

STRATEGIC PLAN FOR THE ECONOMIC DEVELOPMENT OF BRAGA 2014-2026

2018 EDITION



Universidade do Minho



BRAGA

Data





Braga has undertaken the economic development as a fundamental vector to make the city a reference hallmark in terms of dynamism and innovation, improving its citizens' quality of life. Therefore, in 2014, and for the first time, we joined all forces in the City so as to develop a concerted strategy with a long-term vision, thinking about the territory and the future.

The Strategic Plan for the Economic Development of Braga 2014-2026 is the result of such concerted effort that aims to understand the economic structure of Braga, and identify and prioritize the actions to be taken, while defining the critical sectors. We have heard all the agents involved and realized their aspirations and objectives, in a regional, national and international perspective.

This document sets as goal the recognition of Braga in the Iberian top 10 and national top 3, with reference to the economic, cultural and quality of life sphere; the creation of 500 new jobs per year; a level of 1% growth above average and the establishment of a centre of innovative industries and youth-oriented avant-garde technological sectors that need to work closely with the centres of knowledge.

From the beginning, we were fully aware that this plan should be seen as a beacon of an evolutionary process. Almost four years later, thanks to the dynamism of the City, and in the face of what we define as the achievement of unequivocal goals, there is actually a clear need to readjust these guidelines. In this time period, the success of the economic development of Braga has no better examples than the creation of approximately 7000 jobs and the rampant growth in the volume of exports, which actually puts us on the seventh place at the national level.

This success means that we are maximising the knowledge, generating jobs and guaranteeing the quality of life of our citizens. We stimulate the economic resources that Braga has, based especially on the excellence of the knowledge produced in our universities while translating this knowledge in attracting new businesses and generating more jobs for the majority of the population. We have

been creating a climate of innovation and cooperation between all the institutions and it definitely makes a difference both nationally and internationally.

We are achieving the kind of development that we do advocate: a sustained economic dynamism, based on the ICT and electronics sectors; Engineering, health sciences, biotechnology, nanotechnology, construction and environment; trade and tourism. Braga has several competitive advantages that are the result of its geographical location, level of qualification of the workforce, demographics and innovative spirit that are highly appreciated by national and international businessmen.

In 2014, I have stated that our 'soft power' is what moves us, along with the will and attitude of change, and that it would make this city and this region a benchmark and an example to follow. This is an undeniable reality that came up faster than we expected and whose merits are spread by all the living forces of the Municipality of Braga, that have undertaken this commitment together and do strive every day to identify lines of action and common projects inside their sphere of competence.

Today, we go together, steady and with a reinvigorated energy because the work is far from being finished and it is urgent to speed up the future. We will continue to make every effort to put Braga on the radar of the investment and make this city a distinctive mark on the National, European and international panorama.

A handwritten signature in black ink, reading 'Ricardo Rio'. The signature is stylized and fluid, with a large, sweeping flourish at the end.

Ricardo Rio

Message from the Mayor of Braga and President of InvestBraga

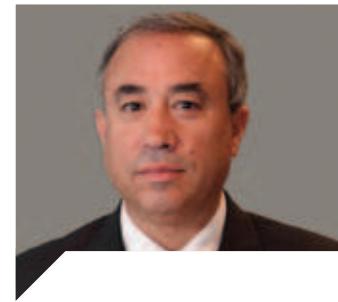
INVESTBRAGA STRATEGIC COUNCIL



President
Ricardo Rio



Non-Executive Board Member
Cláudia Simões



Executive Board Member
Carlos Silva

INDIVIDUAL MEMBERS

Eng. José Teixeira

Prof. Doutor António Cunha

Prof. Lars Montelius

STRATEGIC PARTNERS



“A strategic plan is an essential instrument to build the paths towards the development of a city and municipality that want to take the future in their hands, aiming at building an attractive, modern, innovative region with quality of life and social fairness.”

Rui Vieira de Castro
Rector of the University of Minho

“The decision to structure a Strategic Plan for the Economic Development of Braga signals and shows that the current Municipal Executive and InvestBraga are deeply committed to convey to the city’s institutions and other stakeholders a closer and collaborative approach. And we all want that such instrument of strategic orientation actually contributes to generate wealth, create jobs, stimulate regional development and, by the potential valorisation of the most representative resources and sectors of our territory, it will definitely exercise a multiplier effect on the entire economy of Braga.”

Domingos Macedo Barbosa
President of Commercial Association of Braga

CONTENTS

STRATEGIC PLAN FOR THE ECONOMIC DEVELOPMENT OF BRAGA 2014-2026

2018 EDITION

I. Sustained Economic Development Model of Braga	11
II. Vision and value proposition of Braga	15
III. The path followed since 2014	20
IV. Competitive advantages	35
1. Demographics and Quality of life	36
2. Talent, Education, Innovative spirit and knowledge infrastructure	38
3. Infrastructure and Location	46
4. Comparable cost factor	52
5. History and culture of ambition	55
V. Development axes	57
1. Centres for Engineering, Innovation and Shared Services	59
2. Industry and Construction	62
3. ICTE – Information Technologies, Communication and Electronics	64
4. Health and Medtech	66
5. Tourism and Culture	70
6. Commerce	72
7. Territory	74
Actions	77



I. SUSTAINED ECONOMIC DEVELOPMENT MODEL OF BRAGA

The sustained economic development model of Braga was released in 2014, right at the onset of the implementation of the Strategic Plan for the Economic Development of Braga 2014-2026 (PEDEB 2014-2026). Our basic objectives were and still are to invest on a future economy based on **human capital, knowledge and innovation as engines for job growth and wealth creation**.

After 4 years, an update of the plan is necessary, in accordance with the degree of implementation of the objectives so far and the evolving context.

Additionally, this update aims to position and align Braga at the forefront of public policy guidelines for the next decade, focused on innovation and knowledge, namely on Europe's strategy for the new cycle of cohesion funds and the 2030 United Nations Agenda for sustainable development.

We did identify the development axes that have played and will continue to play a central role in the economic development of Braga, and that will capture the attention and action of public and private agents based in two competitive advantages of Braga:

- **The skills acquired**, for an economic differentiation among national and international competition;
- **The resources available**, so as to enhance and reinforce these skills, especially those that have unrepeatable features.

These competitive advantages are now supplemented and specified in 4 major vectors:

- **People and talent** - so as to promote creativity in arts, science and economy;
- **Innovation, research and development** - essential to achieve a sustained growth;
- **Entrepreneurship** - legacy of the ancient culture of the city and a bet on the future;
- **Infrastructures** - so as to facilitate the attractiveness and connection to the world.

These vectors, if properly articulated, can feed the uniqueness of Braga, and actually work as levers for new projects and the development of economic specialisation profile as established in this plan.

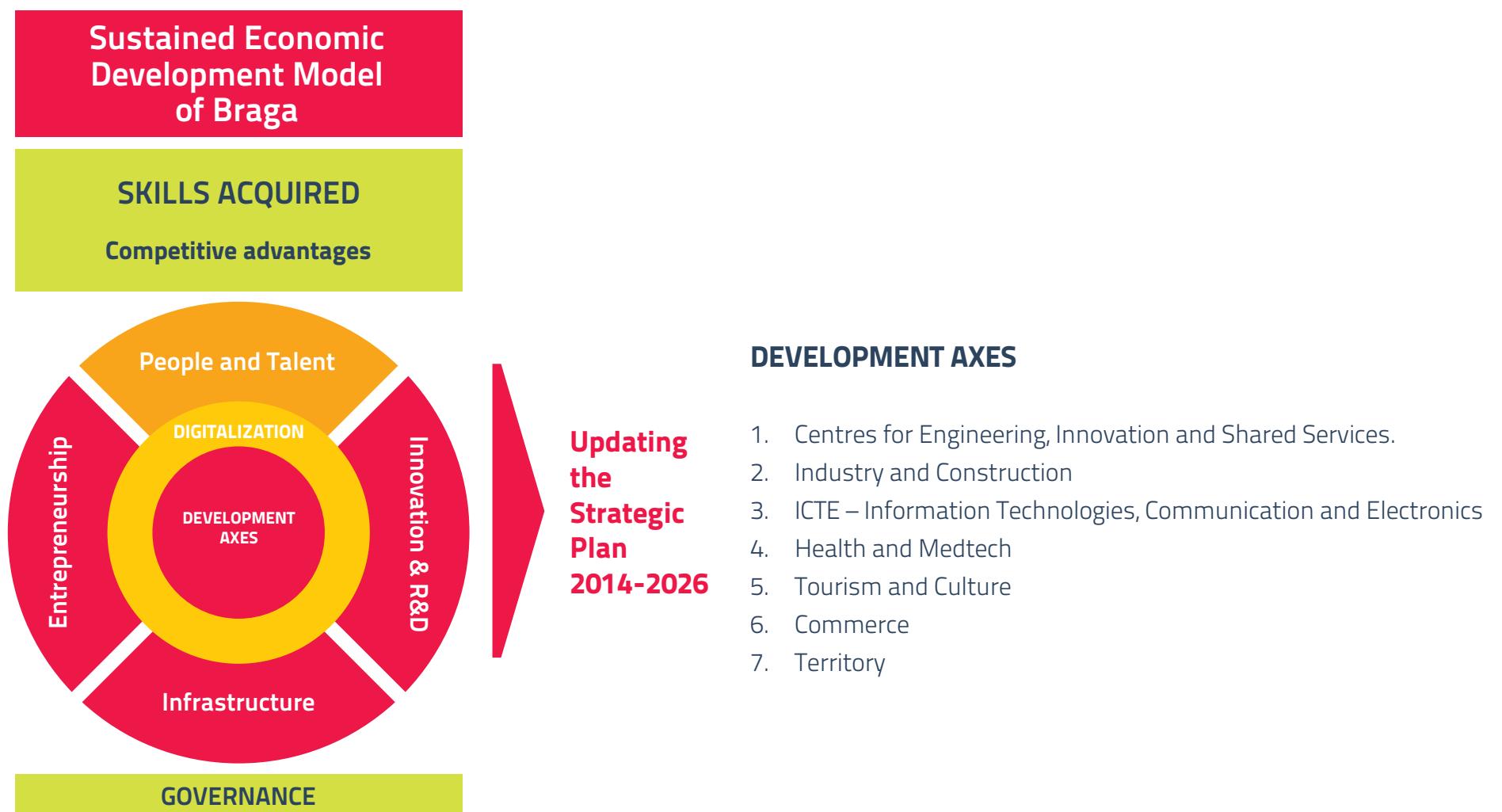
The axes for the economic development of Braga were set consistently bearing in mind the competitive advantages identified, the characteristics of the ecosystem of Braga, the corporate sector in the municipality, the diversity of scientific and cultural institutions and the skills available.

The digitalization process of economies, and its disruptive aspect, assumed as context data and strategic commitment, have been divided by factors in the proposed methodology.

For the purposes of updating the PEDEB 2014-2026, the results of such analytical work are complemented with the aspirations of the stakeholders directly involved in the dynamics of Braga.

**BASED ON THE ECONOMIC DEVELOPMENT MODEL OF BRAGA,
THE FOLLOWING ACTIONS HAVE BEEN TAKEN:**

- updating the vision and positioning of Braga;
- understanding of the relevant cyclical and structural changes that have taken place between 2014 and 2018;
- the adjustment of strategic options;
- the (re)definition and updating of actions to be developed, implementation period and responsible entities.



¹This update should be understood as a continuum adjustment to short-term and structural local and global changes, with a view towards sustainability.



II. VISION AND VALUE PROPOSITION

From *made in Braga* to *invented/designed in Braga*



Anchor Braga
in Knowledge
and Innovation,
so as to promote
economic growth
and well-being

Nurture and
apply Talent

2014

Made in Braga

Expand
endogenously
and attract talent

2016

**Researched and
Developed in
Braga**

Be a
differentiated
Centre on
retaining and
projecting
talent

2026

**Invented/Designed
in Braga**

The endogenous resources of Braga actually result on its appeal to invest, to live and visit. This appeal, along with the dynamization of the economic strategy combined with strategies for the social and cultural development of Braga, will definitely continue to solidify and consolidate its position, in national terms, as the third Portuguese city and, internationally, among the top 10 Iberian cities.

The validation of the development model designed for Braga is sustained by the fact that the targets set in 2014 in the PEDEB 2014-2026 are now being overcome. From 2014 onwards, the economic growth recorded was, on average, 1% above the average growth of Portugal and Spain, and it has accounted for an annual average of employment growth of more than 2,000 jobs over the past 3 years (the objective set in 2014 was a net average creation of employment of 500 jobs per year by 2026).

Braga is currently a national reference hallmark recognized by its best practices as an innovative, entrepreneurial, happy and healthy city. Braga wants to be recognized as the ultimate city of talent, knowledge and innovation, based on the following major axes:

- An **innovative city** based on knowledge and research centres and its different articulations with I&D institutions and economic agents, at the European and worldwide level;
- An **entrepreneurial and technology-based city**, that integrates, enhances and promotes a rapidly developing region, firmly consolidated in the context of the Portuguese economy and in the Peninsular Northwest;
- A **happy and healthy city**, which is reflected in its indexes of quality of life, sustainability and on its social and cultural dynamics.



BRAGA IS RECOGNISED AS:

A Millenary
and Young City

A Political and
Administrative
Hub

A space for the
economy and
knowledge of
the future



Our aim is that Braga becomes increasingly recognized as a city open to the world, for all its history, heritage, deeply marked by multiculturalism and multilingualism, with education and innovation at the heart of its economic ecosystem, thus evolving from the "motto" made in Braga to the invented/designed in Braga. An average and sustainable city in size, but with high economic and cultural dynamism, champion and promoter of entrepreneurship, and based on the following development axes:

1. Centres for Engineering, Innovation and Shared Services
2. Industry and Construction
3. ICTE – Information Technologies, Communication and Electronics
4. Health and Medtech
5. Tourism and Culture
6. Commerce
7. Territory

The implementation of the strategy outlined in this plan will continue to create the adequate conditions so that, until 2026, Braga will:

- Be in the Iberian top 10 and Portuguese top 3 at the levels of economic, cultural and quality of life;
- Keep the 1% economic growth above the average of Spain and Portugal;
- Generate on average 500 new jobs per year;
- Evolve into an Innovation City in the Iberian Peninsula scenario, based on contemporary knowledge and millenary heritage;
- Continue to position itself as a centre for young and creative industries.



III. THE PATH FOLLOWED SINCE 2014

THE PEDEB 2014-2026, PRESENTED IN 2014, HAS SET THE FOLLOWING TARGETS TO BE REACHED IN A 12-YEAR-OLD PLAN:

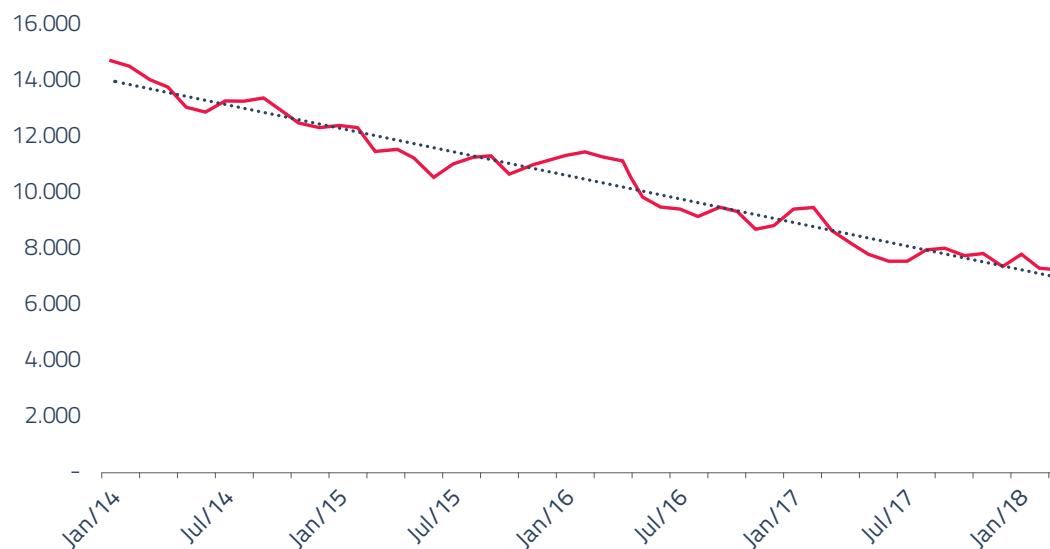


Status in 2018 and the alignment with the goals set for 2026

**The net generation
of at least 500 new
jobs per year**

Between 2014 and 2017 Braga had a net generation of more than 8,000 jobs, which makes an average of about 2,000 jobs per year, clearly above the goal of 500 new jobs per year.

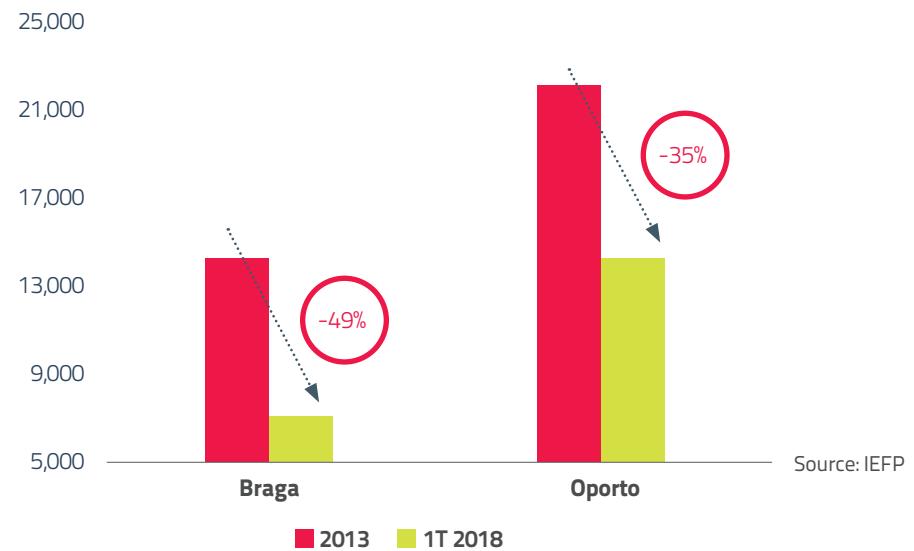
► THE DECREASE IN UNEMPLOYMENT RATE IN BRAGA SINCE 2014



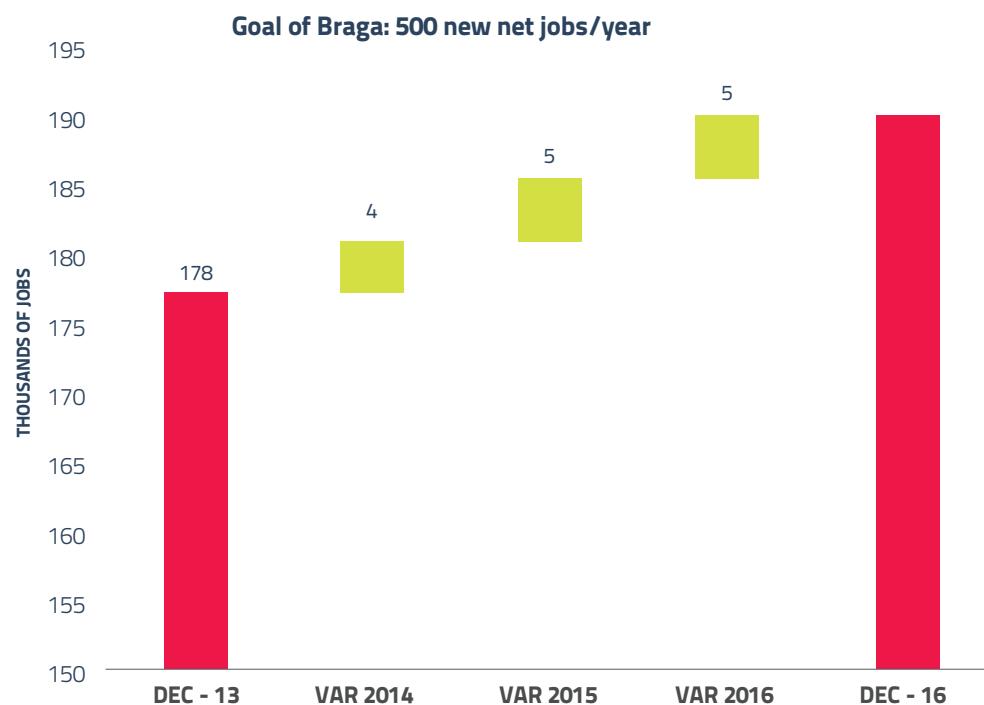
Source: IEFP

There has been a **49% decrease in unemployment**. In the same period, the nearest and bigger urban centre to Braga - Oporto - registered a reduction of 35%, while in the North and in Continental Portugal, it accounted for 44%.

