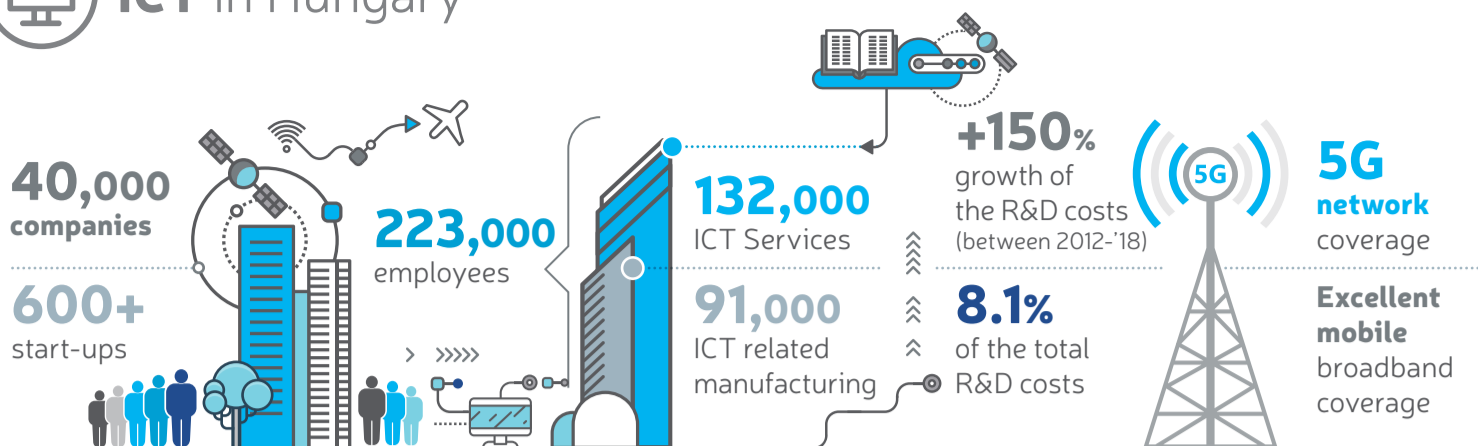


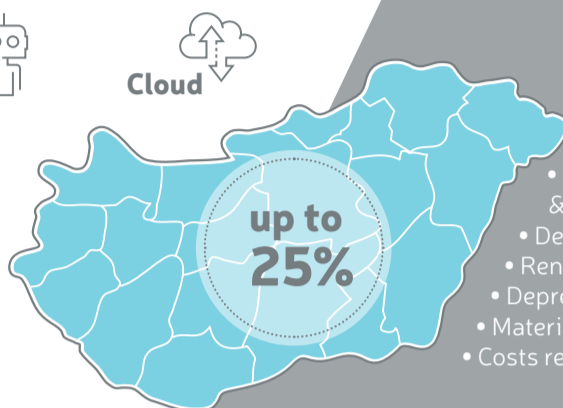
ICT in Hungary



Leading ICT functions



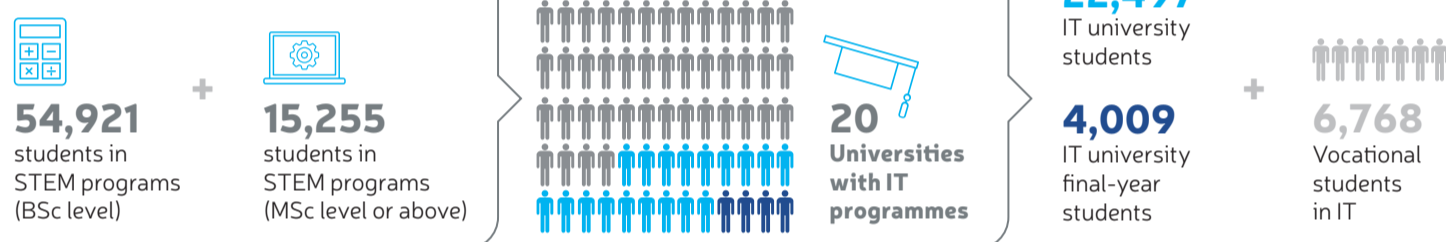
State Aid for R&D activity



Eligible costs

- Personnel related costs of the researchers & developers participating in the project
- Depreciation of buildings
- Rental fee of buildings and other structures
- Depreciation of tangible assets & equipment
- Material costs (up to 25% of the total costs)
- Costs related to contract research

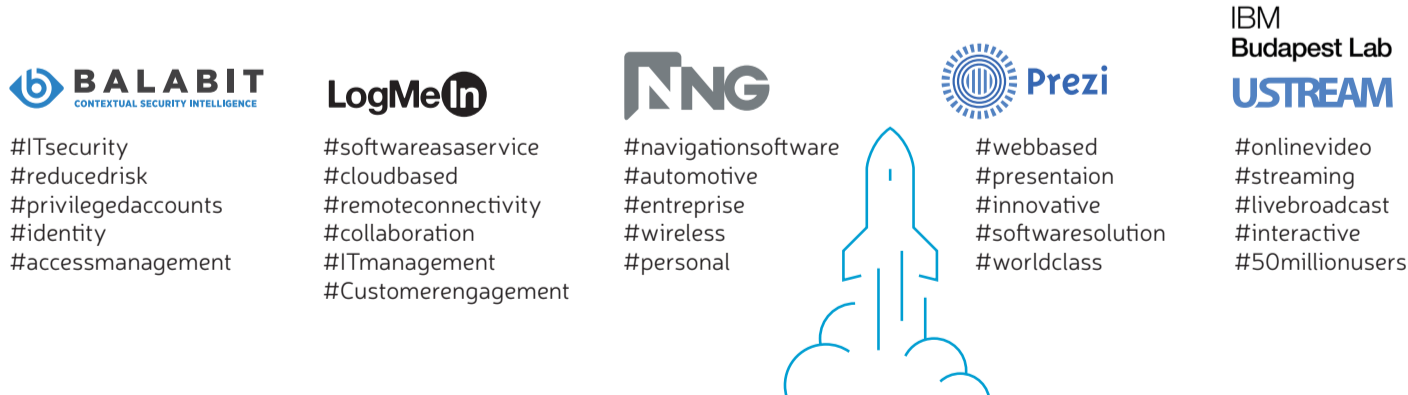
Talent pool & education



Our partners in stepping into the future



ICT start-up success stories



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Access to information on investment sites, labour market, taxation, business environment, local suppliers and more.



Incentives
First-hand information on the full range of incentives, end-to-end management of the VIP cash subsidy system.



Business development
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Electronics Industry in Hungary



5/8

Out of the Top 8 global EMS manufacturers, 5 are settled in Hungary.



20.8%

share in total manufacturing production



€6.1

billion FDI stock in the sector



€21.1

billion production value



92.9%

export ratio in the sector

29.2%

share in total exports

Ratio of renewables in final electric consumption

● **8.5%**

2018

● **11.5%**

2019

● **13.5%**

2020



The most diversified manufacturing sector
With stable and safe environment

120+
industrial parks

EMS manufacturing

Low risk of extreme weather conditions

Stable utility supply

Cable & Construction

Automotive R&D in electronics



Consumer electronics

The most dynamic manufacturing sector

Industrial equipment

IT & Communication

Battery industry

Automotive electronics

Our partners in stepping into the future

ALPSALPINE

AVL

BOSCH

Continental

flex



JABIL



OBO BETTERMANN

Rosenberger

SAMSUNG ELECTRONICS

Schneider Electric

SIEMENS

SIEMENS energy

SK innovation

VIDEOTON

Talent pool & education in electronics

Over half of dual education university students study engineering



30,000
students



6,800
graduates



7,000

vocational students participate in electrical engineering, electronics trainings

in the area of engineering

Did you know?



Electronics is **one of the largest** economic sectors in Hungary



183,000
employees

hipa

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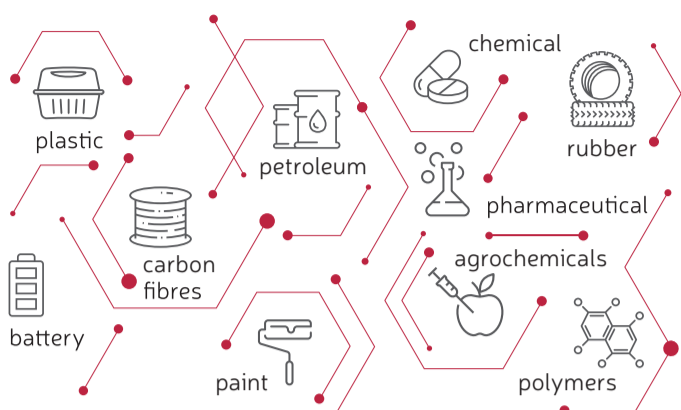
Contact us

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HIPA
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Industrial Products in Hungary

Chemical industry

Wide spectrum of activities



Continuously growing

(2019)

95,700

employees



€ 21.7 billion

production



Production

Nr.1 in the EU in growth in the value added between 2009 and 2017

268%

Hungary



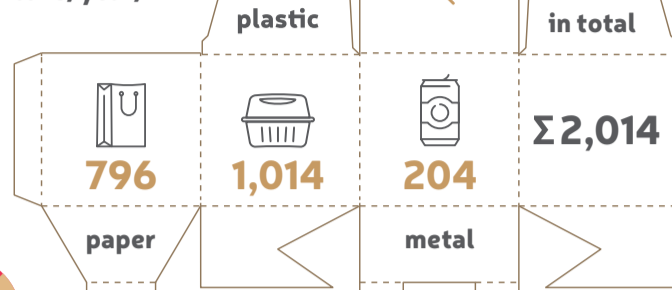
68%

EU

Packaging industry

Wide spectrum of activities

Packaging production (thousand tons/year)



Continuously growing

(2019)

20,500

employees



€ 2.0 billion

production



Production

2nd highest share in total manufacturing production in the CEE region



115 prizes at the WPO's World Star Packaging Awards Competition



Our partners in stepping into the future

BorsodChem

Henkel

KCH

Linde

MESSER

Gases for Life

MOL

TORAY

Unilever

ZOLTEK

DS Smith

Edelmann Group

FLEX

marzek

PACCOR

PRINZHORN HOLDING

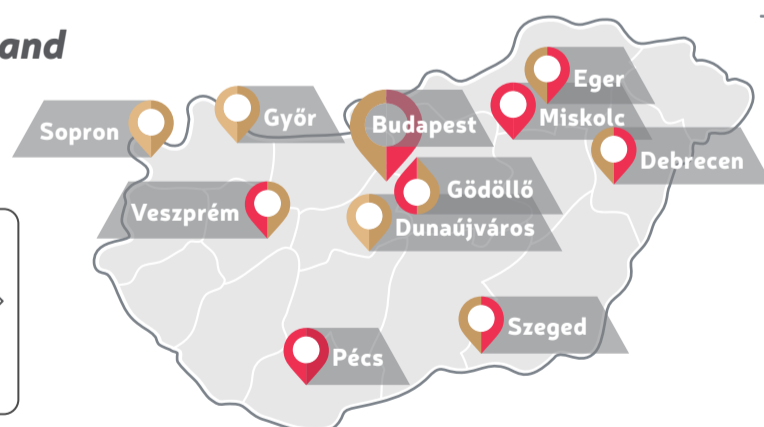
SRF

Taghleef Industries

Tetra Pak

Trained talent pool and strong educational institutions

Dual education system built on company needs



Total number of students in higher education

5,093

chemical industry

2,856

packaging industry

Did you know?



