

FDIATTRACTION: BEST PRACTICES LUIGI MERCURI - VESSEL GLOBAL / FEMAC

PRESENTATION INDEX

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- 2. AFTERCARE
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THE FUTURE OF INVESTMENT ATTRACTION





Synthetic fuels (CRI)



Bio-Cosmetics & Neutraceuticals



High grade food production & processing



Data Centers, Cybersecurity & Industry 4.0



Fish Farming & Processing



Indoor farming



Advanced Materials



Batteries & EV + Aerospace



Hydrogen



Life Science (Pharma, Biotech, MedTech)



Beverage Sector



Algae Aquaculture

SHORT- & LONG-TERM BALANCE











"HUNTING" FDI

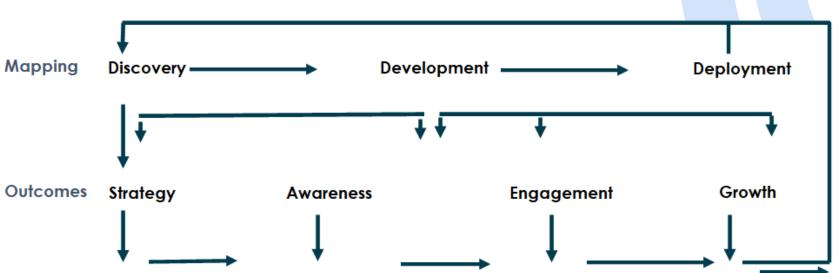




"FARMING" FDI



THE FUTURE OF INVESTMENT ATTRACTION



- Benchmarking
- · Trend analysis
- Stakeholder research

Activities/Tactics/Services

- · Perception Research
- Organizational review an strategy
- Incentives Strategy
- Sector Strategy
- Investor Targeting
- Marketingstrategy
- Competitive Analysis
- Metrics and Dashboard Development

- Branding
- Identity development
- Public Relations
- Media Relations
- · Content Creation
- Website
- Digital Marketing
- Advertising
- Social Media
- Events and Tradeshows
- Fam Tours
- Investor Outreach

- Investor servicing
- Project management
- Stakeholder management
- Site visits
- Incentive negotiations
- Marketing execution
- Investor enquiries
- Proposal evaluation
- Aftercare
- CRM Set up

- Reporting
- Training
- Knowledgemgmt.
- Org Impact analysis

Change

- Economic impact
- Incentives cost benefit
- Staff assessments
- Benchmark analysis
- Performance mgmt.
- Aftercare
- Policy advocacy
- Government communications review



INVESTMENT PROMOTION LIFECYCLE



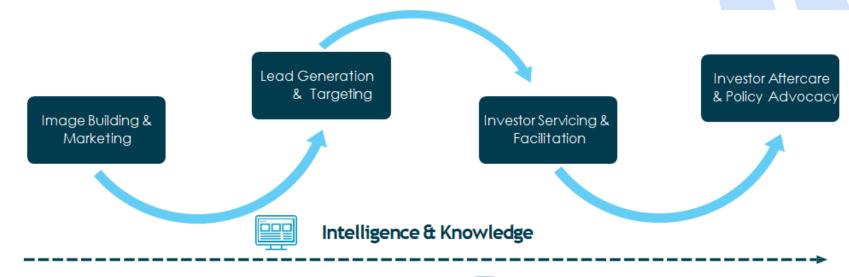




Image Building & Marketing

Create the market perception of your location as attractive locations for international investment.



Lead Generation & Targeting

Attract new investment projects by actively targeting specific investors in (prioritized) sectors. Lead generation entails targeting specific and companies with a view to creating investment leads.



Investor Servicing & Facilitation

Facilitate the efforts of foreign investors seeking to invest by providing service that can assist an investor in analysing investment decisions establishing a business and maintaining it in good standing.



Investor Aftercare & Policy Advocacy

Facilitate the continuing development of a foreign affiliate with a view towards maximising its contribution to the local economic development, including acting as a conduit for foreign investors.