> EVOLUTION OF THE NUMBER OF UNEMPLOYED PEOPLE



> EVOLUTION OF THE NUMBER OF EMPLOYEES IN THE CÁVADO REGION BETWEEN 2013 AND 2016 (IN THOUSANDS)

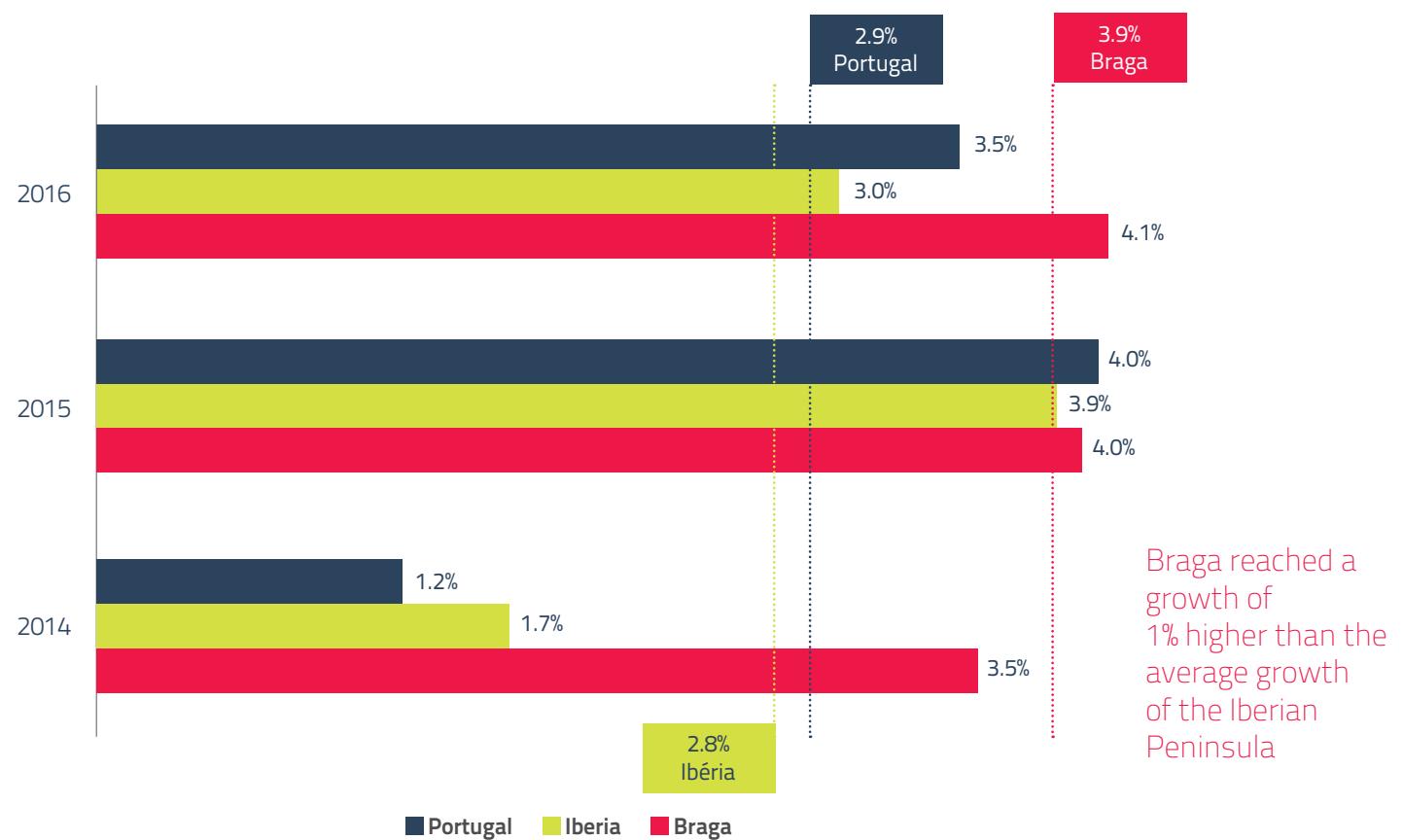


Additionally, the Cávado region - where Braga is accounting for approximately 50% (in view of the several measurement indexes such as percentage of population, number of companies, weight of exports and growth dynamics) - has generated over over 4000 jobs per year, between 2013 and 2016.

**1% economic
growth rate
above the average
of Spain
and Portugal**

In the period between 2014 and 2016, **Braga's growth was 1% above the average of the Iberian Peninsula.**

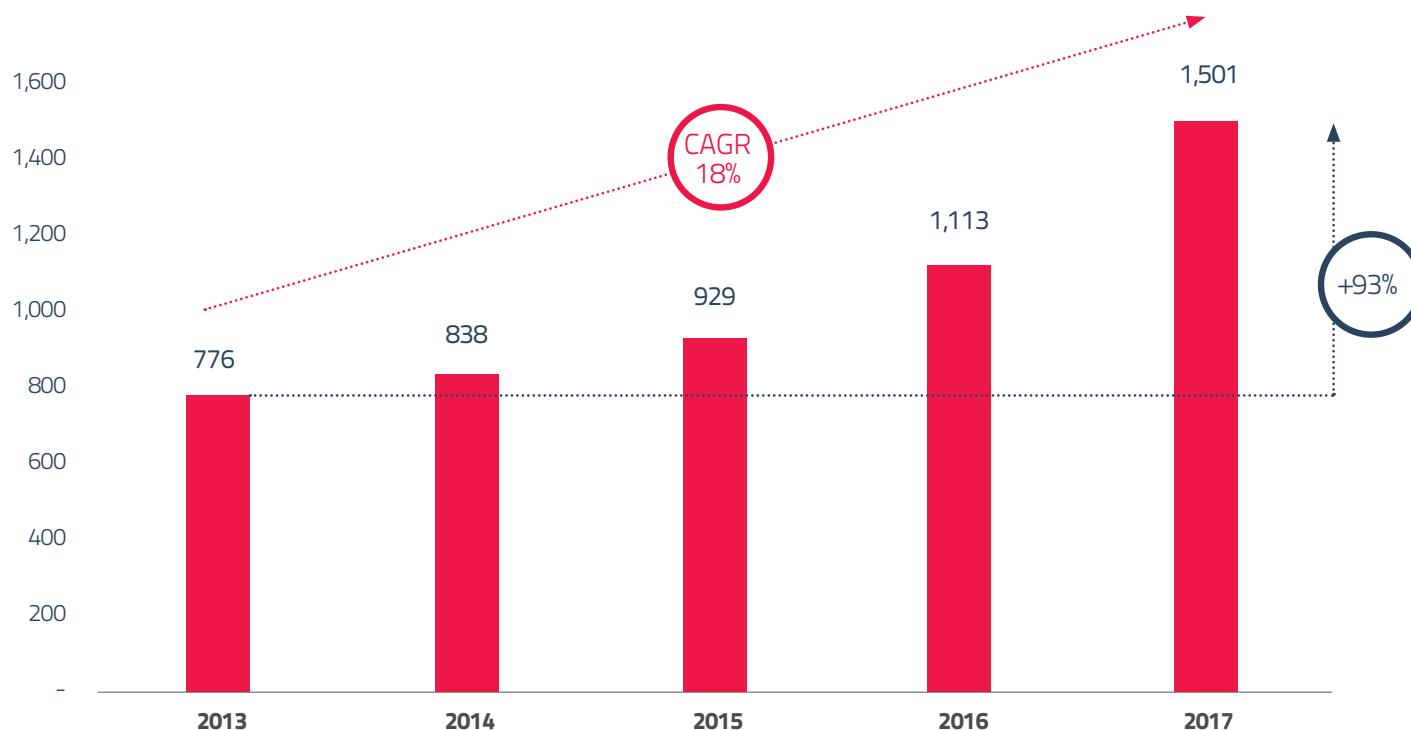
> GDP AVERAGE GROWTH RATE (MARKET PRICES)



Source: Eurostat, NSIs and other calculations

When considering only the companies based in Braga, **exports of goods generated in Braga had an accumulated growth of 93% between 2013 and 2017, and an average annual growth rate of 18%**. This fact highlights the dynamics of the strategy implemented and its positive effects on the economy of Braga.

> EVOLUTION OF EXPORTS OF GOODS (BRAGA)



Considering the effect of companies located in Braga but with headquarters in Lisbon, exports of goods generated in Braga, in 2017, exceeded 2 billion Euro

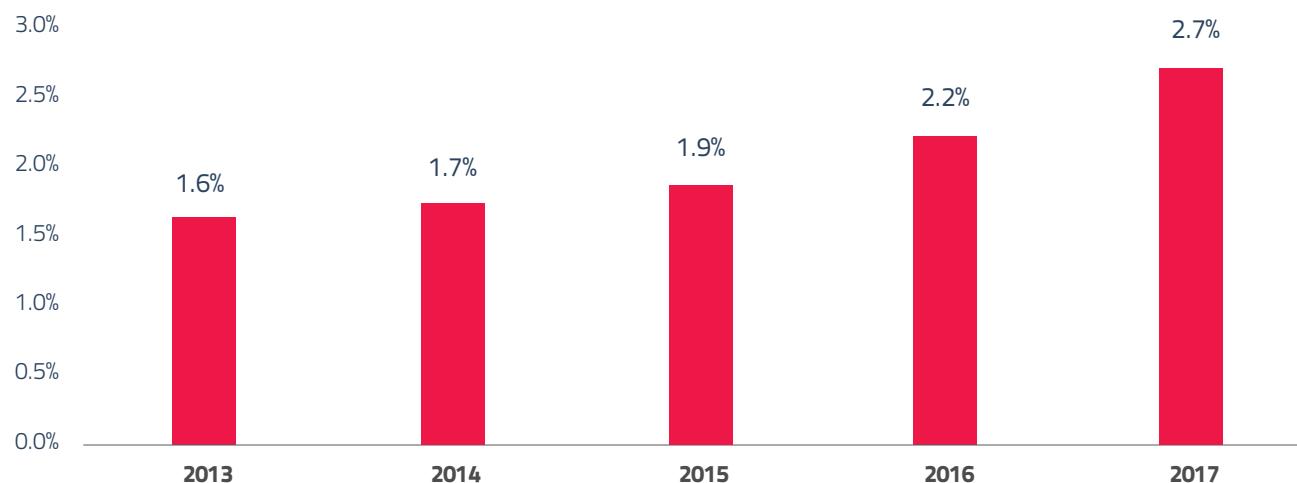
Source: INE



Considering the growth of goods exports checked in 2017, Braga was the 7th municipality of the country with the highest volume of exports (2013: 12th). Considering the effect of some companies located in Braga, but headquartered in Lisbon, in 2017 Braga was the country's 3rd largest municipality exporter (2013: 11th).

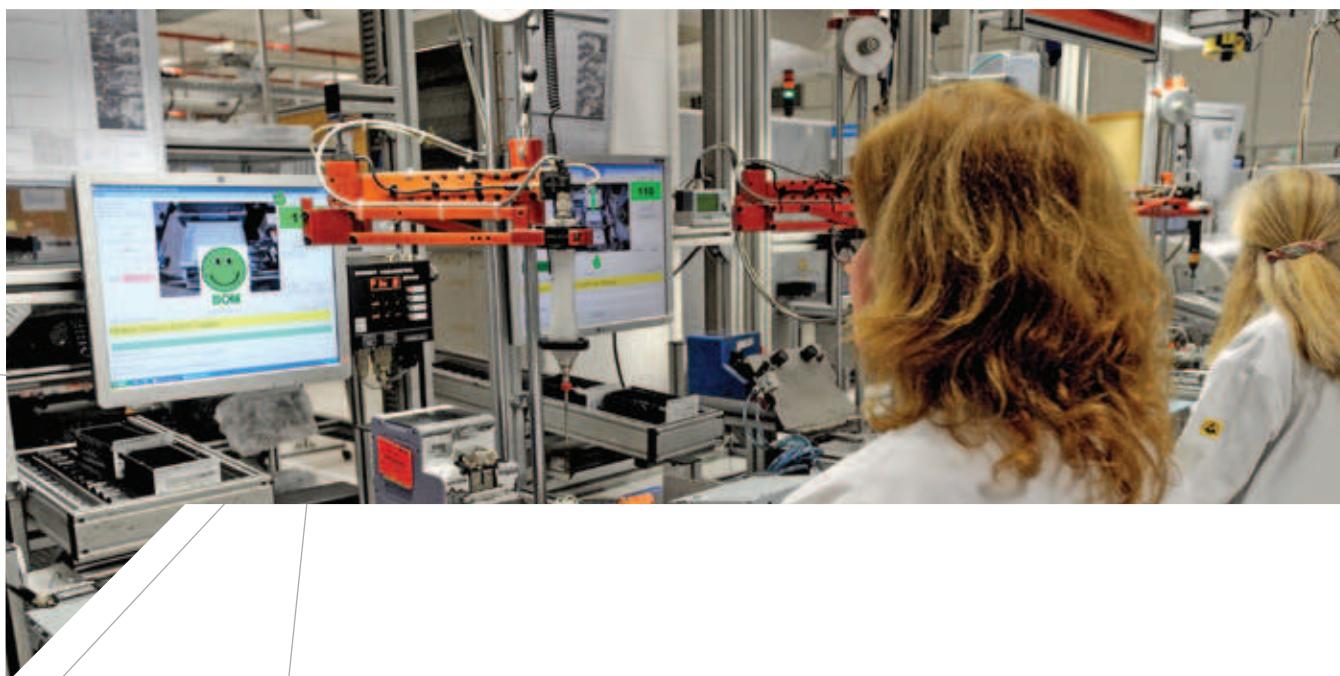
Additionally, when considering only companies based in Braga, there been a significant increase in the contribution of Braga to the total exports of the country (2013: 1,6%; 2017: 2,7%).

► IMPORTANCE OF BRAGA IN PORTUGUESE EXPORTS



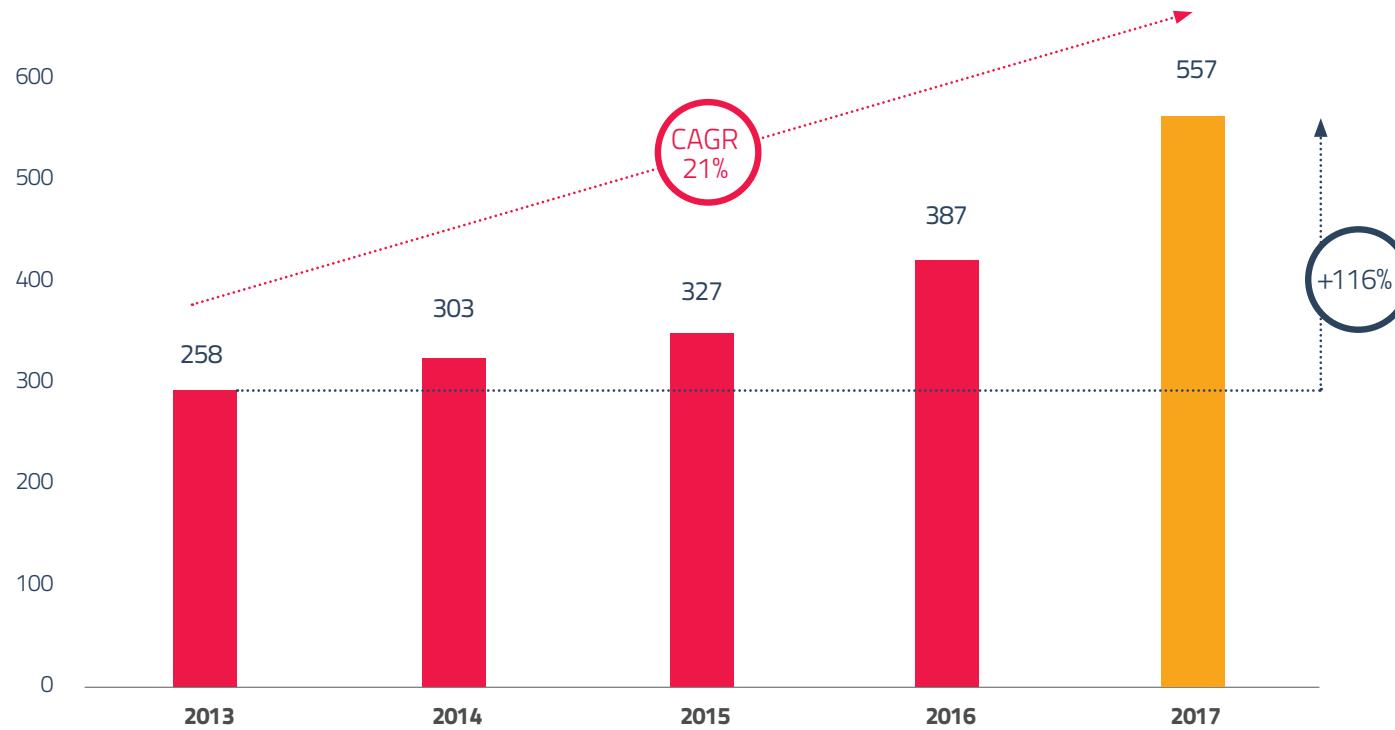
Source: INE

Considering the effect of companies located in Braga but with headquarters in Lisbon, it is estimated that Braga represents about 3.7% of Portuguese exports in 2017.



The exports dynamics of Braga is also evident in the evolution in terms of the goods account balance , with a **116% growth when compared to 2013** and **an average annual growth of 21%**.

> BALANCE OF EXPORTS AND (IMPORTS) OF GOODS (€1 MILLION)



Source: INE

In the period currently under review, Braga had a substantially higher percentage than the growth verified in the Cávado and Northern Regions.

> BALANCE OF EXPORTS AND (IMPORTS) OF GOODS

2013-2017 VARIATION



**Innovation City of
Iberian Peninsula
with a millenary
heritage**

From prehistory to the pinnacle of the Roman Empire, from the the powerful Archbishopric and the birth of a Nation, Braga has always been and continues to be the epicentre of millennia of History and stories that can today be revived and reenacted much beyond the walls of museums and monuments.

