



Presentation

# FI Group Portugal

#HelpingIdeasGrow

# FI Group

R&D Management and Financing

**FI Group is a leading global innovation management company.** It supports the promotion of innovation at the level of companies and public entities, by raising funding for the development of their Research and Development (R&D) activities, through a comprehensive management of investment funds, tax incentives and Business Intelligence solutions.

The technical and tax advice provided by FI Group makes it possible to optimise R&D activities, boosting the growth of organisations.

## Strategic sectors:



Energy



Automotive



Sea



AEC



Pharmacist



Textile



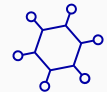
Agriculture



Tourism



TIC



Biotechnology



# FI Group Services Portugal

Specialized Consulting

## Tax Management

Your organization can maximize its intangible assets, optimize its investments and reinvest profits efficiently, through benefits such as **Patent Box, RFAI** and **DLRR**.

[+ Information →](#)

## SIFIDE

Application solutions for the Tax Incentive System for Business Research & Development, through a unique **application in the market (FI Connect)** that aims to increase efficiency and facilitate information sharing, so that you can focus on other aspects of your business.

[+ Information →](#)

## Sustainability

Support for responsible and valuable projects and investments, where sustainability is the crucial element in planning, namely **training services, ESG, Action Plan and Strategy, Reporting and Communication**, and **DNSH Reporting**.

[+ Information →](#)

## Portugal 2030

Support in the framing and **preparation of the application**, from the budget phase, justification of merit, to the monitoring of the incentive **contracting process and respective technical-financial management**.

[+ Information →](#)

## European funding

Applications for European funding programs, with technical support in the **writing, assembly and submission of competitive applications**. Support also in the projects' coordination and management.

# Proven track record

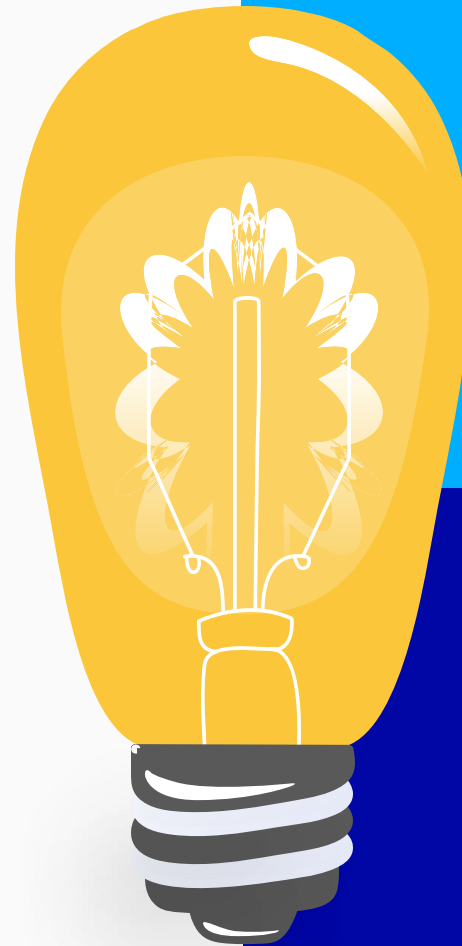
R&D Management and Financing

In the last 6 years (2017 to 2023), in Portugal, we support more than:

**+3300**  
*projects*



These data relate to the capture of tax benefits and financing projects at national and European level.



**1.927.973.216€**

Investment value of our customers' projects

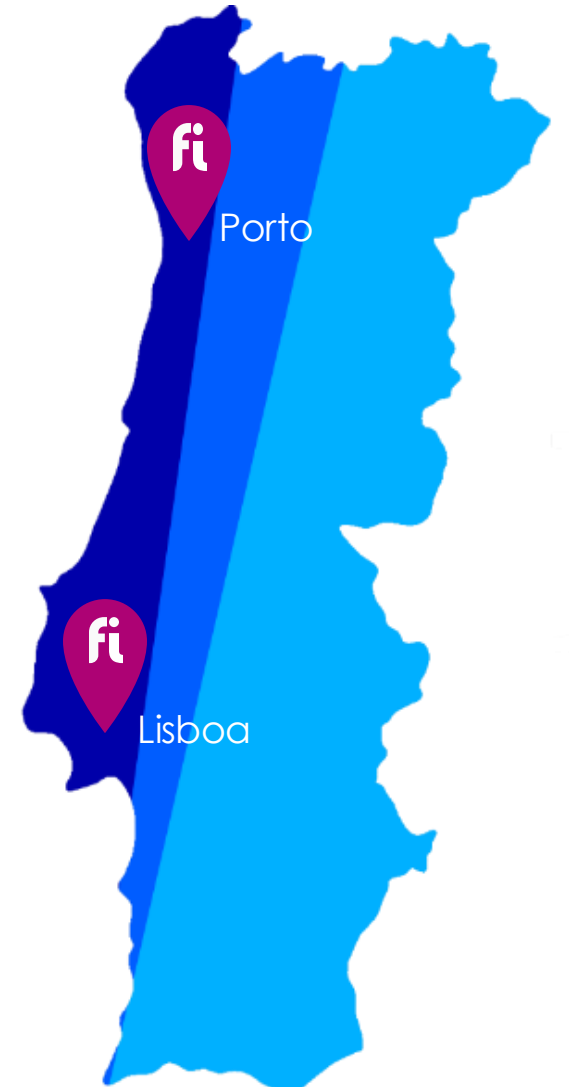
**1.239.161.102€**

Estimated Incentive for our customers' projects

# Presence in Portugal

R&D Management and Financing

In Portugal, the more than 125 employees, divided between the Lisbon and Porto offices, contributed to valuing the innovation processes of 1300 organizations. **Our commitment to R&D is intended to counteract the current framework and contribute to improving the future of our economy, by supporting Portuguese companies in managing innovation and attracting funding for their R&D projects.**