AFTERCARE

- Aftercare is usually not a key function and typically receives far less attention and resources than new investment attraction or marketing and promotion.
- Agencies should stop "neglecting" aftercare in light of changes in the foreign direct investment landscape.
- FDI has been declining for a few years already. In many parts of the world, especially in developed countries, re-investment by existing investors already exceeds investment by new investors
- A recent report by UNCTAD estimates that in 2018, reinvested earnings by the top 5000 multinationals accounted for more than 52 percent of the investment by those companies globally.
- In other words, more than half of global investment is made by companies in locations where they already have a presence, rather than in a new location.





FDI ATTRACTION: HOW TO HUNT



Benchmarking

Value Propositions

Skills Development

Implementation

- Economic environment analysis
- Competitive FDI analysis
- FDI demand analysis

- Positioning strategy
- Sector analysis
- Target group evaluation
- Investment scenarios

- Identifying required skills
- Preparing job descriptions
- Training workshops
- Develop long term mentoring programs

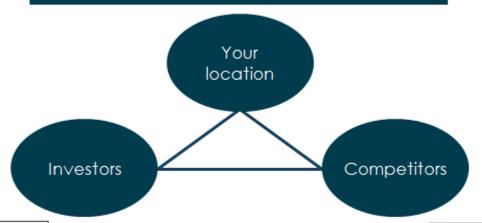
- Economic development strategies
- Data driven lead generation
- Marketing & communication

FDI ATTRACTION POSITIONING



Positioning matrix

- ✓ Image and awareness of your location
- ✓ Strengths and weaknesses of your location
- ✓ Competitive position of your location
- ✓ Development potential of your location
- ✓ Investment opportunities at your location



- ✓ Current global footprint
- ✓ Global expansion strategies
- ✓ Investment demand
- ✓ Location preferences
- ✓ Site Selection criteria

- ✓ Competitors' strengths and weaknesses
- ✓ Competitors' positioning
- ✓ Competitors' target groups
- Competitors' promotion strategy

TYPICAL MISTAKES





Unclear value proposition

Giving up too quickly, or "jumping around" too much

Promises not aligned with reality, e.g., availability of the right workforce

Procuring more leads than the team can handle

Relativizing one's strengths

No/weak follow-up after initial interest raising

Hiding one's weaknesses

Underestimating the impact of regulatory changes

Looking at substance and communications separately

Strong start, painful finish

No end-to-end perspective and/or support

No/little after-care

Overlooking currently active companies

FDI ATTRACTION STRATEGY





Distinctive target group

Some sectors already represent a distinctive target group, while others are highly diversified or fragmented in terms of products or services, making it hard to define a group of target companies.

Growth

Growth is a basic prerequisite for companies to expand internationally.

Greenfield examples

A growing market may not necessarily be an indicator of investment activity. In some rapidly expanding sectors companies are simply expanding existing operations or looking for acquisition targets rather than establishing new facilities.

Sufficient size of company pool

In some sectors, the number of companies with the potential for investing internationally is relatively small (e.g. mainly SMEs and/or only few large players), making a comprehensive investment attraction effort less worthwhile.

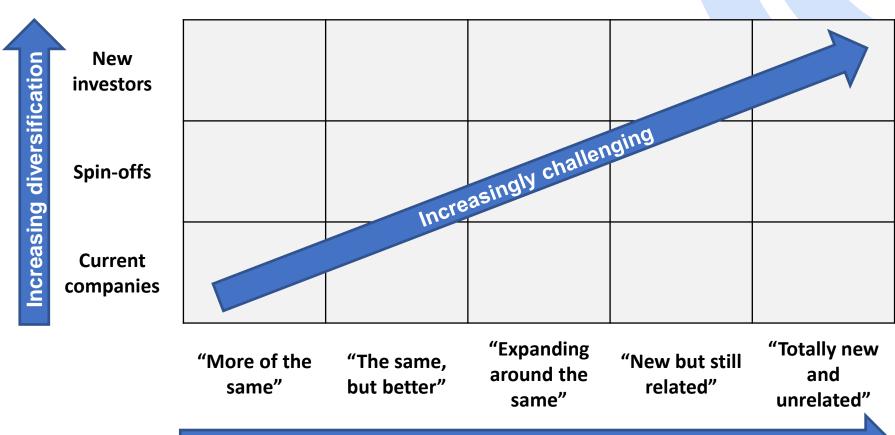
Location fit

Even though a sector might seem promising based on the previous 4 factors, it is important to determine whether the location meets companies' key location requirements.