15,000

tons/year

The biggest carbon fibre manufacturing facility in Europe can be found in Hungary.

hipa

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Business Service Centres in Hungary

131
companies

63,892
employees
~**500**
average
headcount
8-10%
annual
growth rate
in FTEs

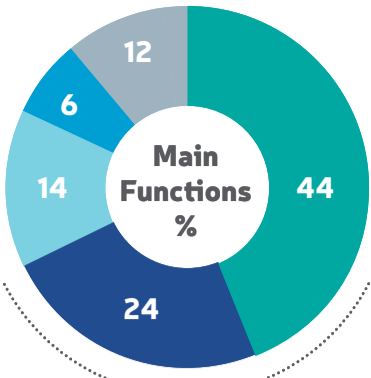
54%
captive

27%
hybrid

19%
BPO

52%
regional
services

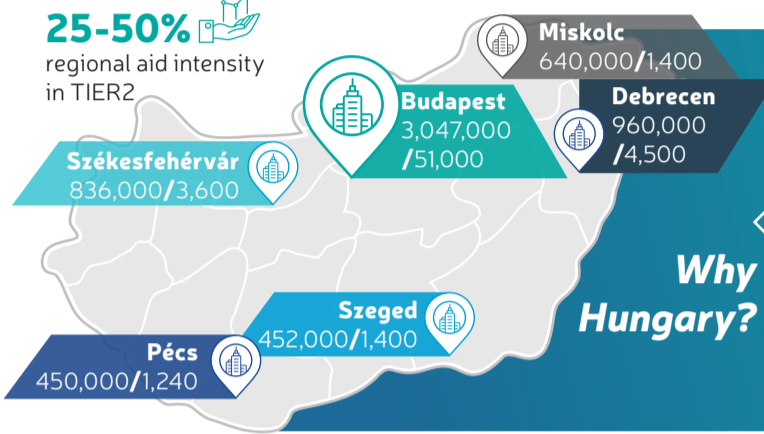
45%
global
services



- Finance, Accounting & Controlling
- Human Resources
- IT
- R&D, Innovation
- Other

Major BSC Locations (population – greater area / employees in BSCs)

25-50%
regional aid intensity
in TIER2



Why Hungary?

1. Highly skilled, multilingual workforce at a competitive cost
2. Mature BSC sector with complex and high value-add activities
3. High quality infrastructure and excellent quality of life
4. Emerging TIER2 cities with strong university background
5. Stable political and economic environment

Talent Pool

285,110

Total number
of students
(Tertiary level 2019/20)



52,860
economics, accounting,
management studies



21,870
IT related studies



8,100
language studies



Languages
served
by BSCs
40+



(2020)
Ratio of foreign
citizens among
employees
15%



(2020)
Voluntary
attrition
rate
12%

Source: HIPA Survey 2020

Our partners in stepping into the future



BlackRock



DIAGEO

ExxonMobil

FLOWERVE



IBM

iff

Morgan Stanley

MSCI



NOKIA



T...

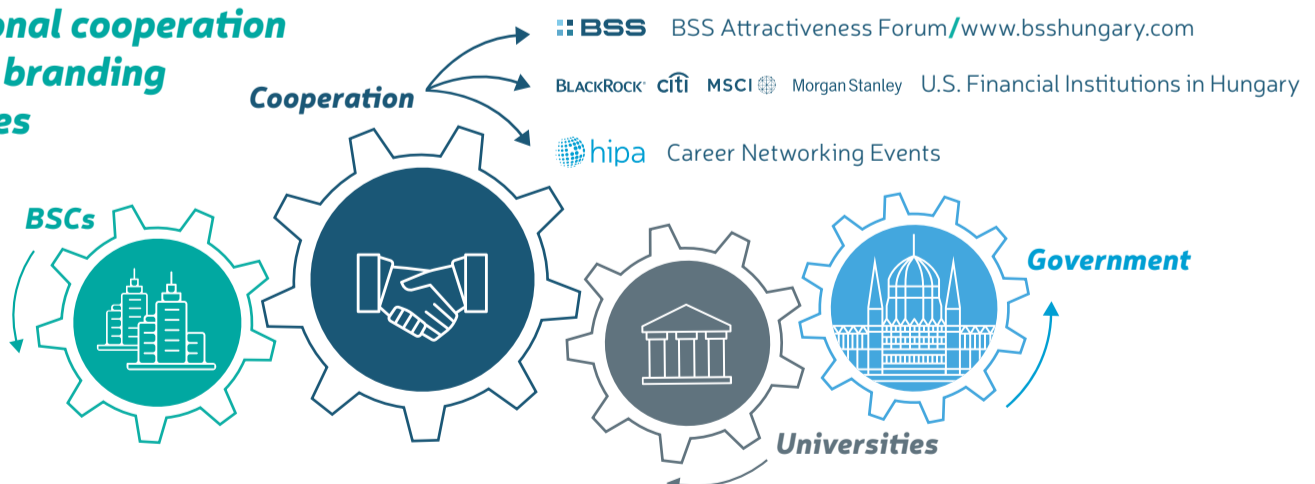
DEUTSCHE TELEKOM IT SOLUTIONS

TATA
CONSULTANCY
SERVICES

ThermoFisher
SCIENTIFIC

TESCO

Educational cooperation & sector branding initiatives



**#employerbranding #recruitment #jobfairs #SSCcourses #BSCcareer #trainings
#meetups #opendays #gamification #socialmedia**



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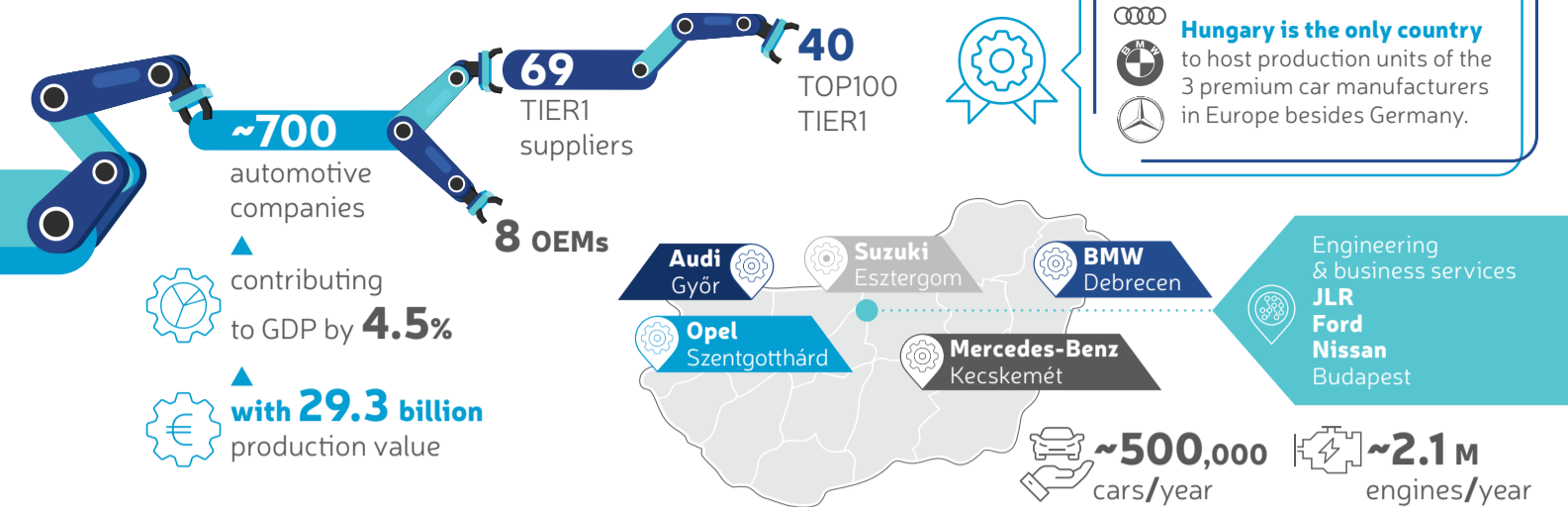
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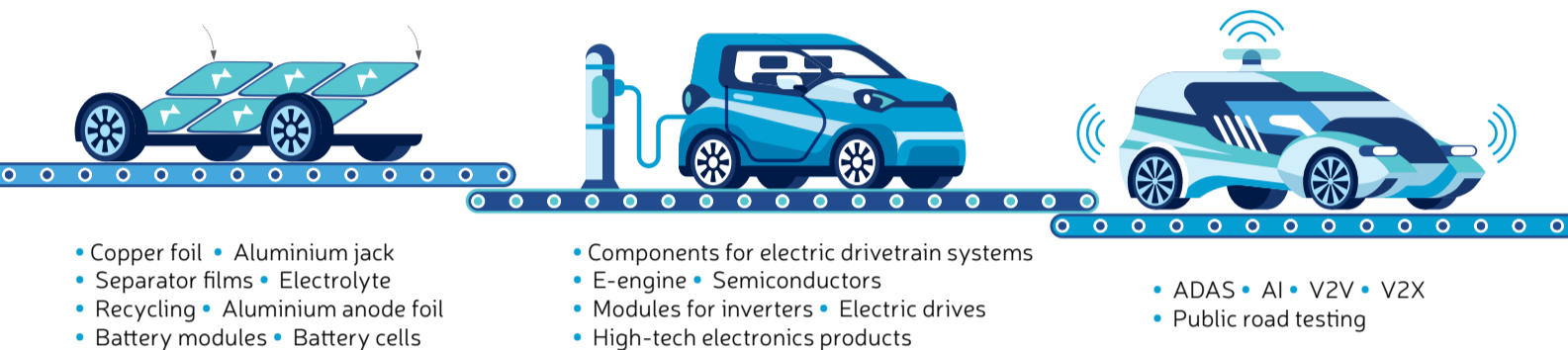




Automotive Industry in Hungary



Hungary is pioneering the new era of mobility e-mobility & autonomous driving



ZalaZone Complex automotive proving ground

Unique test track
in CEE

265
ha



Autonomous & electric vehicle

test environment
with classic
dynamic elements



5G high speed
mobile network
& high speed
CAV testing



AV road tests
supported by
the local legislation

Our partners in stepping into the future

SK innovation

SUZUKI

thyssenkrupp

Valeo

Yanfeng
Global Automotive Partners

ZF

Audi
Hungaria



• **APTIV** •



Continental

DENSO

BOSCH
Életré tervezve

BorgWarner

GSYÚASA

MAHLE



motherson



SAMSUNG SDI

SAMSUNG

SCHAEFFLER

Automotive related studies driving the industry

52,000/285,000
students in automotive related
tertiary education

2,300

university students
in dual education

25 in **42**
universities locations

40,000/145,000
students in practice-based
automotive related
vocational education

Did you know?