Edition of the Frascati Manual 2007 and 2015

## Awards and Certificates



## Institutional Relations and Partnerships



# Global Player

R&D Management and Financing



### FI Group Offices

- Espanha
- França
- Portugal
- Bélgica
- Itália
- Alemanha
- Reino Unido
- Canadá
- EUA
- Brasil
- Colômbia
- Chile
- Japão
- Singapura
- Marrocos

### Operational Hubs

- Peru
- Uruguai
- Argentina

### Partners

- Polónia
- Países nórdicos
- Países Baixos
- Austrália



**23.000+**  
Active Customers



**€2,5b+**  
Global Savings



**1.800+**  
Collaborators



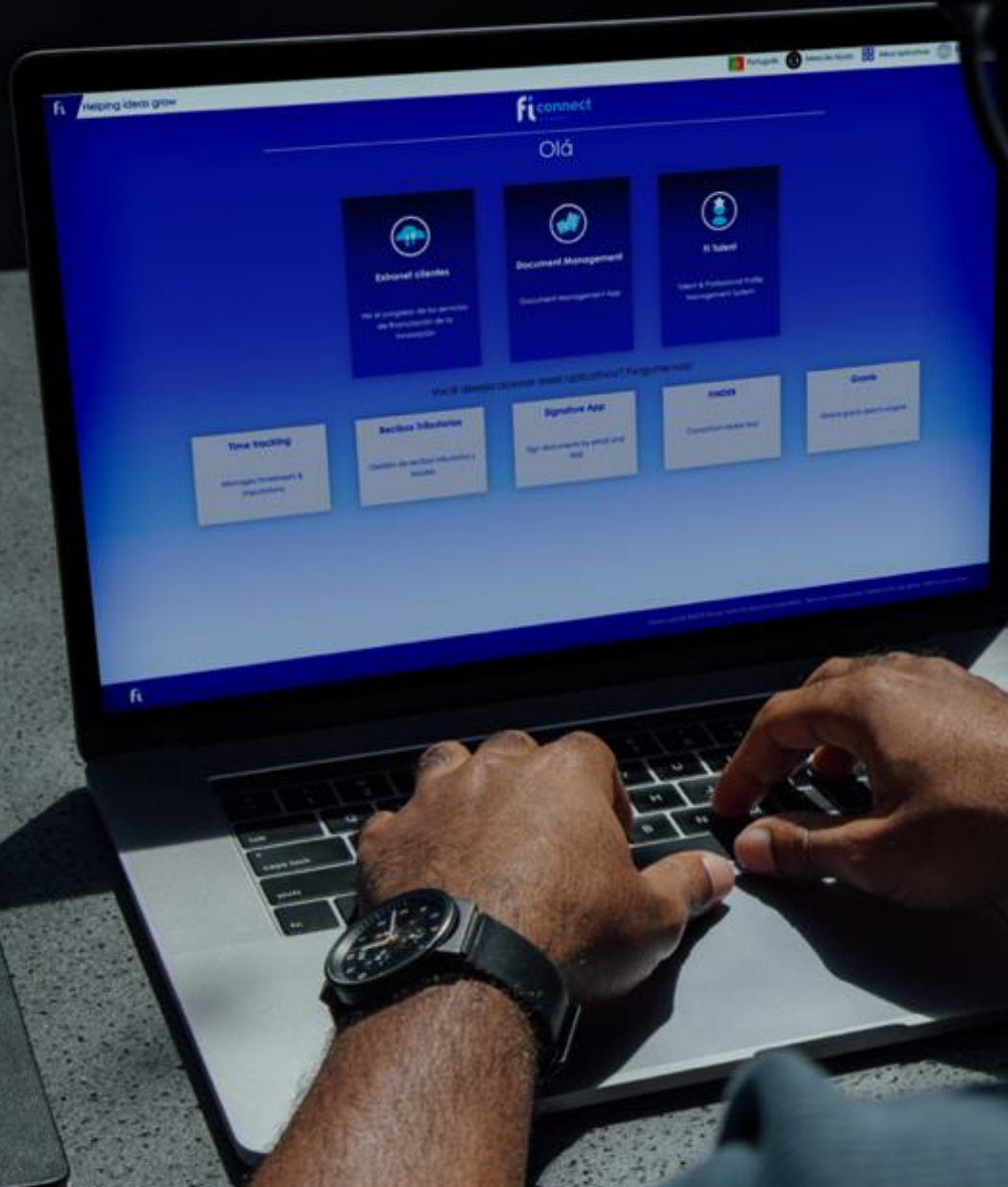
**45**  
Offices

# FI Connect

## Initiatives

## Digital Transformation

FI Group is committed to the digital transformation of its services in all the geographies where it operates. In this sense, it has developed the FI Connect platform, a Hub that aggregates different applications available to our customers.