As a result of this analysis, we identify a list of sub-sectors that seem to represent the highest potential for attracting investment to a location and which we pursue for investment scenario building and lead generation.

WHAT DO I WANT?





Increasing diversification (and in many cases innovation)

WHAT AM I DOING?



Increasing diversification

New investors

Spin-offs

Current companies

	Core o	f the current	project	
Not at th	e core of the	current proj	ect but: Don	't forget!
		"Evpanding		"Totally now

"More of the same"

"The same, but better"

"Expanding around the same"

"New but still related"

"Totally new and unrelated"

Increasing diversification (and in many cases innovation)

EXAMPLE: ICELAND









EXAMPLE: FDI ATTRACTION TARGETS / SUBSECTORS



Target Sector	Specific Sub-sectors	Geothermal Effluents Utilized	FDI prioritization rating
1.1 Aquaculture	Salmon, Shrimps	Hot water, hot steam, electricity	A = primary target (salmon)
1.1 Aquaculture	Salmon, Sillings	not water, not steam, electricity	B = secondary target (shrimps)
1.2 Algae culture	Spirulina, algae for pharmaceutical	Hot water, hot steam, electricity	A = primary target (spirulina)
1.2 Algae culture	applications	not water, not steam, electricity	B = secondary target (biofuels)
1.3. Insect Farming	Crickets & Grasshoppers	Hot water, hot steam, electricity	B = secondary target
2. Vertical farming	Aromatic herbs, medical herbs (cannabis)	Hot water, hot steam, electricity, CO2	A = primary target (aromatic)
-			A = primary target (medical)
3.1 Cosmetics, natural pharma and supplements	Fish and marine-plants	Hot water, hot steam, electricity	A = primary target
3.2 Chitin / Chitosan	Chitin and chitosan	Hot water, hot steam, electricity	A = primary target
4. Bio-fertilizers	Bio fertilizers from fish wastes production	Hot water, hot steam, electricity	A = primary target
5. Lithium extraction	Lithium from geothermal wells	Water, brine, electricity	A = primary target (after chemical analysis of water)
6.1. CO2 utilization	CO2 utilization for e-fuels	CO2, electricity	B = secondary target
6.2. E-fuels production	Methanol and ethanol	Hot water, CO2, electricity	B = secondary target
6.3. Green hydrogen production	Green hydrogen	Hot water, CO2, electricity	B = secondary target
7.1. Carbon fiber	Composite for aerospace and transportation	Hot water, hot steam, electricity	C = complementary target
7.2. Carbon nanoproducts	Hi-tech applications	Hot water, hot steam, electricity	B = secondary target
8. Geothermal aluminium recycling	Domestic recycling	Hot water, hot steam, electricity	B = secondary target
9 Datacentres	Security Database	Refrigeration, electricity	B = secondary target
10. Silica	Precipitated Silica utilization from geothermal by-product	Water	B = secondary target
11. Marine Salt	Marine salt 100% pure	Water, Steam, Electricity	B = secondary target

EXAMPLE: TARGETING SUBSECTORS







Target Sector Description

Production of bio-fertilizers from natural products, in particular fish production waste, through hydrolysation processes.

This sector represents a very interesting opportunity to exploit waste from fish and vegetable production in order to produce natural liquid biofertilizers, both for the local market or to export.