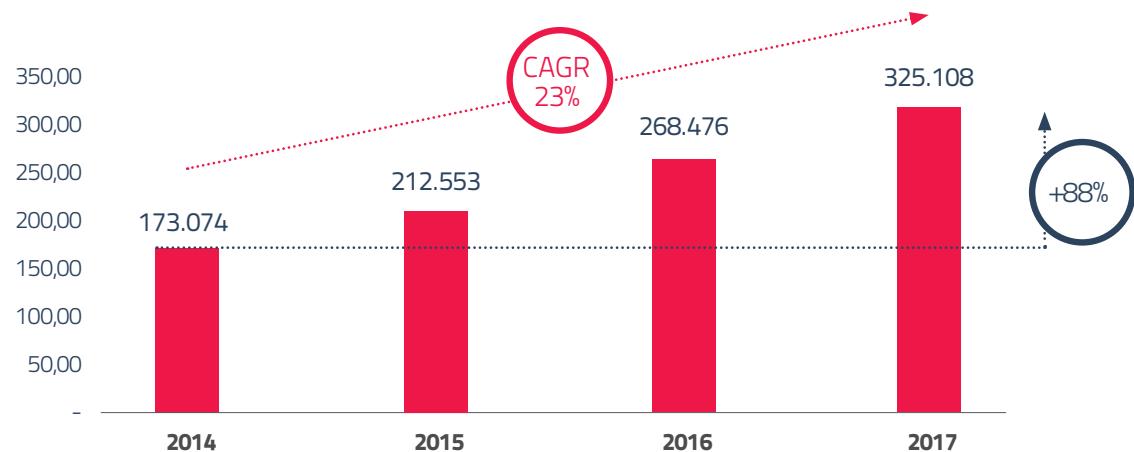
This millenary route was a path for the pagan and the religious alike, as well as for the Roman, the Medieval, the Baroque and contemporary. In the last two millennia, Braga has become **a reference of the civilizational evolution in Portugal and Iberia.**

Anchored in this rich history, revealed by moments and traces of various peoples and cultures, Braga is a locus of crossings - both material and immaterial - ideal for building a vibrant future. As for the youth of this city, for their openness to the new and the future world, they're building **one of the most entrepreneurial cities in Portugal** and an **international reference hallmark in the dynamics of growth based on innovation and knowledge.**

Based on innovation and knowledge, the dynamics of Braga is self-evident and translated in several indicators, such as in the **more than 115 start-ups and 270 entrepreneurs supported by the Startup Braga initiative since 2014** or the results of the Programme +Industry that allowed, since 2014, the allocation of more than **236 M€ of investment and the creation of 1,080 jobs.**

Within the scope of the national dynamics, but also in the light of a local strategy aimed at the consolidation of the identity of Braga and the promotion of initiatives designed to strengthen the visibility and attractiveness of this destination, the city had an **88% growth in the number of visitors since 2014**, equivalent to an average annual growth of 23%.

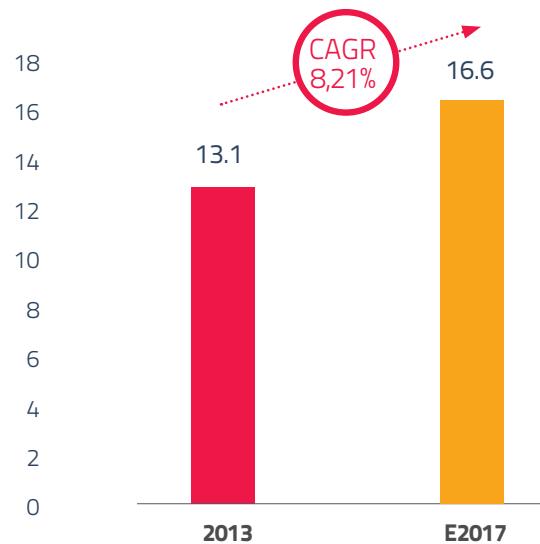
> EVOLUTION OF THE NUMBER OF VISITORS IN BRAGA



Source: Tourism Office of Braga

Another aspect perceived since 2013, that definitely involves the investors' confidence and perception of the sustainable growth, was the 27% increase in the capacity of accommodation due to the dynamics of the market demand.

> CAPACITY OF ACCOMMODATION PER 1,000 INHABITANTS



Source: Tourism of Braga

The reinforced capacity of Braga in becoming an attractive destination, both in terms of business and leisure, is evidenced by the **increase in the proportion of foreign guests in the total number of tourist guests in accommodations** (2013: 27.8%; 2016: 35.2%).

In 2018, the venue named **FORUM Braga** was concluded, thus being a strategic infrastructure to support the development and appeal of Braga. Inspired by the Roman heritage of the capital of Minho, Altice Forum Braga is a new and essential hub in the Northern region of Portugal, with unique and excellent conditions for hosting conferences, concerts, fairs and other events. A modern, interactive and environmentally sustainable forum, developed to bring value to people. A meeting point for business and culture, with multiple functions aimed at making the visitor dream and achieve all kinds of experiences.

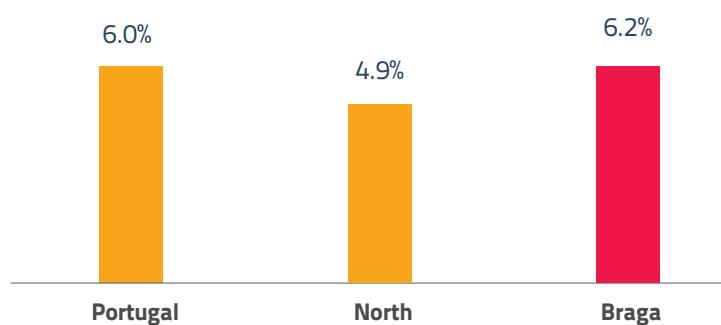
As a way of projecting the millenary heritage of Braga, significant steps have been taken, since 2014, to the formalization of the application of the Sanctuary of Bom Jesus do Monte to become an UNESCO World Heritage site. In 2018, the process entered a stage of evaluation by the ICOMOS (International Council on Monuments and Sites), and it is expected that in 2019 the submission gets to the World Heritage Committee.

As a result from the distinction obtained in 2017, Braga integrates the list of the UNESCO creative cities in Media Arts, in 2018. Additionally, in order to consolidate Braga as a centre for culture, the process of application to European Capital of Culture in 2027 was started in 2018.

But the dynamics of Braga do not end in culture. In order to strengthen the connection of the citizens of Braga with sports, the city was granted the distinction as European City of Sports in 2018.

More than the number of enterprises, it was the evolution of the balance between the creation and dissolution of companies that proved the profound innovative and entrepreneurial spirit of Braga.

> EVOLUTION OF THE TOTAL NR. OF COMPANIES, 2014-E2017

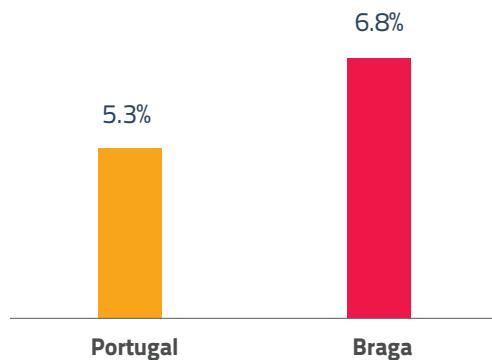


Source: NSIs and other calculations

Braga is a **technology incubator**, where many successful start-ups have appeared, and also the city who has a University with outstanding international recognition (**University of Minho**) and the **Iberian Nanotechnology International Laboratory (INL)**, one of the main international research centres.

Due to the currently existing dynamics, in particular in the field of ICT and digital transformation, the University of Minho has the **first supercomputer in Portugal** located in the newly created MAAC (Minho Advanced Computing Centre). In this context and as a result of partnerships established between the University and other institutions, namely the INL, **Braga will host one of the first European hubs in the field of quantum computing** (at Quantalab), one of the poles of the Collaborative Lab in Digital Transformation (DTx) and the national group of Digital EIT.

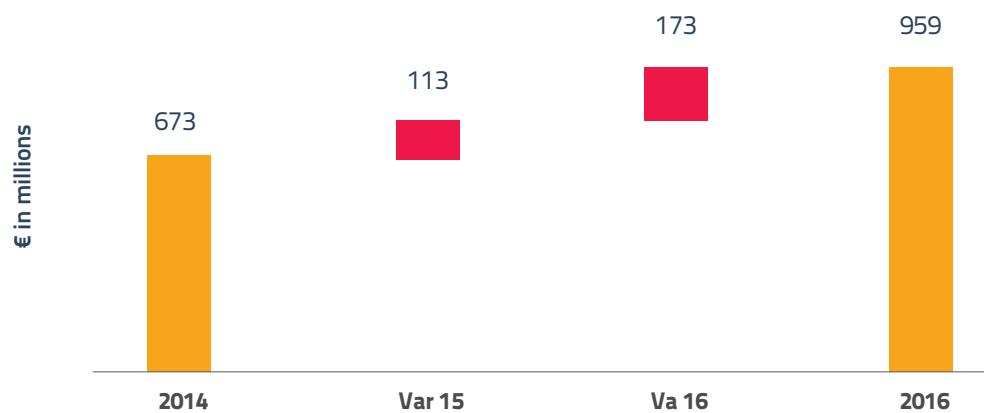
> PROPORTION OF THE GROSS ADDED-VALUE OF HIGH AND MEDIUM-HIGH TECHNOLOGY INDUSTRIES IN THE TOTAL GROSS ADDED-VALUE, 2016



Source: NSIs and other calculations



> TURNOVER OF HIGH AND MEDIUM-HIGH TECHNOLOGY INDUSTRIES, CÁVADO, 2016



Source: INE

As a recognition of the vast work carried out over the past few years, especially at the level of the youth policies, Braga was distinguished as the **Ibero-American Youth Capital**, in 2016, an acknowledgement of how of a priority youth is in the governance of the city of Braga.

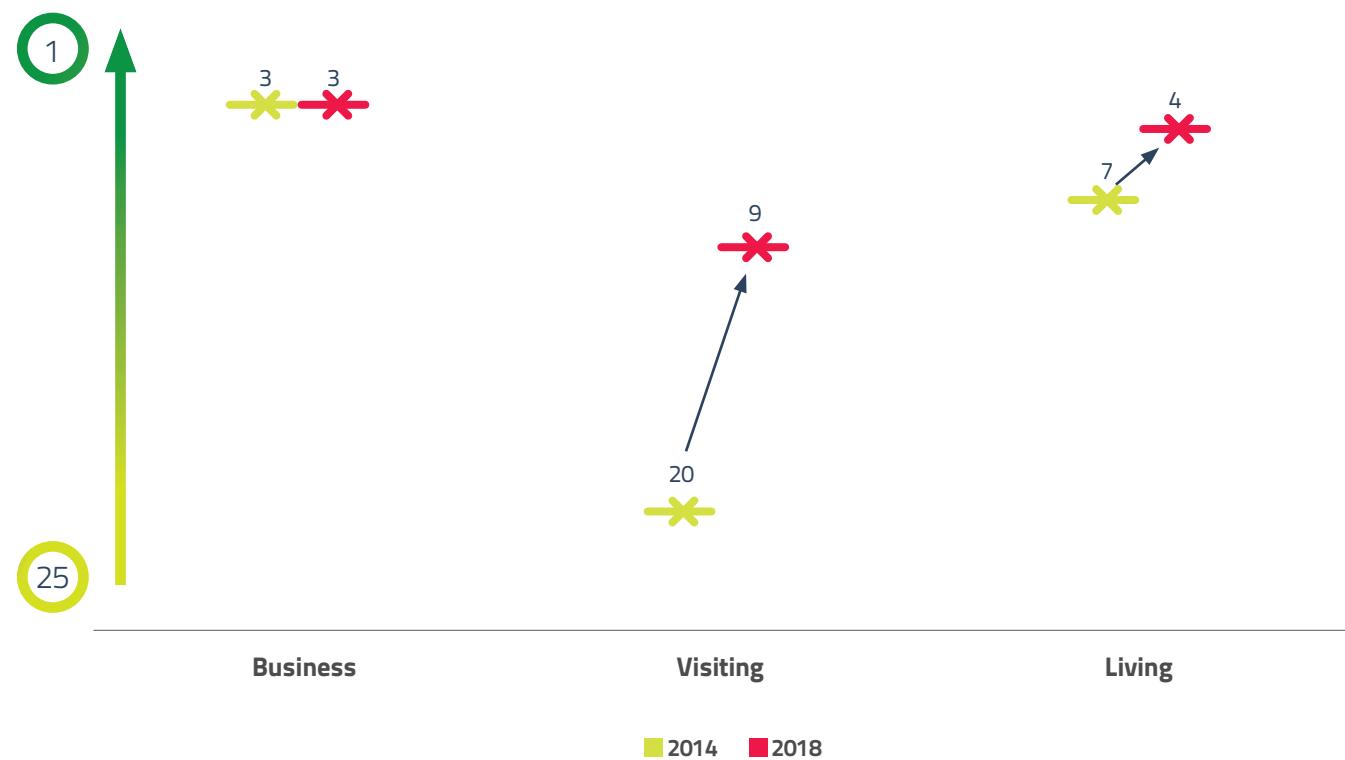
**Iberian top 10 and
Portuguese top 3
at the economic,
cultural and quality
of life level**

Braga is a **clearly distinctive territory** and a reference hallmark at the cultural and economic level for quality of life.

Despite fierce competitiveness between territories for attracting investment, especially in recent years, Braga holds the **third position in the "business" area**, right after Lisbon and Oporto.

With regard to other areas, the municipality of Braga has presented a favourable evolution since 2013, by moving up 11 places on the 'To Visit' area and 3 places on the 'To Live' area.

**> EVOLUTION OF BRAGA
IN THE PORTUGAL CITY BRAND INDEX**



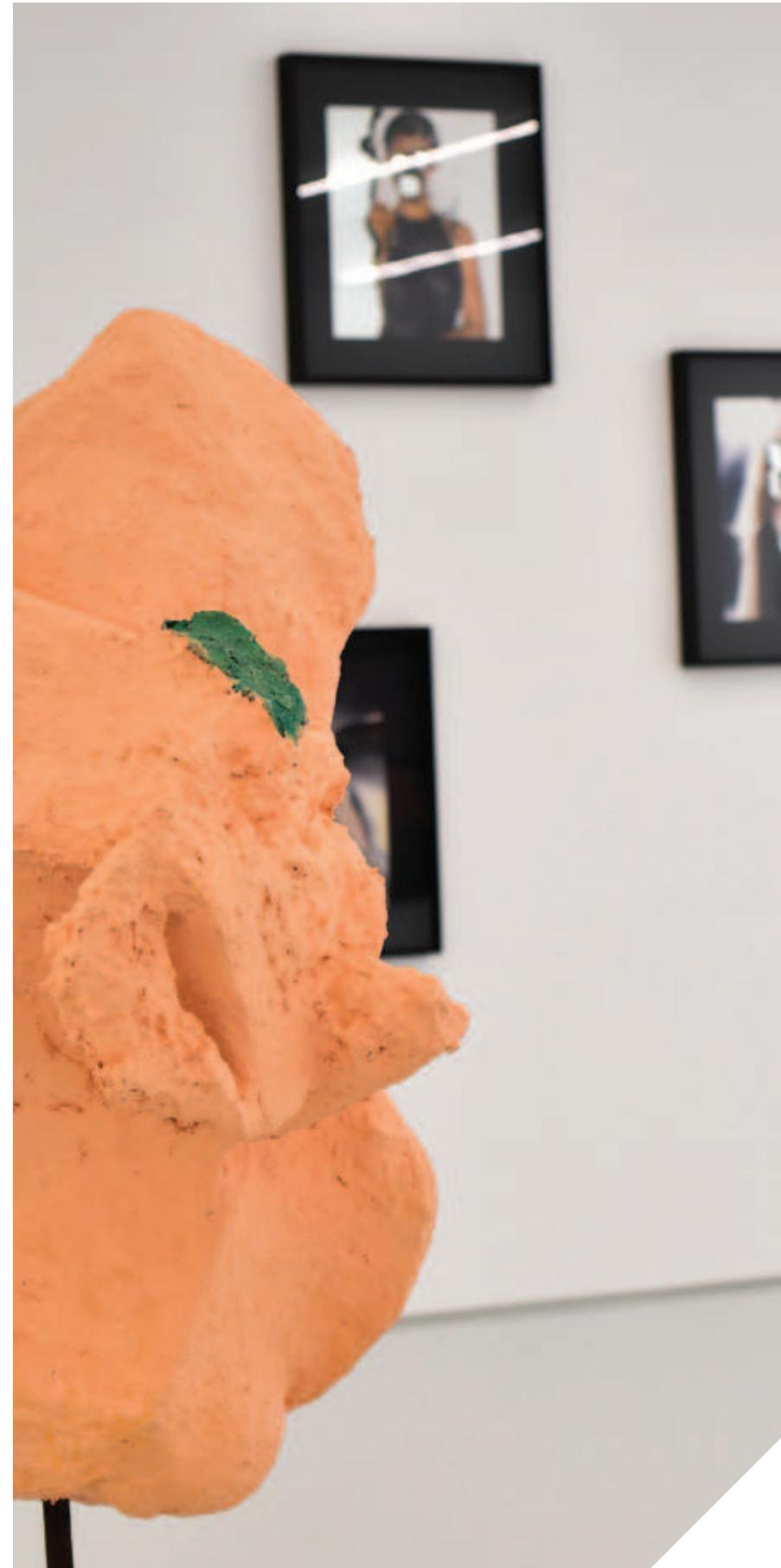
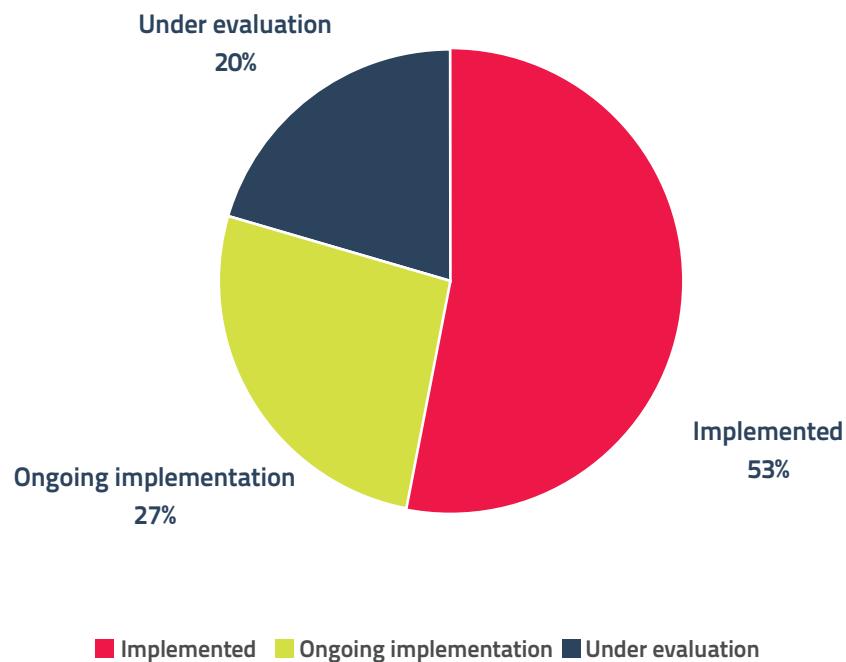
Source: Portugal City Brand Ranking (Bloom Consulting)

Implementation summary of the PEDEB 2014-2026

The path followed since 2014

From the actions planned within the scope of the PEDEB 2014-2026, and until the beginning of the first quarter of 2018, 44 actions were already implemented (53%), 22 actions are being implemented and 17 actions are currently under evaluation.