# FI Connect

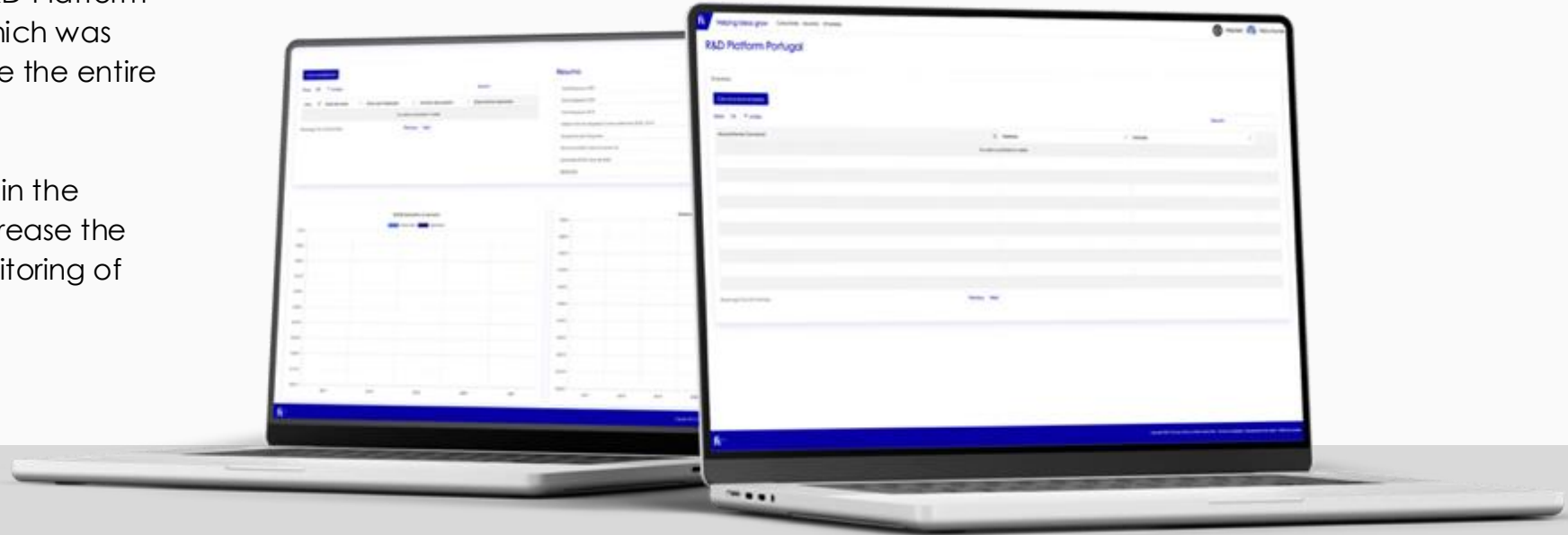
Digital Transformation Initiatives

## R&D Platform

Currently, within FI Connect, the R&D Platform (#PlataformaSIFIDE) is available, which was developed to centralize and digitize the entire SIFIDE application process.

This is a unique and innovative tool in the Portuguese market that aims to increase the flexibility of management and monitoring of applications for this tax benefit.

[→ More information](#)



## Characteristics



Centralization and Digitalization of projects SIFIDE



Platform built according to ANI requirements



Real-time application management



Access to project history and analysis



Increased safety of shared information



Direct connection to ANI Platform



Reduced manual loading tasks



Digital delivery of project dossier

# FI Connect

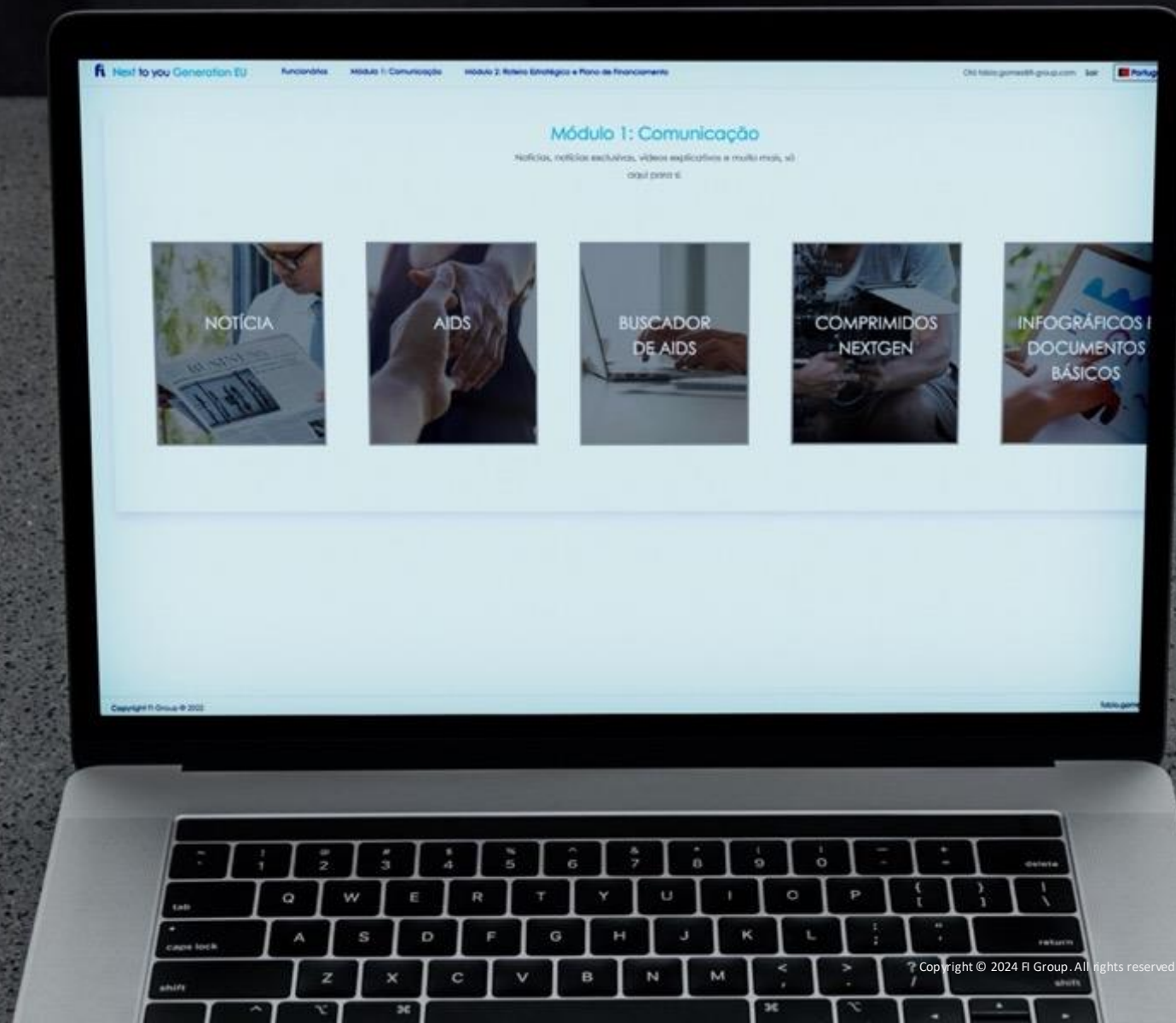
Digital Transformation Initiatives

## “Next to You” Generation EU Plataform

Exclusive solution for FI Group's premium customers at European level.

