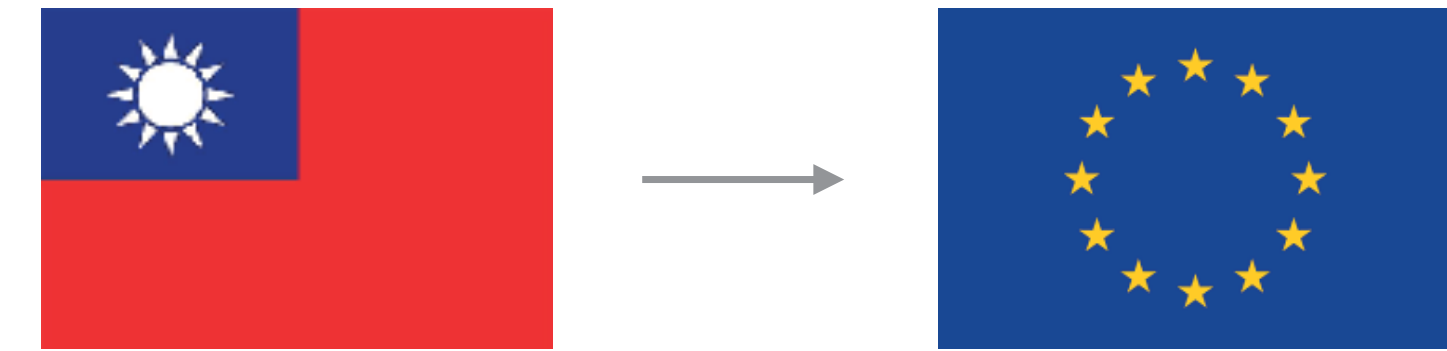
Taiwanese investment to EU

In terms of the amount/size of investment projects (including offices, R&D, manufacturing, etc.), the Netherlands is the top investment destination for Taiwanese companies in EU, while the share of Eastern European countries Czech and Hungary are growing

TAIWAN'S OUTBOUND FOREIGN DIRECT INVESTMENT (FDI) TO EU, AMOUNT/SIZE OF TOTAL INVESTMENTS, AVERAGE % SHARE, 2000-2022



Opportunities for Taiwanese companies in the EU



Proximity to a big market: EU, the world's largest trading bloc

- The EU is Taiwan's fourth trade partner after China, the USA and Japan
- The EU is the largest economy in the world with 500 million consumers
- EU is the largest trading bloc in the world: if you produce and sell your products in one member state market, you can sell it in all the markets under the same rule
- ICT items and machinery make up the bulk of trade between Taiwan and the EU

EU is open to Taiwanese investment

- EU sees Taiwan as a like-minded partner: having a system of governance based on democracy, the rule of law and human rights, open society and market economy
- The EU supports Taiwan's meaningful participation in multilateral fora, especially where Taiwan's participation is important to the EU and global interests.
- The EU and Taiwan have a structured dialogue. In the annual consultations, all trade policy issues are addressed, including WTO obligations and issues

EU sees Taiwan as a partner in resilient supply chains, semiconductors and data protection Flow of technology and talent from the EU (talent and research programs)

Shift of Taiwanese investments to Central & Eastern Europe

Historically Taiwan has been mostly investing in the Netherlands and in the UK among EU countries. The latter commanded a share of 45.6 % of all investments from Taiwan into the EU within the period 1952-2017, while the Netherlands took 36.0 % of investments into the EU.

HISTORICAL

Taiwan outward foreign direct investment into the EU in the past 65 years (accumulated 1952-2017)

EU	Rank	Amount (USD MIO)	% of total
EU28		6,770	100
UK	1	3,084	45
Netherlands	2	2,435	36
Germany	3	380	5

Source: Taiwan Investment Commission

With more offices/subsidiaries investments



TODAY

Growing manufacturing investments to Central and Eastern Europe

Hungary was the recipient of a staggering 89.8% of Taiwanese investments in the EU in 2020. Taiwan's investment in Hungary reached US\$1.37 billion (NT\$40 billion), and its products are largely electronic components and bicycles made by Foxconn, Giant, Sinbon, and Yageo.

Taiwanese investment already accounts for a large proportion of CEE's inbound FDI. Hon Hai Precision Industry Co. (Foxconn), Asus, Acer, and AU Optronics all have factories in the region.

With more offices/subsidiaries investments

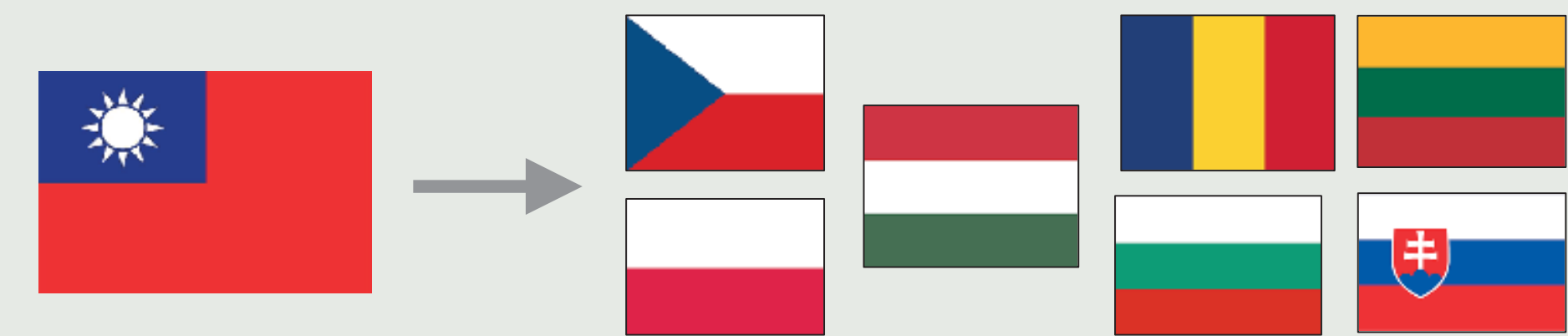
Taiwanese companies are looking to invest in CEE



- By 2020, CEE3 countries accumulated \$2.6 billion FDI from Taiwan, with Hungary receiving the most, followed by the Czech Republic and Poland
- According to the European Economic and Trade Office in Taipei, Hungary was the recipient of a staggering 89.8% of Taiwanese investments in the EU in 2020, compared with the 6.1% and 2.4% invested in Germany and Italy
- Taiwanese investors typically target CEE3 countries for electronics manufacturing or assembly of machinery and transport equipment
- Led by National Development Council Minister Kung Ming-hsin, the delegation in October visited the Czech Republic, Slovakia, and Lithuania, and signed a total of 19 MOUs, as well as several cooperation agreements

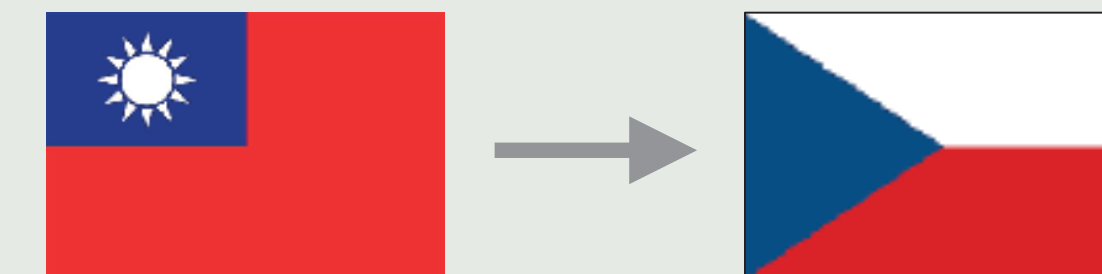
7 key driving factors for Taiwanese investment to CEE

1. Skilled labor force (mainly manufacturing)
2. Labor costs being lower in the CEE than the EU average
3. Access to the whole EU market & global markets, through FTAs
4. Stable government/property rights supporting business development
5. CEE leading the way in EU in reinforcing cooperation with Taiwan
 - Vaccine diplomacy last year sought to reciprocate Taiwan's mask diplomacy from 2020
 - CEE countries are key drivers in developing EU-Taiwan relations as they make up 60% of all interactions between EU and Taiwan actors, according to the Central European Institute for Asian Studies.
6. Least dependent on China than other EU countries
 - Chinese investments in CEE make up less than 1% of overall regional foreign direct investment (FDI). It is difficult for China to seek economic retaliation against CEE countries for having a close relationship to Taiwan, as these countries typically do not export directly to China (CEE countries produce intermediate goods that feed Germany's manufacturing sector, which then ships the finished goods to places like China)
7. Closest cultural affinity with Taiwan in the EU : Like Taiwan, CEE has lived in satellite states under powerful authoritarian neighbors



Opportunities in the Czech Republic for Taiwanese companies

High-tech sector is the most attractive, with focus on the following industries:



- ICT and machinery make up the bulk of trade between Taiwan and the EU
- There is an MOU (memorandum of understanding) in place between Taiwan and the Czech Republic in the following industries
 - Cybersecurity, the space industry, catalyst technology, green energy, smart machinery/manufacturing, electronic vehicles
- Other attractive industries: Semiconductors, life sciences, biotechnology, laser and satellite, crystal research, aerospace, finance/fintech, AI

Men's Dressing Room
Personal Airlock

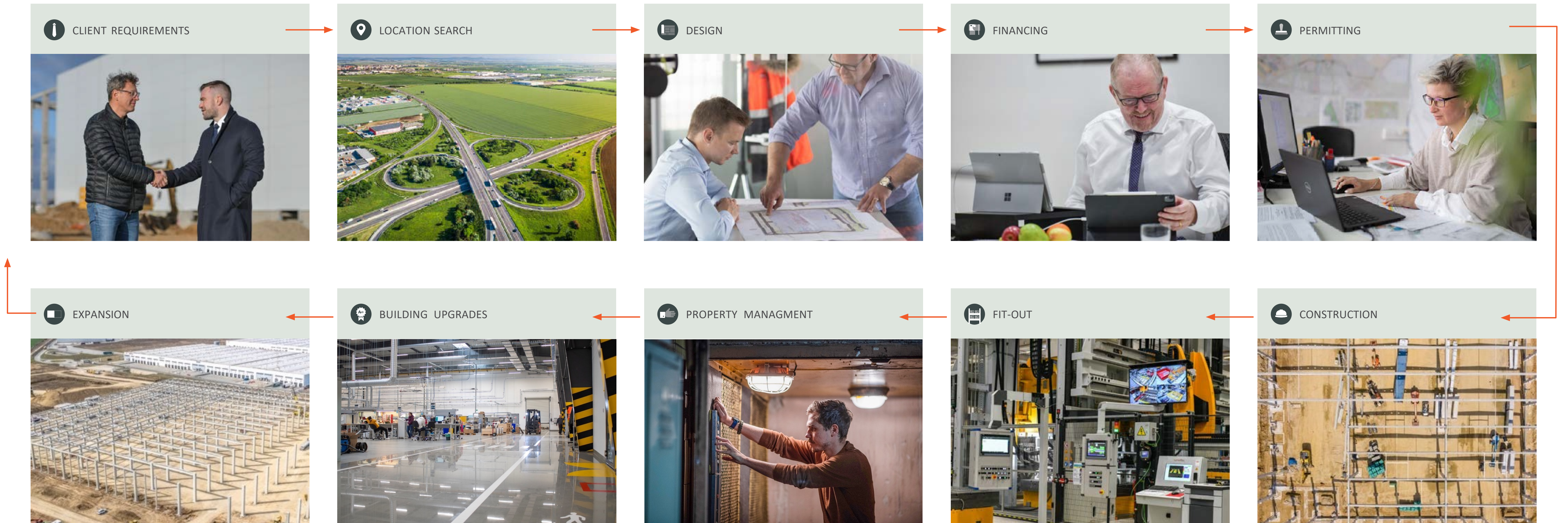
SECTION 3

How CTP facilitates Taiwanese companies' growth in the Czech Republic



Full-Service Property Development: One-stop shop

The CTP platform is our in-house team of property professionals who provide personalised service to our clients from land acquisition to long term customer care after move-in providing our clients a one-stop shop for all their property needs allowing them to focus on their core business.



All shapes and sizes to match any business need

CTP has developed five bespoke building types ranging in size and functionality to support a broad spectrum of business activities.



ctBox



Designed for local companies and startups, this simple and functional building provides showroom, office and warehouse space.

Amtech

Vekra Windows

AkzoNobel



ctFlex



CTFlex offers a modifiable and expandable concept for small- and mid-sized companies with built-in offices and warehouses.

Acer

MAPO Medical

Zodiac Aerospace



ctSpace



The CTSpace concept is ideal for logistics operations, distribution centres or supply-chain hubs.

DHL

DB Schenker

DSV



ctFit



Ideal for the activities of large enterprises with special technical parameters, such as distribution hubs, chilled warehousing, high-tech manufacturing and R&D labs.

Honeywell

Brembo

Thermo Fisher Scientific



ctLab



ctLab is a cost-effective facility ideal for service centres, software/ equipment design, R&D and back-office operations of all types of companies.

IBM

Vitesco

AeskuLab