> STATUS ON THE IMPLEMENTATION OF ACTIONS - PEDE 2014-2026



Most significant achievements

Forum Braga conclusion

Investment attraction

designed to attract 27 external investments

Investor area

more than 300 solicitations and support projects in the 'investor area' since 2015

+Industry Programme

implemented until the end of 2017: 236 M € investment and created 1,080 jobs up to 2020:
Planned investment of 359 M€ and creation of 2,413 jobs

Proximity to foreign ambassadors

More than 70 interactions and visits by foreign ambassadors

Corporate Ambassadors programme

appointment of 28 corporate ambassadors

Revitalization of Startup Braga

115 start-ups in the community and
5 acceleration/speeding up programmes
generation of more than 400 jobs
more than 270 entrepreneurs supported
about 27M€ of funding in venture capital and business angels

Creation of the Business GeoPortal of Braga

Requalification / reconversion of ICT skills (Qualifica IT Programme)

Analysis of available spaces for new business location

Creation of the Investor's Guide

IV. COMPETITIVE ADVANTAGES

1. DEMOGRAPHICS
2. TALENT, EDUCATION, INNOVATIVE SPIRIT AND KNOWLEDGE INFRASTRUCTURE
3. INFRASTRUCTURE AND LOCATION
4. COMPARABLE COST FACTOR
5. HISTORY AND CULTURE OF AMBITION

1. DEMOGRAPHICS AND QUALITY OF LIFE

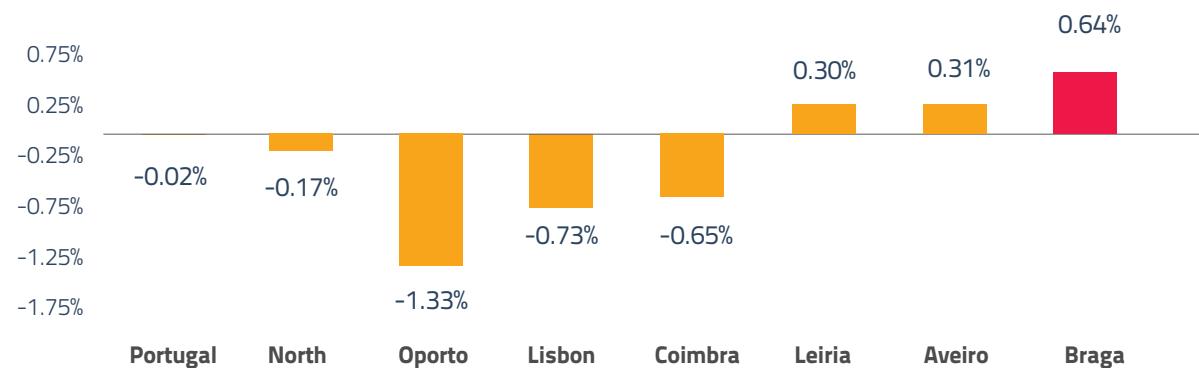
Braga's **strong demographic growth** works as a guarantee for investors and is the clear evidence of the growth in work offer and of the city's continuing attractiveness.

Braga was the city that grew the most between 2001 and 2016, when compared at the national level and to the northern region of Portugal, as well as to other Portuguese cities.

The demographic attraction of Braga is an obvious consequence of the high standards of quality of living provided by the city.

With a strategic geographic location, good accessibility and mobility, a historical and cultural heritage, good education and health infrastructures, natural spaces and adequate facilities for sports practice, Braga actually brings together all the conditions to live with a quality of life well above average.

> ACCUMULATED ANNUAL AVERAGE GROWTH RATE (2001-2016)

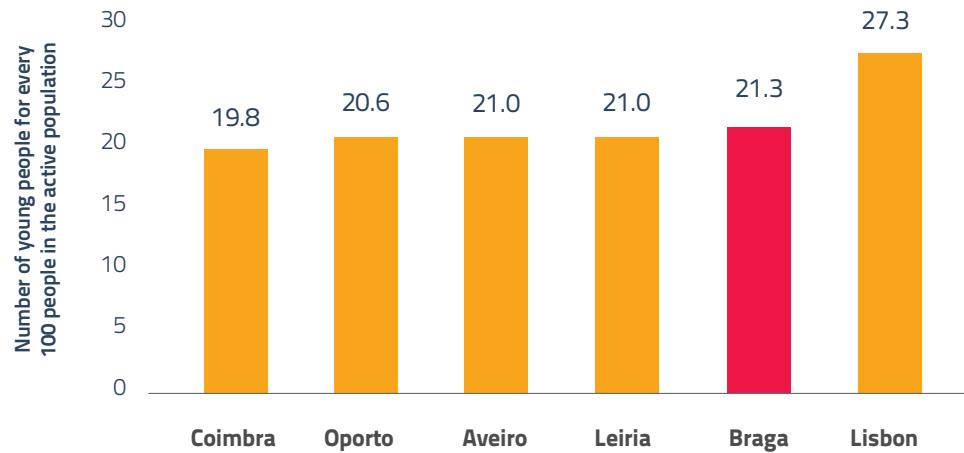


Source: INE



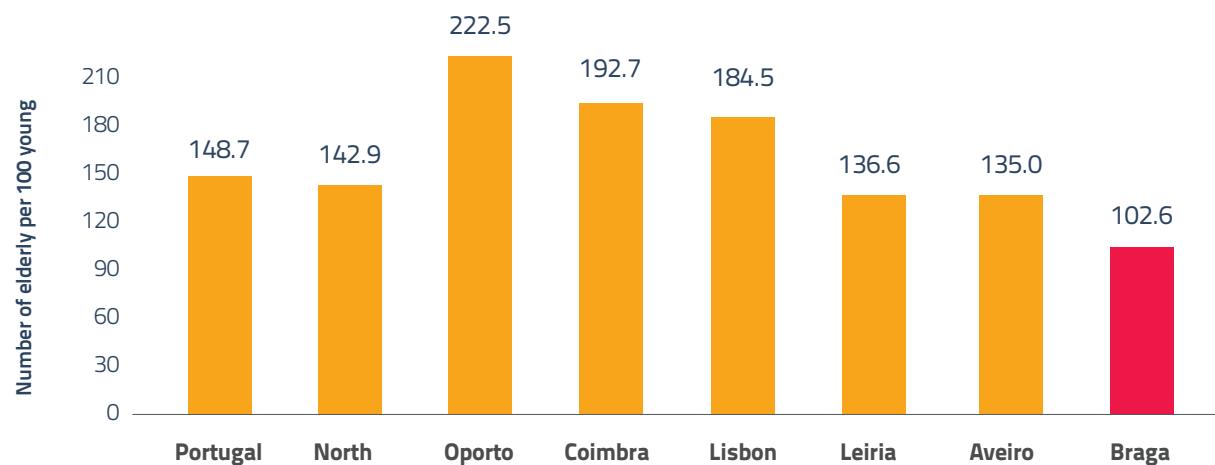
In addition, this differentiation is also evident in the face of other Portuguese cities in the proportion of young people for every 100 persons in active age. In this statistic analysis, only Lisbon has a greater index than Braga, which can be justified by the effect of concentration of young people in Lisbon due to an unparalleled volume of vacancies in higher education and subsequent settling.

➤ YOUTH DEPENDENCY INDEX (2016)



Other relevant demographic data is the **index of ageing**. Braga has a number of old people for every 100 young substantially below the national average and other Portuguese cities, at the same time that the supply of health care is also higher than the average of Portuguese cities, as evidenced in the following chapter.

➤ INDEX OF AGEING (2016)



Source: INE

2. TALENT, EDUCATION, INNOVATIVE SPIRIT AND KNOWLEDGE INFRASTRUCTURE

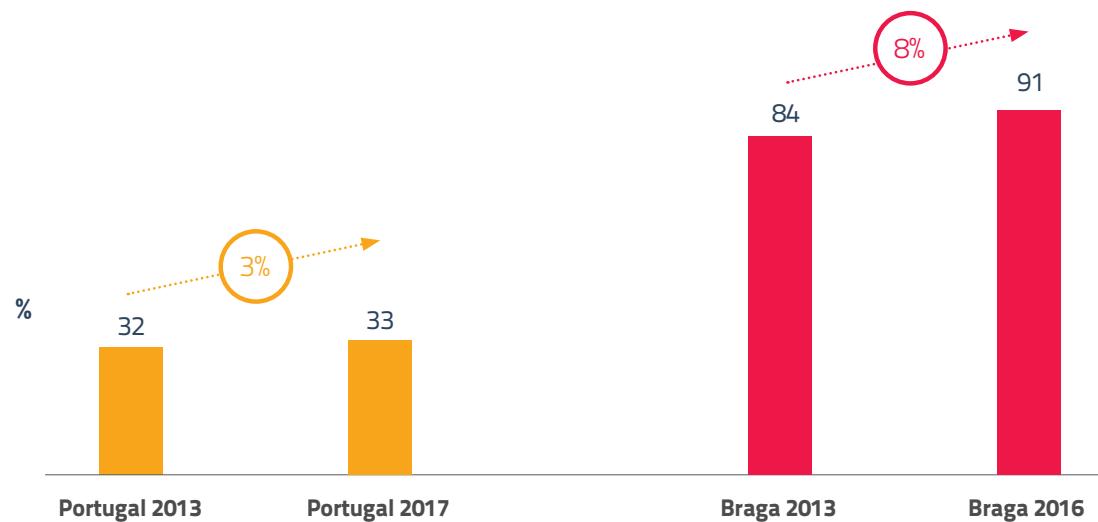


Braga has demonstrated a **continuous ability to generate skilled human capital** in several sectors, particularly in technology.

UNIVERSITY OF MINHO

Higher education in Braga is offered by the **University of Minho** and by the **Catholic University of Portugal**. Both universities are recognized nationally and internationally.

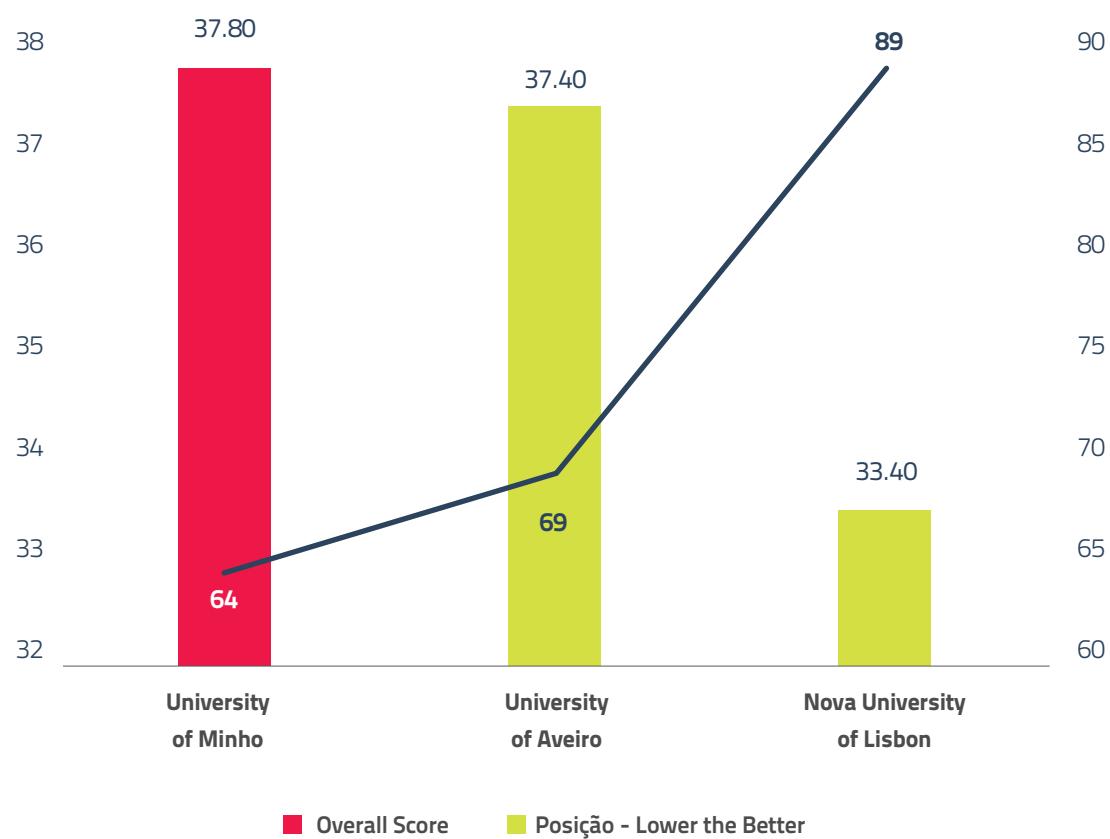
> EVOLUTION OF ENROLLMENT RATES IN HIGHER EDUCATION 2013-2017



Source: INE

The **University of Minho** is a reference to high quality teaching and learning, not only among the Portuguese universities, but also according to European and worldwide standards. The University of Minho demonstrates a significant capacity for change, thus being a pioneer in various fields of teaching-training and research.

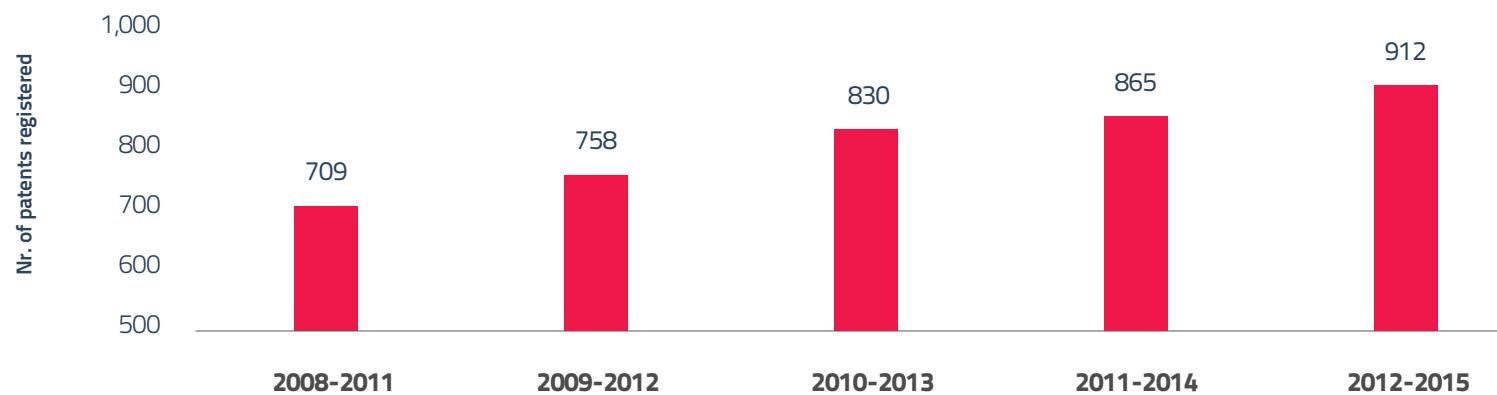
> RANKING TIMES 100 UNDER 50 (2015)



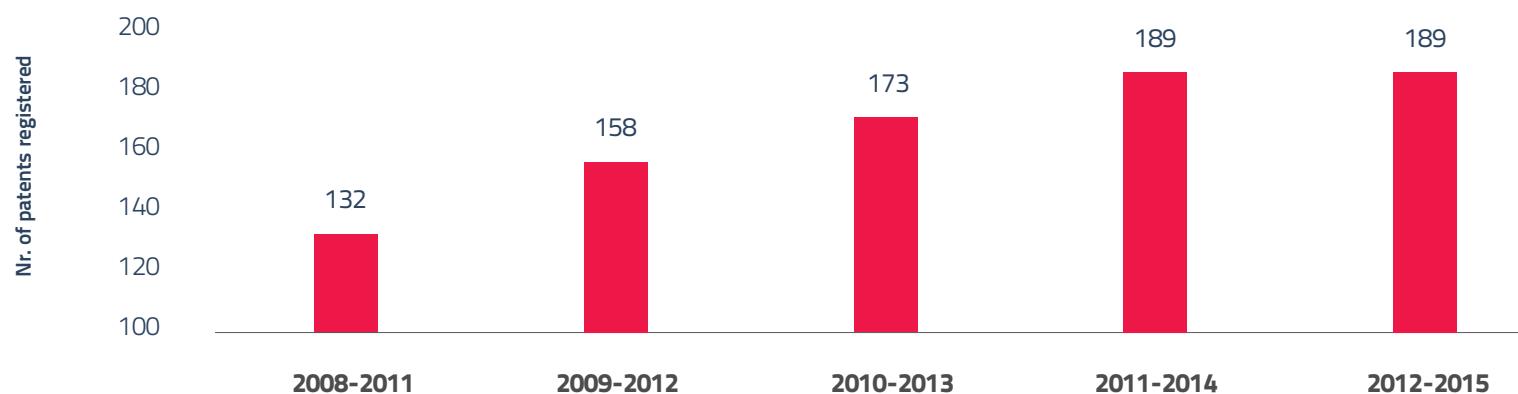
Source: IEFP

The **University of Minho is now clearly a research University**. This is evident in the position it has taken up among the major international rankings, including the Leiden Ranking, one of the leading rankings based on scientific research, but also in major rankings from Times Higher Education (THE), both in the global ranking and in the THE, the ranking of universities under 50 years old. UMinho is also one of the four Portuguese universities in the Shanghai Ranking (ARWU-Academic Ranking of World Universities).

► LEIDEN RANKING
PHYSICAL SCIENCES AND ENGINEERING



► LEIDEN RANKING
MATHEMATICS AND COMPUTER SCIENCE



It is also very clear the increase in the number of scientific publications, and other scientific outputs deriving from the University of Minho over the past few years, as well as the number of citations obtained, and also researchers at the University of Minho which are considered highly cited researchers, and with the largest number of citations and h indexes, in their scientific fields.

The University of Minho accounts for approximately 10% of the Portuguese scientific system, which is clearly higher than the number of researchers that it proportionally represents at national level. In 2016, the University of Minho has published **1,747 articles listed in the ISI Web of Science** (28% more than in 2014) and **2,270 articles listed in Scopus** (25% more than in 2014).

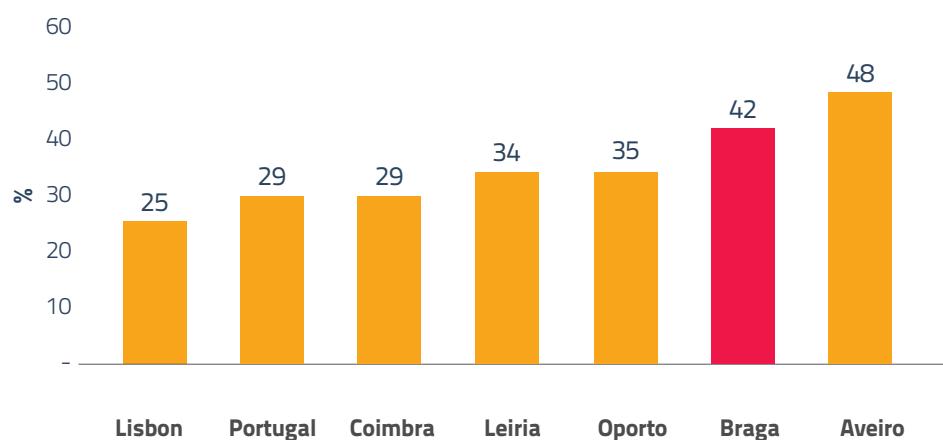
The University has been able to get an increasingly number of large European projects, having 4 currently active Advanced Grants from the European Research Council – ERC AdG (one shared with a Dutch institution). It is also Coordinator of 4 large projects with a funding of more than 2 M €.