Market

Trends

 The biofertilizers market is estimated to be valued at \$2.3 billion in 2020 and is projected to reach \$3.9 billion by 2025, recording a CAGR of 11.6% during the forecast period



Geothermal **Effluents**



Electric consumption



WorkForce



Scale and cost structure



Investments



Attractiveness and ranking

A = Optimal use of geothermal effluents



Electricity



B = Average consumption

- Unit consumption: 1-2 KWh/Kg
- Total consumption (20,000-30,000 T plant): Up to 1.4 GWh/y
- Power: 320 kW

B = Average Workforce

- 30-40 workers
- Technicians

B = Average Margin

- Costs: Up to 0.7 \$/Ka 0.05 \$ Raw 0.15 \$ Electricity 0.35 \$ Workforce 0.15 \$ Misc. **Operative Costs**
- Price: 1.5 \$/Ka
- Margin: 0.8 \$/Kg

B = Moderate Investment

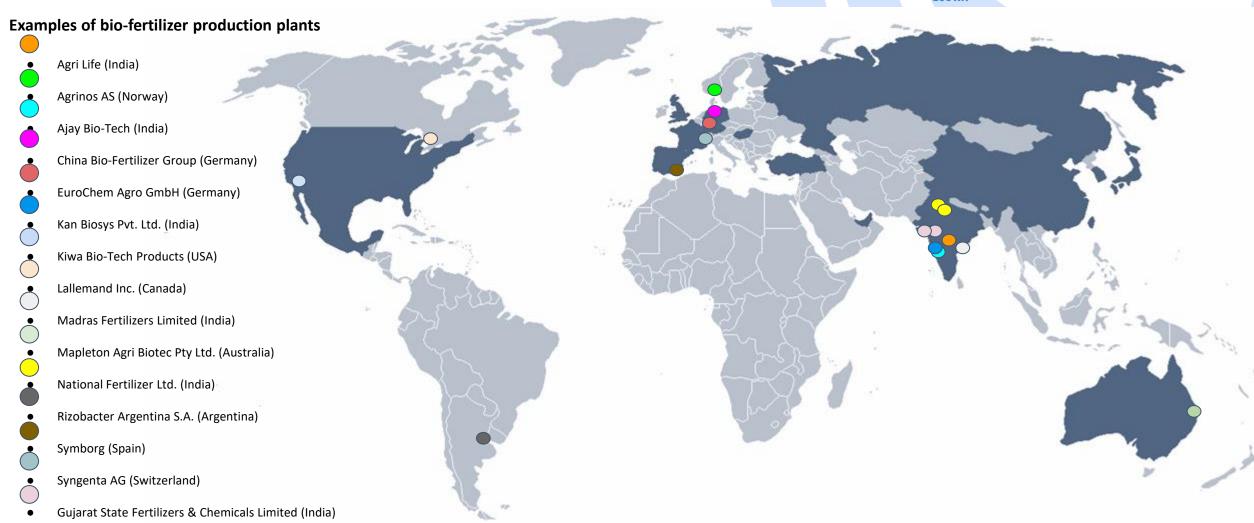
- Initial costs include buildings, plants, machinery (digesters, kneaders, shredders, packaging machines). An average estimate is between \$8 and \$9 million.
- A = Primary Target score: 16/21
- Very good availability of raw material, very good use of geothermal, average costs and workforce, average margin and investment

Strategy: Expand around the same



EXAMPLE: TARGETING SUBSECTORS





EXAMPLE: CITY OF MOSCOW









EXAMPLE: RANKING TARGET SUBSECTORS



Property of the property of																	
Experience Exp	Macrosectors	Intermediate target subsector identified by FEMAC to attract FDI into Alabusheva	already in this sector in Technopolis (5p x per	Companies already in this sector in the Zelenograd area (10p x	already in this sector in Alabusheva (15p x per		growth and future trend average in Russia (10 low - 30	market permeability (5 low - 15 medium - 30	workforce and	of jobs per subsector per average initial facility (5 low - 10 medium - 30 strong	of jobs per subsector per average initial facility (10 low - 25	2019/2020 in the Greater Moskow Region per subsector/product groups (5 low - 10	2019/2020 in the City of Moskow per subsector/product groups (5 low - 10	2019/2020 from the Greater Moskow Region per subsector/product groups (5 low - 10	2019/2020 from the City of Moskow per subsector/product groups (5 low - 10	the sector to contract manufacturing processes (5 low - 10 medium - 20	Total:
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RESEARCHING, SCOUTING & APPROACHING FDI