This is a modular platform that allows our clients to derive the greatest benefit from NextGenerationEU Funds through three independent but complementary services:

- Communication
- Financing project planning
- Institutional Roadmap

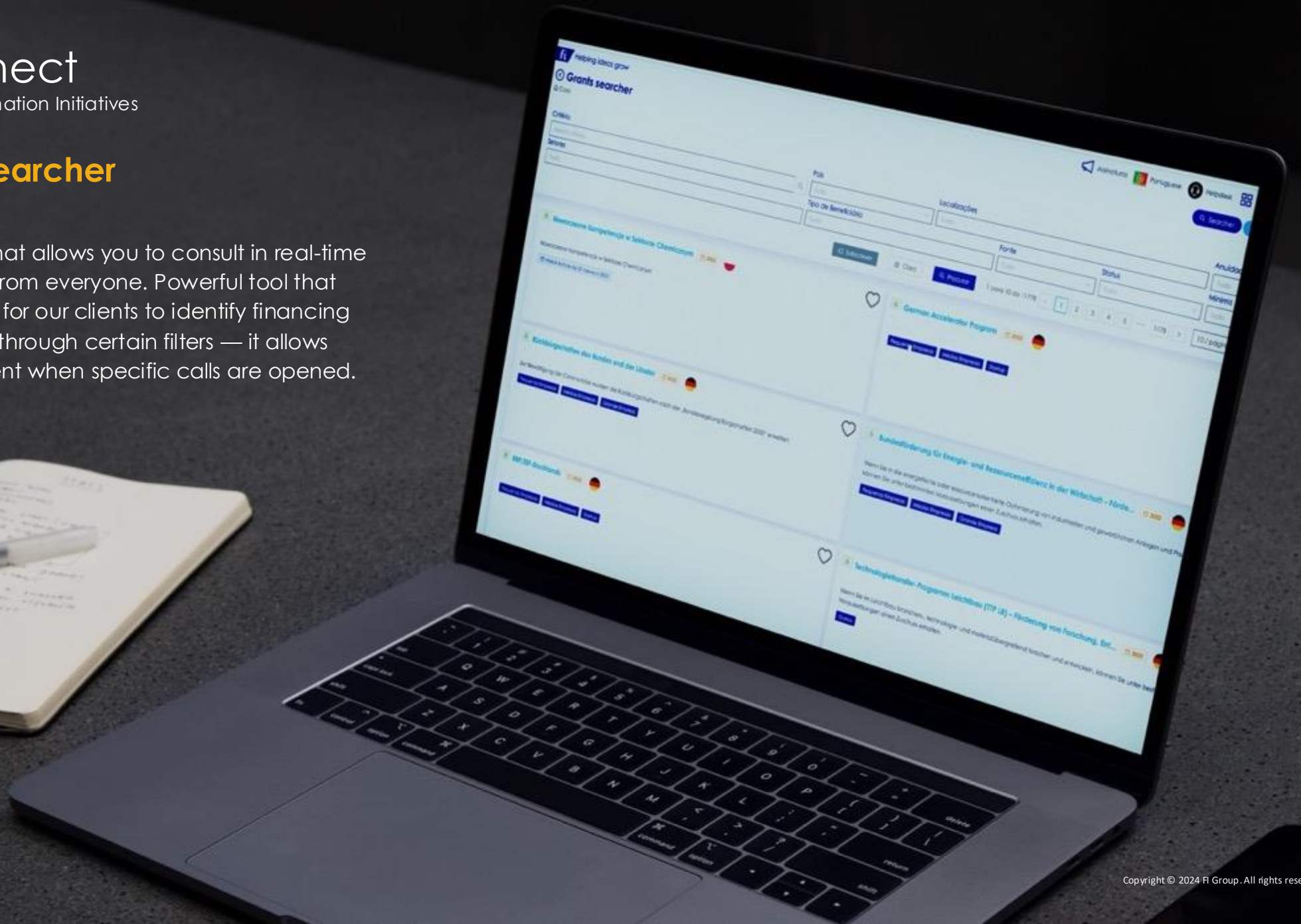


# FI Connect

Digital Transformation Initiatives

## Grants Searcher

Application that allows you to consult in real-time notices/calls from everyone. Powerful tool that makes it easy for our clients to identify financing opportunities through certain filters — it allows alerts to be sent when specific calls are opened.