The University has a very clear strategy for Intellectual Property rights, being one of the most successful Portuguese universities in this area of knowledge protection and in obtaining national and international patents. This is all done with a very strong connection to businesses, to the region and to the territory. Assuming itself as a complete University, it has obtained projects of great success and significant dimension, either with direct financing of companies or with in co-promotion, being currently highlight the partnerships with Bosch (in a 6-year period involving an investment of about 75 M € in I&D and about 500 researchers specifically hired for the purpose).

In the Northern region, more than 3,000 students are trained in the engineering area, between undergraduates, masters, doctorates, as well as professional and technical training courses. Braga is a central pole in the supply of skilled resources in the Northern region, secured by the University of Minho, University of Porto, University of Trás-os-Montes e Alto Douro, Polytechnic Institute of Viana do Castelo, Polytechnic Institute of Cávado and Ave.

Braga's technology excellence is confirmed by having the second highest rate in the country regarding the ratio of students enrolled in higher education in the academic year of 2016/17, in the areas of science and technology.

> PROPORTION OF ENROLLMENTS IN SCIENCE AND TECHNOLOGY DOMAINS IN HIGHER EDUCATION



Source: INE

INL

Apart from UMinho, Braga also houses the **Iberian International Nanotechnology Laboratory (INL)**.

The INL is a **research centre dedicated to various applications of nanotechnology**, a growing scientific and technological area, such as nanomedicine as well as food and environmental quality control.

The combination of the research resources available through the development of knowledge, innovation and entrepreneurship actually **attracts top scientists**. It offers different investment opportunities, investment funds and methodologies that are able to meet the demand of stakeholders in the area of nanotechnology.

INL seeks strong collaborations with industrial partners and academic research institutions, through a vigorous participation in international research programmes.

INL promotes the creation of spin-off companies in competitive areas in the field of nanotechnology, and ensures the management of a strong public awareness programme.



Research centres and businesses

Braga has a set of research and business infrastructures that ensure an environment conducive to research, innovation and business, which is a strong support for boosting economic activities.

2CA Braga - Clinical Academic Centre

In the perimeter of the UMinho School of Medicine and the Hospital of Braga, the Clinical Academic Centre (CCA) plays an important role not only in the translation of fundamental research carried out at UMinho, as well as in support of clinical research to many national start-ups in the medical area. It has already captured a significant share at national level (about 40%) and the challenge is now to design the CCA so as to attract clinical trials of international companies. Following that, and as spill-over, several chances to attract R&D centres of life sciences and Medtech will emerge, specially in locations near UMinho and the CCA.

Research Centres at the University of Minho

UMinho integrates a multitude of research centres, recognized by FCT, in Life and Health Sciences, Social Sciences and Humanities, Law, Economics and Management, Education, Engineering, Natural Sciences and Psychology.

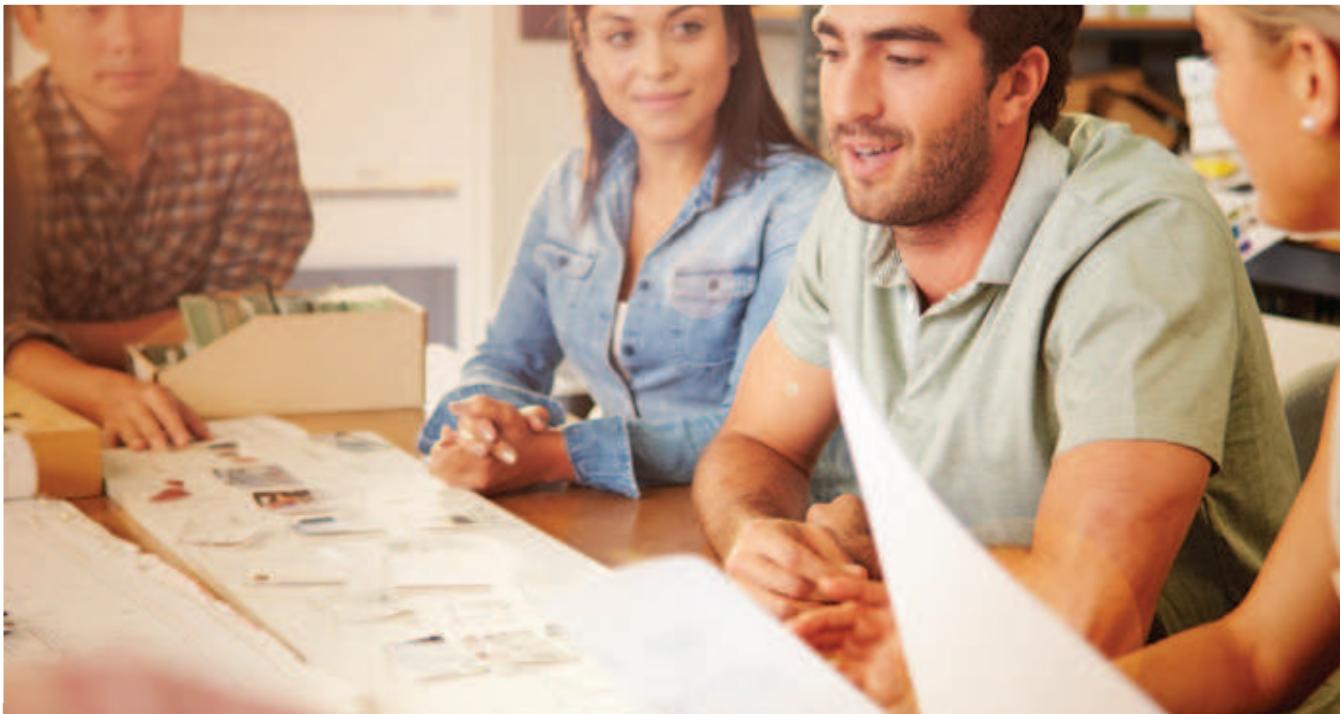
The project Personalized Medicine Centre P5 (still in the deployment/setting-up phase), in the orbit of UMinho (School of Medicine), is another asset with high potential value from Braga to the rest of the country. It aims at following chronically ill patients remotely, but in a customized (humanly) way, and reduce the prevalence of diabetes and hypertension in patients covered in the long-term. It will be a demonstrator unit of the Smart Primary Care – with great potential for national roll-out, in the National Health Service.

Institute for Bio-Sustainability

It is a new multidisciplinary research structure at UMinho, managed in an innovative way, involving partners from the economic fabric. It aims at the development of projects in the field of environmental sustainability, in alignment with the UN Sustainable Development Goals.

STARTUP BRAGA

- Startup Braga is an innovation hub designed to support the creation and development of projects with high entrepreneurship potential in international markets;
- It is an initiative from InvestBraga created in partnership with Microsoft Ventures, that provides acceleration programs for start-ups with global ambitions;
- It comprised an international network of mentors consisting of experienced entrepreneurs and professional investors that have been through the life cycle of a Start-up.



3. INFRASTRUCTURE AND LOCATION

AIR ACCESSIBILITY

Evolution of Francisco Sá Carneiro and Vigo Airports

2017	Oporto Airport	Vigo Airport
Nr. of passengers	10.778.206	1.065.595
Nr. of flights	84.612	12.479
2016	Oporto Airport	Vigo Airport
Nr. of passengers	9.378.206	954.006
Nr. of flights	77.361	11.557

Source: INE

PORT ACCESSIBILITY

Evolution of Leixões, Viana and Vigo ports

2017	Port of Leixões	Port of Viana	Port of Vigo
Annual cargo	7.474.425	N/F	N/F
Nr. of ships	2.692	N/F	N/F
2016	Port of Leixões	Port of Viana	Port of Vigo
Annual cargo	7.191.425	316.730	1.995.582
Nr. of ships	2.717	210	3.282

Source: INE

Braga is a privileged place in the Iberian Peninsula: in Portugal, but next to Galicia, serving at the same time, both Portuguese and Spanish markets.

With excellent access routes, Braga is easily accessible by all means of passenger transport.



LISBON



30 minutes away

OPORTO



VIANA DO CASTELO



VIGO



BRAGA

MADRID

BRAGA

UNIVERSITY OF MINHO

HISTORIC CENTRE

INL

altice FORUM braga

A11

A3

HEALTH INFRASTRUCTURES

Braga has a very favourable number of health and medical infrastructures per 1,000 inhabitants, with particular reference to the Hospital of Braga, which is a national reference, counting also with several hospitals and private clinics, such as the Private Hospital Braga and the new psychiatric hospital.

HOSPITAL OF BRAGA

- Hospital belonging to the National Health System;
- It has a building area of 140,000 square meters, with an inpatient admission capacity up to 705 beds;
- It holds the Academic Clinical Centre (CCA), a partnership with the University of Minho for medical research.

PRIVATE HOSPITAL OF BRAGA

- 2 hospital units (Nogueira and Rua do Raio) belonging to the Trofa Health Group, with an area of 20,000 square meters spread over 5 floors and 15,000 square meters spread over 6 floors, respectively.
- It includes the following services: A delivery block, a surgery block, physical therapy, inpatient admission, scheduled external consultation, complementary diagnostic exams, intermediate care facilities, clinical analysis, medical genetics and anatomic pathology.

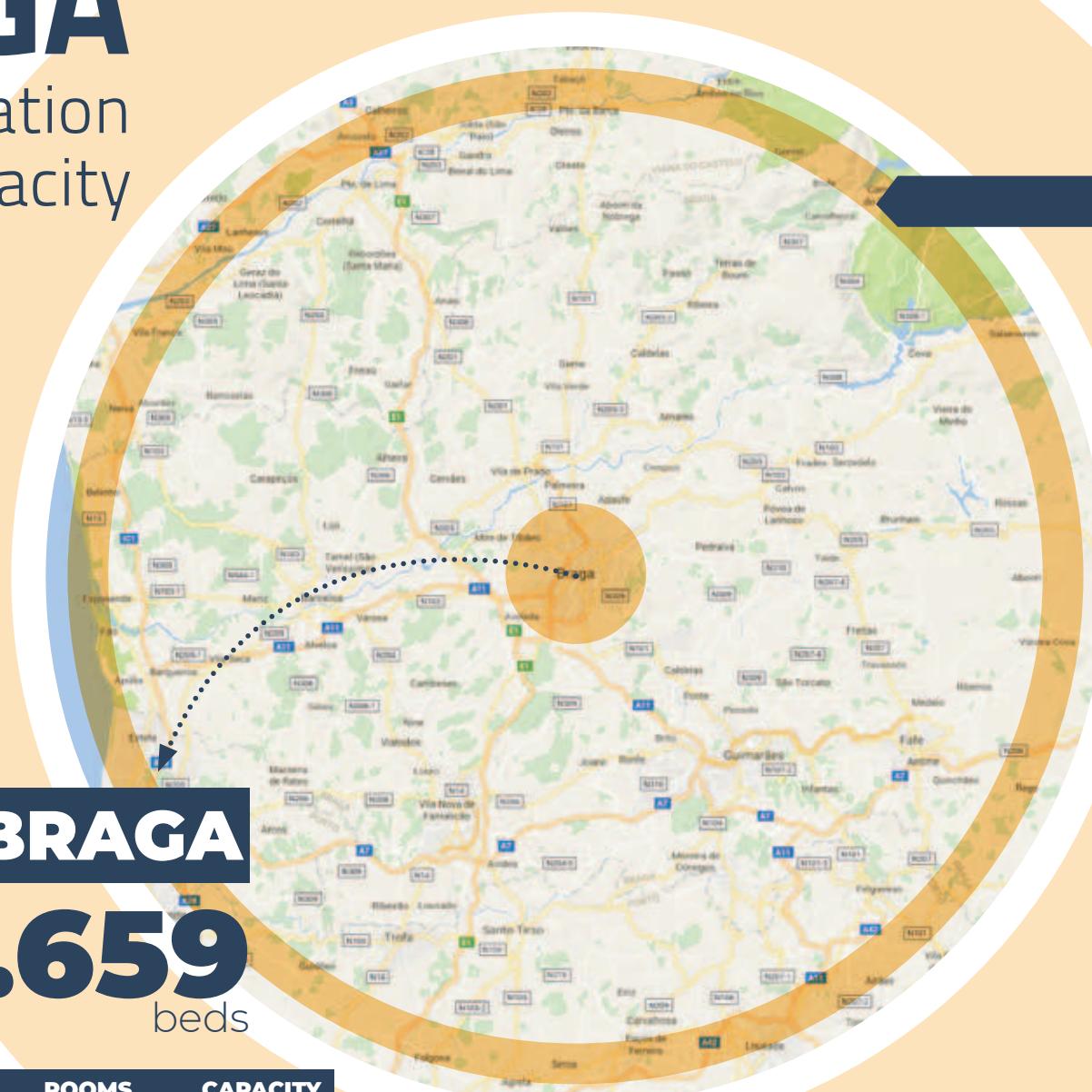
OTHER HEALTH SERVICE PROVIDERS

- Psychiatric Hospital of Braga;
- The Red Cross;
- "Operative Unit of Public Health";
- 3 health centres that also have extensions of health cover.

ACCOMMODATION INFRASTRUCTURES

BRAGA

Accommodation capacity



WITHIN 25 KM
6.500
beds

BRAGA
3.659
beds

WITHIN 50 KM
More than
11.000
beds
In hotels of 4 and 5 stars

	NUMBER	ROOMS	CAPACITY
Hotels 5 *****			
4 ****	13	626	2134
Hotels 3 ***			
2 **	18	706	1373
Total	31	1332	2623

LOCAL ACCOMODATION
1.036 beds

ALTICE FORUM BRAGA

The Altice Forum Braga was recently improved and makes it the largest Auditorium in the northern region of Portugal and the second largest show hall in the country. A modern infrastructure, with a capacity to boost business tourism, while attracting national and international events.



**Largest Auditorium
in the northern
region**

**and the 2nd largest
venue for concerts
in the country**

Altice Forum Braga has three
distinct spaces, integrated
and multi-purpose.

CENTRE OF CONGRESSES

- Largest Auditorium in the northern region (1454 seats)
- Small auditorium
- Modular conference rooms
- Meeting rooms
- Bars and reception area
- Restaurant
- Forum Arte Braga

PAVILION AND CONCERT HALL

- Concerts, fairs, congresses, events
- Up to 12,000 standing
- Web of suspension (120 tons)
- Upper gallery with retractable grandstand
- Bars, dressing rooms and meeting rooms
- Air-conditioning system and acoustic treatment

OUTDOOR AREA

- Concert square for more than 20,000 people
- Parking lot (620 posts)
- Display area (300 stands)
- Green and leisure areas

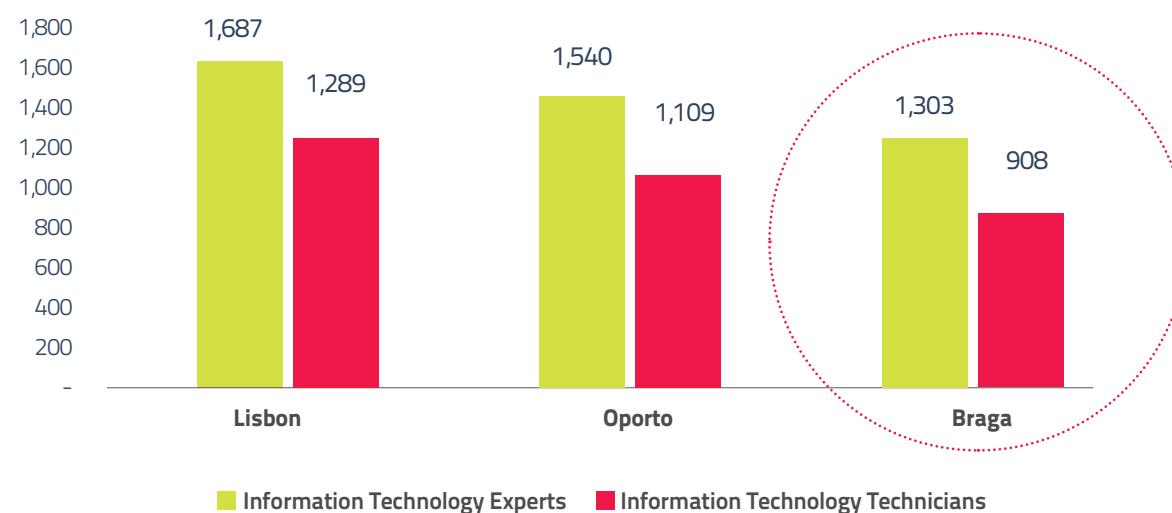


4. COMPARABLE COST FACTOR

Braga presents a considerable advantage in the cost of labour factor, when compared with several Portuguese cities. In the case of the ICTE industry, it is about 3 times lower than the cost factor in Germany.

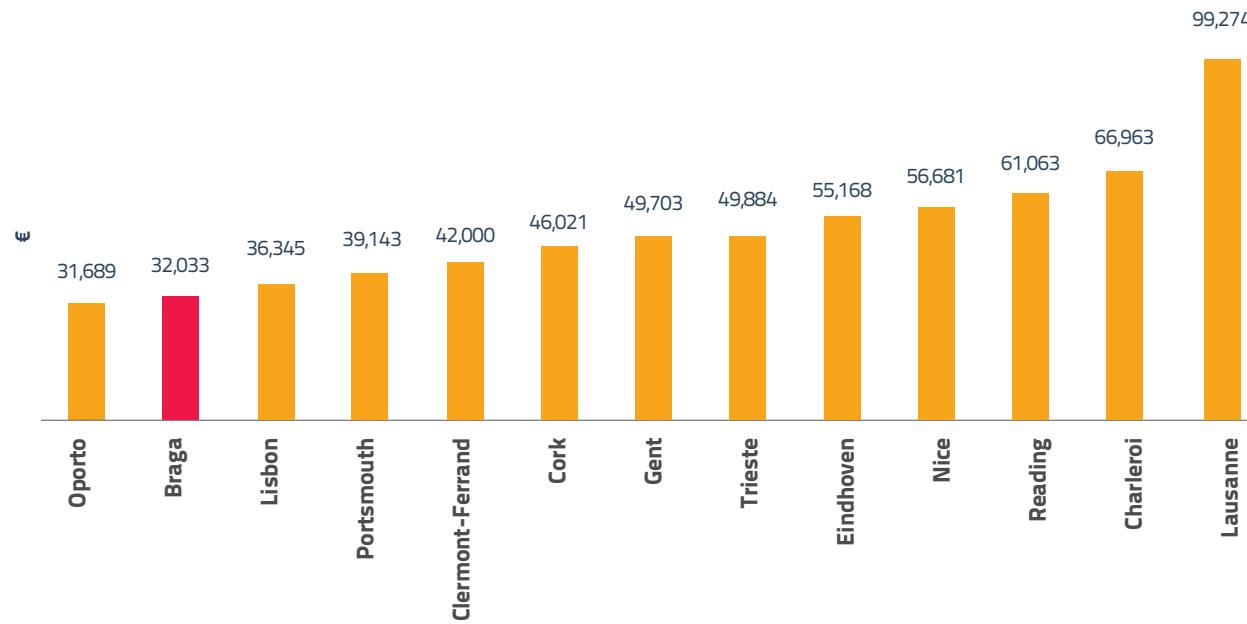
In Portugal, Braga presents an advantage cost of labour factor in the ICT sector, with an average monthly remuneration of €1,303 and €908 to experts and technicians, respectively.