Targeting Outreach Qualification Follow-up

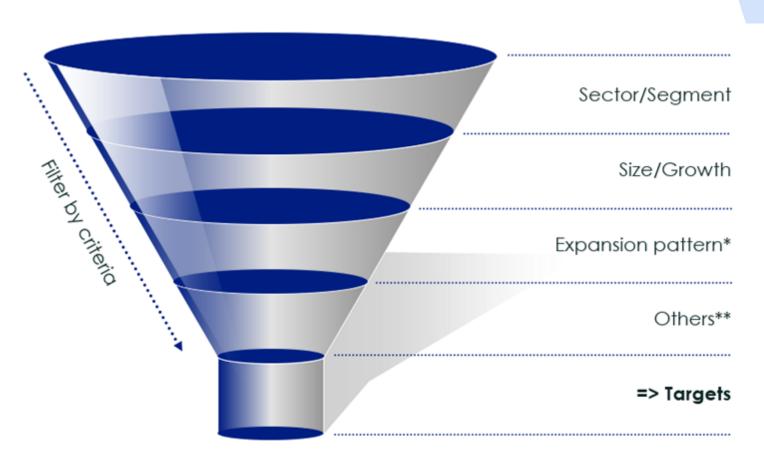
- Industry research of pre-defined target sub-sectors / product segments
- News research to identify growing companies with plans for target region
- Screen exhibiting companies at predefined events (trade shows, conferences etc.)
- Identify right contact person (ideally Clevel executives)

- The outreach method is decided case by case:
- Email marketing
- Direct calling
- Webinars
- Meetings at events
- Indirect targeting via multipliers

- Organization of conference calls between investor and client's industry/country expert
- Organization of meetings at the company's headquarters, at events or at client location
- Follow-up with investors in close coordination with client until final investment decision (including postponed project milestones)
- Support aftercare by staying in touch with existing investors and detecting expansion opportunities

THE "FDI FUNNEL"





^{* &}lt;u>Structure of International presence</u>, <u>preferred investment type</u>
** <u>Depending on targeted investment scenario</u>

RESEARCHING, SCOUTING & APPROACHING FDI



The sales process Overview of the FDI sales process Objectives and outcomes of each phase The corporate decision making process	 Influences on company "buying" behavior Understanding where a company is in the process Elements of the process within and outside of the IPA's control 			
Identifying potential investors How to identify a target Research and information sources Research techniques	 Qualifying companies before the first contact to identify potential investment opportunities and drivers Other potential sources of investment opportunities Specific examples of targets 			
Identifying decision makers Approaches for making the first contact	 Practical techniques (e.g. cold calling) Effective questioning Moving to the next phase of the sales process 			
First meeting and presentations • Meeting preparation • Practical techniques (e.g. presentation skills)	 Positioning the location's benefits Location features vs. benefits Dealing with objections 			
Follow-Up • Methods for follow-up • Timing	How to keep the company engaged Building relationships and providing value			

RESEARCHING, SCOUTING & APPROACHING FDI



Additional topics	
Marketing and communications The role of marketing in the overall investment attraction effort Effectiveness of different types of marketing channels	 The best marketing mix and required resources Developing sector-based propositions Differentiating the location Evaluating results
Websites and promotional material Essential material vs. "nice-to-have" Presentation and structure Content that appeals to potential investors	Effective use of data and statistics Case studies and testimonials Adapting materials to different target groups Tools and apps
Site visits Determining the company's requirements Selecting participants to represent the location	 Consistent messaging Identifying and addressing concerns Building rapport Avoiding surprises and common mistakes
Aftercare and key account management The role and importance of aftercare Selecting key accounts Monitoring existing investors	Dedicated key account managers – functions and skills Services for existing investors Evaluating investor satisfaction