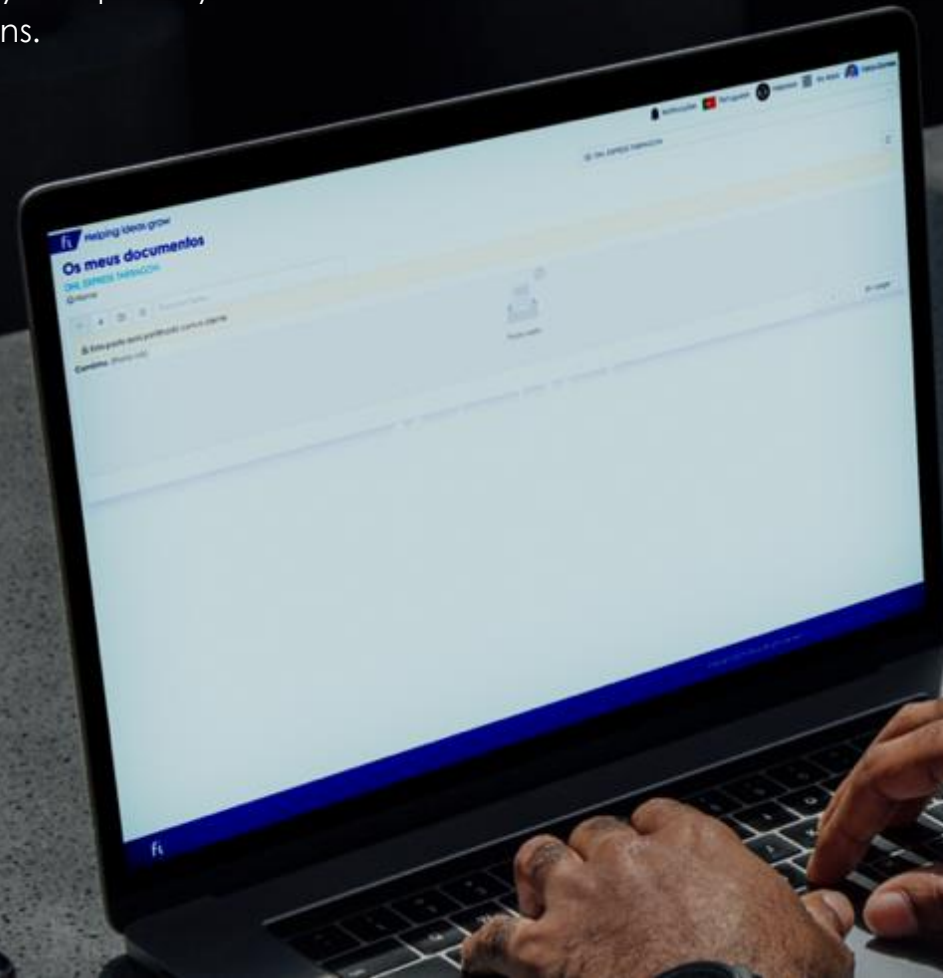


# FI Connect

Digital Transformation Initiatives

## FI Docs

Tool that enables the document management of files related to applications and projects, increasing security and privacy according to specific permissions.

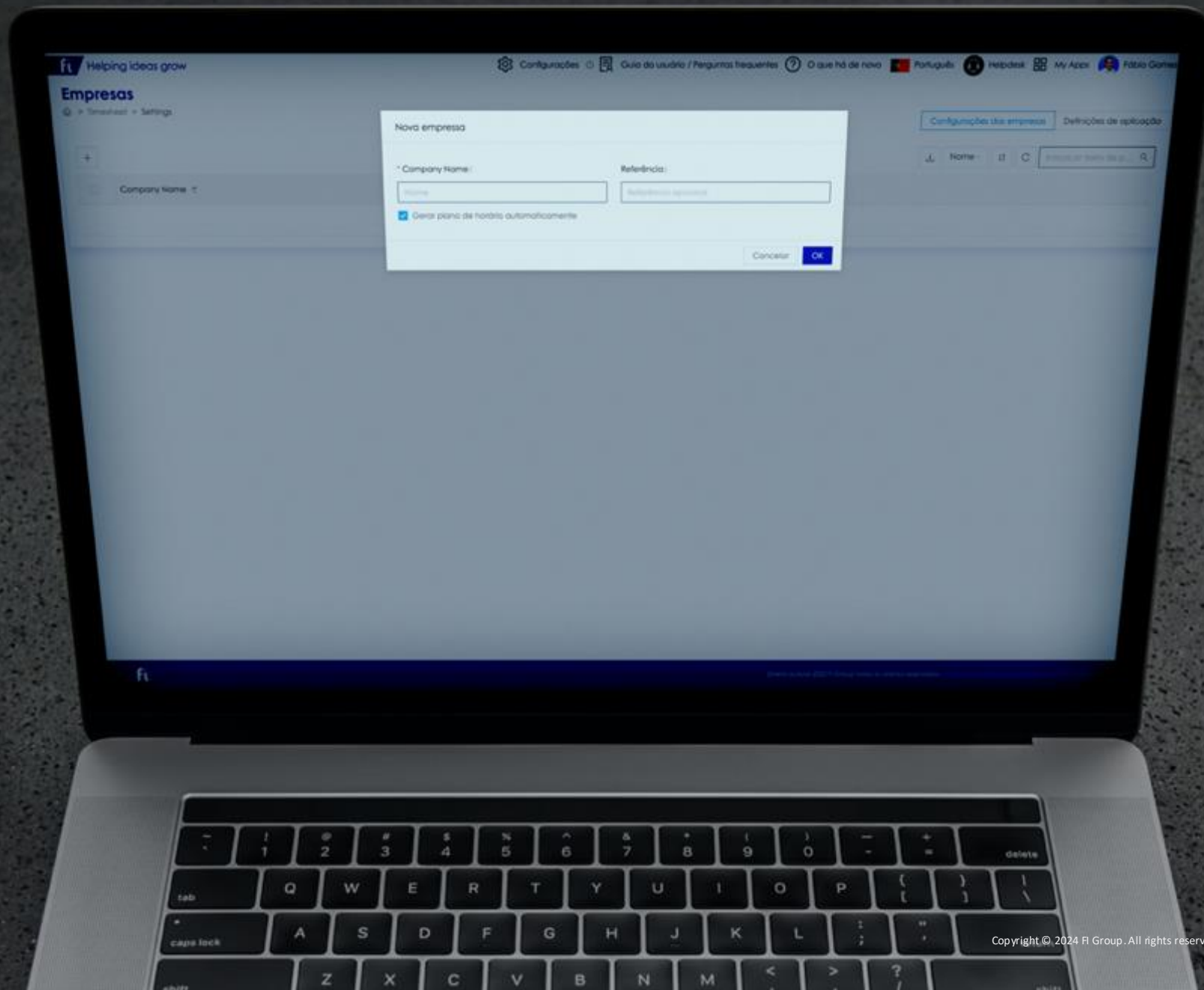


# FI Connect

Digital Transformation Initiatives

## Time Tracking

Solution that facilitates the accounting and planning of hours allocated by consultants/human resources assigned to a certain project(s).

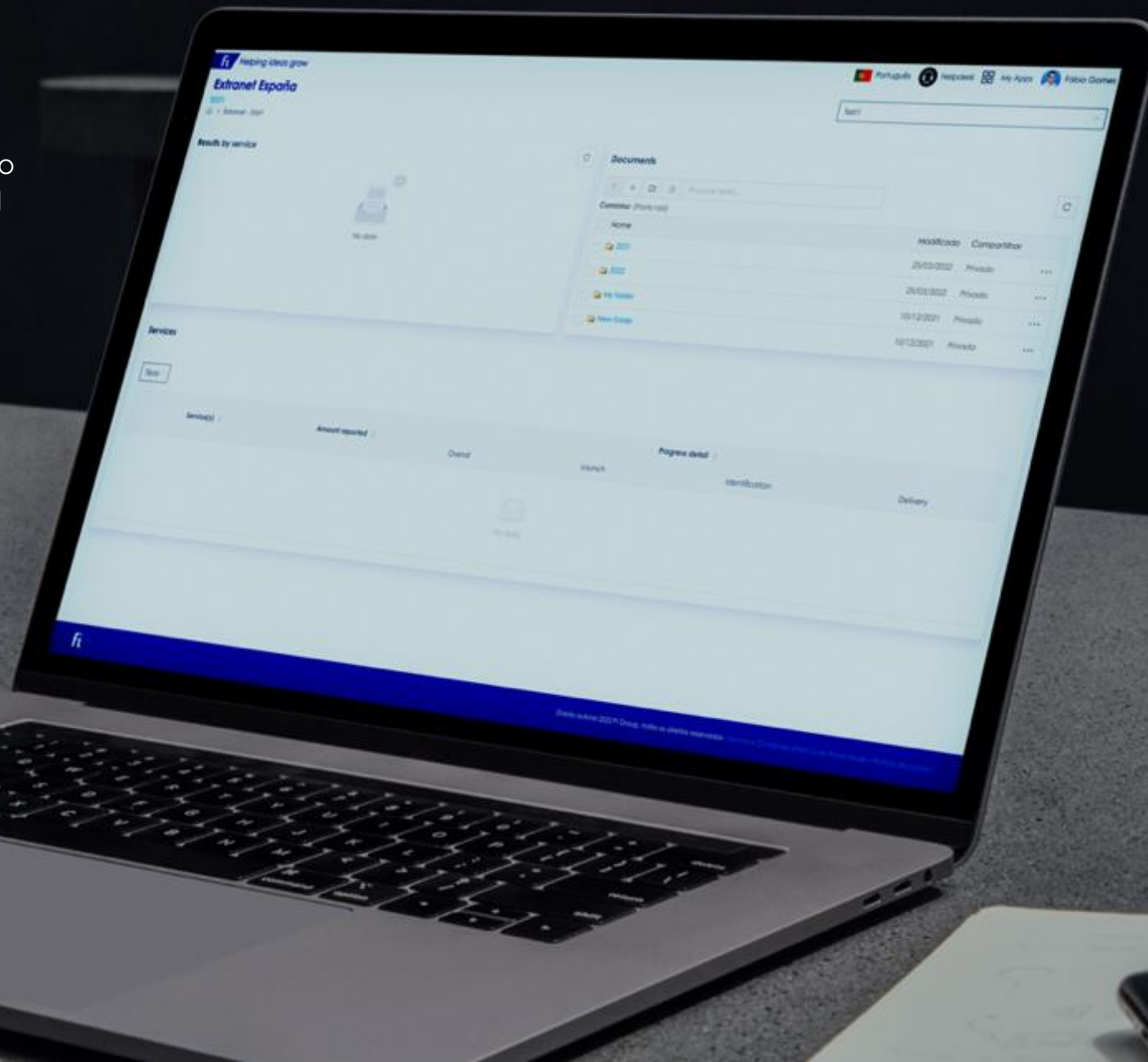


# FI Connect

Digital Transformation Initiatives

## +FI

Extranet/portal dedicated to our partners, customers and suppliers.



# Strategic Projects

FI Group Portugal



## It aims to increase collaborative projects between ESCTN and companies

We are a founding partner and Vice-President of the Board of **DataColab – Collaborative Laboratory for Data-Driven Innovation Services**, which aims to promote and carry out R&D initiatives and activities aimed at creating a cross-sectoral innovation ecosystem, with multidisciplinary stakeholders.



Its mission is to redefine the way we produce, consume and live, from the generation and standardization of data to the analysis of data and the development of tools to support decision-making, ensuring its integrity and security throughout the value chain.

This initiative is led by the multinational company SGS and co-promoted by the companies FI Group and Smartwatt. Representing the scientific world, this structure has the presence of the Polytechnic Institute of Viana do Castelo, the University of Minho, the University of Porto and the New University of Lisbon.

[→ More information](#)





# Bairros Comerciais Digitais

FI Group Portugal

## 1 in 10 FI Group applications

The Digital Business Districts (BCD) project, integrated in component 16 of the Recovery and Resilience Plan, seeks to promote the digitalisation of the economy, through technological adoption by economic operators and the digitalisation of business models.



131 applications  
**13 from FI Group**



52.5M€ allocation  
**11.5M€ to FI Group**



36,137 establishments  
**2.825 of FI Group**



FI Group, aware of the challenge, sought to position itself with its customers to assist them in the application process, from the identification of digital needs to the construction of the diagnosis and action plan, including the survey of the market reality, identifying stakeholders and studying financial feasibility.

This partnership will allow several municipalities to offer a better consumer experience, develop new business models and increase the digital skills of employees in the areas of commerce and services.

The initiative represents an investment of 17,529,355.37 euros in promoting the development of digital innovation in 2825 establishments located from North to South of Portugal, including Autonomous Regions.

[→ More information](#)



"FI Group Portugal leads applications for the "Commercial Districts" project"

# Test Beds

FI Group Portugal


## FI Group partner of 20% of the innovation consortia of the National Network of Test Beds

The concept of Test Beds aims to create and provide adequate infrastructure and equipment, through robust and well-positioned companies that have the capacity to provide these services to small and medium-sized enterprises (SMEs) and startups. Services include testing and experimentation of products or systems, in physical or virtual spaces.



 30 applications  
**6 of FI Group**

 €141M allocation  
**17.5M€ of FI Group**

 2711 riders  
Develop by 2025  
**- FI Group (updating)**

The National Network of Test Beds, which aims to provide Small and Medium-sized Enterprises (SMEs) and startups with the necessary conditions to test new products and services, has 30 approved applications for the development of innovation consortia - which means that FI Group currently assumes a 20% share.

This initiative is part of the Companies 4.0 Incentive System of the Recovery and Resilience Plan (PRR) and has a total allocation of 150 million euros.

Among the applications under the purview of FI Group, which is a partner of two of the six Test Beds, are: **The Smart Lab - Aveiro, Collaborative Productization Network, Aveiro Media Competence Center Test Bed, Future Collaboration Test Bed, [NextGen Mobility](#)** and **Textile of the Future**.

[→ More information](#)



"FI Group Portugal partner of 20% of the innovation consortia of the National Network of Test Beds"

## FI Group promotes green hydrogen production projects worth 90 million euros

This amount will be invested in only six of the 39 applications submitted in the second notice launched by the Government to subsidize this type of projects and which represent more than 15% of the initiatives that will have public funding included in this measure.



39 applications  
**6 of FI Group**



Investment value  
**€90M from FI Group's applications**

Most of this investment will be located in the Central region, in a sign of demonstrating the potential of this area of the country for the implementation of projects focused on the production of clean energy.



The six applications that benefit from the support of FI Group Portugal will thus be "included in the REPowerEU program, a proposal launched by the European Commission to promote the energy independence of the community bloc, namely in relation to the supply of fossil fuels by Russia, as a response to the Russian invasion of the Ukrainian space and the consequent inflation of energy and food prices", can be read in the company's statement.

Helena Amador, Team Leader of FI Group Portugal, points out that "these projects aim to contribute to the goal of carbon neutrality, promoting the energy transition by supporting renewable energies, in particular with regard to the production of hydrogen and other gases from renewable sources".

[→ More information](#)



*"This amount will be invested in only six of the 39 applications submitted in the second notice launched by the Government to subsidize green hydrogen production projects."*

## Digital Innovation Hub



We were co-promoters in 2 different DIHs (DigitalBuilt and InnovTourism).

These are collaborative networks made up of dedicated digital competence centres, which aim to stimulate the uptake of advanced digital technologies by businesses, in particular SMEs, through the development, testing and experimentation of these technologies.

## Consultancy Strategic



Our experience in the field of R&D+IT (Research and Development + Technological Innovation) allows us a unique position to create differentiating strategies for each client, from idea to implementation.

This advantage allows us to create value for shareholders and stakeholders by defining the answer to the most strategic business issues.

## Studies & Sector Analysis



We have been developing several studies and surveys with different sectors of the Portuguese business fabric.

This type of content is something that we want to continue to offer to the market, because we believe that access to this type of information is important to pass on the feedback of entrepreneurs in building better solutions to support companies.

## Business Reception Areas

We approved 5 applications under the call for applications addressed to the New Generation Business Reception Areas, financed with a total value of 110 million euros by the Recuperação e Resiliência (PRR).

The municipalities of Chaves, Melgaço, Rio Maior, Campo Maior and Beja will modernize industrial zones and business areas already existing in their territories, to prepare them for the green and digital transitions and ensure an improvement in the competitiveness of the companies installed there.

€ Approved investment amount  
**70M€ from FI Group**

## Mobilizing Agendas

We approved 2 applications under the Agendas/Alliances mobilizing business innovation, for the reindustrialization of Portugal, in the Component C5 – Capitalization and Industrial Innovation.

The first - Agenda Drivolution, led by VW Autoreuropa, had the participation of 40 partners with an investment of €170M. The second – Microelectronics Agenda, led by Amkor, is composed of 20 partners and with an investment of €80M.

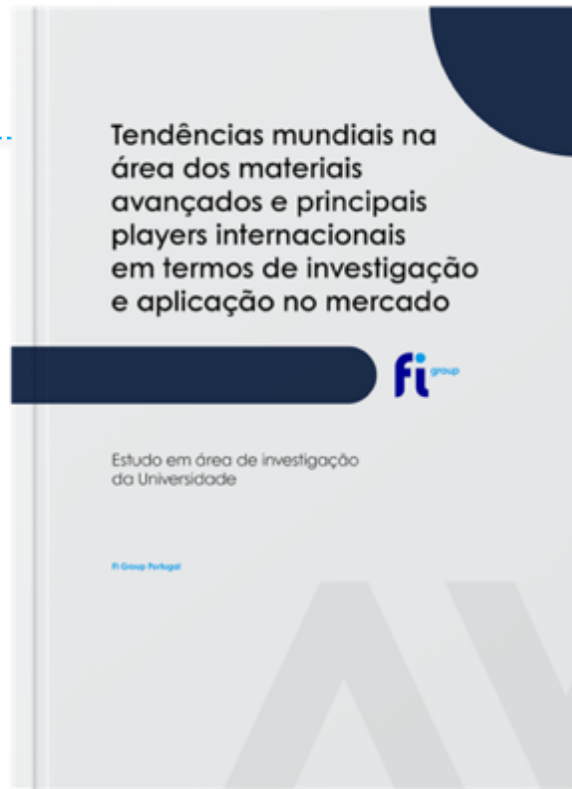
€ Approved investment amount  
**250M€ to FI Group**



# Sector Studies & Analysis

Strategic Consulting





## Worldwide trends in the field of advanced materials and key international players in terms of research and application in the market

**Sector**  
Advanced Materials

**Objectives**

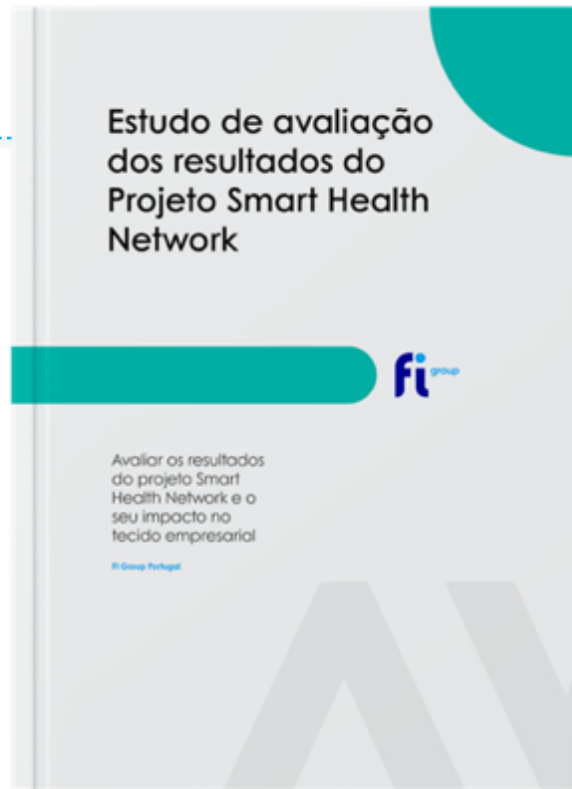
- Present advanced materials and their application and research context

**Lines of study**

- Introduction to Advanced Materials
- Markets
- Trends (application and research)

Addressee





## Evaluation study of the results of the Smart Health Network Project (ongoing)

Sector  
Health

### Objectives

- Development of a methodology for evaluating the results of the project
- Systematization and evaluation of the project's results and their impact on the business fabric

### Lines of study

- Development of Methodological Report
- Development of a project evaluation questionnaire
- Development of final evaluation report

Addressee







## Segment mapping Digital/Smart Health in Portugal

Sector  
Health/ICT

### Objectives

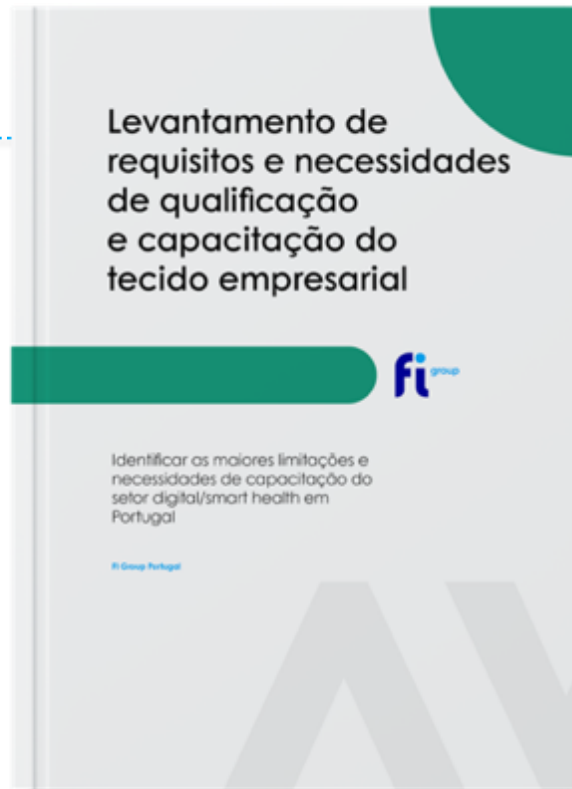
- Mapping of stakeholders in the Digital/Smart Health segment
- International benchmarking

### Lines of study

- Mapping of companies, users, R&D entities with relevant activity in Digital/Smart Health
- Mapping of incubators/technology parks with the potential to host companies in the Digital/Smart Health segment and business financing entities (CV, Business Angels)
- Company survey and international benchmarking analysis of 3 relevant ecosystems in the area of Digital/Smart Health

Addressee





## Survey of requirements and qualification needs and training of the business fabric

**Sector**  
Health/ICT

### Objectives

- Analysis of medical device and digital health regulation
- Identify the greatest limitations and training needs of the digital/smart health sector in Portugal

### Lines of study

- Analysis of medical device and digital health regulation (deskwork)
- Company survey
- Analysis of the questionnaire and identification of the biggest problems in the sector
- Identify priorities for the qualification and training of the business fabric

Addressee





## Sectoral roadmap for R&D (ongoing)

### Sector

AEC (Architecture, Engineering and Construction)

### Objectives

- Geographical mapping of companies in the AEC sector
- Identify key challenges, trends, and emerging technologies in the AEC sector
- Identify key national and international R&D funding initiatives
- Mobilization of industry stakeholders, development of interviews for success stories and organization of workshops

### Lines of study

Ação 1. Mapeamento do setor AEC

- Ação 2. Casos de sucesso de aplicação de IDI no setor AEC
- Ação 3. Preparação e realização de workshops
- Ação 4. Desenvolvimento de estudo “Roteiro Setorial para a I&D”
- Ação 5. Reuniões de acompanhamento e gestão de trabalhos

Addressee





## CONTECHFUND (ongoing)

Sector  
Construction

### Objectives

- National Funds Analysis
- Preparation of a file for an R&D fund for the construction sector
- Development of a methodology for analysis and scoring of companies and R&D projects

### Lines of study

- Raising and evaluating R&D Funds
- Summary of the characteristics of National R&D Funds
- Development of the technical sheet associated with CONTECHFUND
- Development of a scoring for R&D projects
- Monitoring meetings and work management

Addressee





## Technology Screening Industry 4.0

**Sector**  
Industry

### Objectives

Screening development of industry 4.0 technologies and their contribution to the United Nations Sustainable Development Goals (SDGs)

### Lines of study

- Survey of the main technologies of industry 4.0 and their contribution to the SDGs
- Development of 10 Industry 4.0 technology sheets: description of the technology, main application sectors, alignment with SDGs, areas of application in companies, main benefits, financial effort required for its implementation

Addressee

**Porto  
Business  
School**

/ University of Porto



## SIFIDE Framework: FI Group vs National Panorama (2021)

### Objectives

- Synthesis and comparison of SIFIDE data (FI vs Portugal) in the years 2016 to 2021

### Lines of study

Quantification of R&D expenditure and tax credit

- Analysis by type / age / location / company activity



## Portugal 2020 Study

### Objectives

- Understand the share of the IF at the national level and understand its evolution over time and the representativeness at the national level of the IF in terms of the Portugal 2020 programme.

### Lines of study

Portugal 2020 Framework

- National Overview
- FI Group Portugal Global Overview 2015-2021
- Analysis by campaign, typology and notice



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