In response to the new trends, the following courses have been launched
Autonomous Vehicle Control MSc + Autonomous Vehicle Programming MSc
(in English) in Budapest.

hipa

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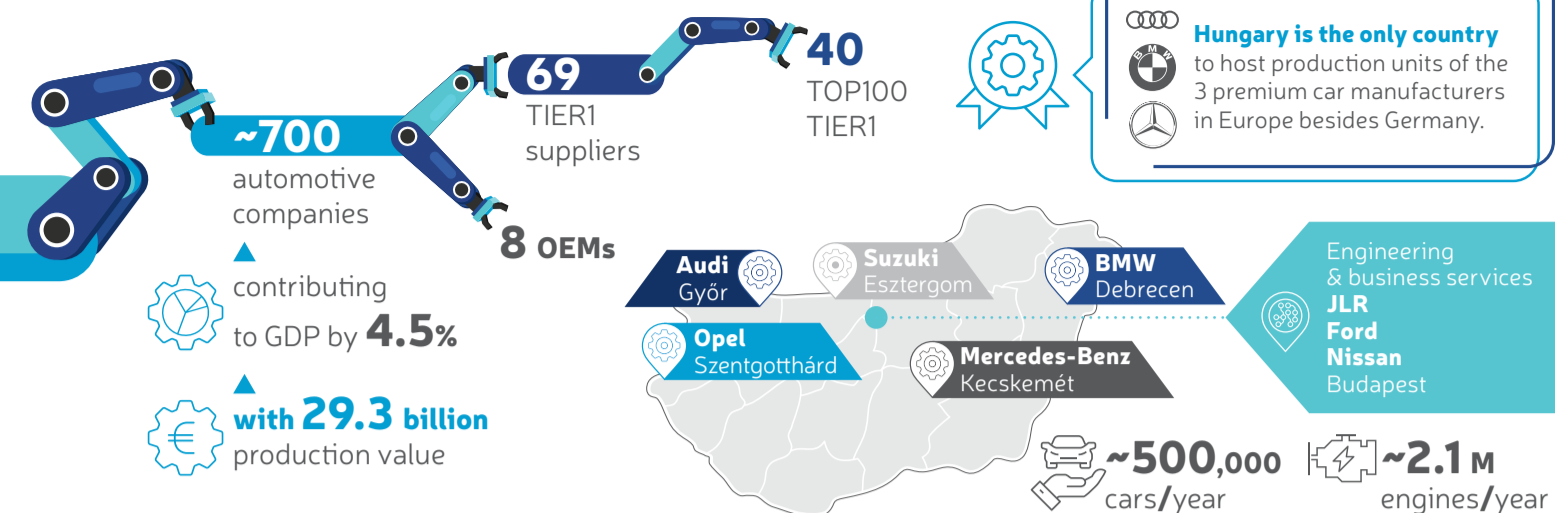
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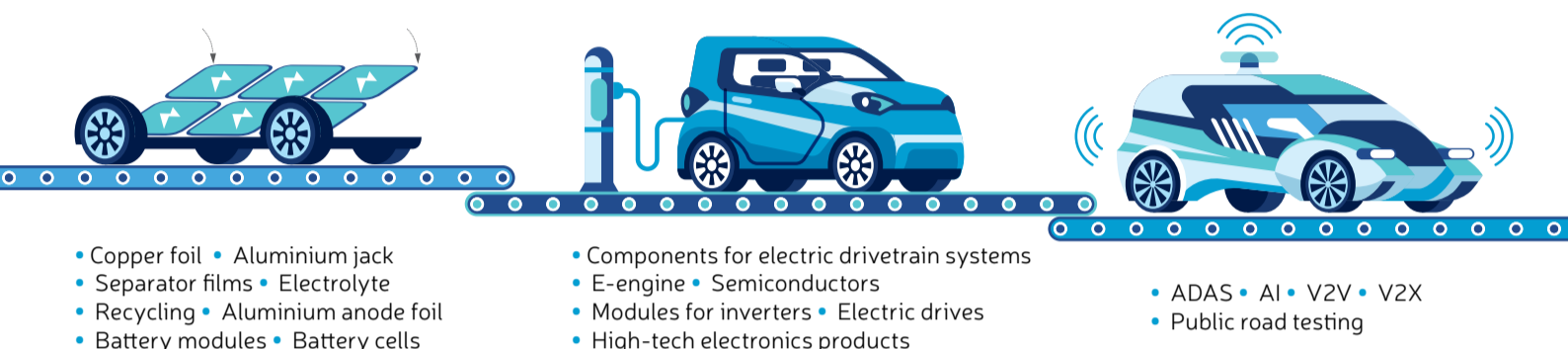




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• APTIV •



Continental

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MAHLE



motherson



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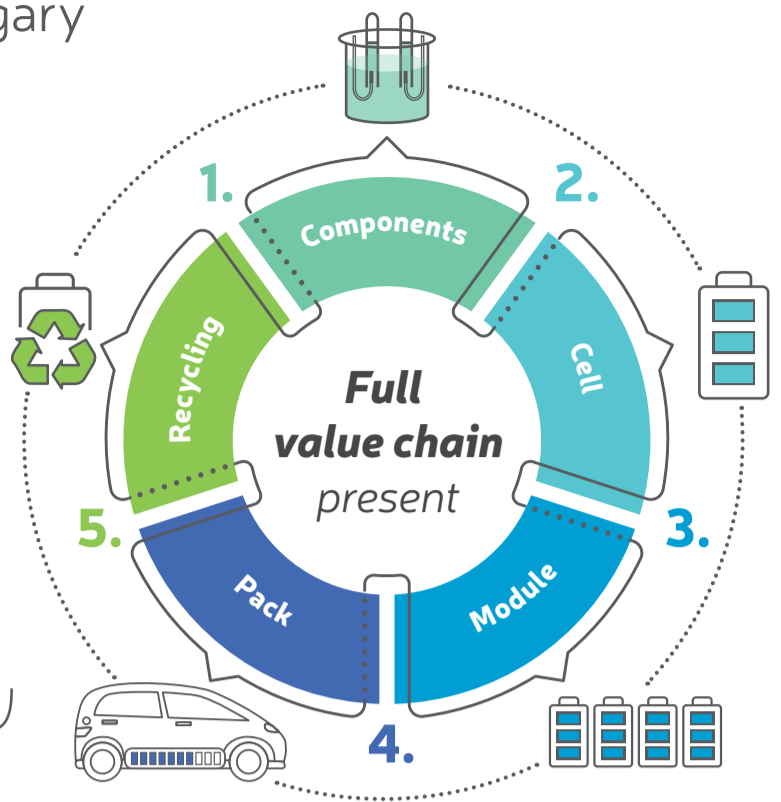
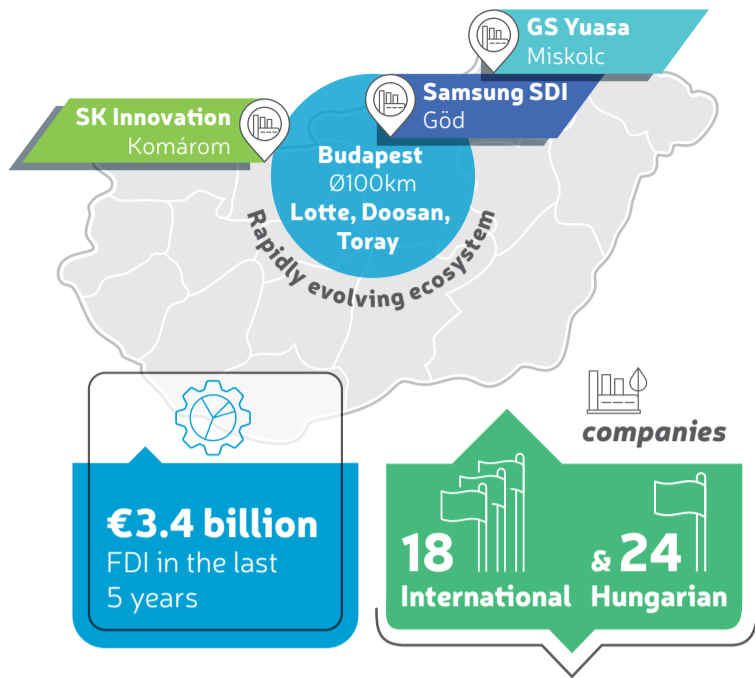
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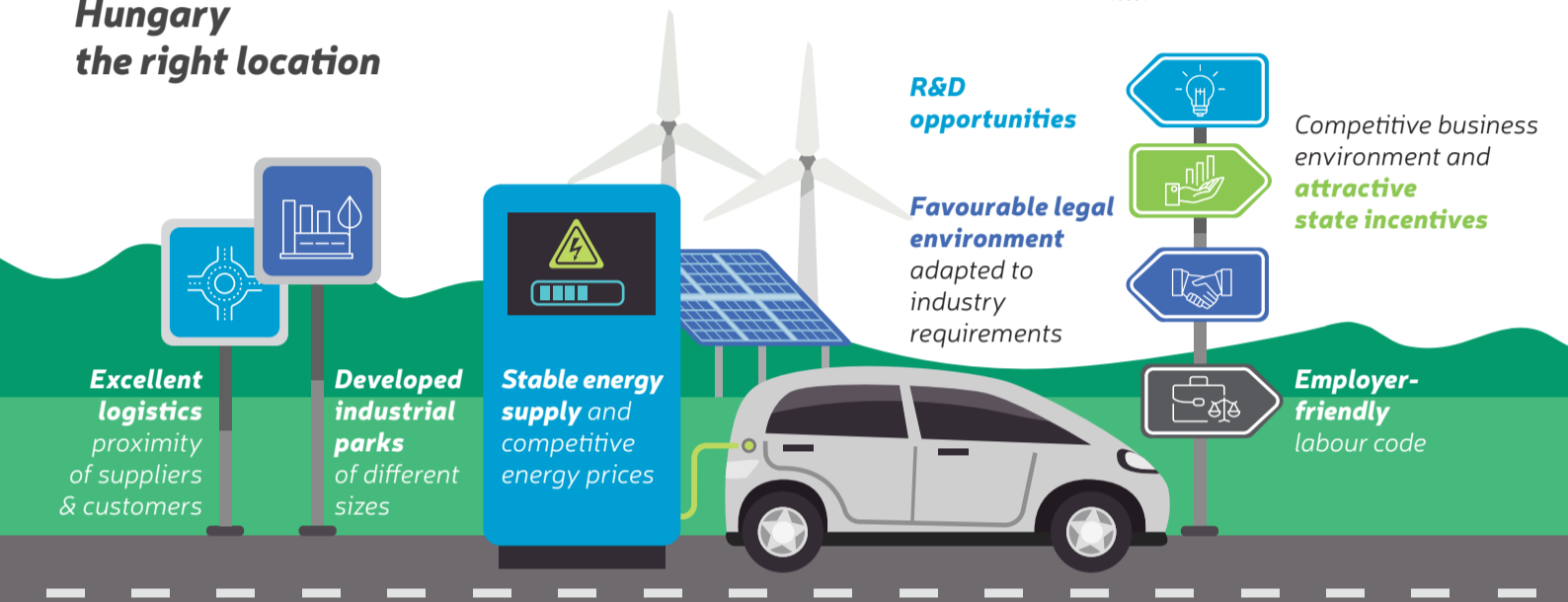