> MONTHLY AVERAGE BASE REMUNERATION FOR ICT, 2017



Source: Office for Strategic Planning, Economic Bulletin, December 2017

> GROSS ANNUAL SALARY (ALL SECTORS) 2017

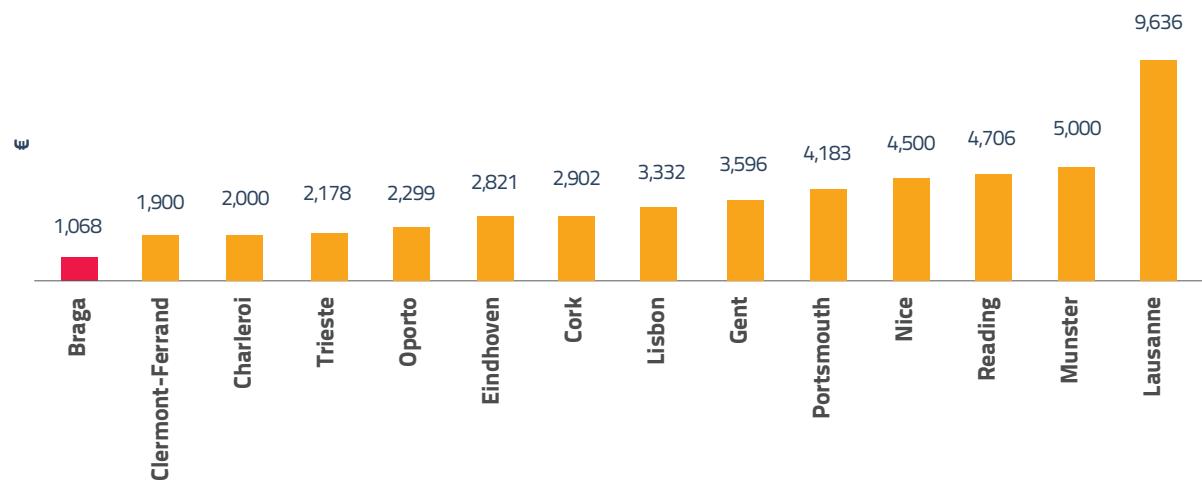


Source: Numbeo

Braga provides its inhabitants a significantly lower cost of living than other competing cities, being this competitive advantage the same when it comes to costs for companies.

Moreover, these are also critical factors for the establishment of human resources, that can actually compensate for the less favourable remuneration factor.

> AVERAGE PURCHASE PRICE PER M2 OF APARTMENT IN THE CITY

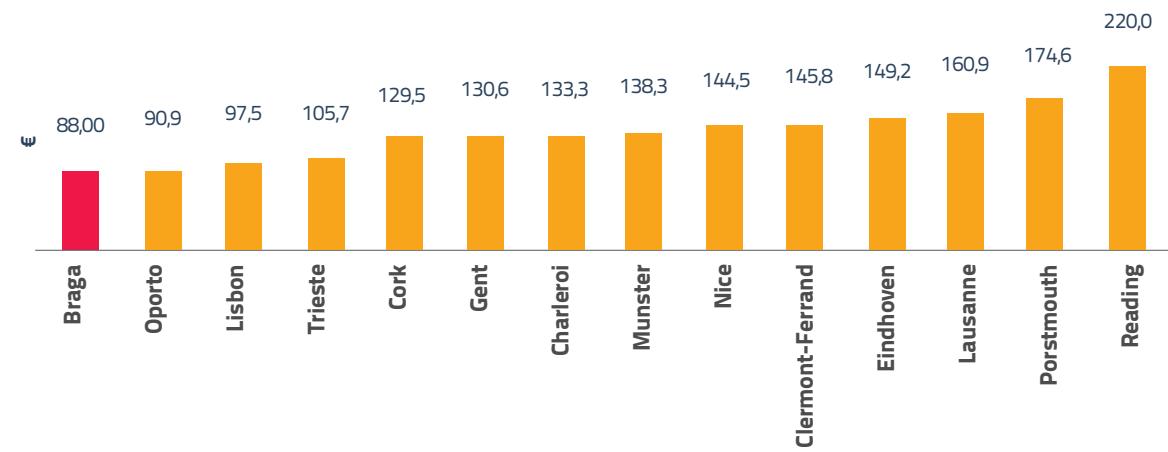


Source: Numbeo and INE

In Braga, the property cost is below the national average. Spaces for offices and spaces for industrial facilities are available at competitive prices, with a growing supply. The cost per square meter apartment in the Centre of Braga is 60% less than the cost in Lisbon. There is a great offer of apartments available for sale or lease at very competitive prices.

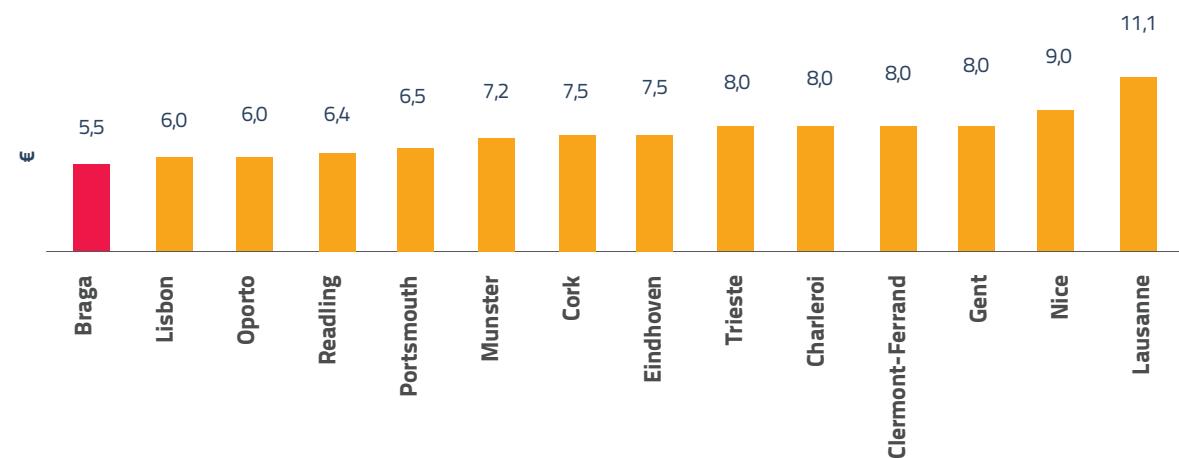
Regarding the cost of living and services, Braga offers an **index of purchasing power above the national average.**

> AVERAGE MONTHLY COST WITH UTILITIES



Source: Numbeo

> MCDONALDS COMBINED MEAL PRICE



Source: Numbeo

5. HISTORY AND CULTURE

Braga has a unique millenary cultural heritage, both secular and religious, which secures its political and economic centrality in the region

The long history and tradition of Braga is visible in its monuments and churches. The most striking religious building is the Cathedral (Sé), boasting several styles ranging from the Roman to the Baroque. Also worth stressing are the outstanding houses of sublime architecture, namely from the 18th century.

Braga is the third district in the country with the largest number of classified monuments as of national interest.

The Bom Jesus, Falperra and Sameiro, together with the Historical Centre, are strong tourist spots worth visiting which, by their intrinsic beauty and cultural interest, do stand out as a must-see landmark.

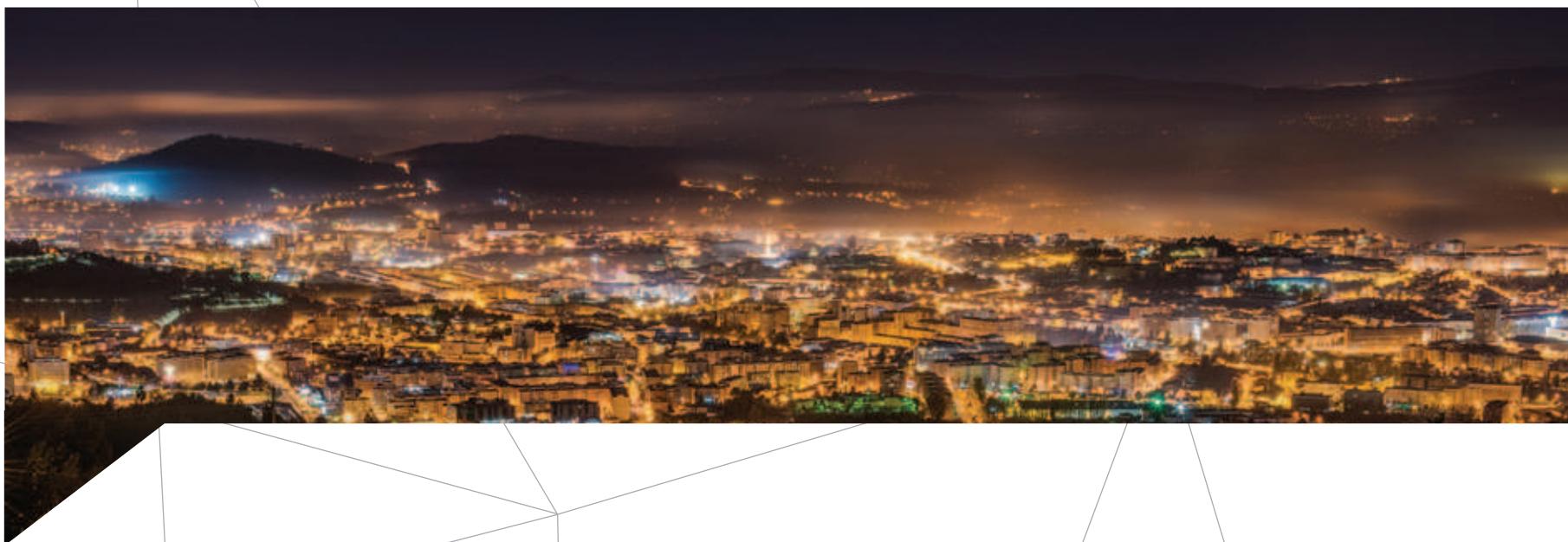
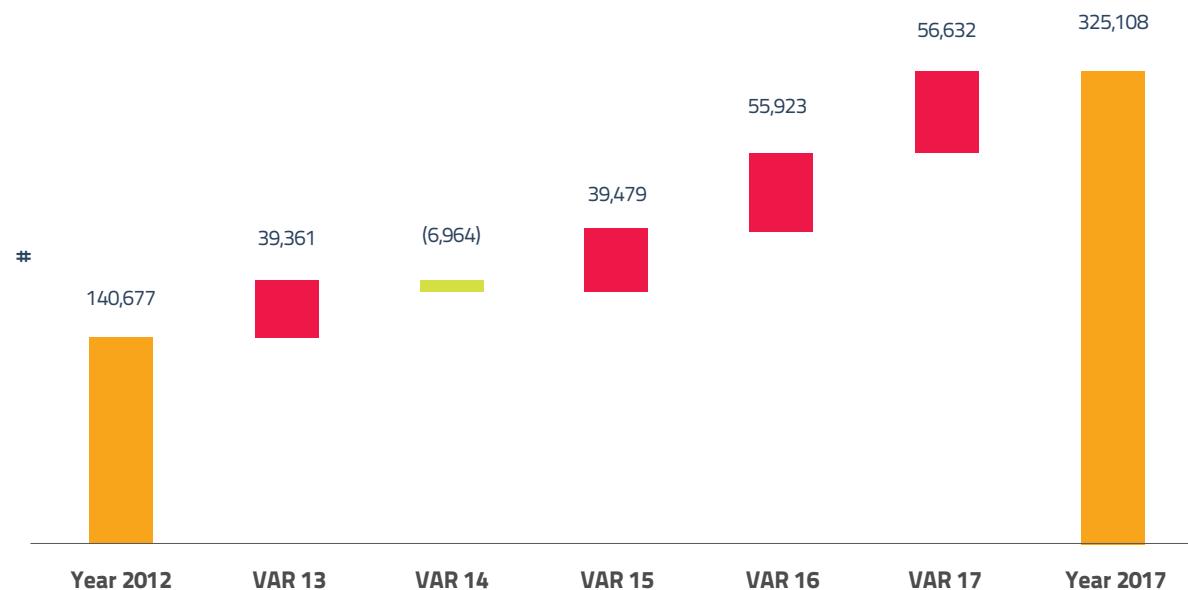
The Braga District Archive, a cultural unit of the University of Minho, is the second most important historical archive in Portugal, with documents dating back to the 9th century.

The region's attractiveness capability has soared in recent years. Between 2014 and 2017, Braga has recorded a cumulative annual average growth rate of more than 20%.



> EVOLUTION OF THE NUMBER OF VISITORS IN BRAGA

Since 2014,
the number
of visitors
in Braga has
increased 88%,
in cumulative
terms



V. DEVELOPMENT AXES

1. CENTRES FOR ENGINEERING, INNOVATION AND SHARED SERVICES
2. INDUSTRY AND CONSTRUCTION
3. ICTE – INFORMATION TECHNOLOGIES, COMMUNICATION AND ELECTRONICS
4. HEALTH AND MEDTECH
5. TOURISM AND CULTURE
6. COMMERCE
7. TERRITORY



Scope:

The vision and positioning established for Braga, according to its differentiating competitive advantages, are based on their resources and actions identified and to be developed by all stakeholders involved.

The skills that form the basis of the definition of the development axes and which constitute the pillars for future economic development are:

- the ability to offer growing talent and qualified human capital;
- highly relevant innovation and knowledge infrastructures;
- cost-view competitiveness;
- unique social and economic history;
- culture and tourism.

Within the framework of the current dynamics of Braga, the major distinctive activities that mark the city's reality are identified, which definitely deserve to be enhanced in the national and international context.

1. CENTRES FOR ENGINEERING, INNOVATION AND SHARED SERVICES

The attraction and growth of large enterprises in Global Value Chains has been one of the axes of the strategy towards the development of Braga.

On the one hand, presence of large multinationals like Bosch, Aptiv (former Delphi), Accenture, Fujitsu, IBM, We Do, Outsystems and many other companies, reflects the quality of human resources, infrastructure and capacity for knowledge generation of institutions such as the University of Minho or the INL. On the other hand, when setting up and extending the scope of their activities, they are themselves a crucial factor in attracting more qualified resources, creating new knowledge and innovation, generating multiplier effects on the entire ecosystem of the city and a knock-on effect on other companies.

The way the city has been able to change its own activity and the activity of those companies (which have actually moved to new phases of the production process aimed at a greater value creation) through a strategic innovation ecosystem made it possible for the city, the region and the country to benefit more from globalization, thus making Braga one of the largest service centres in the country with the ambition to become an international reference hallmark in innovation.

The size and the economic and socio-cultural features of the city, combined with the availability of qualified talent in the surrounding region and the easy mobility of people, both North (Viana do Castelo and Galicia) and South (Porto), are determinant factors for attracting medium and large size engineering and innovation centres, as well as shared services.

Braga's current skills set shows competitive advantages for the development of this sector in the municipality. The presence of leading companies, in particular since 2014, demonstrate this and already guarantee employment for thousands of people.

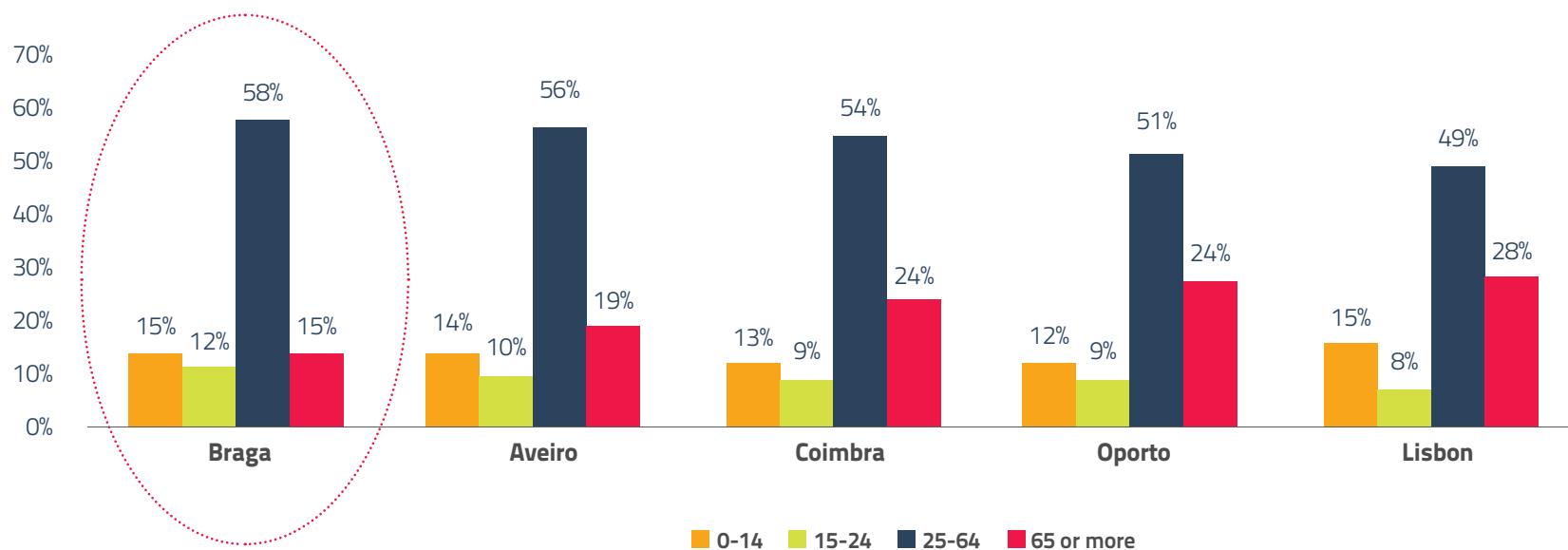
COMPETITIVE ADVANTAGES

- **Young population: with highest percentage of the population in subgroups of age 15 to 24 years and 25 to 64 years;**
- **Talent available and highly qualified;**
- **Good conditions of public schools and quality of education offer, from preschool to secondary school and vocational training;**
- **Competitive labour costs compared to other countries;**
- **Good infrastructure at the level of communications;**
- **Cultural experience.**

STRATEGIC OPTIONS

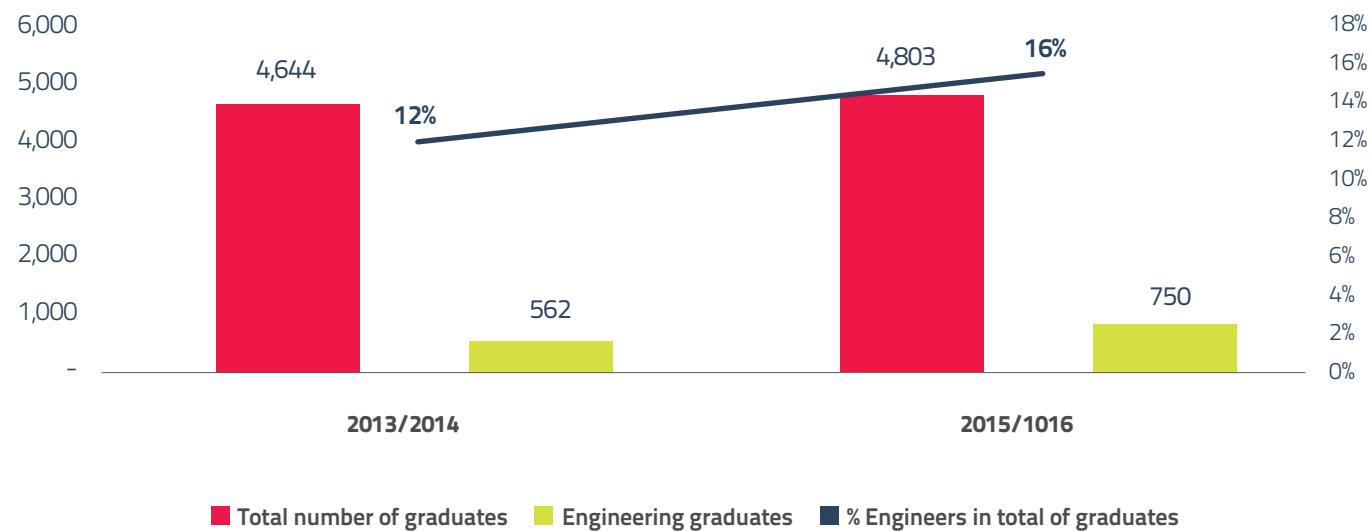
- Attracting engineering and innovation centres and shared work-factor intensive services;
- Positioning as a highly qualified and competitive city in terms of labour cost;
- Attraction of companies from shared services centres (BPOs);
- Focus on qualification and retraining of human resources.