GENERATION MANAGEMENT



- Once we've identified companies with genuine investment potential, we contact them directly a
 personal outreach is always the most effective approach.
- We perform thorough background research before we contact companies this enables us to conduct an informed discussion, convinces decision makers to disclose expansion plans & provides credibility to favorably position a client location.
- Trade shows & events are effective for meeting company decision makers, and personal meetings help to develop relationships. In Europe and North America, for example, we regularly attend the following events:
 - Automotive: IAA (Frankfurt, Germany);
 - Chemicals/Plastics: NPE The Plastics Show (Orlando, USA);
 - Composites: JEC (Paris, France);
 - Food: International Food Technology (Chicago, USA);
 - Life sciences: BIO/ BIO EUROPE (Boston, USA & Europe) / Medica (Duesseldorf, Germany);
 - Logistics: Supply Chain Summit (Atlanta, USA) / Transport Logistic (Munich, Germany);
 - Machinery: Pack Expo International (Chicago, USA).

TARGETING A COUNTRY: UNDERSTANDING ITS CLUSTERS



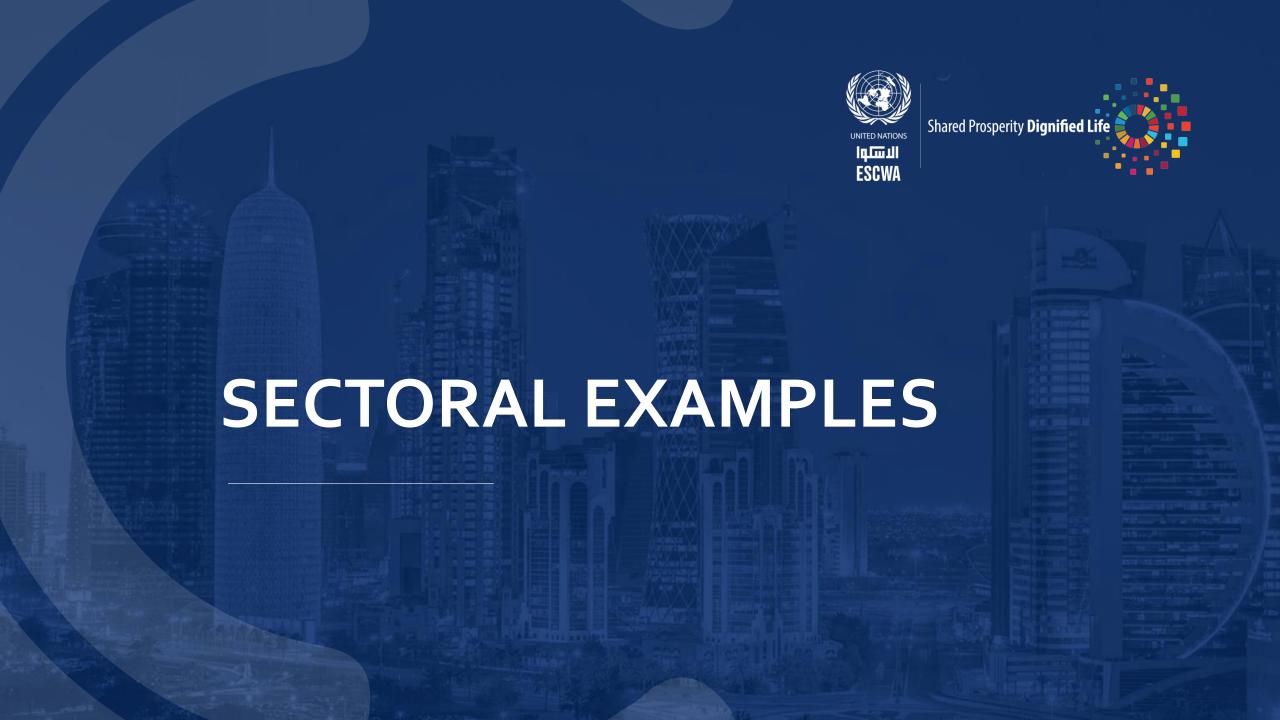


12 main centres of excellence across Germany since 2018

Medium-sized business and larger corporates are connected with new innovation partners from the scientific and start-up communities.

This is digitalisation made in Germany





QATAR AS A FOOD PACKAGING EXPORT CENTER





The Global Food
Packaging Market
offers opportunities for
cost-efficient
production platforms

Sustainable packaging is one of the global trends that could boost packaging exports from Qatar

Qatar's location makes it the ideal platform for exporting to major global packaging markets

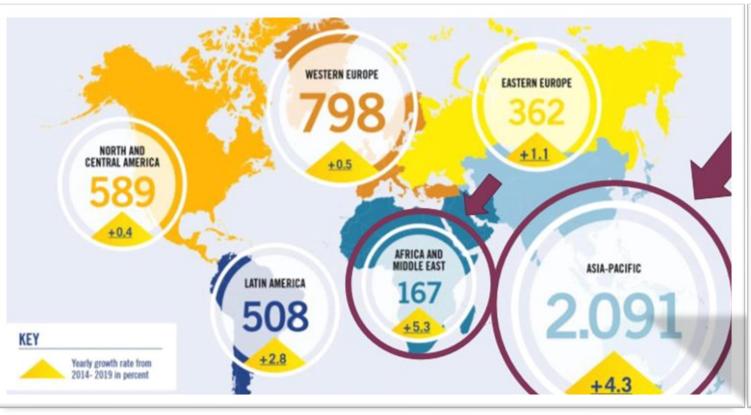
Qatar's technological competitiveness, skilled workforce and knowhow represents the base for a cost-efficient production.

Qatar aims at becoming a sustainability leader with the Agenda 2030. The country has the potential to become a champion in this field

Being geographically close to Asia and Africa, Qatar is the ideal platform to export to global packaging markets. Furthermore, Hamad port is solidly globally connected

QATAR'S HISTORY WITH FOOD PRODUCTION AND AMBITIONS FOR THE FUTURE

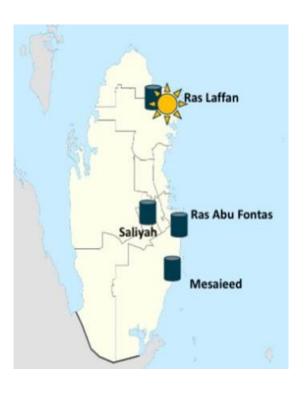




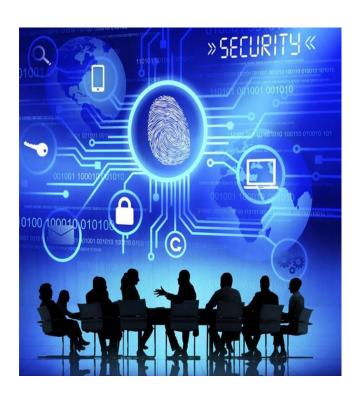


- Potential growth opportunities in India
- Beneficial opportunities for exporters in Japan, the Middle East and Africa
- Potential for cooperation with China, the world's largest packaging consumer market

QATAR'S HISTORY WITH FOOD PRODUCTION AND AMBITIONS FOR THE FUTURE



- Solar energy: a sector that has been acquiring considerable attention in the last years. The joint venture Qatar Solar, or QSTec
 (www.qstec.com) has the aim to lead Qatar to draw most of its energy from solar power.
- Due to the vast existence of natural resources available in Qatar, the electricity supply is guaranteed.
 Qatar produces almost 100% of its electricity from fossil fuel.
- Qatar's interest in renewable energy and innovation will ensure new kinds of energy sources
- Qatar's electricity supply is one of the highest in the electricity supply rankings
- Qatar's energy affordability is another factor that makes this country so attractive



- Cybersecurity is a sector in which the government has invested considerable time and resources in order to ensure the best measures
- This sector is in continuous improvement

- As Qatar plans to expand its economy on information and communication technology, resilience and urgency to ensure security in the cyberspace is a priority
- Qatar is a pioneer in cybersecurity legislation
- The agency Q-CERT is ready to ensure security in the cyberspace and avoid all possible threats
- They provide all possible security measure and cyber attacks and threats can be reported to them
- Protecting Qatar's ICT infrastructure is their priority

"A goal without a plan is just a wish"

شكراً - Thank you

Luigi Mercuri Head of Investment / CEO Vessel Global / FEMAC mercuri@vessel-global.com



WORKING GROUP - COMPANY 1



Operator of a circular economy company engaged in food waste treatment and processing. The company specializes in decomposing organic food waste and turn it into protein, insect fat oil, fertilizer and other products that are used to produce animal feed, enabling clients to promote and accelerate plant growth and make optimum use of available resources.

Entocycle is a British company developing the world's most efficient and sustainable way to produce protein. The rainforests and savannahs of South America are being destroyed at shocking rates in order to grow crops such as soy to feed farm animals. Using insects to feed livestock requires significantly less land and water compared to soy whilst being a natural part of the diet for many animals including fish, chickens and pigs. Their technology is significantly more efficient at producing protein than traditional methods of production as their insects are vertically farmed and not restricted to floor space or area. Thanks to their automated system they can produce at industrial scale and offer farmers a cost-effective and sustainable alternative to soymeal and fishmeal.

The company's insect-based organic waste management process converts organic waste from farms, restaurants, and supermarkets into insect-based biomass, thereby allowing farmers to create sustainable insect protein from organic waste, anywhere in the world, throughout the year.

ENTOCYCLE

WORKING GROUP - COMPANY 2

UNITED NATIONS

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Biotest is a global company that supplies plasma protein products and biotherapeutic drugs. Their products are primarily used in the therapeutic areas of clinical immunology, haematology and intensive care medicine.

For patients with serious and often chronic diseases they provide targeted treatment. In addition to the company headquarters in Dreieich (near Frankfurt, Germany), Biotest has subsidiaries and sales companies in seven European countries (France, Great Britain, Italy, Austria, Switzerland, Hungary, Spain) and in Brazil.

Production location Biotest's manufacturing facilities are located in Dreieich, Germany at the company's headquarters. Together with its contract partners, Biotest can process up to 1.5 million litres of blood plasma annually. Biotest is currently working towards doubling its production capacities with its "Biotest Next Level" investment programme in Dreieich

Biotest products are currently marketed in more than 90 countries around the world. Biotest either sells its products directly through its own subsidiaries or in cooperation with local marketing partners or distributors. The raw material for plasma protein products is human blood plasma. Biotest collects plasma through plasmapheresis in proprietary collection centres in Germany, Hungary and the Czech Republic. Plasma donations and processing are subject to very strict safety requirements and regulations.



Legal	Regulatory	Financial	Companies	Academics	
1.	1.	1.	1.	1. Both	
Qstp	Municipality and environment -2	Engine network	QD Waste	Qatar energy and enviroment	
Freezone -2	Ministry of Commerce and	Qatar development bank-2	Chamber of Commerce-2	centre	
Chamber of commerce	industry	QFC	2.		
Municipality and enviromentn—	Ministry of Public Health-health registration department	Central Bank	Sidra	Qatar University-3	
Agricultural Research Centre	QFC		Private Health Sectors	Texas A&M	
Ministry of Commerce and industry - 2	Freezone	2.	Boom Waste Treatment		
Ashghal	Trade and Economy – 2- Standards	Same as above	CoC-2	Calgari Uni	
Astiglial	Authority	BotH:			
	Culture Ministry		Both	Cornell	
2.	2.	Ministry of Finance	QSTP		
Ministry of public healthy- 2	мон,	Qatar Tax Authority	QP	2.	
Both.	Interior ministry	Investment Promotion Authority	Food Companies	QBRI-2	
Legal experts from MOPH	Assghal		Livestock companies		
Private legal firme					