Battery Industry in Hungary



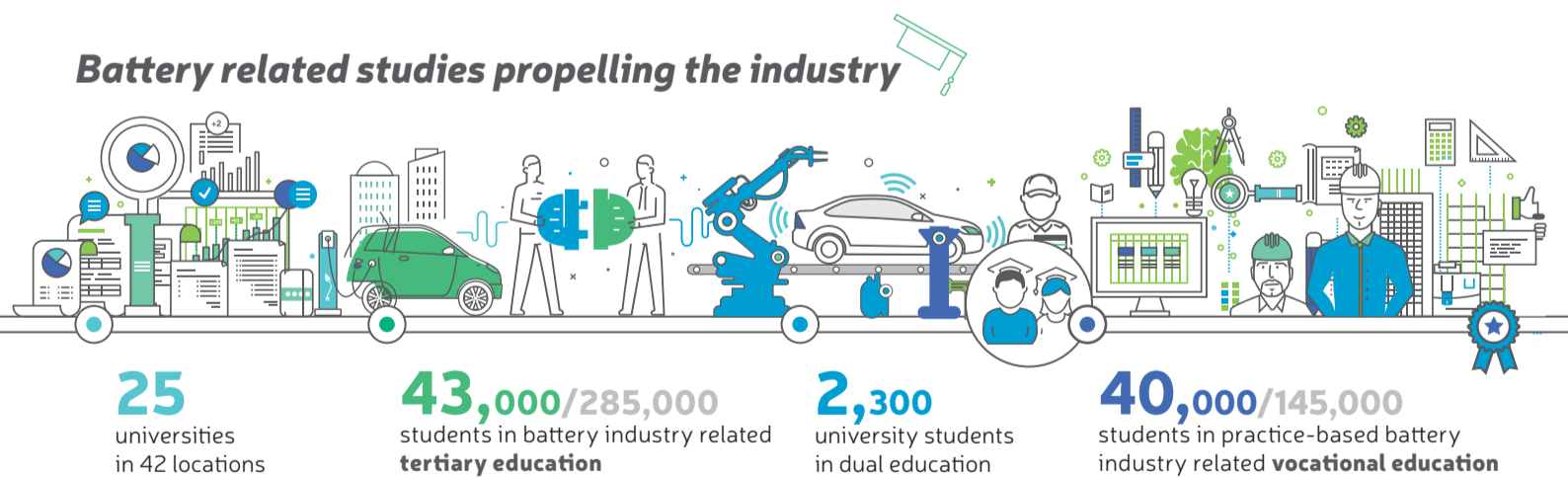
Hungary the right location



Our partners in stepping into the future



Battery related studies propelling the industry



Did you know?



Hungary has implemented a flexible curriculum for vocational education, allowing to incorporate business specific content in one academic year.



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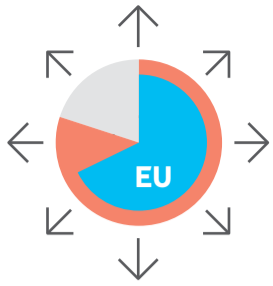
Contact us

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Medical Technology in Hungary



over 80%
export ratio

85%
to EU countries

Nr.1 in the region
Largest exporter
of medicinal & pharma
products in the region

5.3%
of total export



Nr.1 in the region
Medical technology
& pharma industry
together amount to over

9%
of the total manufacturing
value added



~40,000
employees



Did you know?

Hungarian medtech instruments are available on every continent including the **Antarctica**.

The global trends show that the world demands **new disease preventive, diagnostic and curative equipment**. Hungary is also able to join this process.

Main export products – Focus areas

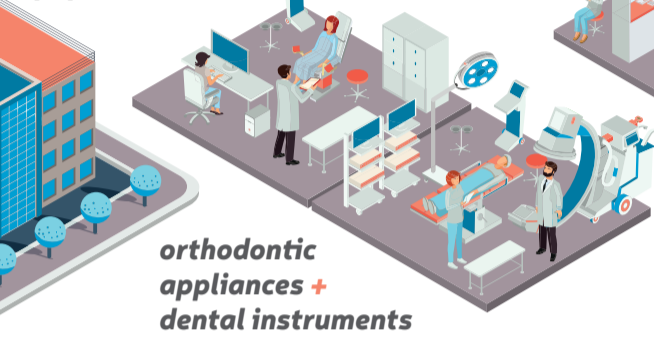
medical imaging



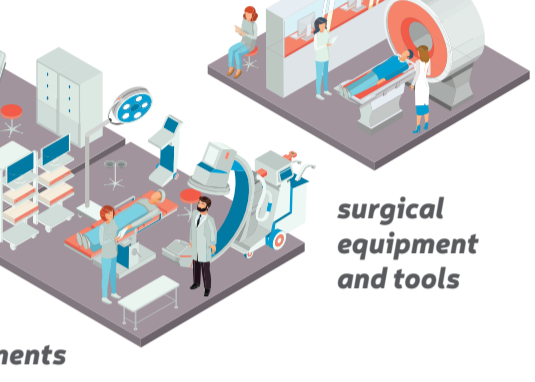
dialysis equipment, endoscopes



diagnostic related + laboratory equipment



implants & medical devices



electrical & biosensor devices + IT services

100 years of innovation in Hungary

Philips established X-ray factory and also domestic manufacturers produced medical devices

Medical Aids Factory played significant role in patient's rehabilitation

Large number of new SMEs and world companies settle down

10% of all medtech enterprises are engaged in export-driven, advanced manufacturing

1910s

Industrial scale manufacturing of X-ray machines

1920-'30s

Medicor Művek with 14,000 employees, prepared 450 types of equipment becoming the 3rd largest medtech company globally

1940s

1960s

1980s

Hungary became the "medtech specialist" in CEE

1990s

2000s

Innovative startups enter the market

2020s

Our partners in stepping into the future

B|BRAUN
SHARING EXPERTISE

BD

Coloplast

CooperVision

THINKING AHEAD
FEMTONICS
MICROSCOPY

GE Healthcare

HOYA

INNOMED

MEDICENTUR
Material. Design. Optics.

MEDICOR

Sanatmetal
Manufacturer of Orthopaedic and Traumatologic Products

Specsavers

77 ELEKTRONIKA

R&D concentrated around 4 major cities with medical universities

Knowledge & Research centres

Budapest

- Hungarian Academy of Sciences, Institute for Technical Physics and Materials Science
- GE Healthcare's R&D Centre
- Budapest University of Technology and Economics, Healthcare Technologies Knowledge Centre
- Semmelweis University, Department of Imaging and Medical Instrumentation

Number of university students



Budapest
11,505



Debrecen
5,717



Pécs
4,200



Szeged
4,602

Szeged

- University of Szeged, Institute of Informatics, Department of Image Processing and Computing Graphics
- GE Healthcare's R&D Centre

Pécs

- University of Pécs, János Szentágothai Research Centre

Debrecen

- University of Debrecen, Medical and Health Science Centre

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Life Sciences in Hungary



Innovation for the future

€3.5 billion

FDI stock



8/TOP10

global drug and biotech companies have manufacturing / R&D activities

5.3%

of total export



largest exporter of medicinal & pharma products in CEE

over 9%

of the total manufacturing value added



Nr.1

in labour productivity



Unique focus areas

Pharma

original and generic drug production, APIs production, herbal industry

Biotechnology

medicinal chemistry, preclinical studies, stem cell research

Veterinary

CEVA-Phylaxia's largest biological R&D center in Budapest

Clinical trial

~300 clinical trials registered each year



Leveraging our century old pharmaceutical knowledge base



Nobel



Capacities



R&D knowledge

13

Nobel laureates of Hungarian origin

Holography

Cathode ray

Vitamin C

40,000 employees

~300 innovative biotech & medtech SMEs and start-ups

89 pharma companies

3,445 R&D units

32.4% R&D spending in total manufacturing

4

major cities with medical universities

~70,000 workplaces

28

FDI related projects (2014–2020H1) resulted in

€733 M

investment & over 4,100 jobs

Our partners in stepping into the future

BÉRES



Goodwill



PANNON PHARMA



GEDEON RICHTER

SANOFI



SOLVO[®] BIOTECHNOLOGY A CHARLES RIVER COMPANY

teva

xellia PHARMACEUTICALS

Strong talent pool of life sciences students



15 universities



27,274 students



3,100 graduates



13,143

Medicine



3,900

Chemical engineering and processes



2,830

Biology and related sciences



2,644

Pharmacy



2,046

Veterinary



1,518

Medical diagnostic and treatment technology



1,193

Chemistry



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Food Industry in Hungary

100%
GMO free
agricultural
goods



Sunflower
>1.7M tons
#3 in EU



Corn
>8.2M tons
among TOP10
producers globally



Fruits & vegetables
5%+ of total EU output
of various fruits



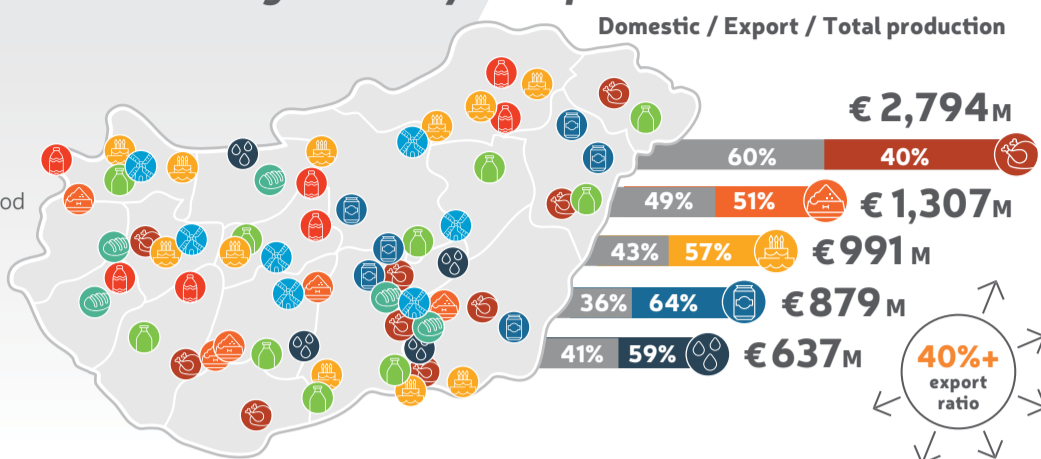
Poultry
>530,000 tons
#6 in EU

Main subsectors of the food and beverage industry

- Meat** processing and preserving
- Beverages**
- Pet food** and prepared animal feed
- Sweets, snacks** and convenience food
- Milk** processing and dairy products
- Bakery** and farinaceous products
- Grain** mill products, starches
- Fruits & vegetables** processing
- Oils & fats** (vegetable and animal)

Export oriented subsectors

Domestic / Export / Total production



€6.06 billion total export value



€1.11 billion surplus in trade balance

€10.9 billion
of production
value

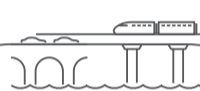
10.8%
of total manufacturing
production

~100 & **200+**
large
companies
mid-sized
companies

140,000+
employees
(2020 Q2)



Automation of
the production



International quality
and safety standards



Halal, kosher, "free from",
vegan and bio products



Advanced
packaging

Source: Eurostat&HCSO, 2019

Our partners in stepping into the future



Bonafarm
CSOPORT

BUNGE

Coca-Cola

Gierlinger
PREMIUM Bacon



FrieslandCampina

Givaudan

GLENCORE

HEINEKEN

HELL
ENERGY DRINK

KOMÉTA

Mondelēz
International
SNACKING MADE RIGHT

Nestlé

NISSIN

RAUCH
SEIT 1919

Unilever

Significant investment and reinvestment results (2014-2020H1)



>40
food & beverages
related projects



total investment
value of
>€1 billion



almost
6,000
new workplaces



9/10

projects were genuine reinvestments
of already settled companies

1/4

investments in meat processing
and preserving activities



hipa

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Logistics Industry in Hungary

Central location

the centre of gravity for distribution to Central & South-Eastern Europe and CIS countries



27h

SWEDEN

FINLAND

ESTONIA

LATVIA

RUSSIA

LITHUANIA

BELARUS

1,500 km

1,000 km

500 km

UKRAINE

ROMANIA

BULGARIA

GREECE

MACEDONIA

ALBANIA

BOSSIA AND HERZEGOVINA

SERBIA

CROATIA

SLOVENIA

AUSTRIA

ITALY

FRANCE

GERMANY

NETHERLANDS

BELOW

2.5h

1.5h

1h

9h

18h

36h

54h

SPAIN

PORTUGAL

IRELAND

UNITED KINGDOM

200 million consumers within 1,000 kilometers

200 million consumers within 1,000 kilometers

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200 million consumers within 1,000 kilometers

200 million consumers within 1,000 kilometers

200 million consumers within 1,000 kilometers



6.0%

Hungarian GDP (2019)



303,000

employees (2019)



EU & Schengen

zone membership (free movement of goods)



3TEN-T

European transportation corridors



190 logistics & industrial parks



2 million m² modern warehouse stock



4G countrywide coverage



5G already available for commercial users

Competitive transportation infrastructure



Nr.1 in length of motorways in CEE (EU Transport in Figures 2019)



Hungary is ranked **Nr.6** by railway line density in Europe



153 direct destinations by 49 airlines from Budapest Airport



50+ scheduled container trains weekly to European ports of the North Sea, the Adriatic and the Mediterranean

Our partners in stepping into the future

Top 10 distribution centres (Company / nr. of countries served)

DAE

23

Ford

15

HUAWEI

50

HYUNDAI MOBIS

14

JYSK

7

KONICA MINOLTA

15

MSD

14

ORIFLAME

12

SANOFI

17

Schneider Electric

21

Continuous investments in transportation infrastructure

TIR

1,630 km

world class highway network
+ 429 km under construction

Highway density once fully developed: 0.0221 km/km²

4th in Europe

Allocated budget: € 7.7 billion until 2025



BUD Cargo City:

new € 50 million investment
32,800 m² air cargo facility handed over at BUD Airport in November 2019

New direct flights launched in the past two years to

NEW YORK Philadelphia CHENGDU
CHICAGO XI'IAN SEOUL
SHANGHAI CHONGQING



4 new container terminals

planned or under construction in the countryside



Continuous investments into rail infrastructure

Allocated budget: € 5.4 billion (2016-2024)



The Hungarian Investment Promotion Agency offers one-stop-shop management consultancy services providing tailor-made information packages and incentives for companies interested in investing in Hungary.



Location selection

Access to information on investment sites, labour market, taxation, business environment, local suppliers and more.



Incentives

First-hand information on the full range of incentives, end-to-end management of the VIP cash subsidy system.



Business development

Identification and development of local suppliers, mediation between business and government, policy proposals to improve the business environment.



Contact us

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Investment Promotions
Logistics & distribution centres
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INVEST
IN

HUNGARY



HUNGARY

smart.
ambitious.
competitive.

#1

European destination
for 2019
by European Best
Destinations

IIH
2021
page
4

About Hungary



Population
9,769,526
(2020, HCSO)



Area
93,023 km²



Capital (population)
Budapest
(1,750,216)
(2020, HCSO)



Form of
Government
**Parliamentary
Republic**



Currency
Forint (HUF)



Time zone
GMT + 1hour



Membership in international organisations
EU, UN, OECD, WTO, NATO, IMF, EC
EU member since 2004

Key figures



Inward FDI stock
61% (of GDP)
(2019, MNB)



GDP (PPS)
€ 225,808 M
(2019, HCSO)



GDP / capita (PPS)
€ 23,110
(2019, HCSO)



GDP growth
4.6%
(2019, HCSO)



Inflation
3.4%
(2019, HCSO)



Average gross earning
€ 1,131
(of full-time employees)
(2019, HCSO)



Budget balance
-2.1%
(% of GDP)
(2019, HCSO)



Business friendly environment

Hungary has been continuously improving its taxation system.



Corporate
income tax
9% flat rate



Social contribution tax
15.5%
(As of 1 July 2020)

the
lowest
in the
EU



based on
3 main pillars

FDI focus
through
HIPA



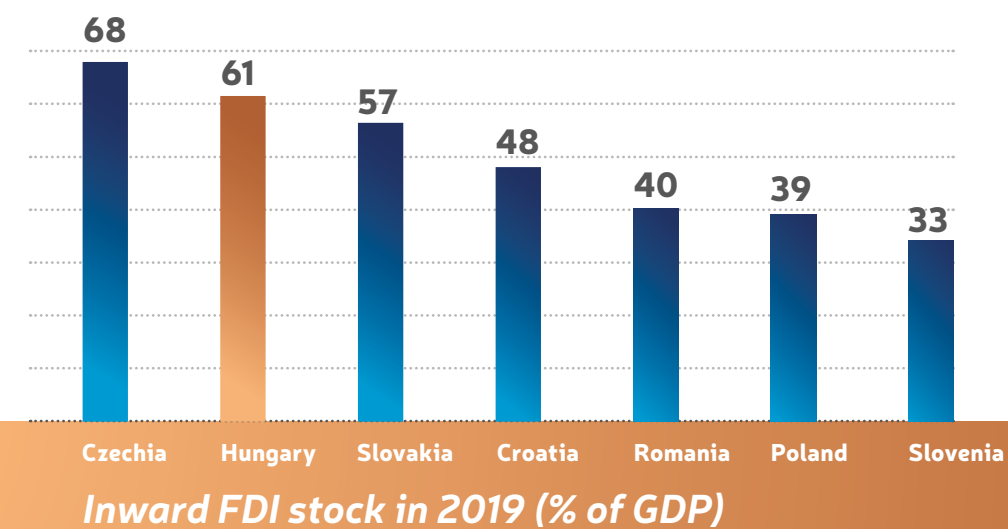
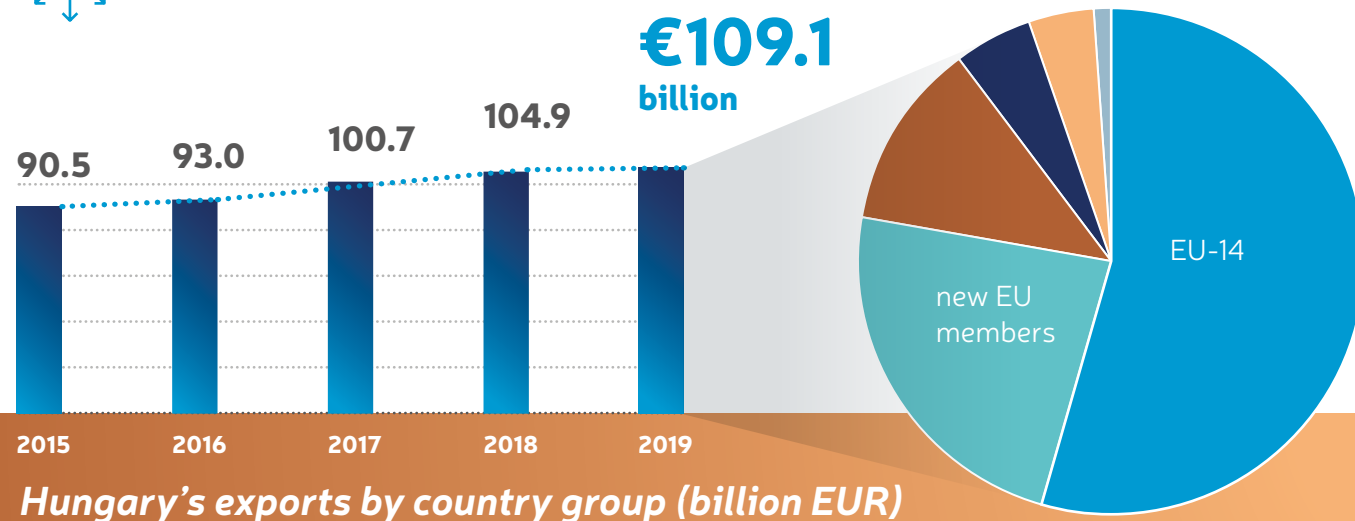
Export
promotion
by HEPA



Effective financing
and insurance
facilities by EXIM



Continuously
increasing
FDI inflow
since 2015



**extensive network
of diplomats**
promoting Hungary's
foreign trade relations

at

148
local
representations

in
84
countries



BUD P A T E S T

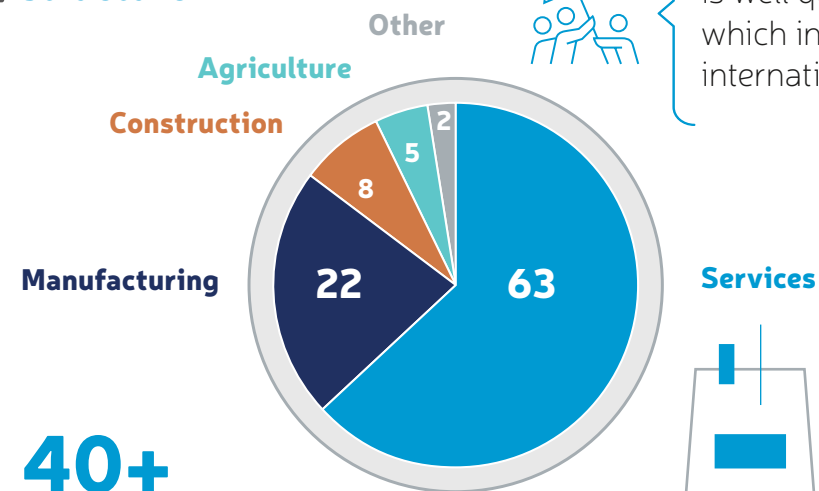
#1

Budapest is the most affordable city for running a business (Utility Bidder)



the Most Livable City
in Eastern Europe according to
The Economist's annual list

Labour pool structure



40+
languages served
by Hungarian Business
Services Centres

The Hungarian labour force
is well qualified and cost effective,
which increases the country's
international competitiveness.



Multilingual
highly educated
talent pool

Services

English

German

French

Italian

Spanish

Russian

Chinese

Dual education



Talent pool in the service of
the Hungarian economy



285,110
students in
tertiary
education

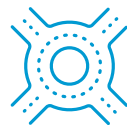


The number of
tertiary dual
education partner
organisations
amounts to over
900

145,016
students in
vocational
education



The number of
students engaged in
**vocational
dual training**
is around
50,000



EU and Schengen
zone membership
(free movement of goods)



50+
scheduled container trains
weekly to European ports
of the North Sea,
the Adriatic and
the Mediterranean



3rd fastest
4G mobil internet
in the world

5G already available
for commercial users



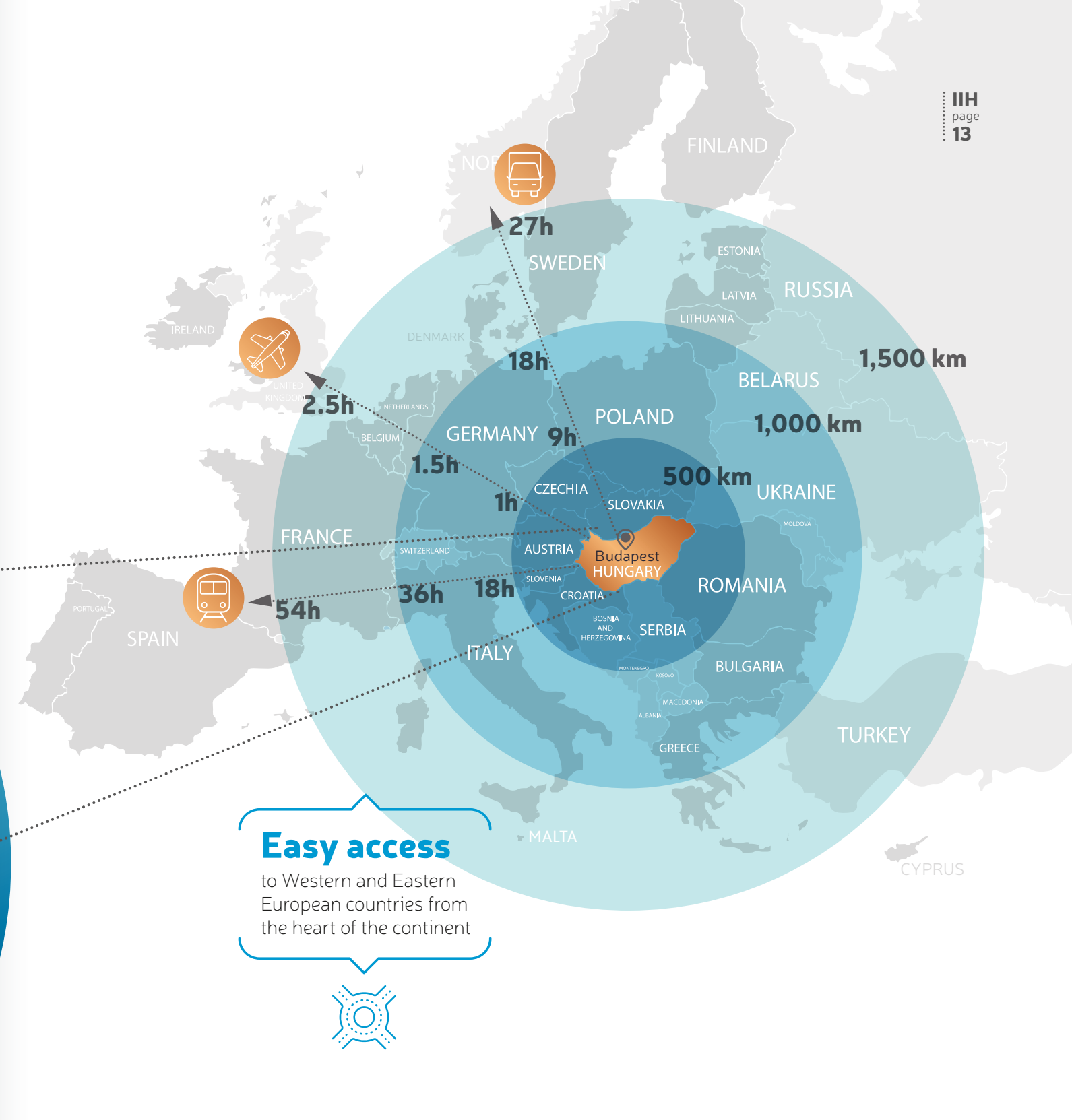
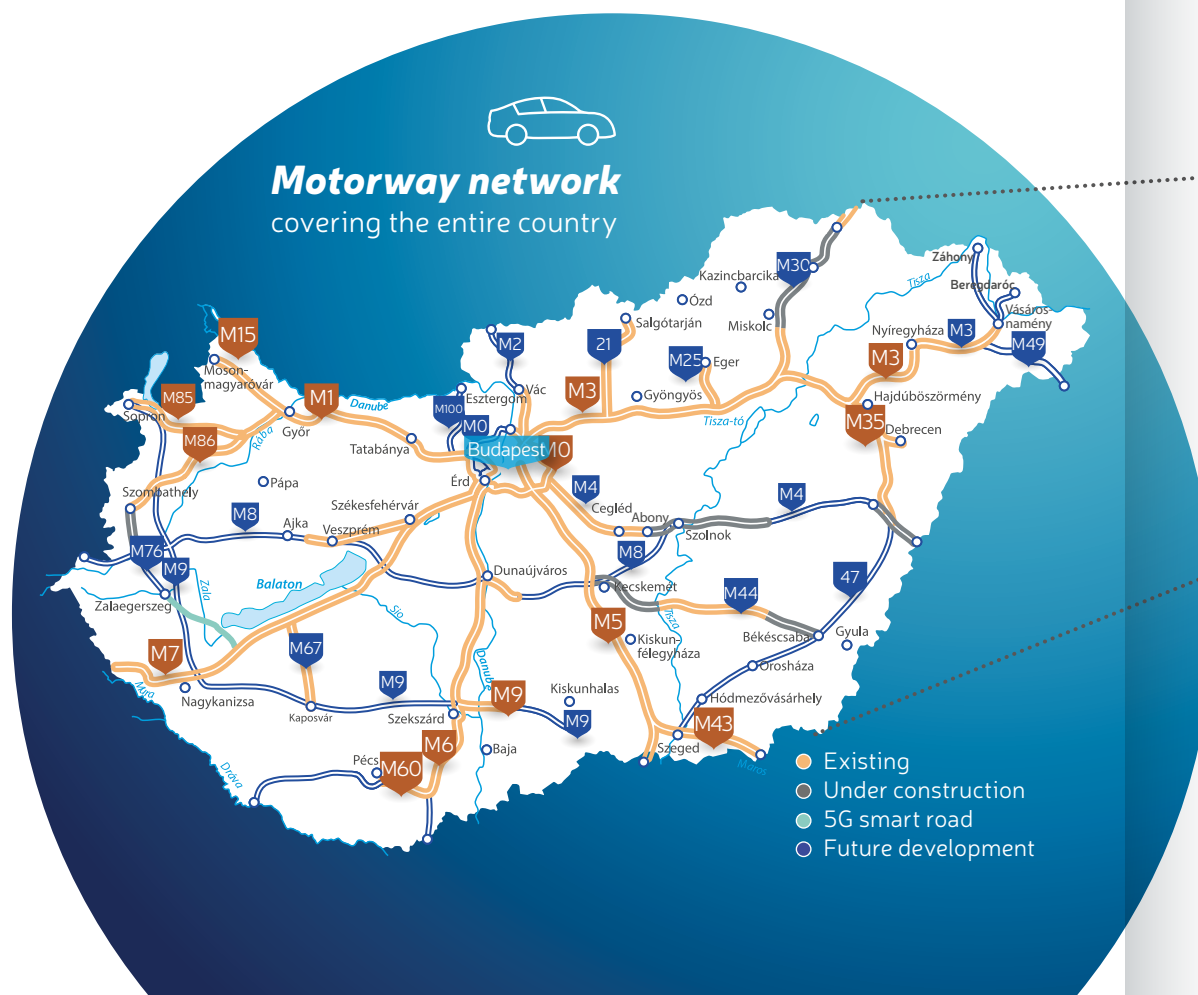
Direct flights to
153
destinations
by 49 airlines
from Budapest Airport



Nr. 1
in length of motorways
in CEE (EU Transport
in Figures 2019)



Nr. 6
in railway line
density in Europe



BUD AIRPORT

#1
6x best
Best airport
in the Eastern
European region



1.



Location selection

Access to information on investment sites, labour market, taxation, business environment, local suppliers and more.

2.



Incentives

First-hand information on the full range of incentives, end-to-end management of the VIP cash subsidy system.

3.



Business development

Identification and development of local suppliers, mediation between business and government, policy proposals to improve the business environment.

HIPA offers one-stop-shop management consultancy services providing tailor-made information packages and incentives for companies interested in investing in Hungary.



Investment sites

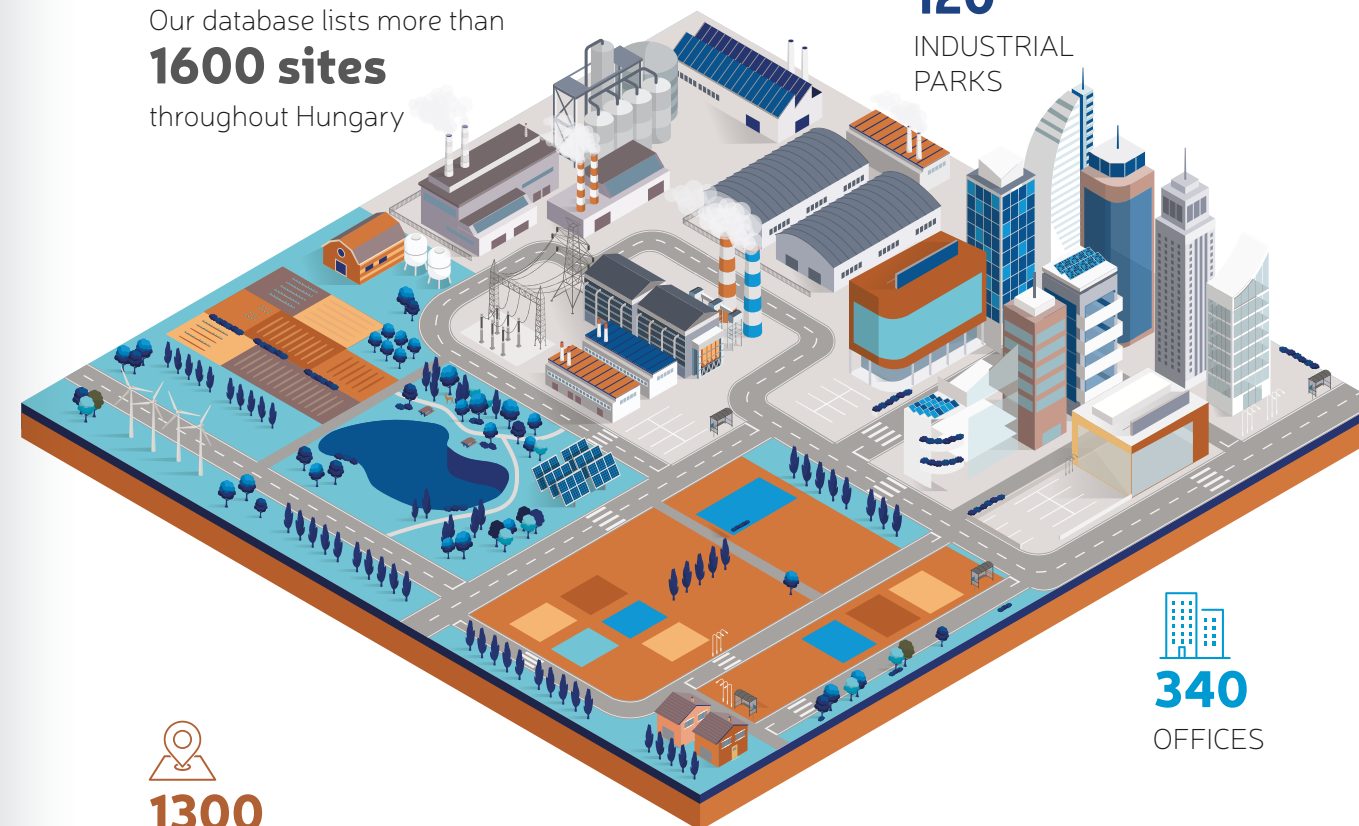
HIPA operates an internal database of investment sites in Hungary. The Investment Sites Database simplifies the task of matching investors' needs to potential locations. Searchable by size, location, available infrastructure and incentives.



Our database lists more than
1600 sites
throughout Hungary



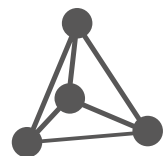
120
INDUSTRIAL
PARKS



1300
GREEN- & BROWNFIELD
SITES

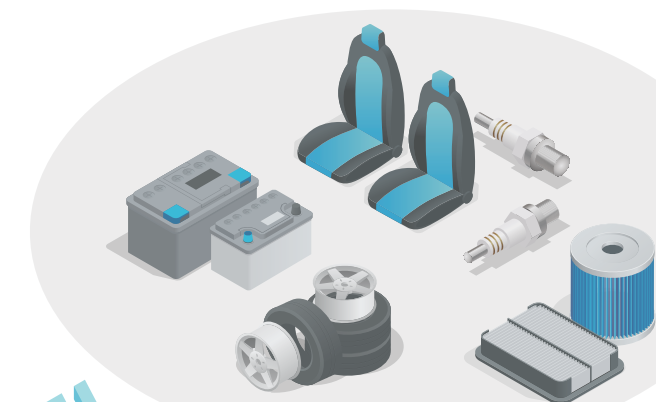


340
OFFICES

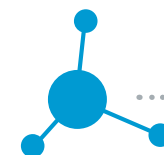
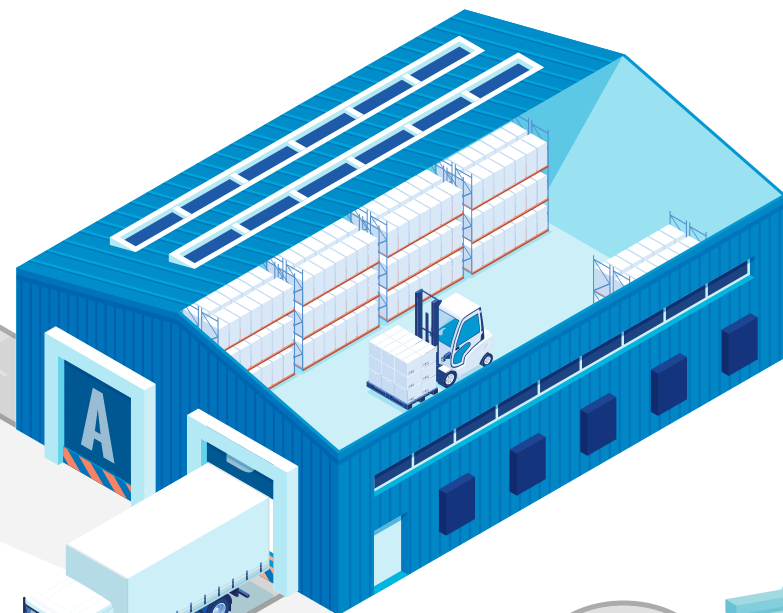


The quantity, quality and geographical location of suppliers play an increasingly important role

when choosing the location of an investment project.



It is also common in the automotive sector, that the added value by suppliers in the final product is growing increasingly. Therefore, at HIPA, we pay special attention to the supplier-related demands of our investing partners so that Hungarian enterprises can be present in as many numbers as possible in the added value chains of the multinational corporations. We are ready to provide our partners with a complete picture about Hungarian suppliers in a given sector at the earliest stage of the investment project. Later, we support the expansion of the added-value chain of the investor by presenting actual supplier's profiles in Hungary.



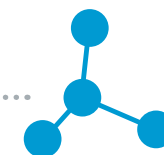
For INTEGRATORS



Market information
about the existing supplier ecosystem before the investment decision.



Supplier database
about the companies in Hungary with active connections and references to the manufacturing sector.



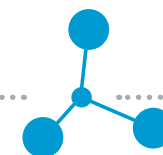
For INTEGRATORS & SUPPLIERS



B2B meetings
between integrators and suppliers in order to create business opportunities.



Development trainings
focusing on quality and efficiency in order to help suppliers enter and grow within the added value chain of multinational partners.



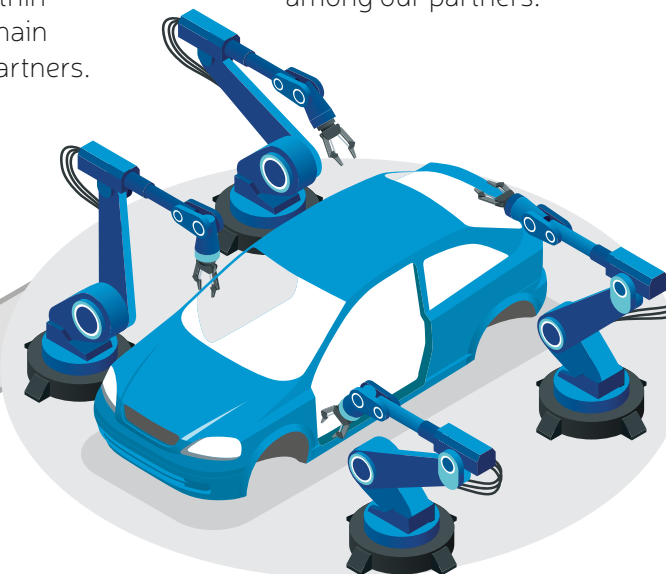
For SUPPLIERS



Exhibitions
to participate on the biggest international fairs and trade shows.



Supplier Forums
to enhance horizontal and vertical connections among our partners.





responding to the dynamics
of the economy



trainings

Cash grant



up to **50%**
of the training costs
of the employees and

up to **73%**
of the costs of workshop
establishment and
development.



R&D&I projects

Cash grant



VIP Cash Subsidy
up to **25%**
of the project
costs



EU
co-financed
tenders



Tax benefit

R&D&I tax benefit
up to **100%**
of the direct costs
of the projects



investments (Regional Aid)

Cash grant



VIP Cash
Subsidy

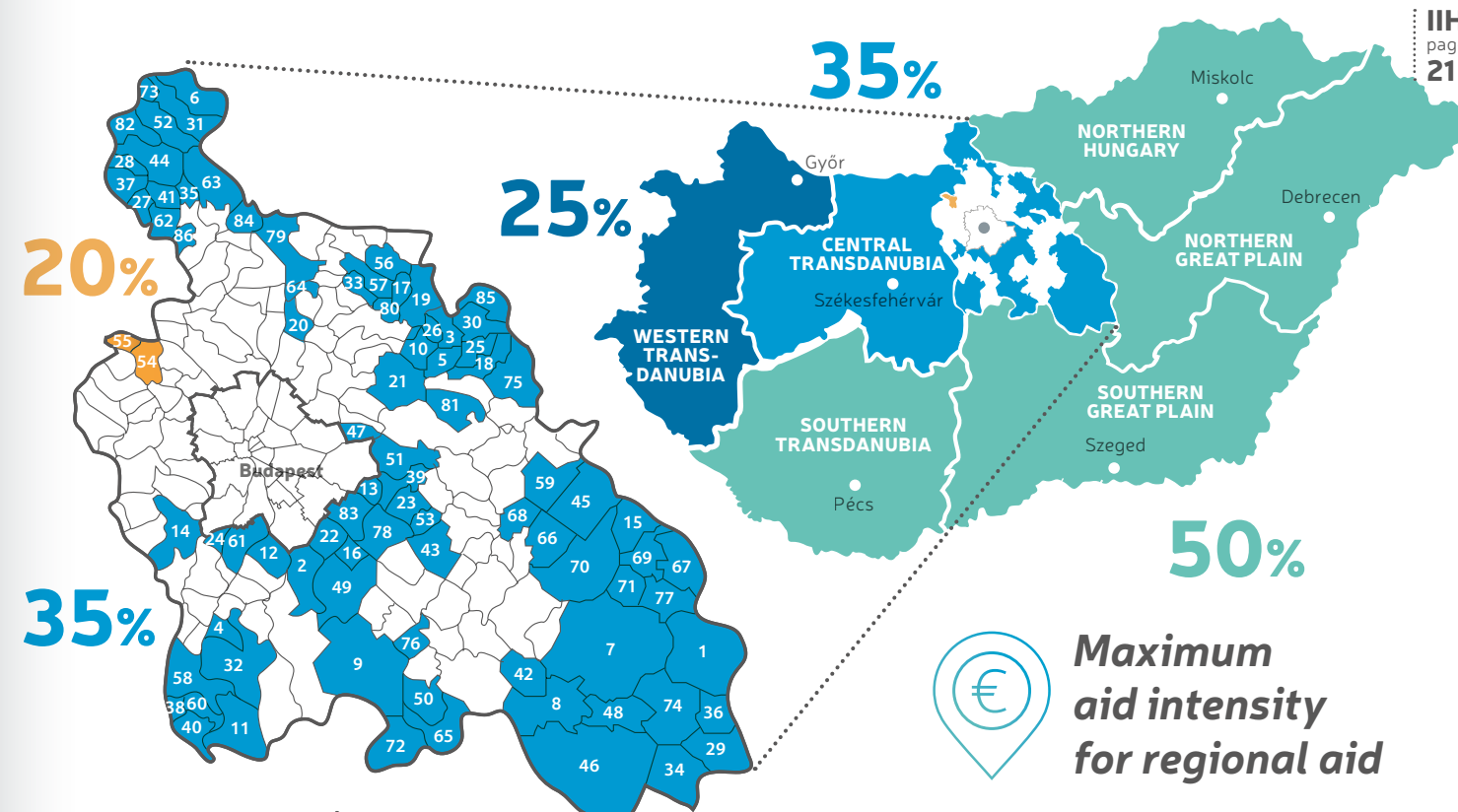


Local subsidy
grant by
municipality
(based on the
regions marked
on the map)



Tax benefit

Development tax benefit
as an exemption of
80%
of the CIT payable



CENTRAL HUNGARY

- 1 Abony
- 2 Alsónémedi
- 3 Aszód
- 4 Áporka
- 5 Bag
- 6 Bernecebaráti
- 7 Cegléd
- 8 Csemő
- 9 Dabas
- 10 Domony
- 11 Dömsöd
- 12 Dunaharaszti

- 13 Ecsér
- 14 Érd
- 15 Farmos
- 16 Felsőpakony
- 17 Galgagyörk
- 18 Galgahévíz
- 19 Galgamácsa
- 20 Göd
- 21 Gödöllő
- 22 Gyál
- 23 Gyömrő
- 24 Halásztelek
- 25 Hévízgyörk
- 26 Iklad
- 27 Ipolydamásd

- 28 Ipolytölgyes
- 29 Jászkarajenő
- 30 Kartal
- 31 Kemence
- 32 Kiskunlacháza
- 33 Kisnémedi
- 34 Kocsér
- 35 Kőspallag
- 36 Kőröstétlen
- 37 Letkés
- 38 Lórév
- 39 Maglód
- 40 Makád
- 41 Márianosztra
- 42 Mikebuda

- 43 Monor
- 44 Nagyörzsöny
- 45 Nagykáta
- 46 Nagykőrös
- 47 Nagytarcsa
- 48 Nyársapát
- 49 Ócsa
- 50 Örkény
- 51 Pécel
- 52 Peröcsény
- 53 Péteri
- 54 Piliscsaba
- 55 Pilisjászfalu
- 56 Püspökhatvan
- 57 Püspökszilágy

- 58 Ráckeve
- 59 Szentmártonkáta
- 60 Szigetbecse
- 61 Szigetszentmiklós
- 62 Szob
- 63 Szokolya
- 64 Sződliget
- 65 Táborfalva
- 66 Tápióbicske
- 67 Tápiógyörgye
- 68 Tápióság
- 69 Tápiószéle
- 70 Tápiószentmárton
- 71 Tápiószőlős
- 72 Tatárszentgyörgy

- 73 Tésa
- 74 Törtel
- 75 Tura
- 76 Újhartyán
- 77 Újszilvás
- 78 Üllő
- 79 Vác
- 80 Váckisújfalu
- 81 Valkó
- 82 Vámosmikola
- 83 Vecsés
- 84 Verőce
- 85 Verseg
- 86 Zebegény



Results

IIH
2021
page 22
from 2014 to 2020
by HIPA



Number
of projects

Investment volume
(EUR billion)

New jobs

- 22 Electronics
- 12 Automotive
- 10 Food industry

97 FDI

810

2020

12,914

4.0

907

97 FDI projects

+ 810 COVID related projects

2019

13,493

5.3

101

2018

17,024

4.3

98

2017

17,021

3.5

96

2016

17,647

3.2

71

2015

12,995

1.4

67

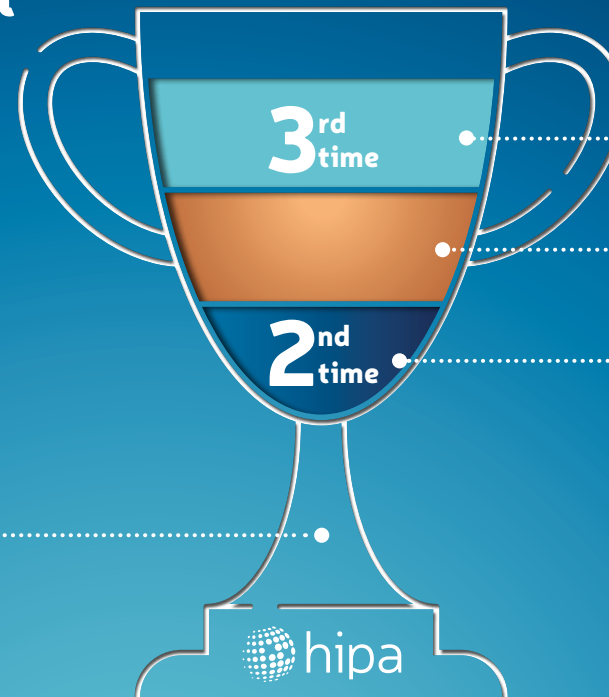


+222%

the investment volume has more than tripled

Professional investment promotion

by HIPA



Top IPA of the Region
/ Site Selection Magazine

FDI Strategy 2018
/ R&D Support
/ fDi Magazine

Investment Award for the Region
/ AIM

References

hipa



2018



2019



2020

Top IPA Awards

The Hungarian Investment Promotion Agency (HIPA) aims to build a close cooperation with the Hungarian investor community. One important tool with this purpose is our most important event of the year, the annual "Investors of the Year" award ceremony.

Investors of the Year Award Ceremony

Each year, companies executing the most considerable investments of the previous year are being recognized together with a Hungarian supplier and an industrial park.

The awards are presented by Minister of Foreign Affairs and Trade and CEO of HIPA.



2015

2016

2017

2018

2019



Győr

Komárom

Nyerges-
újfalú

Budapest

Érd

Göd

Eger

Nyíregyháza

Debrecen

Kecskemét

Szeged

Makó



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