> WEIGHT OF AGE GROUPS IN THE TOTAL POPULATION 2016



Source: INE

> STUDENTS GRADUATED IN ENGINEERING IN BRAGA



Source: NSIs and other calculations

Braga has demonstrated
a continuous ability to generate
skilled human capital
in diverse sectors

2. INDUSTRY AND CONSTRUCTION

Industrial activity has a strong predominance in Braga, with a more visible presence in metallurgical industry, metalworking and textile industries. These industries have the potential to expand and enhance other critical sectors.

The industries referred to are traditionally from Braga, which makes it a city with a strong cumulative know-how and among the best in terms of quality, internationally speaking.

The auto industry also has a strong presence through the activities involving the production of electronic components.

The existing reference infrastructures are also important indicators for the development of other clusters and activities such as nanotechnology, aeronautics, logistics, among others.

The complementarity between the traditional sectors and the new sectors will position Braga at the forefront of the new technological industrial revolution (Industry 4.0). The skills should continue to be developed as the existing ecosystem is an asset, but now with a renewed positioning towards innovation, namely in process digitization (with generalization of BIM solutions), project approaches, sustainable operations and automation/robotization of industrialization.

The construction and engineering sector and its complementary activities, as well as the industries that they are associated with, also have a strong relevance in the region. The construction and engineering activities associated are a reference industry, having been one of the activities with greater weight in the GDP of the region, whose dimension and know-how have developed over the past decades and left their marks all over the country. The construction has been suffering major adjustments and adaptations to the reality of the sector at national and international level, seeking to develop into new areas of higher added-value activity.

Braga has the ambition to lead in the sustainable construction industry, supported on innovation and technology. In recent years, the main companies in Braga are investing on internationalization in order to find alternative markets and growth opportunities, thus assuming a clear focus on engineering and added value.

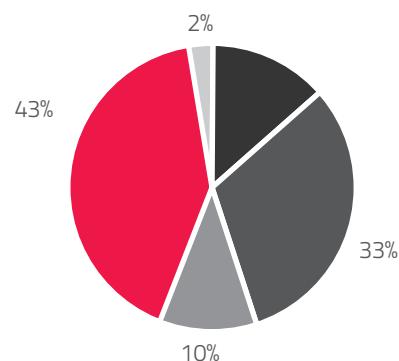
COMPETITIVE ADVANTAGES

- Strong industrial component, marked by companies linked to the metallurgical, engineering and textile industries;
- Existence of industrial centres and business centres on the outskirts of the city;
- Research centres, such as the UMinho and the international Nanotechnology Laboratory (INL), as well as infrastructures, such as the racetrack and the airfield;
- Braga is recognized as a leader in engineering and construction with leading companies;
- Labour costs are competitive when compared to other countries, notably European Union;
- Business fabric with large predominance in the field of engineering in the construction sector: DST, Casais, ABB, Rodrigues & Névoa, Costeira among others;
- Development of innovative approaches in the field of environmental sustainability.

STRATEGIC OPTIONS

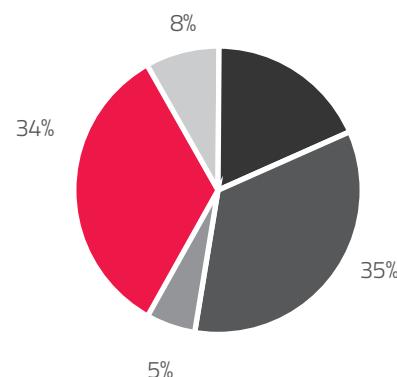
- Leverage integrated knowledge and experience;
- Differentiate technologically, in particular on sustainable solutions, IBS of the UMinho;
- Bet on metalworking and new materials in construction;
- Advance in the value chain through an "intensive engineering" so as to ensure competitiveness;
- Label Braga's construction industry as environmentally sustainable;
- Promoting the development of 'vocational school' connected to crafts focusing on dual education;
- Bet on urban redevelopment and heritage;
- Attract and facilitate the establishment of industrial units:
 - Automobile and Aeronautics (industrial support units);
 - Logistics.
- The INL as World Excellence Nanotechnology Centre and industry-oriented.

EMPLOYEES



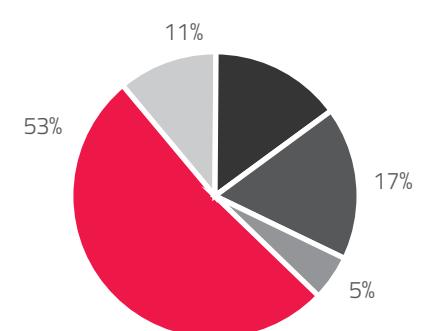
- ICTE
- Commerce and Tourism
- Health
- Industry, construction and other related service
- Other sectors

SALES



- ICTE
- Commerce and Tourism
- Health
- Industry, construction and other related service
- Other sectors

EBITDA

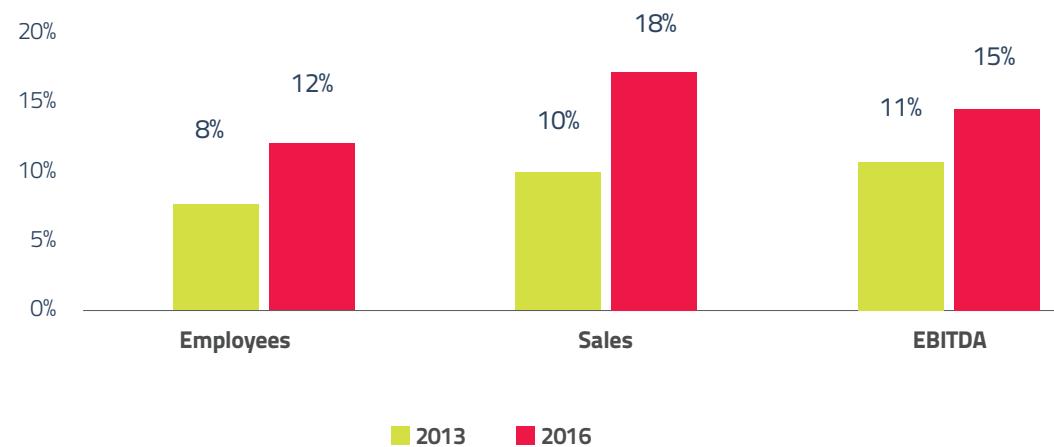


- ICTE
- Commerce and Tourism
- Health
- Industry, construction and other related service
- Other sectors

3. ITCE – INFORMATION TECHNOLOGIES, COMMUNICATION AND ELECTRONICS

The ITCE will continue to be the vector for the city transformation and will form the basis for competitiveness in the second quarter of the 21st century.

> REPRESENTATIVENESS OF THE ICTE (% ON TOTAL)



The ICTE represent a profound transformation activity in Braga. The investment in ICTE is a sustainable option in the already recognized cluster of companies and skills that have been created and secured around the University of Minho, a pioneer in the formation of frameworks in computer systems, mathematics and computer science and information systems, at a national level.

The ICTE sector is understood as the basis for competitiveness in the second quarter of the 21st century, adding value in various activity sectors central to the economic development of Braga.

COMPETITIVE ADVANTAGES

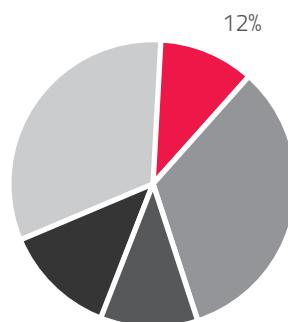
- High offer of qualified resources in engineering, trained by UMinho;
- Competitive labour cost compared to other regions and other countries, including the European Union;
- Existing corporate sector strongly focused on the future Tech sector, with 2 of the top 5 world automobile companies exporting more than 1500 M € from Braga;
- The example of the partnership established between UMinho and Bosch Car Multimedia Portugal, the creation of two Centres for Innovation and Technological Development (I&DT) can be replicated to other contexts.

STRATEGIC OPTIONS

- Confidence in Braga as a talented and innovative city, a reference hallmark in the Iberian Peninsula;
- Grow ICTE activities enhancing the already installed value chain of activities/sectors (automotive and software);
- Infrastructure and attraction reference centres in this field (e.g., Supercomputing or Digital EIT, positioning Braga on a map of the major international networks);
- Active cooperation with the textile, engineering and biomedicine sectors;
- Continuous production 'of skilled labour" (University of Minho, others).

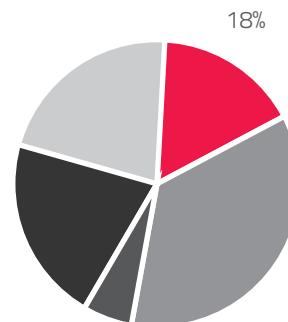
Turning Braga into a nationally and internationally reference innovation city is the goal to pursue.

EMPLOYEES



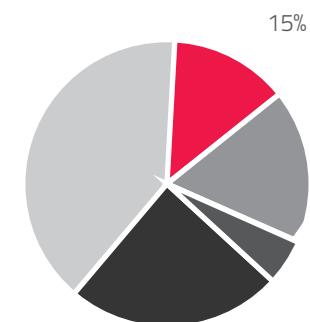
- ICTE
- Commerce and Tourism
- Health
- Industry, construction and other related service
- Other sectors

SALES



- ICTE
- Commerce and Tourism
- Health
- Industry, construction and other related service
- Other sectors

EBITDA



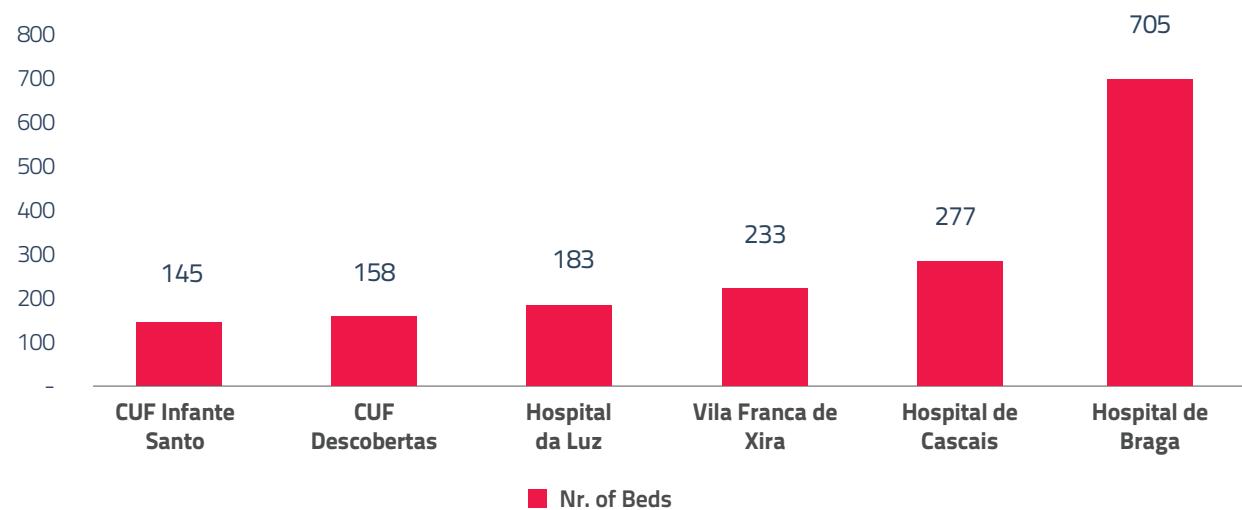
- ICTE
- Commerce and Tourism
- Health
- Industry, construction and other related service
- Other sectors

Source: Orbis extraction, data regarding 2016

4. HEALTH AND MEDTECH

Braga has a set of reference health infrastructures - a public hospital and the UMinho School of Medicine. In the private sphere, Braga also counts with excellent health units, of great quality and dimension, as the Private Hospital of Braga.

> CORRELATION WITH THE NUMBER OF BEDS IN PORTUGUESE HOSPITALS



Source: Annual Report and Accounts from the various entities

The Hospital of Braga is a public-private partnership, recognized for its clinical excellence:

SINAS - NATIONAL HEALTH ASSESSMENT SYSTEM

Clinical Excellence

Focus on the Patient

Patient Safety

Patient Satisfaction

Suitability and comfort of the facilities provided

HEALTH EXCELLENCE AWARD

The Kaizen Institute awarded the Excellence Award in the Health Sector to the project Centralized Platform in Programmed Conventional Surgery, developed at Braga.

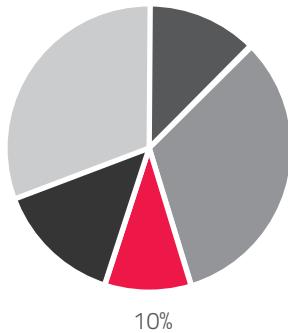
**TOP 5'16 – D GROUP
HOSPITAL EXCELLENCE**

For the second consecutive year, Braga won first place in the best hospitals of medium/ large size of the SNS in 'TOP5' 16 - "Hospital Excellence", promoted by the IASIST.

These infrastructures are a critical resource that must be leveraged, in conjunction with the medical technology industries, based on the practical component of these institutions.

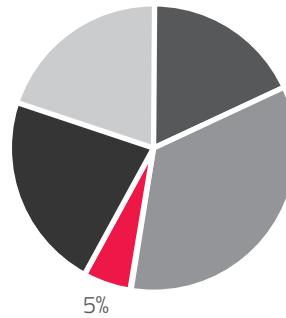
With the existing infrastructure and the competences formed for the market, we have created the conditions for the development of new activities, while attracting and creating new companies around the areas of health, leisure and well-being.

EMPLOYEES



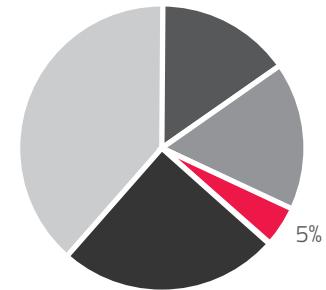
- ICTE
- Commerce and Tourism
- Health
- Industry, construction and other related service
- Other sectors

REVENUE



- ICTE
- Commerce and Tourism
- Health
- Industry, construction and other related service
- Other sectors

EBITDA



- ICTE
- Commerce and Tourism
- Health
- Industry, construction and other related service
- Other sectors

Source: Orbis extraction, data regarding 2016



RESEARCH AND DEVELOPMENT

In the last decade, Braga showed evidence of a very healthy growth in this area, becoming an important leader for local research projects both in medicine and health. In this context, special mention goes to the activities carried out in the research centre of the School of Medicine of the University of Minho, the ICVS which, together with the 3Bs Research Group, integrate an Associated Reference Laboratory, the ICVS/3Bs.

This scientific domain is also the subject of activity of other research groups at UMinho (biology, physics, chemistry, biological engineering and nursing) as well as at the INL.

The Academic Clinical Centre (2CA-Braga) is a partnership established between UMinho and private entities, set in specific facilities at the Hospital, which has become a national reference in clinical trials.

The result of this activity and the entrepreneurial culture of the city and of its University have led to several spin-offs in this area, many of which are incubated in StartupBraga.

It is in this context that UMinho, in collaboration with entrepreneurs of the region, is launching a structuring and pioneering project in new medicine paradigms – the P5 – that will integrate information technologies, data science and artificial intelligence for the development of pilot preventive, predictive, personalized, and participatory medicine.

COMPETITIVE ADVANTAGES

- **Quality of infrastructures available - hospital with “state of the art” equipment in the different areas of specialization;**
- **Health infrastructures, such as the reference Hospital of Braga and the Academic Clinical Centre (performs about 40% of clinical trials in Portugal);**
- **Quality training and research at the School of Medicine, UMinho;**
- **Human capital in various specialties, particularly in nursing;**
- **Component of the ITCE that will be ubiquitous in the medicine of the future.**

STRATEGIC OPTIONS

- Focusing on multiple areas of health with clear competitive advantages;
- Cooperation between technological innovation and health sciences, aimed at supporting the development of biotechnology and pharmacy industry, in addition to ICTE-based medical devices;
- Medium-term attraction of companies in the medical and pharmaceutical technologies sectors that can take advantage of the talent and knowledge produced in Braga, in the context of growing digitization of research and development activity in these domains.

5. TOURISM AND CULTURE

Braga is a millenary city which was home for the pagan and the religious, for the Roman, the Medieval, the Baroque and contemporary. Although it has a unique heritage and location, it is not yet widely recognized in the international tourism circuits.

Braga has all the conditions to continue to grow this sector and should assert itself on the map of religious tourism, from Roman to Baroque, and as entry point for nature tourism, for example through the Peneda-Gerês National Park, among other factors of tourist attractiveness.

The Theatro Circo is a reference, both for cultural programming and as an imposing concert hall of outstanding architectural beauty, difficult to match by any other venue, Portuguese and European.

The D. Diogo de Sousa Museum is another reference in the city, being a scientific-cultural entity in the archaeological domain. The museum carries out activities in the fields of research, museology, cultural dissemination, support for the teaching and the protection and preservation of the archaeological heritage.

Business tourism, associated with the economic dynamics of Braga, events tourism boosted by the unique conditions of the FORUM Braga and prime location in the Peninsular Northwest, are privileged areas which will be enhanced in the next few years.

More than 2,000 years of history and stories. Braga is a unique destination where we can travel back in time and relive the adventures of our ancestors.

Braga is also a window to a bright future for our youth, with an innovative and determinant spirit, paving the way for a perpetual movement of rich cultural expression.

BRAGA
3.659
beds

	NUMBER	ROOMS	CAPACITY
Hotels 5 *****			
4 ****	13	626	2134
Hotels 3 ***			
2 **	18	706	1373
Total	31	1332	2623

LOCAL ACCOMODATION
1.036 beds

COMPETITIVE ADVANTAGES

- Strong presence of history (Roman, Medieval, Baroque);
- Existence of major cultural attraction spots;
- FORUM Braga and Theatro Circo as strategic infrastructures for attracting events;
- Surrounding nature: Peneda-Gerês National Park;
- Architecture and religious heritage: Cathedral, Bom Jesus and a variety of churches and convents.



STRATEGIC OPTIONS

- Promotion of tourist attractiveness;
 - Roman, Medieval, Baroque and contemporary;
 - Invest on religious tourism through the implementation of several initiatives (e.g.: "Holy Week in Braga") and visibility as relevant point on the axis Fátima-Santiago;
 - Gerês Gateway ("Interland");
 - Develop and promote new tourist sectors for younger people.
- Position Braga as an autonomous tourist destination among the target markets;
- Braga, city of culture, past and future;
- Increase the supply of accommodation available;
- Increase the length of stay of tourists and the average stay;
- International recognition of this destination through the classification of the sanctuary of Bom Jesus of Braga as a UNESCO World Heritage site and obtain the distinction of European City of Culture 2027.

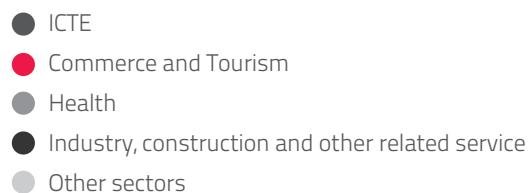
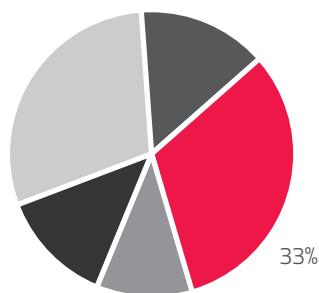
6. COMMERCE

The political and administrative centrality of Braga has created a commercial tradition shown in the existing offer.

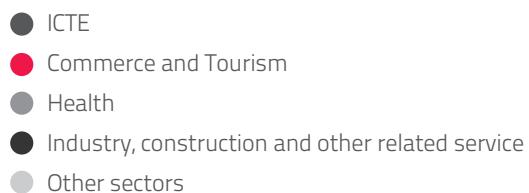
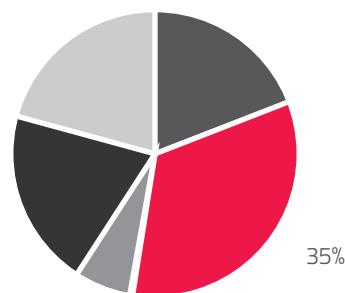
The city centre is the area's local trade reference and should definitely continue to be strengthened, marked by a strong presence of specialized and differentiated street trading, complemented by the supply of peripheral shopping areas. The leverage of the historical centre must continue through its conversion into a strategic and privileged trade reference spot, with the dynamics required to complement the offer of the periphery.

Braga's trade serves the needs of the local population density and attracts people from surrounding municipalities, and from other parts of the country and Galicia, to do their shopping in Braga, given the diversity, variety and quality of the supply.

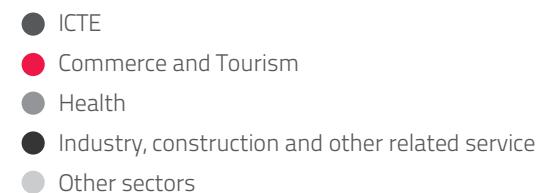
EMPLOYEES



SALES



EBITDA



COMPETITIVE ADVANTAGES

- Historically, this is a very strong sector;
- Braga, known as the "capital of trade" and recognized for its "street trading";
- Recurring events that attract tourists;
- Historical centre with a wide pedestrian area;
- Key centrality of the region.

STRATEGIC OPTIONS

- Make Braga a shopping destination in the North of the country, for the offer/service and comfort provided;
- Focus on the historical centre;
- Multipolar offer, both in the centre and outskirts;
- Recover life and activity in the historic city centre;
- Develop specific targets for trade and as a showcase of the region's products;
- Focus on e-commerce as an add-on.



7. TERRITORY

An adequate and proper management is an essential factor to boost the city's competitiveness and quality of life of its citizens.

Braga takes on the challenge of urban management, focused on the use of already requalified spaces, while valuing the existing heritage and assuming the requalification of rural urban soil as an exception.

The strategic territorial development model advocated for Braga leads to the strengthening of its centripetal character and to favour the actions aimed at urban consolidation. On the other hand, it promotes a substantial attraction for businesses and a greater appetite for economic development.

The management of the territory complies with the following vision for the territorial development of Braga:

1. Braga, a city where we want to live
2. Braga, a municipality that we want to visit
3. Braga, a territory to invest
4. Braga, towards the Iberian centrality

The territory management instruments aim at the consolidation of a balanced urban model based on respect for the logic and natural spaces of the territory's endogenous characteristics, heritage valuation and the consolidation and affirmation of centrality, articulated with the definition of an Ecological Structure able to balance human occupation.

COMPETITIVE ADVANTAGES

- Access infrastructures;
- Perception of Braga as an “Investor Friendly” territory with a professional support structure, thus facilitating establishment processes;
- Located in the Northwest of the Iberian Peninsula.



STRATEGIC OPTIONS

- Regeneration of industrial parks;
- Tax competitiveness of the territory in attracting new investment;
- Focus on future mobility and on a more efficient and economically attractive public transport system;
- Reinforcement of the mobility conditions through pedestrian zones and bike lanes;
- Implementation of recurring mechanisms in order to listen to citizens, entrepreneurs and tourists;
- Refurbishment of buildings and infrastructures (e.g.: Municipal Market, Youth Hostel).



Actions

STRUCTURING ACTIONS

ACTION	GOAL	OWNER / STAKEHOLDERS	IMPLEMENTATION DATE
1 Viability, promotion and implementation of the "Innovation Arena"	Create an area to host innovative projects, in a shared and vibrant environment for innovative companies based in knowledge and technology, looking for anchor companies and private promoters, favoured by the connection to the UMinho and the INL.	IB/CMB/UMinho/INL/ Strategic Partners/ Private	2017-2026
2 Continue to invest on the Program + Industry and establish a value model for industrial parks	Support the definition of models designed for the management, communication and operation of industrial parks, in particular with the creation of more appropriate regulations and management for each one. Support and promote business investment, with a view to economic development and to increase exports. Invest in refurbishment of business parks, with the support from European funds.	IB/CMB/Associations Entrepreneurs from the Industrial Parks/ AIMinho	2018-2022
3 Develop mechanisms for the attraction and dissemination of Braga for engineering and innovation centres and shared services	By identifying targets for companies and groups to strengthen investment, contact with international players showing Braga as a place of excellence, a destination for engineering service centres, innovation and shared services centres nearshoring.	IB/AICEP/CMB	2014-2026
4 Maintain and strengthen the Economic Diplomacy in Braga	Conduct actions to promote Braga to foreign ambassadors and the world as a destination of excellence to live, invest and work; work the destinations of the SCB football matches abroad for the economic promotion of Braga.	IB/CMB/SCBraga	2014-2026
5 Invest on Business Tourism	Attract congresses and events of national and international importance.	IB/CMB/Tourism of Porto and Northern Portugal/UMinho/ INL/ Strategic Partners	2018-2026

ACTION	GOAL	OWNER / STAKEHOLDERS	IMPLEMENTATION DATE
6 Implementation of the strategic plan of the Altice FORUM Braga	Implementation of the Business and Culture Tourism development plan on the basis of the infrastructure FORUM Braga.	IB/Partners	2018-2026
7 Promote the development of knowledge and technology of I&D centres for businesses	Promotion, observation and monitoring of knowledge and technology development strategies at UMinho, INL and others, in order to identify successful models and allowing their replication in companies.	UMinho/INL/IB	2015-2026
8 Promote the health sector and Medtech, by attracting companies	Generate momentum in the health sector and Medtech, in conjunction with the provision of space, and with the support from UMinho, Hospital and 2CA, INL and MACC/QuantaLab, enjoying also the potential of projects such as the Centre for Personalized Medicine P5.	IB/CMB/UMinho/2CA/INL/Private	2015-2026
9 Consolidate the Braga's competitiveness in the Clinical Trials and clinical research, through the 2CA	Promote the potential of 2CA, UMinho and Hospital of Braga so as to capture the interest of the pharmaceutical industry. Implementation of measures for the promotion of the Academic Clinical Centre as a competitive structure for clinical trials conducted by foreign companies.	2CA/UMinho/Hospital de Braga/Private	2019-2022
10 Promote adequate skills for welcoming and developing of investments in the automotive /mobility sector	Implementation of mechanisms designed for enhancing the positioning and strengthening of the automotive and mobility sector, based on research and excellence centres, while taking advantage of the proximity to the racetrack and airfield.	IB/AICEP/IAPMEI/CEiiA/UMinho/Partners	2016-2026
11 Increase the supply of specialized technical resources in strategic areas such as ICTE, health and industry	Creation, attraction and retention of specialized talent so as to support the companies' activity in key areas.	IB/CMB/ IPCA/other Universities and Professional Schools in the Region	2015-2026
12 Implement qualified training programmes and promotion of I&D, according to corporate needs	In partnership with the IEFPP, UMinho, local businesses, and with the purpose of promoting or converting skills into the ICTE areas, health and local industries of the main sectors of activity.	UMinho/IB/IEFP	2015-2026
13 Development of the Qualify IT programmes, with reduced hours and aimed at a target audience with qualifications lower than graduation	Support companies in the municipality, qualifying the human resources that meet their needs, by developing this type of programs, though aimed at an audience with lower qualifications. This action will be developed following the commitment established between UMinho and the potential employers.	IEFP/IB/UMinho	2019-2023

ACTION	GOAL	OWNER / STAKEHOLDERS	IMPLEMENTATION DATE
14 Readjustment (review of the offer) and articulation of such vocational education offer with the needs of the main sectors of activity	Create talent in the areas of development and knowledge so as to ensure the growing needs of companies and sectors to be developed in Braga, as well as an active model for resource attraction, which can go through financial or resources support and eventually financing employers.	CMB/IB/IEFP/ EPB/PROFITECLA/ ESPROMINHO/ACB/ other professional schools in the region	2018-2022
15 Requalification of people over 45 years to support activities aimed at the development of the main sectors of the municipality and currently in expansion	Development of requalification programs to support activities aimed at the development of the critical sectors in the region.	CMB/IB/IEFP/UMinho	2019-2026
16 Regular monitoring of foreign students (more than 10% of the total number of students) from higher education institutions	Through regular actions to be carried out in higher education institutions of Braga and adjacent municipalities in order to present the city, employment opportunities (national and multinational companies) and their inclusion in civil society (through internships to be held in local businesses, among others).	CMB/UMinho/IPCA/ UCatólica	2018-2026
17 Liaise with UMinho so as to bring college students to the city centre	Promote the organization of dynamic initiatives designed to attract students to the city centre.	CMB/UMinho/AAUM/ ACB	2019-2026
18 Promotion of a building refurbishment programme designed for student accommodation	Attracting students to the city centre, through the adaptation/conversion of buildings into residential accommodation where they can be housed.	CMB/UMinho/ Private	2018-2026
19 Promote the ‘Investor’s Space’	Developing the service designed to support the investment and economic development in Braga	IB	2014-2026
20 Design a learning plan to be adopted in schools from 1st to 3rd cycle in a foreign language	Promote the implementation of educational programs of high added value in schools from 1st to 3rd cycle, using the different disciplinary content teaching in a foreign language, thus promoting linguistic competence and learning content in this same language (CLIL- Contented and language Integrated learning)	CMB/IB/Schools of 1st, 2nd e 3rd Cycles	2018-2020

ACTION	GOAL	OWNER / STAKEHOLDERS	IMPLEMENTATION DATE
21 Promote the creation of a transformational Museum about Braga	Identify the opportunity to create the transformational City Museum and identify potential partners and permanent collections	CMB/IB/ Private	2018-2021
22 Promote a strategy for Culture, within the framework of the preparation of the application of Braga as European Capital of Culture	Within the context context of the preparatory work for the elaboration of the application of Braga as European Capital of Culture, define a cultural strategy to be implemented in the city with a programme aimed at the promotion and projection of the city and training of economic and cultural agents	CMB/Theatro Circo/ Museums	2018-2020
23 Create the event 'Promenade of Science and Technology"	Making Braga and UMinho closer to other cities in the country (Lisbon, Oporto, Coimbra and Aveiro) promoting a kind of TEDx to be held at UMinho and its science courses	UMinho/IB	2018-2020
24 Definition of tax policy measures of municipal nature designed to encourage the establishment of new companies	Strengthening the competitiveness of Braga (e.g.: reduction of spills for a 3-year period) as an additional stimulus a differentiating agent for attracting new investments and retaining businesses.	CMB/IB	2018-2022

CONTEXT AND SUPPORT ACTIONS FOR THE DEVELOPMENT MODEL

ACTION	GOAL	OWNER / STAKEHOLDERS	IMPLEMENTATION DATE
1 Evaluation of funding opportunities for upgrading important infrastructures in the city and other strategic investments	Assess funding opportunities and define in conjunction with UMinho and other partners, a strategic plan for the rehabilitation of some relevant areas of the city: São Geraldo, 1° de Maio Stadium, requalification of the Santa Barbara garden, changes to the Avenida da Liberdade, tunnel construction of the 'Avenida das Piscinas' with entrance to the 'BragaParque' (restoring the connection of Rua D. Pedro V and Rua Nova de Sta. Cruz, with a bike path in order to better connect the city to UM.).	CMB/IB/ Archdiocese of Braga /UMinho	2018-2022
2 Managing the accommodation capacity	Enhance the accommodation capacity in the municipality of Braga by attracting more hotel chains.	IB/CMB/ACB/Private	2018-2022
3 Organize the "Tourism Forum"	Create a reference event for tourism, being the technological component the differentiation element. This Forum will bring experts to Braga and therefore putting the eyes of the world upon Braga.	CMB/ACB/IB/Tourism of Oporto and Northern Portugal	2018-2026
4 Create a Website to promote Tourism in Braga	Make a website for Tourism so as to promote the city, with a strong emphasis on attracting tourists and supporting visitors.	CMB/IB/Companies of the sector/ACB	2018-2020
5 Participation in international tourism fairs	Take part in tourism fairs in conjunction with other stakeholders so as to boost the offer available in Braga.	CMB/IB/ACB/ Tourism of Oporto and Northern Portugal	2017-2021
6 Preparation of a plan for the promotion of the application of Bom Jesus to UNESCO World Heritage Site	Disclose the rich heritage of Braga via the most noble media, at international level.	CMB/ Confraternity of the Bom Jesus do Monte	2018-2020

ACTION	GOAL	OWNER / STAKEHOLDERS	IMPLEMENTATION DATE
7 Definition of a strategy aimed at maximising the cultural offer in the municipality	Create and organize a cultural offer consistent between the different cultural infrastructures in the city (Forum, Theatro Circo, São Geraldo, street events, among others).	CMB/Theatro Circo/IB/ Cultural associations of the municipality	2018-2022
8 Definition of an annual plan designed for training employees in the tourism sector	In accordance with the needs found useful as far as street trading, catering and hotel trade.	ACB/EPB	2018-2019
9 Training of agents and employees for catering and hotel trade	Updating and enhancing the preparation and training of catering and hotel trade sector so as to guarantee the consistency of a quality response to tourism demand, thus contributing to the qualification as agents and disseminators of the dynamics and city culture among tourists	ACB/CMB	2018-2020
10 Organization of the resources at the disposal of the cultural associations of the municipality and subsequent integration in the city's cultural plan	Shared and integrated management of resources available, in order to allow their integration into the city's cultural plan.	CMB/ Cultural associations of the municipality	2018
11 Attract shops widely renowned brands into the historical area	Promote the development and the establishment in the historical centre of anchor stores, from medium/ high category brands.	ACB/Companies in the sector/IB	2018-2023
12 Map the existing commercial offer in the city centre and develop a monitoring system of movement of people and consumers	Get real information about the existing offer and implement mechanisms that allow a better understanding of consumption and trade patterns, trends and movement of people and customers.	ACB/CMB	2019
13 Elaboration of the development plan and revitalization of the Municipal market	Define the major objectives for the space, reintegration/relocation of existing merchants and elaborate a concept of value for the space ('a local market, open to visitors and citizens').	CMB	2018
14 Supporting/encouraging the birth rate and citizen's welfare	Create a backup plan/birth incentive through municipal benefits and access to relevant infrastructures.	CMB	2018-2022
15 Information based on the opinion of citizens and tourists, leading to decision-making measures for the development of Braga	Development of listening processes for citizens and tourists, through 'Town Hall' open inquiries.	CMB/ACB/IB	2018-2023

ACTION	GOAL	OWNER / STAKEHOLDERS	IMPLEMENTATION DATE
16 Review of public transport network	In order to decrease the distance between any place in the city and new centralities, as well as to achieve a 20%-decrease in the distance between the most relevant points.	CMB/TUB	2018-2020
17 Promote, together with investors, the opportunity to create a theme park in the city	Create a theme park in Braga based on the interconnection between the technological capabilities available.	CMB/IB/Private	2020-2026
18 Make an area designed for potential business park in Palmeira available in the PDM - Land-use planning (next to the airfield and racetrack)	Potential business park near the airfield and racetrack focused on the establishment of companies linked to the automobile and aeronautical sectors.	CMB/IB/Stakeholders	2020-2026
19 Evaluate the expansion of the airfield	Adequate conditions for the airfield to work as a complement to the Sá Carneiro Airport for private aviation and to be used to attract companies in the context of the promotion of the Business Centre in Palmeira dedicated to aviation-related activities.	CMB/IB/Private	2018-2021
20 Strengthen the city's mobility capacity and improve mobility 'between the valleys'	Development of a study/analysis of the options available so as to increase mobility 'between valleys' in order to enhance mobility in the geographical area.	CMB/TUB/AMFEQU/ CIM Cávado	2019-2021
21 Enhance the georeferencing portal for business centres, by providing the functionality with the ability to support and facilitate the industrial activity and the establishment of companies	Devising mechanisms for periodic update of the georeferencing portal for industrial centres and existing businesses, in order to implement simplification measures for a faster industrial licensing.	IB/AlMinho/CMB/ Associations of Entrepreneurs from Industrial Centres	2018-2019
22 Strengthen the language skills in the city	Attracting bilingual education in high schools and enhance the teaching of Chinese in secondary schools.	CMB/ACB/UMinho	2018-2021
23 Boost the CERPUB action programme - Strategic Council for the Heritage and Urban Regeneration of Braga	Thinking about the urban design of Braga as a public space and create the figure of the "Ombudsman for the Aesthetics of the Municipality", applicable to buildings, gardens, parties and all interventions in the public space.	CMB/IB/CERPUB	2018-2021

ACTION	GOAL	OWNER / STAKEHOLDERS	IMPLEMENTATION DATE
24 Implementation of the "Time Viewpoint".	Create a specific location in Braga, through the use of new technologies and innovative methods, where a tourist can see the city of Braga from the past until today. The ability to understand the impact of diverse civilizations and to do a visual reconstruction of the city through different periods is to travel in time, which is the central idea of this project.	CMB/IB/Tourism of Oporto and the Northern Portugal/ACB	2018-2022
25 Creation of the "Time Passport"	Implement a new tool designed for tourists. With a normal passport format, it can be stamped in several places, such as museums, galleries, shops, historical sites, restaurants and other public and private sites. This Passport will have a special feature: all stamps will have a time reference.	CMB/IB/ Tourism of Oporto and the Northern Portugal/ACB	2018-2019
26 Create a unique identity for every for every significant period in the history of Braga and the civilizations that have shaped the territory	The goal of this project (considered one of the key projects) is to guide travellers through time, on a journey to the past.	CMB/IB/UMinho/ACB	2018-2019
27 Implementation of the project "Guardians Replay"	Develop a training project associated with the knowledge about the history of Braga, which will require the production of materials related to the training and testing of the Guardians Replay, as well as the creation of a certification methodology.	CMB/IB/ACB	2018-2020
28 Create the "Braga Future Week"	Create an annual one-week event which will invite all artists, entrepreneurs and citizens to bring out into the streets their inventions and visions for the future. This will be anyone willing to show, sell or exchange ideas about what the future will bring to us.	CMB/IB/UMinho/ Stakeholders/ACB	2019-2026
29 Development of an "Experiment Platform"	Develop an online platform in which the time traveller will not only have access to all the information on the on the several local experiences to visit, itineraries and information on catering, accommodation and local trade, but also build his/ her detailed journey through time, knowing exactly how much time will be needed, how much will be spent and how far will this traveller go.	CMB/IB/ACB	2018-2022





In collaboration with:



Supported by:

