

We value Values



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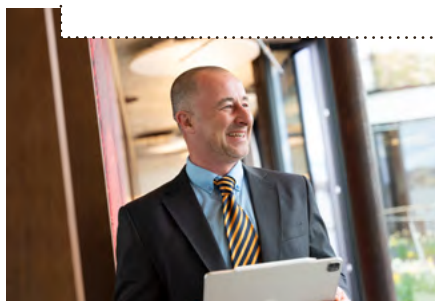
ALL THE BIG STUFF
YOU NEED TO READ
ABOUT 'CAUSE IT'S
REALLY IMPORTANT
TO KNOW



CTP just released its **H1 2023 results**, showing outstanding operational and financial results. All employees can be proud of their valuable contributions to the company's success.

A key CTP advantage is that our parks, create synergies between businesses, local communities and educational institutions, which brings high added value and a positive long-term economic impact.

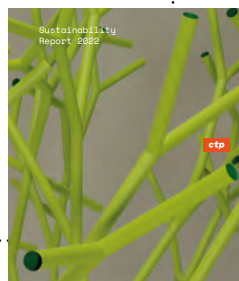
CTP is extending its reach to new markets. Following a trip to Asia, we are opening an office in the region to get closer to Asian clients considering nearshoring locations in Europe.



Peter Čerešník joined CTP in April 2023 to serve as our new Group COO, further professionalising the company and setting it up for future growth.

In June, CTP published its first **Sustainability Report**, which should be required reading in CTP 101!

Download a copy from our website or ask reception for a printed copy.



CTP is expanding its innovative community developments: **Two new Clubhaus locations** are under way in Warsaw and Ostrava, and we are opening two more **Clubco co-working hubs** in the Czech Republic—in Prague and Ostrava.

GLA (owned)
H1 2023

11.0

MILLION SQM

Landbank
H1 2023

20.7

MILLION SQM

Under Construction
H1 2023

1.8

MILLION SQM

CTP CONTINUES TO DELIVER STRONG PERFORMANCE, BOTH OPERATIONALLY AND FINANCIALLY, DESPITE THE MACROECONOMIC UNCERTAINTIES OF THE FIRST HALF OF THE YEAR.

Remon L. Vos
CEO

**LET'S DANCE!
DANCE!**

CTP has had an excellent start to 2023, both operationally and financially, as demand for our full-service property solutions continues to grow.

We signed many new leases in H1 totalling 850,000 sqm, at an average rental price 12% higher per/sqm compared to the same period last year. We also reached another milestone during H1, as we successfully grew the portfolio to 11 million sqm of gross lettable area ("GLA") with the delivery of an additional 413,000 sqm of new space, including 120,000 sqm at CTPark Amsterdam City. We currently have 1.8 million sqm of properties under construction and expect to deliver around one million sqm by the end of the year with 10.6% Yield on Cost, which we think we can grow in the near term to 11%. We remain the largest publicly listed industrial property developer by GLA in Europe.

I am also pleased to report robust H1 financial results, with €654 million in contracted revenues for the next 12 months, a 21.5% increase compared to last year at this time. We have a widely diversified tenant roster of more than 1,000 blue-chip companies from a broad range of industries and sectors. Our rent collection rate remains strong at 99.8%, with like-for-like rental growth of 7.5%.

We remain market leader in our core markets and continue to grow market share across our portfolio in line with our targets. Key growth markets include Poland, where we have nearly 450,000 sqm under construction and where we have seen rental growth increase by more than 30% in some regional markets. In Austria we opened our first park in H1—CTPark Vienna East, near the airport—and are developing two more locations around the capital. We are also actively growing our team in Germany, where we are developing our first own-built projects, with plans to become a major player in that country in the future.

As part of our long-term strategy we are constantly growing our development landbank, which stood at 20.7 million sqm at end H1 2023. Two-thirds of this land is located at or adjacent to our existing parks and is pre-permitted for rapid expansion. We continue to build the landbank to reach our target of growing the portfolio to 20 million sqm of GLA by the end of the decade.

Like-for-Like
Rental Growth
H1 2023

7.5%

Retention Rate
H1 2023

92%

Full-time Employees
H1 2023

>746



EPRA Earnings per Share
H1 2023

+20.5%

Contracted Revenues
NEXT 12 MONTHS

€654

MILLION

Proforma Liquidity
H1 2023

€1.5

BILLION

Occupancy
H1 2023

93%

Yield on Cost
H1 2023 (Projects under construction)

10.6%

CEE REMAINS “BUSINESS SMART”

During H1, I continued to travel around the portfolio to meet with our long-term tenants and discuss their plans and strategies and how CTP fits in. In June, I had the opportunity to visit some of our Asian clients and prospective clients in places like Taipei, Hong Kong and in mainland China. We see fantastic opportunities to grow with them in our Central and Eastern European (“CEE”) markets, for a number of reasons.

First among them is the on-going nearshoring trend—which we expect to become entrenched as the new paradigm for global business, as companies rethink their global footprint in terms of where they produce for whom. The focus is to de-risk supply chains by locating manufacturing and supplier hubs closer to final customers. Many Asian companies are now lining up to move their manufacturing to places like Mexico for the North America market, and are looking for locations to serve Europe.

We see opportunities to partner with more companies from Asia, particularly in CEE markets, as they understand the business-smart benefits that the region offers—strategic location, excellent infrastructure, smart people, and lower operating and labour costs than Western Europe. Asian companies are already active players in several drivers of investment in CEE, such as electronic components, chips, semiconductors, consumer electronics, and automotive—particularly electric vehicles—and these existing synergies add to the CEE’s attractiveness as the destination for nearshoring to Europe.

**We don’t dream,
at CTP we plan...
we’re going BIG!**

Based on the interest we are seeing, we’ve opened an Asian office run by Jaromír Černík, who brings nearly 20 years of on-the-ground experience in Asia, and with whom we worked successfully in the early 2000s during his tenure at CzechInvest, the Czech investment agency, during the first wave of investments from Asian countries in CEE. Jaromír’s role will be to connect potential Asian clients with CTP and help them find the best location within our network.

GROWING THE COMPANY

As our business grows, so too does our company. We reached a headcount of nearly 750 Parkmakers at the end of H1. New hires during the period include Peter Čerešník, our new Group COO, who will help raise CTP to the next level. His focus includes the roll-out of our new energy business, improving our HR function, and overseeing our core markets in the Czech Republic, Hungary and Slovakia. Peter’s experience is vast and includes serving as a board member for international office developer HB Reavis and as country team leader for Microsoft, SAS Institute, Alef Nula and Exe.

We continue to grow in all markets, especially in Poland and in Germany, where we see strong potential for growth. Market dynamics are different in our Western European markets than in CEE, but we are seeing low vacancy, and demand remains strong. Some of our peers have slowed down their supply in Western Europe, mostly due to funding or exit-strategy reasons, and this creates further opportunities for us to expand.

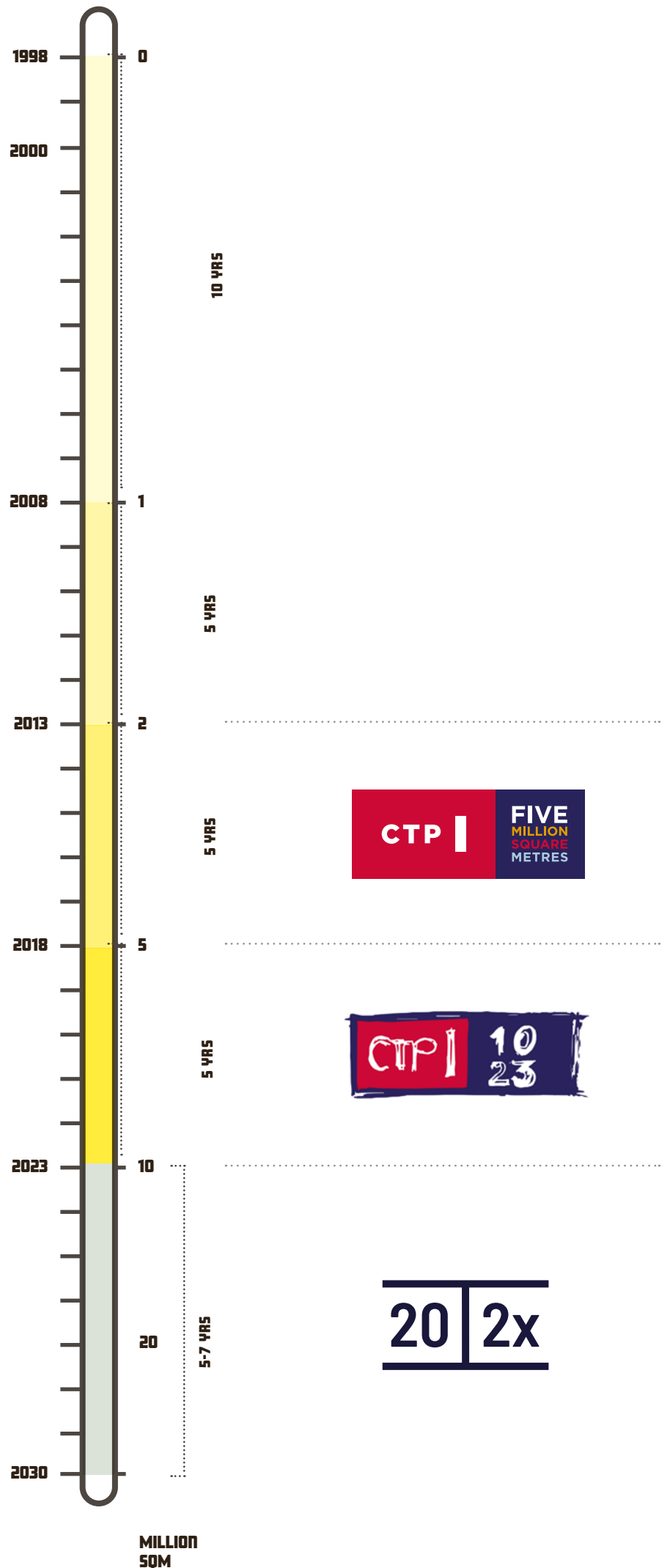
I am also excited about the growth of our energy business. We continue to install solar panels on the rooftops of our buildings to provide renewable energy to our park tenants, which is much appreciated by them, as it is in line with their ESG strategies. We are on target to install over 100 MWp of new solar-generating capacity by the end of this year.

I am grateful to all of CTP’s Parkmakers, for their talent, dedication and on-going commitment to upholding our values and serving our clients. My thanks go also to our many business partners and investors, for your trust and confidence. We remain optimistic about the growth prospects for our business as we enter the second half of this year.

DID YOU KNOW, WE ALWAYS MEET OUR TARGETS?

Since 1998. It took us ten years to reach our first million sqm, and we've been speeding up ever since.

**EACH TIME WE SET
A NEW GLA TARGET,
WE DOUBLE IT, SETTING
THE BAR HIGH INDEED!**



A MAN OFF

CTP IS SUCH A GREAT STORY—OUR TEAM, CLIENTS AND OVERALL HISTORY ARE THE REASONS THAT I AM HERE.

WHAT DOES YOUR JOB AS CTP'S GROUP COO ENTAIL?

Various functional responsibilities, such as business development, construction, procurement, IT, HR, project controlling and a few others. Another dimension of my job is overseeing our business in the Czech Republic, Slovakia and Hungary.

WHAT ARE SOME OF YOUR GOALS AT CTP?

CTP is such a great story—our team, clients and overall history are the reasons that I am here. Currently I am getting to know our team and am excited to become a part of our joint dream of growing our business at a pace seen nowhere else. In the short term, I am responding to the various business needs of our teams, ranging from business development, project controlling, IT, HR, etc.

For the mid-term I see lots of opportunity to boost our energy business, to further advance our design and construction of future-proof buildings, to continue to strengthen our ESG agenda, and to continuously improve the quality of our property management.

Over the long term, it's about CTP continuously growing its business not only in its existing markets, but also expanding our presence to other countries in Europe and perhaps even beyond the continent. And most importantly, to keep our entrepreneurial spirit and unique CTP culture.

WHAT DO YOU SEE AS THE MAIN CHALLENGES FACING CTP AND HOW DO YOU PLAN ON TACKLING THEM?

Preparing our business to double its size before the end of the decade is a great challenge. We need to become more efficient, continue to improve our operational model, keep things simple and not be shy to be innovative.

My approach to those challenges is to try to help CTP become a learning organisation, so that we can respond to challenges continuously over time.

TELL US ABOUT THE ENERGY BUSINESS, WHY WE ARE DOING THIS AND HOW WILL IT IMPACT CTP, EMPLOYEES, CLIENTS AND OTHER STAKEHOLDERS?

There are two major reasons to go bold on our energy business. In the first place, it's a contribution to the ESG agenda, which is very high on the priority list of the majority of our clients. It also shows great potential to become a third pillar of our business, together with our developer and operator activities.

WHAT BROUGHT YOU TO CTP? HAS YOUR IDEA CHANGED NOW THAT YOU'RE WITH THE COMPANY FOR SOME TIME?

Having the chance to talk to many Parkmarkers prior to joining, spending about two months in discussions with company leadership, traveling to several countries—all of it. What I saw were people with great passion, with a special culture of "full-speed" all the time.

It doesn't change. After several months it still resonates with me, and I am finding even more passion to be part of our team.

WHAT ARE WE DOING IN TERMS OF PROCUREMENT, SUPPLIER SOURCING, AND INNOVATION TOWARDS MAKING MORE SUSTAINABLE BUILDINGS?

We've learned a lot about how to bring better solutions and satisfy more of the ESG-related needs of our clients. Currently we are putting together a "must do" list of building specifications for our building design, which will evolve over time. A big area of our focus is also building reporting and further developing capabilities to better understand our environmental footprint.

WHY IS HR AND ORGANISATIONAL DEVELOPMENT A FOCUS? WHAT ARE YOU PLANNING TO ACHIEVE THERE?

We are a people-driven business, and our team is our biggest value. Making us better, stronger, and utilising our people's talents to the fullest can only happen if we evolve into a learning organisation. And that's where I wish to focus our attention over the coming years.

WHAT IS YOUR APPROACH TO DECISION-MAKING/PROBLEM SOLVING?

Understanding deeply before deciding and acting. Taking into consideration the broader picture—what are the areas where my decision will have an impact?

HOW DO YOU PRIORITISE YOUR TIME AND RESPONSIBILITY?

It would be great to spend the majority of my time talking to clients, understanding their needs and bringing the best service to them. But other areas are also crucial—evolving our organisation, people, and processes, talking to our suppliers. Part of what I do is well structured in advance, and part of my time is spent responding to the current and ad-hoc needs of the business.

WHAT DO YOU SEE HAPPENING OUTSIDE OF THE REAL ESTATE WORLD THAT MIGHT AFFECT CTP, BOTH POSITIVELY AND NEGATIVELY?

Economic slow-down. War. Political insecurity. Labour shortages. Changes in supply chains. Innovations. I could make a long list, but you would not learn anything new from it. At CTP we are very clear about what we want to improve—product innovation, ESG, our services to our clients, and our ability to absorb strong growth. Plus, we have our dreams and plans—to continue growing at a pace hard to see elsewhere, to be a strong partner to the communities where we do our business, and to keep our passion for what we do. And to remain "full-speed" people.



MANY HATS

What We Value

“Our values are
who we are”

It's commonplace for companies today to talk about their values. But what do “corporate values” really mean? Just as each company has its own unique culture, each defines its values in different ways. At CTP, what makes us tick—going full-speed, with the drive to win—hasn't changed in our 25-year history. Our strategy of long-term ownership—and the commitment to sustainable growth and communities and the accountability that go hand-in-hand with that strategy—has always set us apart. The times may have changed, but not us. Our values are who we are. They are not just ideals or aspirations: they are the nuts and bolts of how we do business, both as a company and as individuals. They are like a road map, showing how we've gotten to where we are and charting our course for the future. They also bring us together and attract like-minded professionals who share our company credos. At CTP, we don't just stand by our values—they they guide us and move us forward. Our values are what we value the most.



Entrepreneurial

We bring our hands-on, can-do entrepreneurial spirit to everything we do. We play fair, and we play to win. We've built our success from the ground up and never rest on our laurels: the same entrepreneurial drive that made CTP what it is today carries us forward. We're leaders, not followers. With our experience and know-how, we see opportunities ahead of the curve and take calculated risks with the security of our strong financial position. Our mission is to create long-term sustainable growth and value in a changing world.

BOGI Our entrepreneurial spirit speaks for itself. For example, over the past two years we have grown our operations in Poland by over 600% in an intensely competitive environment. Despite the challenges, our young and dynamic team is powered by an unwavering eagerness to succeed. Each member brings a unique set of skills and perspectives, fostering a culture of innovation and adaptability. The journey has been filled with both triumphs and obstacles, but our entrepreneurial spirit is the driving force behind our perseverance. We view every setback as an opportunity for growth, continuously learning and evolving to stay ahead in the market. Our hunger for success is matched by our commitment to ethical practices and fair play. We believe that integrity and transparency build a solid foundation for long-term success. As we forge ahead, we remain dedicated to playing to win, pushing our boundaries, and creating impact in the industry, not only for today but also for tomorrow's market.

Bogi Gabrovic
Deputy Country Head,
Poland

GRID asked five team members to take a moment to share their personal views of CTP's values, what they mean to them in their day-to-day work, and what they mean for our tenants and all other stakeholders.

Accountability

Accountability at CTP means being transparent and responsive to our tenants and stakeholders. Promises made. Promises kept. On-time and on-budget. We mean what we say and say what we mean. Trust is the essential ingredient required to build long-lasting relationships. We are strategic partners to our clients based on the confidence we engender through our actions—both large and small—each day. Accountability requires clear communication, honesty, integrity, and the courage to stand for the values that built this company and make each Parkmaker an integral part of the CTP team.



JAKUB Accountability for me is part of my job description. I see my role as being engaged in a true partnership with our clients, on good days as well as bad. There is always a solution to be found. This includes making sure that there is space for growth over the long term. Delivering on promises is of course essential. I also take the big-picture view to ensure that development plans take into consideration the community and wider area, as well as the client's objectives. We work closely with local municipalities to ensure not only compliance with all requirements, but that our parks add value to the community—not only job creation, but through investment in public infrastructure and transportation links and by paying attention to well-being and quality of life at work. As head of Business Development in the Czech Republic, I am also responsible for our team and its performance and service to our clients.

Jakub Kodr
Head of Business Development,
Czech Republic

Sustainability

Sustainability isn't a buzzword at CTP—it's always been integral to our strategy and philosophy. We build to own and naturally take a long-term view. We know that our industry can be damaging to the environment, and so we've always built resource-efficient buildings and parks and make significant investments to mitigate the harmful impacts of our developments. And just like our parks, our business model is sustainable and has proven its ability to not just weather storms but to emerge from them bigger, better, and stronger.



ADAM For me Sustainability is long term approach living and developing. Enjoying now, thinking about future - it can be easily compared to eating healthy, nutritious, tasty meals - you enjoy it now, it lets go full speed not just now but also tomorrow and for many years if it is a habit. It is also related to act in the way that executing own agenda takes into account people around, making sure it does not harm them and inspire them.

Adam Targowski
Group Head of ESG Management

Commitment

Commitment is the cornerstone: without it, everything falls apart. We are passionately committed to everything we do, and we're always challenging ourselves to do better. We are committed to our tenants, our shareholders, and to the communities where we work and live. We are committed to our values, to our mission and goals, and to each other as team members. To be a CTP Parkmaker is more than a job—it's a commitment to success, both personal and professional.



BERT Working for CTP is a way of life. It's like sport: you are in it to win. And you do it because you love the sport and you love doing it. From the first second until the end of the game. And then you get ready for the next game, and the next. One of the keys to success at CTP is work-life integration. You thrive when you are committed and when you love what you do. I am a Parkmaker for life!

Bert Hesselink,
Group Client Relationship Director

Community

We've long been walking the walk when it comes to community—our bread and butter is building dynamic business communities that help develop the local economies where we operate and which are often a focal point of the surrounding area. As part of our commitment to community we build public infrastructure, support local educational initiatives and youth, and provide charitable assistance to those in need. Our long-term strategy means that we strive always to be good neighbours and build lasting relationships based on trust and mutual understanding.



ANA Building communities means breaking down barriers and bringing people together. That's what we do at our parks every day and in different ways. From monthly breakfasts in the garden at the Clubhaus at CTPark Bucharest West to blood donation drives, foreign language lessons, first-aid training, farmers' fairs, summer schools, scholarships, medical care, ice cream, a hot meal, coffee on the house, an outdoor terrace, a place for picnics, sports facilities, the highest quality fit-outs, mobility, infrastructure, bio-diversity, solar energy—we do it all as part of our daily drive to make our parks vibrant business communities. In Romania, our Gen Z-dominated community team brings their youthful energy and enthusiasm to each project, large or small, to make sure that our parks are making our communities better places to be.

Ana Dumitrache,
Managing Director,
Romania

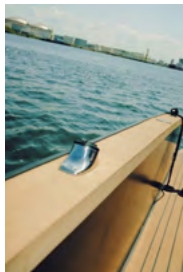
THROUGH A DIFFER- ENT LENS



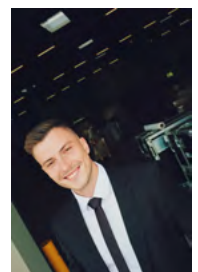
We recently finished filming our latest CTP video—about our Parkmakers and our values—which took place at many of our parks and at various locations across Europe. During filming, the director, Alek Kropidłowski, took the opportunity to photograph our team members and came up with his perspective on us and our work. We hope you enjoy what CTP looks like through a different lens as much as we do!



June
Amsterdam / Northern Holland



June
Budapest





May
Warsaw



May
Prague



May
Vlněna, Brno



June
Bucharest

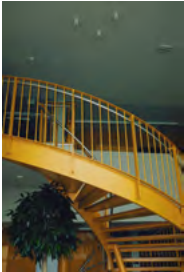




June
Bucharest West



June
Budapest West

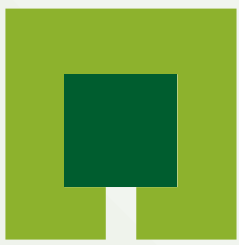


May
Prague



June
Čejkovice





CTPark Network

WHERE YOU NEED TO BE

10 countries

TRACK RECORD OF SUCCESS

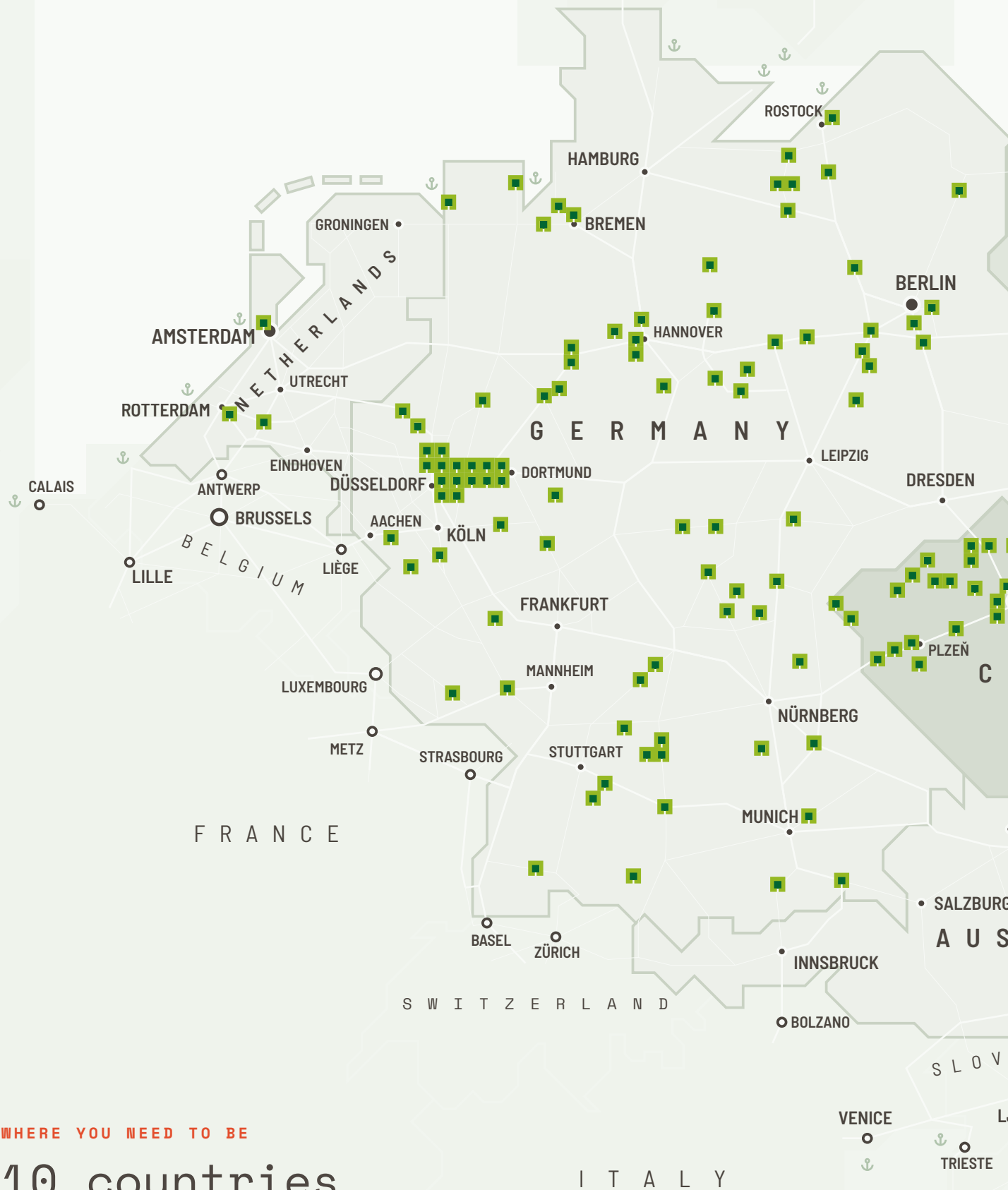
11.0 million sqm
GLA

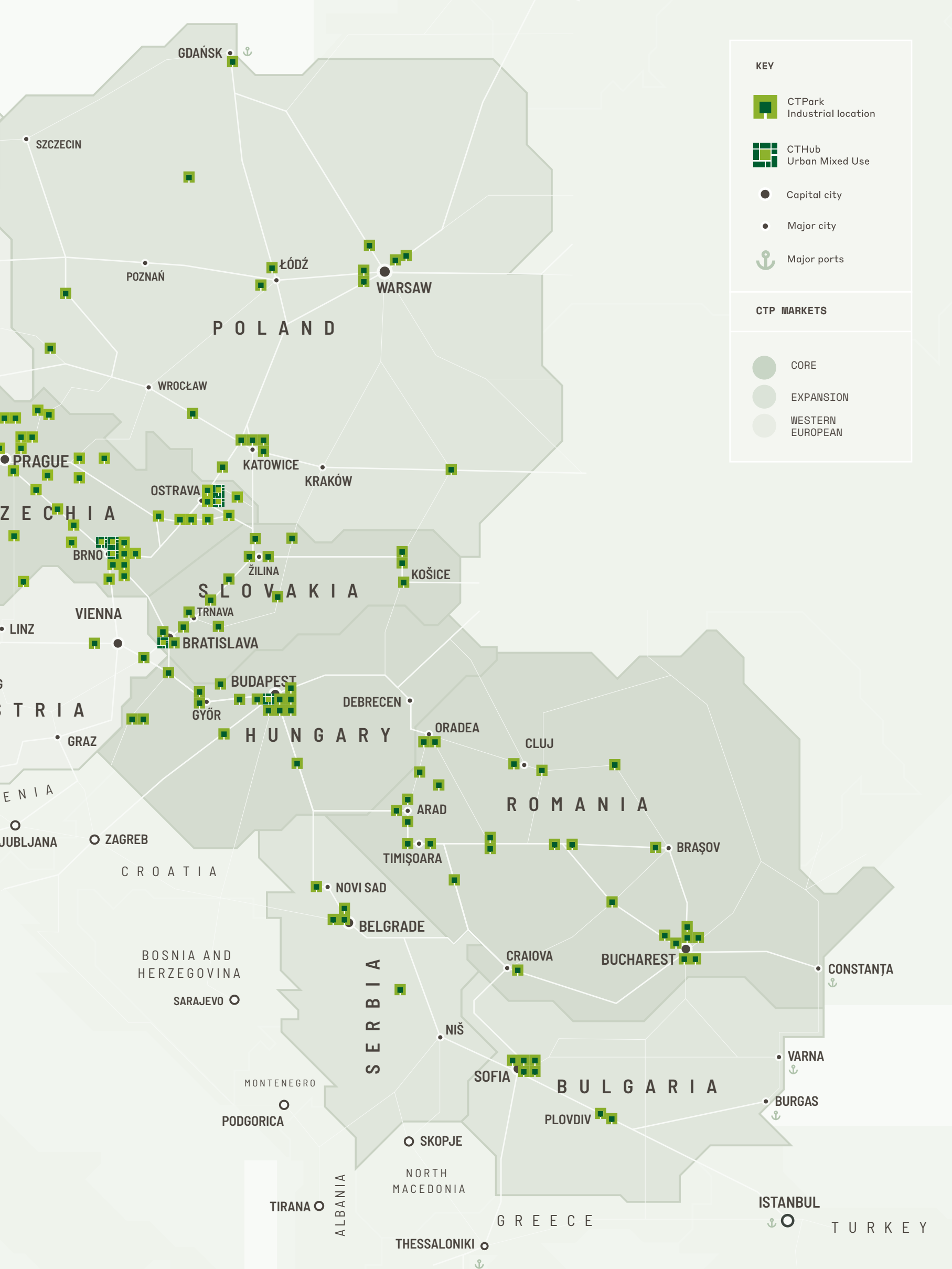
SPACE FOR YOU TO GROW

20.7 million sqm
landbank

LONG TERM PARTNER

>1,000 clients





Re g i

News and views from our Business Development teams from across our markets. They are the "engine" of CTP and give us the best insights into our business, clients and future plans.

R o u n

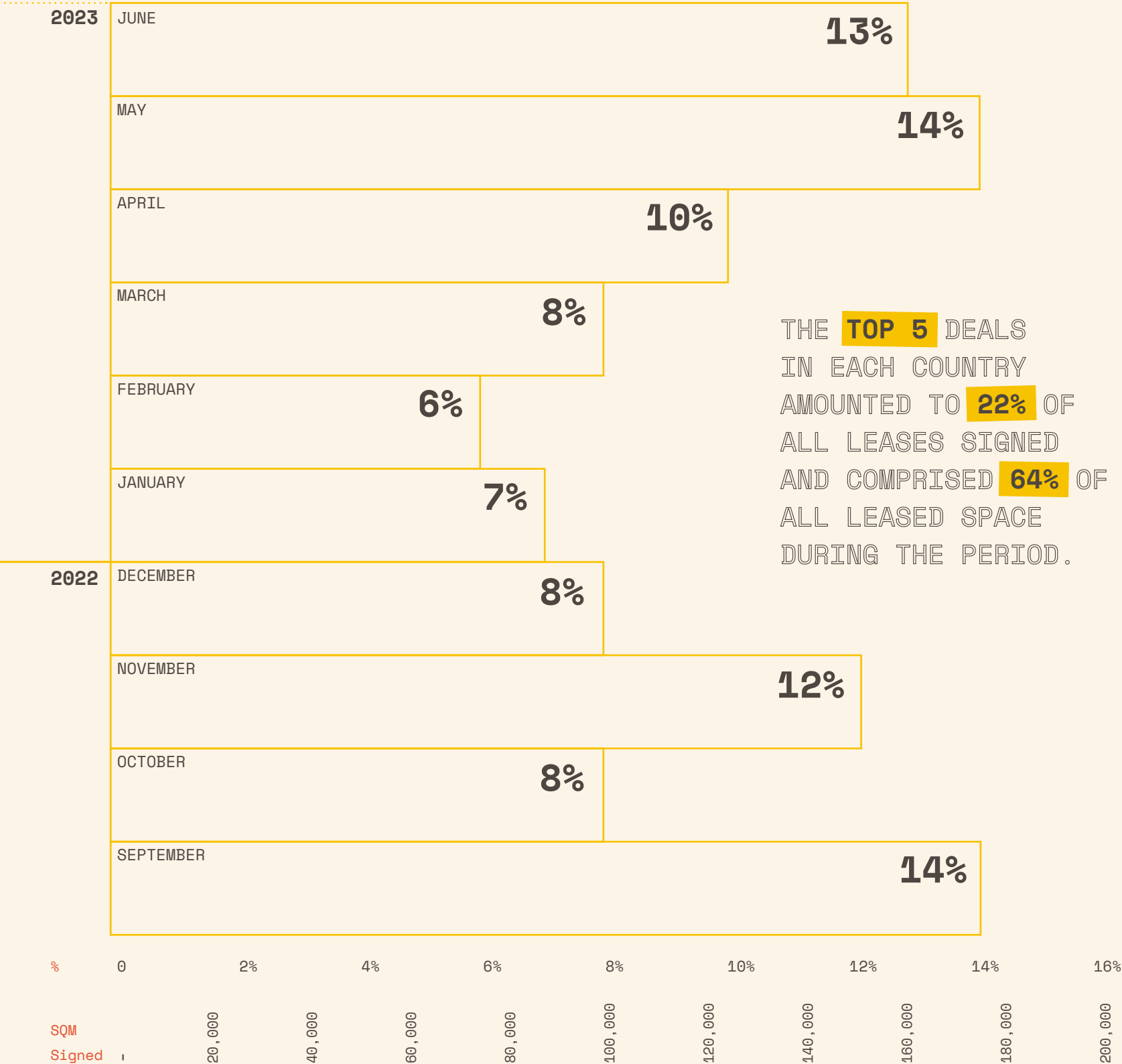
onal



ndup

Leasing Activity

Since last GRID our BizDev team has been working overtime to strike deals with both new and existing clients, signing almost **1.5 million sqm** of space. Demonstrating the continuing growth trend of nearshoring and e-commerce, our teams saw a large upswing in requirements over the past quarter.



TAIWAN



BIZDEV
BRNO



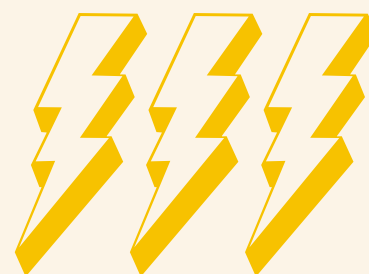
ROOFTOP
PARTY



OPENING CTPARK
VIENNA EAST



TOP DEAL MAKERS!
DEMONSTRATING
THEIR COMMITMENT
TO THE DEAL,
THE OUTPERFORMERS
BELOW ARE THE
TOP DEALMAKERS
IN THEIR COUNTRY!
CONGRATS!



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ALL★STARS ALL★STARS ALL★STARS ALL★STARS ALL★STARS ALL★STARS ALL★STARS ALL★STARS ALL★STARS ALL★STARS



CTP OPENS UP
REGIONAL OFFICE
IN HONG KONG



CTP recently brought on Jaromír Černík to be CTP's eyes and ears on the ground in Asia. Having worked for CzechInvest, the Czech investment agency, where he worked also with CTP in its early years, Jaromír has "gone native," with over 20 years of experience in real estate and cross-border transactions in Taiwan, Hong Kong and mainland China.

Jaromír Černík
Business Development
Director for Asia
jaromir.cernik@ctp.eu

Trends are pushing global manufacturers to create more resilient supply chains that are de-risked from geopolitics, climate threats, and global shocks like pandemics. With many of the world's largest strategic manufacturers based in Asia, CTP found it the right time to meet them there and make the case for nearshoring their operations relating to European markets to business-smart CEE.

Tell us something about your background in Asia and how you met CTP.

I have been based in Hong Kong since 2005, with strong connections to local companies across Greater China, which I built initially with CzechInvest starting in 2001, and then with Deloitte and Summer Capital, so I have a solid track record for over two decades now. My involvement with Asia started in 2001–2002, with the first wave of Taiwanese, Japanese and Korean companies setting up plants in CEE. That was when I met Remon, who was quick in providing solutions for contract manufacturers from Asia, as they required immediate production capacity. Those were the days of rapid expansion in Brno, for instance, which brought some of CTP's first clients, including Foxconn, Wistron, and Inventec. Many of these companies are still in Europe and have expanded with us, and that is positive.

What new trends are you seeing among Asian companies, in terms of their interest in CEE?

Global supply-chain networks are changing, and many companies, including Chinese and other Asian investors, are seeking production and warehousing capacity closer to their European customer markets. For example, many Chinese suppliers in the automotive industry are seeking properties in Europe—we saw the fast-expanding facilities of YanFeng in Serbia supplying Mercedes and BMW, and there are many more brands and suppliers coming, as it is no longer feasible to supply directly from Asia. We are seeing an increase in the number of suppliers of precision parts and electronics locating around their major customers, including lithium-ion battery producers and other specialised components for electric cars. Contract manufacturing companies, for instance from Taiwan, are now



looking to build new capital-intensive capacity in Europe, and the expectation is that CEE, with its business-smart fundamentals, including lower operating and labour costs, will attract many of these suppliers to the region.

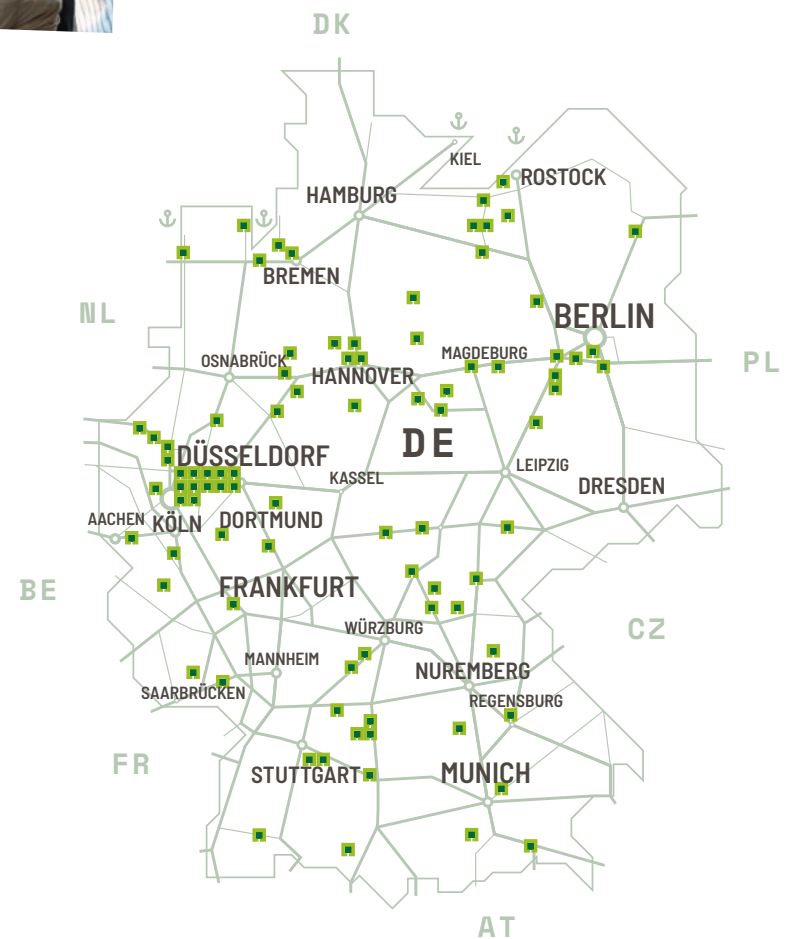
At the same time, in Europe we see increasing consumer spending and more applied advanced technologies and innovation, including electric cars, robotics, AI and Web3 apps. Such developments and changes bring opportunities for CTP. We are in a good position as a market leader in CEE now offering solutions across ten countries in Europe, and with the capacity and know-how to expand to new markets based on client demand.

What's on your agenda for the rest of the year?

In the next months we are pushing for company visits and meetings with as many suppliers as possible in China and Taiwan, to explain to them the many benefits of choosing the CTPark Network as their operational base in Europe. At the same time, we are also looking at acquisition opportunities in Asia. We see potential targets de-leveraging from the region, and many property funds facing head winds and difficulties with refinancing, which may open opportunities for us.



DE
West European Markets
Portfolio
15%
GLA
1.7 mil sqm
Under Construction
28,000 sqm
Landbank
155,000 sqm



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Dialogue is the first step.

“ Already just talking to a perspective client is a good sign, because they are interested in CTP and what we can do together. And talking to each other helps to understand their challenges and how we can find mutual success. One of CTP’s strengths is that we operate in different countries, and it also helps to understand the challenges and perspectives faced in different markets, to build our growing business in Germany, as well as to support the cross-border strategies of our clients. We have to know their needs and even anticipate them, and this requires us to stay in routine contact with our clients, to be there with the right solution when they need it. ”



Timo Hielscher
Managing Director
West Germany
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First DE CTPark underway in Rastatt



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ASK
ME

...



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Alwina Rib-Birjukow
Assistant Business
Developer
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CZ
Core Markets
Portfolio
35%
GLA
3.9 mil. sqm
Under Construction
577,000 sqm
Landbank
6.5 mil. sqm

Client View

Dr. Max signs for two facilities at two different CTParks

Fast-growing pharmacy business Dr. Max has decided to extend its footprint in the Czech Republic, leasing 27,000 sqm across two CTParks. At CTPark Brno Líšeň, the company signed a 20-year lease for 15,800 sqm and plans to open a community pharmacy. Meanwhile, at CTPark Ostrava Poruba, Dr. Max leased an additional 11,300 sqm for the next five years.

Dr. Max's CEO for the Czech Republic, Jan Žák, praised CTP's tenant-centric approach: *"We value our relationship with CTP because it builds energy-efficient logistics properties to suit our needs then continues to own and manage them for the long term. This creates a lasting landlord-tenant relationship because it means CTP has an in-depth understanding of our requirements, which is invaluable as we increase our footprint across the region."*

Dr. Max is already present in three CTParks in Romania, where they occupy almost 50,000 sqm. We look forward to further supporting Dr. Max's regional expansion.



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CTPark Brno Líšeň



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Tomáš Stryček
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CTPark Prague West



CTPark Lipník n. Bečvou (UC)



CTPark Ostrava Poruba



CTPark Prague North

The first step is of course to listen to the client, not just about their current needs, but about their business, their strategy, and their challenges.



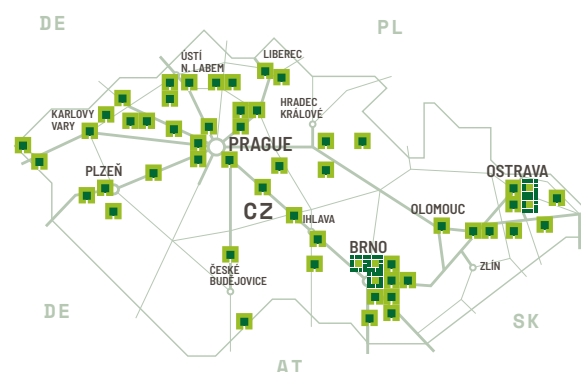
Michal Přeb
Senior Business Developer
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“ It is also essential for me to know the ins and outs of our portfolio offering, the technical details, the things they want to know. From my experience, clients value flexibility, speed and full engagement. Each client requires a unique approach, and understanding their business and needs is essential to deliver the right solution. My goal is to build long-term trust. In the end, property development is like riding a bike. To be the best and fastest you don't look under your wheel—you look ahead to see the challenges you need to tackle. ”

ASK
ME
...



Kristýna Dinebierová
Business Development Support
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RO
Core Markets
Portfolio
23%
GLA
2.5 mil. sqm
Under Construction
186,000 sqm
Landbank
3.6 mil. sqm



Aurel Cirstea
Senior Business Developer
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Knowing your client is a non-stop job.

“ It’s about being proactive and explaining how CTP can support their plans and find solutions for their challenges. It also means genuinely caring about their business, because we win when our clients win. It’s essential to keep your word, to deliver what was promised. To be relevant. It’s about respecting the client and understanding their expectations. What are their targets? Their values? Understanding this enables us to be their reliable, long-term business partner. ”

Client View

Maersk expands its regional hub in Romania

In Romania, we successfully expanded our partnership with integrated logistics company **Maersk** and **IB Cargo**, reaching approximately 100,000 sqm of leased warehouse space at CTPark Bucharest West. Operating the regional distribution center for one of the world’s largest furniture retailers, Maersk delivers goods from Bucharest to stores in Southeast Europe and the Eastern Mediterranean.

Starting in 2021, Maersk’s business developed swiftly, increasing its leased space at CTPark Bucharest West by over 30%. Eusebiu Dumitrescu, Site Manager at Maersk Romania, shared the company’s satisfaction with the project, stating, *“We are very proud of this project and especially regarding the way it has evolved and grown over the last two years, in line with our development strategy and our plan to increase our coverage in Southeast Europe.”*



CTPark Bucharest West

CTPark Oradea Cargo Terminal



CTPark Timișoara

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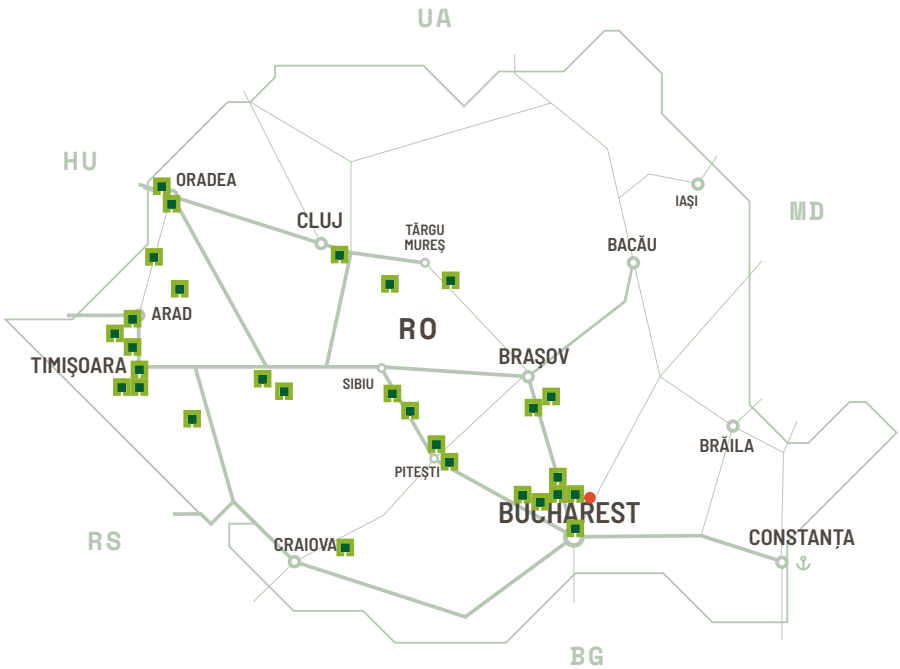
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Andrei Koszti
Regional Business
Developer
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Clubhaus, CT Park Bucharest West



ASK
ME
...



Claudia Lazarica
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HU
Core Markets
Portfolio
9%
GLA
1.0 mil. sqm
Under Construction
194,000 sqm
Landbank
2.3 mil. sqm



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ASK
ME



Viktor Nemes
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Client View

Quehenberger continues to grow in Budapest

Quehenberger, a valued tenant within the CTP portfolio, is once again broadening its operational footprint at CTPark Budapest West. The international full-service logistics provider has entered into a new lease agreement for an 11,000 sqm unit, affirming a 5.5-year commitment to the location. This expansion further solidifies Quehenberger's strong presence across CTP's CEE parks, which currently spans over 180,000 sqm of space. CTP and Quehenberger's partnership, rooted in adaptability and strategic alignment, leads to Quehenberger's repeated expansion within our portfolio. Ferenc Ujzaszi from Quehenberger encapsulates this sentiment perfectly, saying: *"CTP's understanding of our business gives us the confidence to expand within their portfolio time and again. We have developed a close landlord-tenant relationship with CTP that involves strategic cooperation and flexibility in accordance with our needs, and we look forward to working with CTP long into the future."*



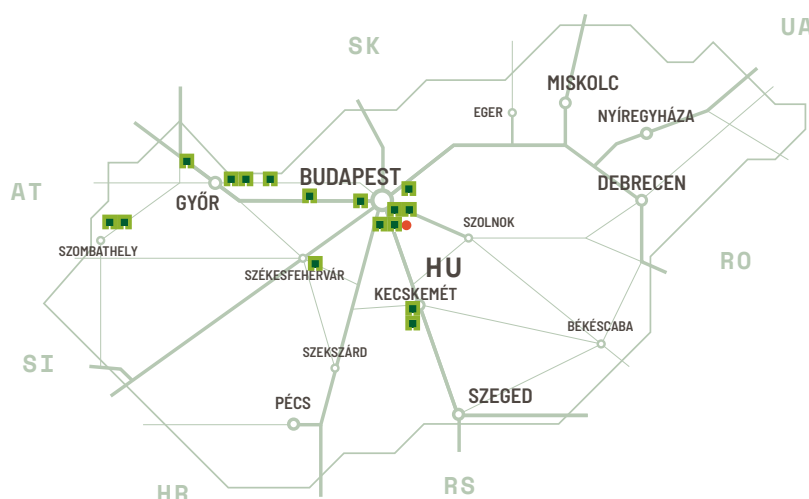
Ildikó Mente
Business Developer
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It's necessary to be curious.

Information is the key. I make sure that I understand the client's business and strategy. Visiting their existing facilities gives me the chance to learn more. Clients naturally like to present the bright side and successes of their business, but they also share their specific, sometimes difficult requirements, and they tend to disclose their struggles as well if trust is established. Every requirement is special, unique and brings its own challenges. The recipe for success is never the same, but the goal is always to provide the perfect solution for our clients' business needs. I am fortunate to have the support from our amazing team in Hungary and across CTP.

99

CTPark Budapest West





SLOVAKIA
Core Markets
Portfolio
7%
GLA
776,000 sqm
Under Construction
48,000 sqm
Landbank
1.8 mil. sqm



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Managing Director,
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Senior Business
Developer
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Ivan Pastier
Business Development
Director
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To check “how hot the pot is” with a potential new client, I use the BANT framework!

- “ What’s the Budget for the project? The Approval process? What is the specific Need and do they really need it? And the Timeline. It always helps to visit their existing facilities in their home country to see their operation, what they do, and how they do it. We also get to see a bit how they live and how they spend their time after work. I think the personal touch is important; after all, we are all people. Spending quality time with clients is beneficial because we can solve problems together as a team. ”



CTPark Žilina Airport

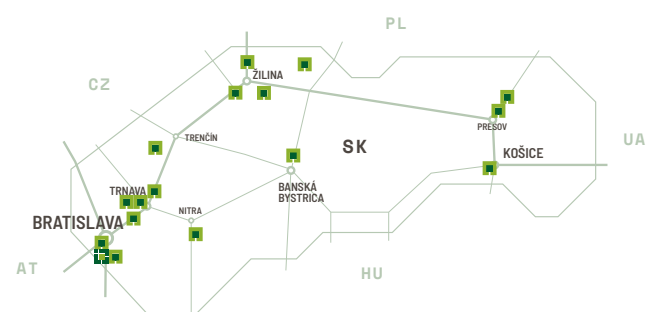


CTPark Trnava

ASK
ME
...



Kristína Bačková
Admin Support Associate,
Business Development
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POLAND

Expansion Markets

Portfolio

3%

GLA

277,000 sqm

Under Construction

448,000 sqm

Landbank

2.6 mil. sqm



Łukasz Tomczyk
Leasing Manager
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The factors affecting our clients' businesses are changing rapidly, which makes it even more important for me to try to understand the other side's perspective.

“

For me, knowing my client means knowing not just the drivers of their business but also the factors that limit their business. Understanding their needs and finding the ideal solution is the name of the game. It's also very important to keep in contact and to develop relationships over time. It's all about quality—the client needs to know that they are receiving top quality in all ways—the best solution for them, the best service, the best business partner for their property solutions, not just for one deal, but for others over time. Growing with our clients is part of our strategy, which is why I make sure I understand the “big picture” of our clients' strategy and what they want to accomplish over time.

”

Client View

TRUMPF

Technology specialist TRUMPF Huettinger is launching the largest production of control cabinets for the high-tech industry in Europe at CTPark Warsaw East. The company has recently secured nearly 25,400 sqm of production and warehouse space at the park, pushing its occupancy rate to a solid 80%. This development marks TRUMPF Huettinger's fifth investment in Poland's Masovia Province. The newly leased space will host the production of control systems for the TRUMPF Group as well as control cabinets for the semiconductor industry, with products distributed globally. TRUMPF Huettinger's Managing Director in Poland, Paweł Ozimek, attributes this expansion to increasing demand for their products and expresses appreciation for CTP's understanding of their needs. *“We chose CTPark Warsaw East in Kobyłka because CTP understood our needs and had a business model with a long-term perspective. We also appreciated the range of modern, low-emission solutions.” As part of this expansion, TRUMPF Huettinger plans a significant increase in employment over the next five years, more than doubling its current workforce.*

CTPark Warsaw East



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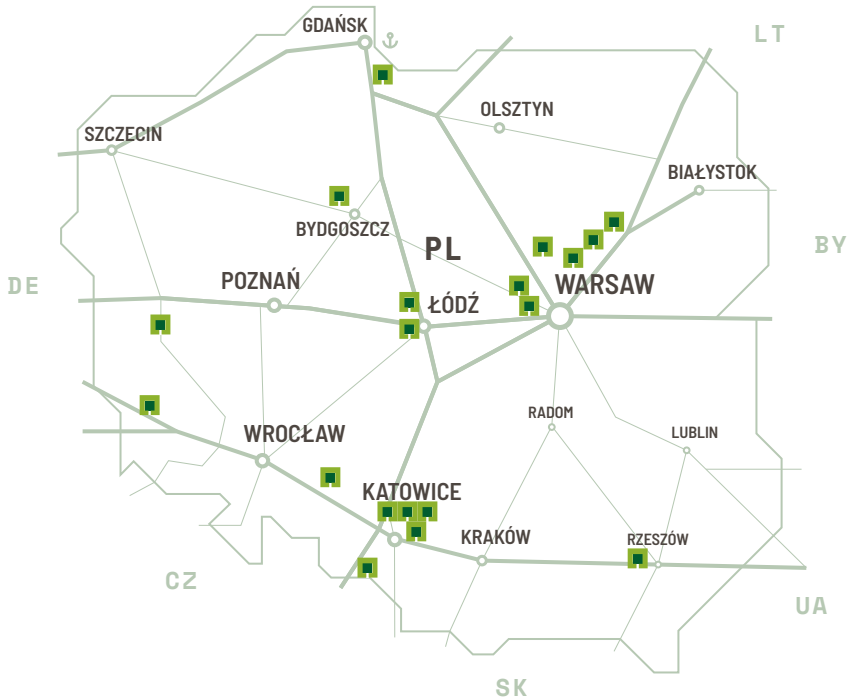
CTPark Gdańsk Port



CTPark Opole



Winning team at BizDev Meeting, Vlněna Brno





SERBIA
Expansion Markets
Portfolio
3%
GLA
281,000 sqm
Under Construction
250,000 sqm
Landbank
1.4 mil. sqm

I want to learn everything I can about a potential client—first through research, and then we sit down and talk.



Petar Kolognat
Business Development
Director
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“ I don’t see myself as a salesman, but as a problem solver. My job is to understand what the client needs to achieve to help provide the optimal solution. My approach is to be supportive and positive. It is also helpful to be part of the larger CTP team, where I can share my knowledge and experience with my colleagues and learn from theirs. We are always looking to grow with our clients, and so understanding other markets is also essential for me to deliver the best results. ”

CTPark Novi Sad East



CTPark Belgrade North



ASK
ME

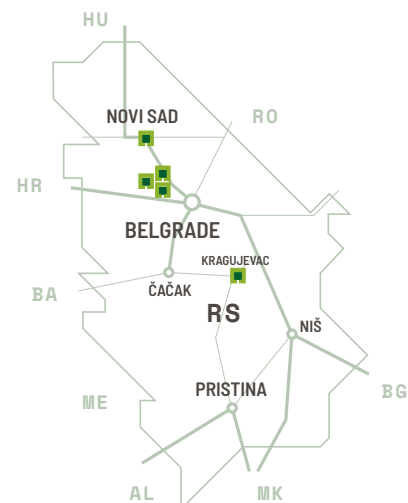


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Jovan Dobric
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Daniela Boytcheva
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Director
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Being in regular contact with our clients helps not only to react to their needs, it also helps us gain knowledge to further develop the quality of our buildings and services provided.

“ Communication is key throughout the client relationship, and the important thing for me is to listen. As they say, treat others as you want to be treated. For me this translates into showing respect and building trust. I don't see things as problems but rather as challenges to solve, and clients appreciate this approach. I believe in transparency and clarity with clients, as in my view this is a winning strategy over the long term. ”

BULGARIA
Expansion Markets
Portfolio
2%
GLA
200,000 sqm
Under Construction
66,000 sqm
Landbank
450,000 sqm



CTPark Sofia West



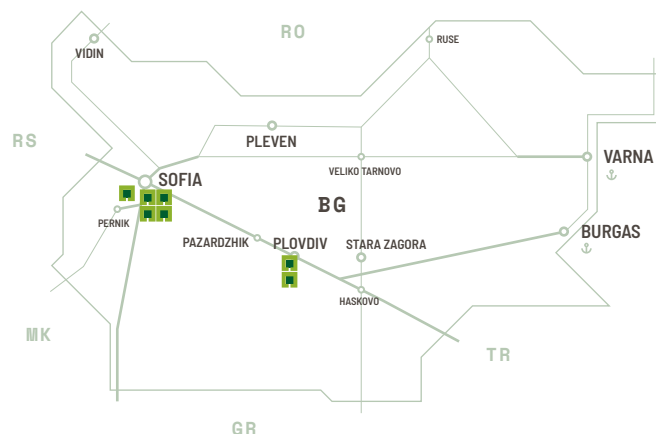
CTPark Sofia Airport

**ASK
ME**

...



Ivelina Ilieva
Leasing Manager
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It's always helpful to get feedback from our clients, to help us improve and grow with them together.



Daniel Pfeiffer
Senior Business
Development Manager
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“

It's also necessary for me to truly understand the client's business model and objectives. I try to stay close to decision makers to be relevant and effective with providing solutions. In the end, the most important thing to me is keep things real. Building trust comes from sincerity and from delivering on promises. This is what enables us to grow with our clients over the long term. ”

AUSTRIA
WE Markets
Portfolio
1%
GLA
52,000 sqm
Under Construction
48,000 sqm
Landbank
419,000 sqm

CTPark St. Polten North



CTPark Vienna East



Client View

Frigologo

In response to Austria's surging demand for sustainable logistics space, CTP successfully completed the full leasing of CTPark Vienna East, even before its official completion. One of the final tenants, Frigologo, a major service provider for temperature-controlled food logistics in Europe, committed to a seven-year lease for 13,116 sqm of space.

Friedrich Zechmann, Frigologo's Managing Director, praised the park's central location and its robust sustainability credentials, which fit perfectly with the firm's 'just-in-time' delivery model. In his words, *"CTPark Vienna East absolutely fits our criteria, and the high sustainability credentials of our modern, newly constructed building, with state-of-the-art technologies, is another 'must have' for Frigologo."*

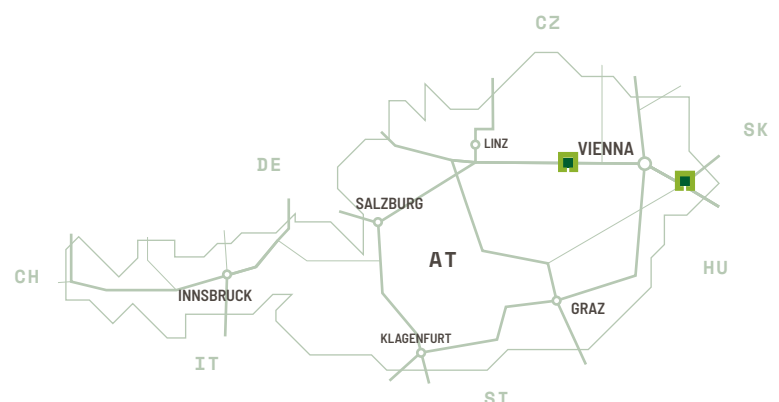


ASK ME

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Stefanie Turneretscher
Marketing, PR and HR Manager
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NETHERLANDS
WE Markets
Portfolio
2%
GLA
247,000 sqm
Under Construction
- sqm
Landbank
1.6 mil. sqm



CTPark Amsterdam City



CTPark Rotterdam

Understanding the client's goals is essential.



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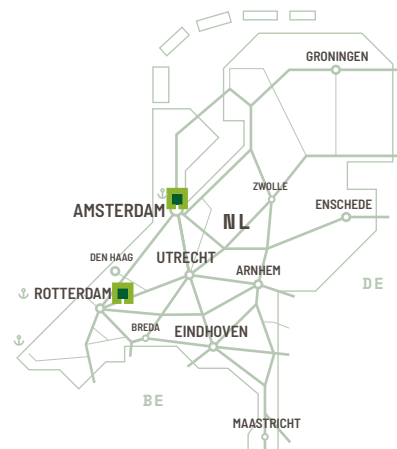
“ Also what kind of market they are operating in, who are their competitors. I act modestly and listen, but I also demonstrate to them that I have done my homework, and that I am already thinking about the right solution to meet their needs. I focus on building long-term relationships with clients, and this is done only based on mutual respect and trust. I love my work, engaging with clients and finding the way forward together. Despite the demands and the deadlines, I think client cooperation should be fun, it should be creative, and of course should be beneficial to both parties over the long term. ”

ASK ME

...



Doménique van de Kimmenade
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WHY CEE IS THE EUROPEAN NEARSHORING HOTSPOT FOR MULTINATIONALS

The global business landscape is changing before our eyes. A series of shocks to the decades-old system of globalisation—first the pandemic, then the war in Ukraine and the geopolitical uncertainty that has followed in its wake—has revealed the inherent weakness in the previously touted efficiencies of just-in-time global supplies lines.

Rising risks—and the perception that the underlying uncertainties behind these risks will continue—are forcing companies active in diverse industries and sectors to re-think their old supply-chain paradigms. Among the de-risking strategies increasingly deployed by global companies is to de-couple from their old supply chains in far-flung, previously low-cost locations like China and the Asia Pacific region and reposition their production capabilities closer to their final customers—a process known as “nearshoring.” Although this is only one of the de-risking strategies, it is a major trend in CEE among multinationals and our focus here.

Bringing supply chains closer to final consumers also fits the ESG agenda to reduce the embedded carbon footprint of final products and to establish more sustainable business models. In Europe, new and planned EU regulations are incentivising companies to bring the manufacturing of products destined to be sold in the EU back to Europe—everything from cars and machinery to clothing and consumer goods—while firms storing customer data or using certain types of complex technology will increasingly need to locate these operations within the EU for cyber security reasons.

A report on the results of a survey published by global consultancy EY in 2022 showed that the majority of companies participating were already taking or planning to take steps to de-couple existing supply chains and relocate them closer to consumers.

CEE POISED TO BE THE “MADE IN EUROPE” HOTSPOT

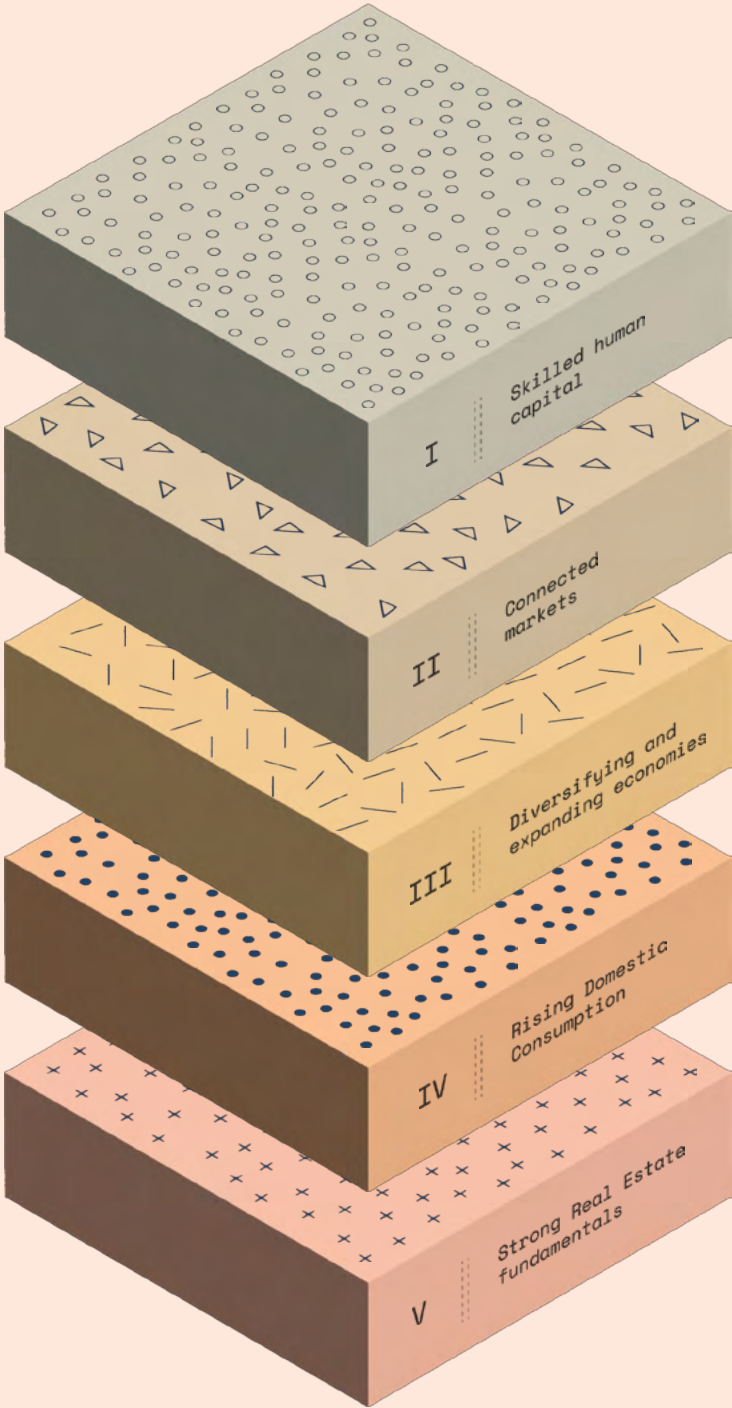
The CEE region is emerging as a principal destination for multinationals to nearshore their supply chains for the European market. This trend is only recently emerging in CEE markets and is expected to continue for the foreseeable future, as the strategy of de-coupling and re-establishing supply lines with new facilities takes time to implement. From market experience, CTP expects the emergence of this trend in CEE to be “the tip of the iceberg,” as global business focuses on de-risking European supply lines with new, state-of-the-art facilities in the region.

In 2022, South Korean company LG Energy Solution announced plans to expand its lithium-ion battery factory in Poland—launched in 2016 as Europe’s first and largest plant for the production of batteries for electric cars, with 10,000 employees—to make it the world’s largest EV battery plant. The company plans to increase output from 70GWh production capacity in 2022 to 115GWh by 2025. The €1 billion investment received €95 million in state aid from the Polish government.

“Poland is a gateway for Korean companies to enter Europe and a strategic logistics hub,” declared South Korean President Yoon Suk Yeol ahead of a recent visit to Poland. LG Energy Solution is one of many strategic South Korean investments in Poland, which also includes a new polypropylene plant in the city of Szczecin for multinational automotive company Hyundai, where production began in June. In 2021, South Korea was the largest foreign investor in Poland, investing \$1.9 billion in the country, well ahead of the United States and Germany, which invested \$364 million and \$155 million in Poland that year, respectively.

CTP has also seen an uptick in interest in CEE from manufacturers looking to nearshore in Europe. At CTPark Warsaw East, TRUMPF Huettinger, a leading German company specialising in the design and production of advanced industrial electronics, recently opened its seventh building in the Warsaw area, leasing an additional 25,500 sqm of production and warehouse space. From its newest Polish base, TRUMPF Huettinger will launch the largest production of control cabinets for the high-tech industry in Europe.

DRIVERS OF CEE ECONOMY



THE TENANT VIEW

John Busby
Director
Inventec



What does your business do and what is your relationship with CTP? We are a Taiwanese electronics manufacturer that supplies some of the world's largest computer and automotive companies. We have a long relationship with CTP, having first moved into CTPark Modřice in the Czech Republic in 2003. In 2019 we grew and took 12,000 sqm of space at CTPark Brno, and CTP is now creating a 52,000 sqm build-to-suit manufacturing space for us at CTPark Blučina that we will move onto next year, bringing all of our European operations under one roof in the Czech Republic.

Are you nearshoring? If so, why? Although we've had a presence in CEE for a long time, we are basing more of our operations closer to European markets. One reason for this is to reduce risk in our global supply chain, but our customers are driving it, too. They increasingly want to see that we have capacity and operational capabilities in Europe to support their businesses. Our clients' ESG requirements are also rightly more important. They are looking at their supply chains and saying "part of reducing our carbon footprint means having our suppliers closer to our main markets". They want their suppliers to produce more locally, and this is a trend that will continue.

Why is CEE a popular region for nearshoring?

Being close to major Western European markets and the region's skilled but competitively priced labour are key reasons. But there are many others, including the stability of locating within the EU – which most CEE nations are part of. The EU is also putting more pressure on major industries to manufacture goods destined for Europe within the EU. Certain products and services are also increasingly required to be made or housed in Europe for cyber security reasons, driving demand from electronics businesses and companies storing data.

Why do you work with CTP? CTP is a developer-manager that understands our business and what we need from our space. Their focus on and knowledge of renewable energy is also important to us. We are working with CTP to generate enough onsite electricity at our facilities to power our manufacturing, which is what our customers want to see from us to reduce the carbon footprint in their supply chains. It's a very commercial point for us and a main reason why we work with CTP.

Earlier this year TitanX Engine Cooling, a global supplier of cooling systems for vehicles, ramped up its production and distribution capacity at CTPark Opole in Poland taking a further 27,000 sqm of space, having first signed for a building at the park in 2018. At move in, TitanX's CEO explained the city of Opole serves as a central footprint for its business in Europe, effectively serving both its regional and international customers while providing a skilled and highly engaged workforce to drive the future of TitanX.

Serbia has also emerged as a nearshoring base. Last year, German multinational and engineering company Bosch took delivery of a 20,000 sqm built-to-suit facility at CTPark Belgrade West to produce motors for electronic window lifters. CTP also handed over a 26,500 sqm build-to-suit property to Japanese electromotors giant Nidec at CTPark Novi Sad in Serbia's second-largest city.

SO WHAT MAKES CEE SO ATTRACTIVE FOR NEARSHORING?

The business-smart fundamentals that have made CEE a hotspot for investment over the last decades have only strengthened over time. Strategic location, an educated and cost-competitive workforce, excellent infrastructure (which has improved significantly over the last decade), a long industrial tradition, a favourable business environment, and lower operating costs than Western Europe make nearshoring European activities to CEE a winning proposition. As most CEE countries are EU member states, setting up operations there allows for the borderless flow of goods within the EU's Single Market.

In addition to location and cost effectiveness, access to skilled labour is seen as essential for nearshoring manufacturers. In CEE, almost a quarter (24%) of graduates have degrees in one of the STEM (science, technology, engineering and mathematics) disciplines that are vital for high-tech manufacturing. This is the same percentage as in the EU-27, but CEE labour costs are one-third compared to Western European countries thanks to the region's lower cost of living. Labour costs in some CEE countries are now competitive with China.

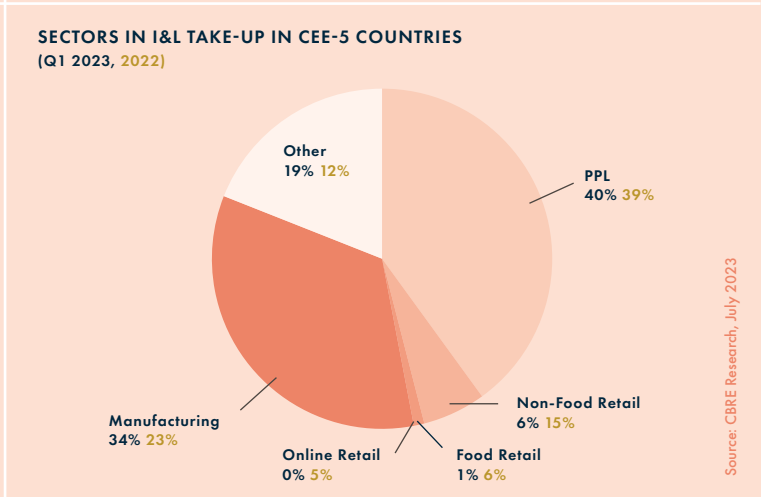
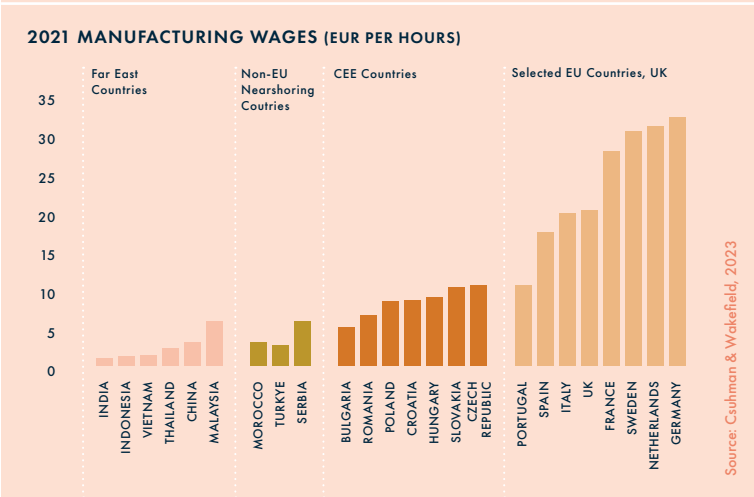
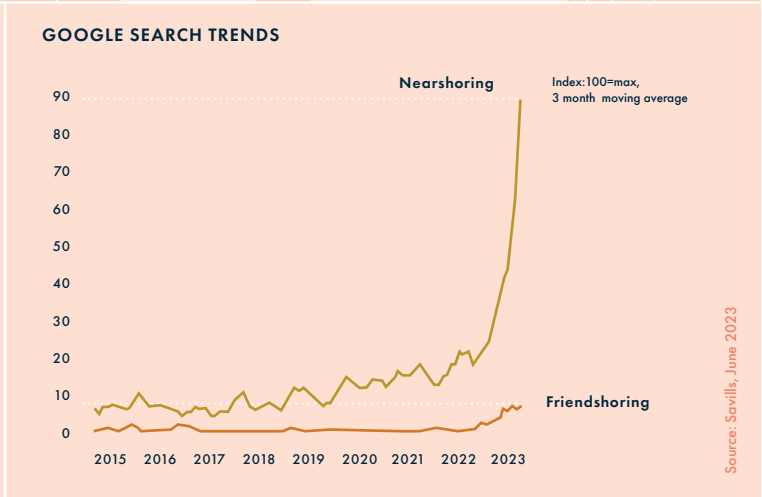
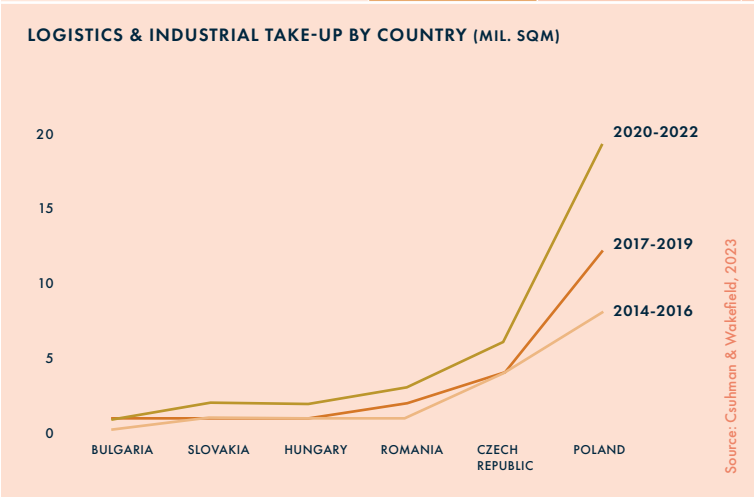
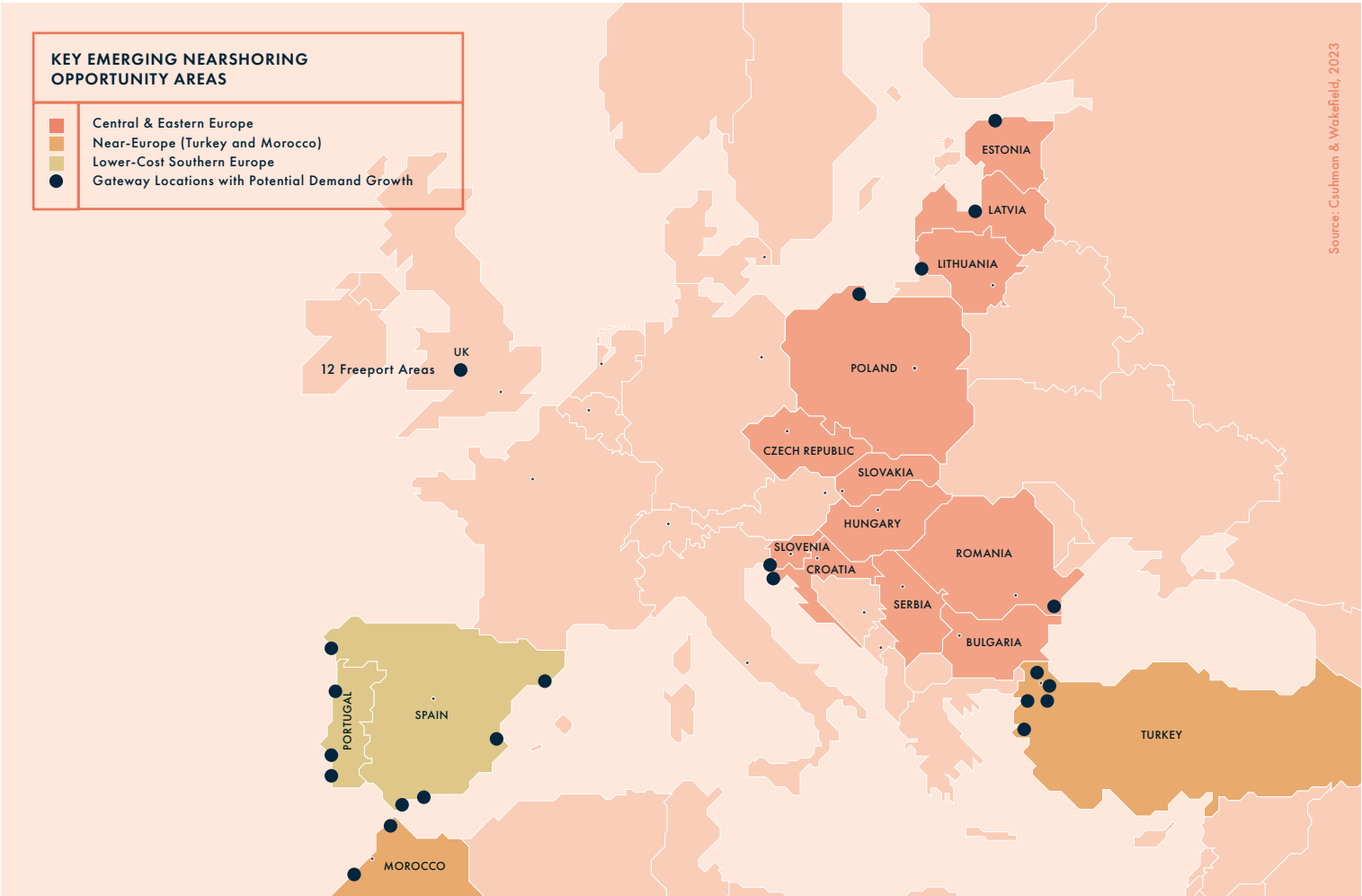
Another benefit is ease of communication. With English seen as the main language of tech and commerce, the CEE scores highly. In an index of English-language proficiency, CEE countries (except Serbia, where data is not available) ranked higher than France, Italy and Spain.

The CEE region proudly boasts a buoyant manufacturing sector stretching back to the Habsburg Empire. Today, six out of seven CEE countries are among the top 10 countries in Europe with the highest share of jobs in manufacturing. Budapest, Prague and Bratislava are among the highest-scoring cities for high-tech jobs, including high-tech manufacturing. In 2021 the region exported over €370 billion in machinery and transport, close to a fifth (19%) of the EU-27 total—growing from 14% in 2011.

Another factor helping to drive CEE's success as a nearshoring hub is also the massive investment in and expansion of its infrastructure, both internally and its connections to Western Europe and global markets. For example, since 2000 the length of motorways in CEE has almost tripled, increasing by 271%, compared to only 16% for Western Europe. Hungary currently has one of the highest motorway densities in Europe, ranking third after Belgium and the Netherlands, while the Czech Republic has one of the highest rail network densities. This has led to a massive expansion of consumer market catchment areas. For example, Iłowa in Poland, located near the German border, has access to 21.1 million consumers within a five-hour drive.

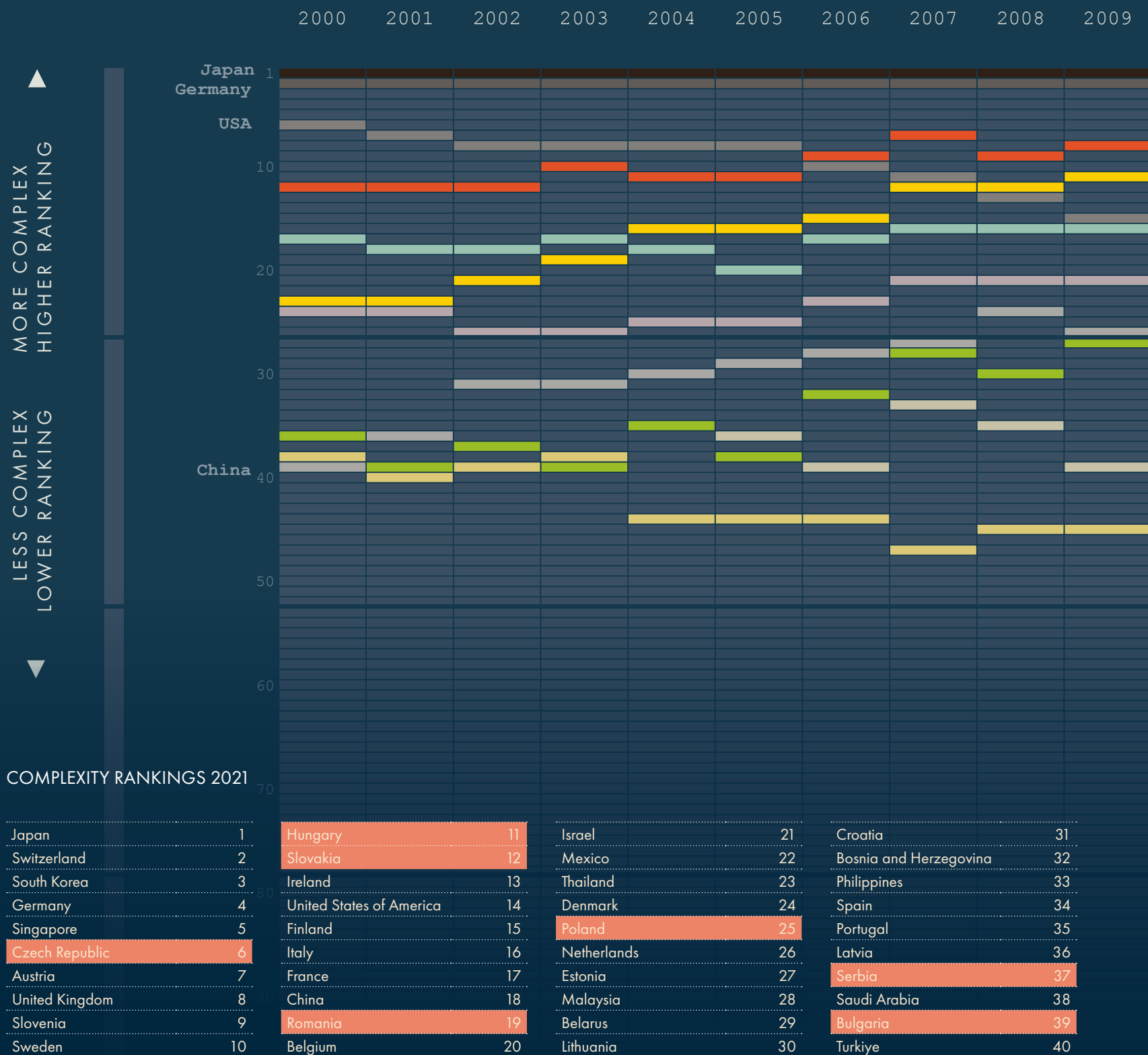
In terms of economic performance, CEE is predicted to continue to outperform Western Europe and the rest of the EU, with GDP forecast to grow at double the eurozone average between 2023 and 2026. With a multitude of factors set to keep driving the nearshoring boom in CEE, demand for high-quality industrial and logistics space can only accelerate.

SUPPLY CHAINS: YOU'VE GOT A FRIEND IN ME

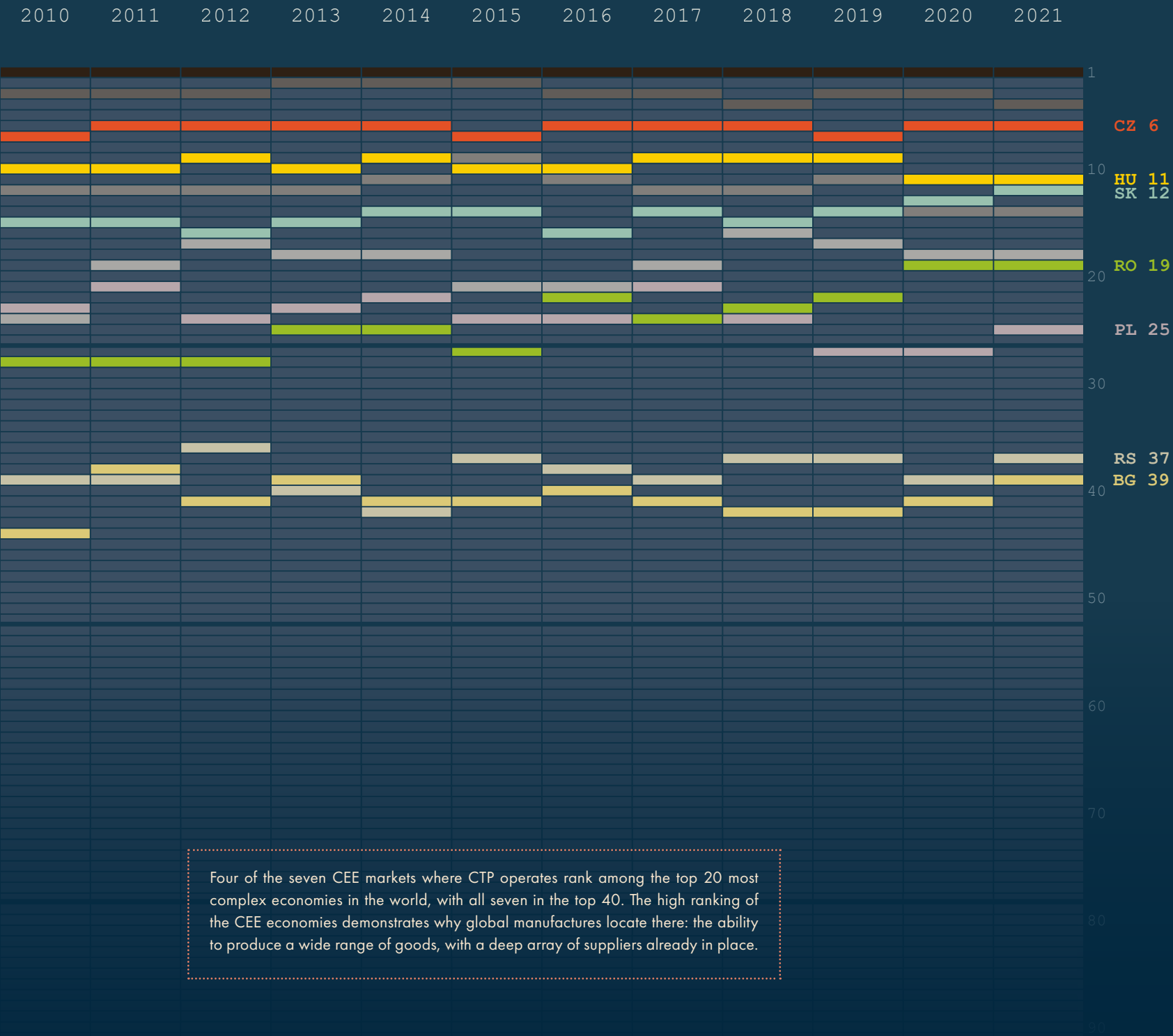


COUNTRY COMPLEXITY RANKING

The Economic Complexity Index (ECI) is a measure of the relative knowledge intensity of an economy based on the diversity and complexity of its export basket. High complexity countries are home to a wide range of sophisticated, specialised capabilities and are therefore able to produce a highly diversified set of complex products.



Developed by Cesar A. Hidalgo, Director of the Center for Collective Learning at the Artificial and Natural Intelligence Institute of the University of Toulouse, and Ricardo Hausmann, from Harvard University’s Kennedy School of Government, the ECI provides estimates of economic complexity based on trade data, patent data, and research publication data. It has been shown to explain income inequality across countries and is able to predict future growth better than any other single measure. CEE countries score highly on the ECI ranking, reflecting the high level of value-added production capabilities and the depth and diversity of local knowledge and know-how.



Four of the seven CEE markets where CTP operates rank among the top 20 most complex economies in the world, with all seven in the top 40. The high ranking of the CEE economies demonstrates why global manufacturers locate there: the ability to produce a wide range of goods, with a deep array of suppliers already in place.

Source:
The Growth Lab at Harvard University, 2019,
“Growth Projections and Complexity Rankings”.

YOU CAN'T IMPROVE WHAT YOU DON'T MEASURE

– PETER FERDINAND DRUCKER, CONSULTANT AND AUTHOR

CTP has been “doing” ESG long before ESG appeared on the scene. Why? As a Dutch company, it’s part of our nature to be resourceful, but it’s mainly because of our business model, which from our start sits at the core of how we do business: we build to own and aim to create long-term sustainable value. We work constantly to improve our operations and developments to better harmonise with the environment around us—both the communities where we operate and with the natural world—while also improving our governance standards.

It’s a lot to do, but we’re committed to grabbing this opportunity by the horns. By doing so, we’re also helping our tenants meet their ESG goals. It’s a win-win that we’re ramping up. Over the last two years, we have established an ESG accounting system that assesses three areas of our activities: our corporate operations, our park and landlord-controlled consumption, and tenant-controlled consumption within the portfolio.

ESG can be a big, lofty topic. But by measuring, assessing and setting goals with this accounting framework—which is supplemented by other voluntary and non-voluntary assessment schemes and reporting, such as the UN’s Sustainable Development Goals—we’re systematically building and ESG framework that we organise into

FOUR PILLARS.





2 EMBEDDING PARKS IN COMMUNITIES

We don't just build warehouses; we build parks that take root in local communities, create long-term value, and improve quality of life for all stakeholders. We do this with things like attractive and biodiverse landscaping, thoughtfully designed public spaces and recreational facilities, residential units for short- or long-term use, public or shared transit connections, and community spaces like our unique Clubhaus for tenants and local residents to enjoy. It's important for us that our parks are not just production sites, but that they also serve people and communities as a place to make friendships, to learn, or to unwind.



1 STRIVING TO BE CLIMATE POSITIVE

Being climate positive at CTP goes beyond reducing carbon emissions. We know that creating sustainable value requires a holistic approach to conserve resources, reduce harmful emissions and protect the environment—and we have an extensive (and growing) tool kit to do this. Things like our renewable energy business, which we launched to power our parks. Or smart buildings that minimise energy and water use, with waste sorting systems to reduce what ends up in landfills. We upgraded our standing portfolio with LED lighting to reduce consumption and are installing EV charging stations throughout our parks. We also support biodiversity with forest management and landscaping. We work each day to improve and expand our efforts to shrink our impact and contribute positively.



4 CONDUCTING BUSINESS WITH INTEGRITY

Transparency, clear communication, and ethical treatment underpin how we conduct business. We ensure this with a range of policies, such as our Code of Conduct, Anti-Bribery and Corruption Policy, and Insider Trading Policy. Inclusion and equal opportunities are core values, and we provide multiple channels for employees to raise concerns or grievances. We align with the EU Taxonomy and maintain transparency in our eligibility and alignment. Downloadable governance documents are available to ensure transparency.

23.5%

OF GROSS LETTABLE AREA COVERED BY LEASES WITH A GREEN CLAUSE (Q1 2023), WHILE 90% OF NEW LEASES SIGNED IN H1-2023 INCLUDED A GREEN CLAUSE



3 STIMULATING SOCIAL IMPACT AND WELL-BEING

At its core, our business is about people. We think about our social impact as an employer, as a landlord to other employers, from the perspective of the communities where we operate, and as a global citizen. Several of the initiatives we support focus on education, as education can unlock people's potential to improve communities even further. We support several local civil society organisations, such as the Tereza Maxová Foundation in the Czech Republic, which helps disadvantaged children; HOSPICE Casa Sperantei in Romania, which provides palliative care and family support; and Človek v ohrození in Slovakia, an educational support programme for youth.

Sustainability Report

You can get the full picture with all the numbers, frameworks and graphs in our first-ever Sustainability Report, which we published in June 2023.

And of course – you know and we know that sustainability doesn't stop with just a Sustainability Report!

#FULLSPEED HIGHLIGHTS

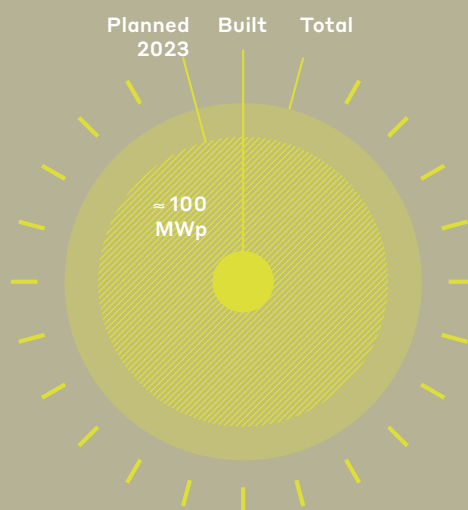
SOLAR

SUNNY DAYS AHEAD FOR OUR NEW ENERGY BUSINESS

Things have progressed a lot since we delivered our first photovoltaic (“PV”) ready roof in 2012. Producing local, renewable energy is an integral part of our strategy going forward, together with our core businesses as developer and operator. Doing so helps address Europe’s energy needs at large by ensuring affordable, clean and reliable energy to our tenants across Europe.

In 2022, CTP increased its installed PV capacity from 6MWp to 38MWp, and we are on track to install an additional 100MWp of capacity by the end of this year. By the end of 2026 this should be increased to 400MWp. These plans are all grounded with specific KPIs. Currently, we have installed a total PV capacity of 42.5 MWp as at end-July.

We are excited to announce that the European Investment Bank is supporting our 2026 solar roll-out plans with €200 million in financing. Where onsite renewable energy is not currently available, CTP partners with energy suppliers to provide tenants with 100% renewable energy.



GREEN STEEL

A NEW SOLUTION TO TACKLE SCOPE 3 EMISSIONS

At CTP, we have no intention of sweeping our upstream, Scope 3 emissions under the rug. This presents a big challenge for real estate developers, but we’re looking this challenge straight in the eye and working each day to implement new, innovative solutions. Steel production doesn’t leave a light carbon footprint—so we have been assessing new alternatives.

In spring this year at CTPark Prague North, we were excited to try out a new green steel solution by Arcelor Mittal for an entire 32,000 sqm roof area. By using these trapezoidal sheets made of Xcarb steel—a decarbonised, low-carbon product whose production uses primarily renewable resources—we were able to reduce the embodied carbon by 835 tonnes of CO₂.

BIODIVERSITY

PARKS GONE WILD!

Loss of biodiversity is a serious issue for our planet today. We need to promote a new era where real estate is harmonised with nature, and we’re getting creative—and wild—with how we are doing this.

For example, we are using a wider variety of native grasses, shrubs and trees, which brings two benefits. First, it takes fewer resources to maintain, like watering, pesticides and gardening labour, and secondly, it allows for a more dynamic ecosystem to grow and evolve. Our water retention ponds have been creating new homes for critters like ducks, frogs, and a whole host of microorganisms that play an important role in serving an ecosystem. For example, we have beehives at five parks and in one forest in the Czech Republic, which equates to roughly 945,000 bees—and a lot of pollination power! CTPark Prague West is home to a lizard habitat, and we’re proud to have nearly 20 insect houses and over 30 birdhouses across our parks.





BREEAM

SUSTAINABILITY THAT IS VERIFIED

In 2020, we set out to certify our entire portfolio to the BREEAM Very Good In-Use standard and higher. It was an unprecedented move in our industry, raising the bar for not just our competitors, but also for ourselves. The “In-Use” caveat on the certification means that every three years the buildings’ form and function are tested again to uphold their rating.

To make it even tougher and raise the bar higher, we are increasingly certifying with BREEAM’s “New Construction” scheme, which requires more and better green solutions and materials in the design and building phases.

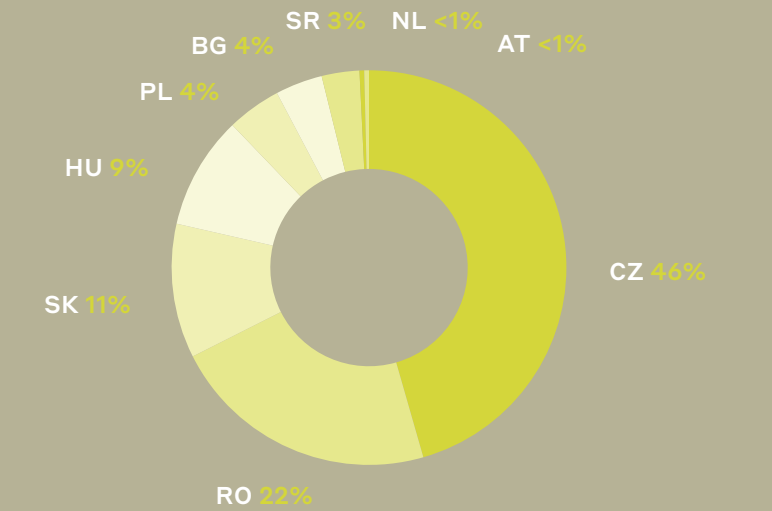
We are proud to have built not one, but ten buildings to date that have achieved BREEAM Outstanding.

BUILDINGS CERTIFIED BREEAM OUTSTANDING

Clubhaus Bucharest West, RO	85.2*	94.6**
CHR2 Prague West, CZ		92.1
CHR1 Prague West, CZ		90.6
NU3 Prague East, CZ		89.6
Tower B Spielberk Office Centre, CZ		88.6
VCS2 Vecsés		88.2
BIA5 Budapest West, HU		87.7
BUW 20-21 Bucharest West, RO		87.5
B-08 Ber, CZ		86.9
DomeQ II+III CZ		85.1

* new construction rating
** in use rating

BREEAM CERTIFIED BUILDINGS BY COUNTRY



UNHCR

BEING A GLOBAL CITIZEN

In March this year, some of our team members had the opportunity to go with the UN Refugee Agency (UNHCR) on a three-day visit to Uzhhorod, in western Ukraine. We were able to see the continued important work the UNHCR is doing to help people since the war broke out, such as providing essential items, psychological support, legal assistance and helping them access social services. Additionally, we saw a lot of community-led activities, including sewing and cooking classes and other workshops to provide skills for entry into the market. CTP stands in solidarity with the millions of people who are forced to flee their homes, as we financially support the UNHCR’s activities.



Clubhaus Concept



COMMUNITY SPACES THAT KEEP GETTING BETTER

CTP's signature Clubhaus concept is a great example of how brick, mortar, and smart design can facilitate a community—and it all started back in 2000 when we opened our first common space at CTPark Humpolec in the Czech Republic. By providing versatile meeting spaces, onsite services (like medical facilities, cafeterias, convenience stores, and canteens) and beautifully crafted reactional spaces to unwind and relax, these hubs help make our parks more than just a place to work by facilitating a space for community relationships, shared learning and fun times.



Visualisation of the new Clubhaus at CTPark Warsaw West, scheduled to open in Q2 2024.

Each Clubhaus we build is better than the last, and that is why we are thrilled to be unveiling soon our newest Clubhaus at CTP Warsaw West. Like our other Clubhauses, it will house an array of amenities for tenants and community members to make use of. This includes a co-work zone and gaming room, a self-service grocery store, a first-aid room, a canteen, office and meeting rooms, an outdoor square that can host food trucks, an outdoor gym and relaxation area, and a multifunctional sports field with shower rooms.

But what makes this Clubhaus extra special is how sustainable it is. It's built using a timber structure and apart from the foundation doesn't use concrete as a structural material. Utility usage is minimised by using rooftop PV panels, grey water reuse systems, and gas-free heat pumps that are powered with renewable energy. In addition, the outer walls will be covered in climbing plants to help lower the carbon footprint over the lifetime of the building.

From educational events for young professionals to blood drives and monthly brunches to workshops for tenants—there is always something happening at CTPark Bucharest West! As Ana Dumitrache, CTP Managing Director in Romania explains, “Providing this community space has been a real game changer for the industry.”

15% of energy used at the Clubhaus at Bucharest West is covered by the rooftop solar system.

BUCHAREST WEST



Clubhaus at CTPark Bor includes meeting spaces, a healthy restaurant, a cafe, a doctor's clinic and shared offices.

BOR

At one of CEE's largest business parks you'll find the Clubhaus at CTPark Bor. With around 4,000 people working at the park, this community hub is well used—be it for winding down and relaxing, meetings and sparking new cooperations, or getting some team spirit fired up at its sport facilities. This year, we're hosting our 4th annual CTP Sports Day that invites tenants and CTP employees to get together for some fun competition – congrats to last year's winner, Hostel Soho!

Clubhaus at Bucharest West hosted 20 community events in its first 18 months.



clubhaus

SOFIA

Our Clubhaus at CTPark Sofia opened in spring this year to accommodate employees and community members in this quickly emerging region. Designed by Helen Koss Interiors, this is one of our sleekest interiors yet and we love it.



BUDAPEST WEST

The vibrant colours and welcoming space make it ideal for both business and social occasions. Its terrace is the perfect place to take advantage of the summer weather. Tenants are regular visitors to the Clubhaus, where all kinds of events from large meetings to training sessions are held.

Watch out for the grand opening of the Clubhaus at CTPark Ostrava this fall!



OSTRAVA

Next in the Clubhaus pipeline is CTPark Ostrava. It will feature all the classic Clubhaus amenities, plus a yoga room and very elegant interior design and landscaping.

How to

build a



science

& technology

park





CTP loves Brno. The city has it all—great location, great people, and great value. It's not for no reason that CTPark Brno is one of our premier developments. Since its launch in 2004, the park has attracted big names in the high-tech industry, who came to take advantage of the prime location just a short drive from the centre of Brno—the Czech Republic's "Silicon Valley", with several highly ranked universities, including the Brno University of Technology, and the city's young, smart population and excellent liveability.

CTPark Brno today is a vibrant technology hub with both local and global companies operating state-of-the-art R&D and testing centres, high-tech manufacturing plants, and consumer product service centres, among other high-tech activities—companies like Honeywell, Garrett Motion, ITT, Inventec, and Thermo Fischer Scientific—formerly FEI, a company that originates in Brno, was acquired in the early 1990s and is now a world leader in the development and assembly of electron microscopes.

As CTPark Brno has grown, so too have our tenants' needs, including their employees' requirements for an enjoyable and enriching workplace. Currently, CTP is planning several new initiatives at the park, including expanding Thermo Fisher's scientific facilities and building for them a new R&D campus. We are also in the process of re-inventing the Honeywell campus and adding more green places. A big project in the works is the construction of a new, multi-level Clubhaus community centre for park residents. And that's not all. We are in the early planning stages of a major new science technology park at CTPark Brno. We have brought in specialists to help us with plans and are in discussions with the City of Brno, local universities, students and local residents on the shape of the planned science technology park and how the new campus can benefit all stakeholders.

Planned launch of the new Science Technology Park in Brno is set for 2030



CEES ADMIRAAL, CTP INNOVATION DIRECTOR



Cees Admiraal joined CTP from the internationally renowned High Tech Campus Eindhoven, where he headed up business development, to help us knit together the educational, local administration and business communities behind a solid plan for the new science technology park in Brno.

My name is Cees Admiraal, and I have been employed by CTP since May 2023 as Innovation Director. My main task is to advise on the development of a new science technology park at CTPark Brno, in order to develop a more technologically-oriented "ecosystem".

When the term Technology Park comes up, two words come to mind: knowledge and focus!

Knowledge about diverse technology areas—from the theoretical, scientific level to very practical craftsmanship. And the

activity that goes with it is also very diverse, from global companies via institutes to start-ups in that specific area.

Focus is important because you want to excel, so you need to really focus on what you want to excel in and whether it is realistic.

What is also very important is that young people are involved, because they have had a modern education and understand the latest technology, so students should not be missing in this high-tech ecosystem.

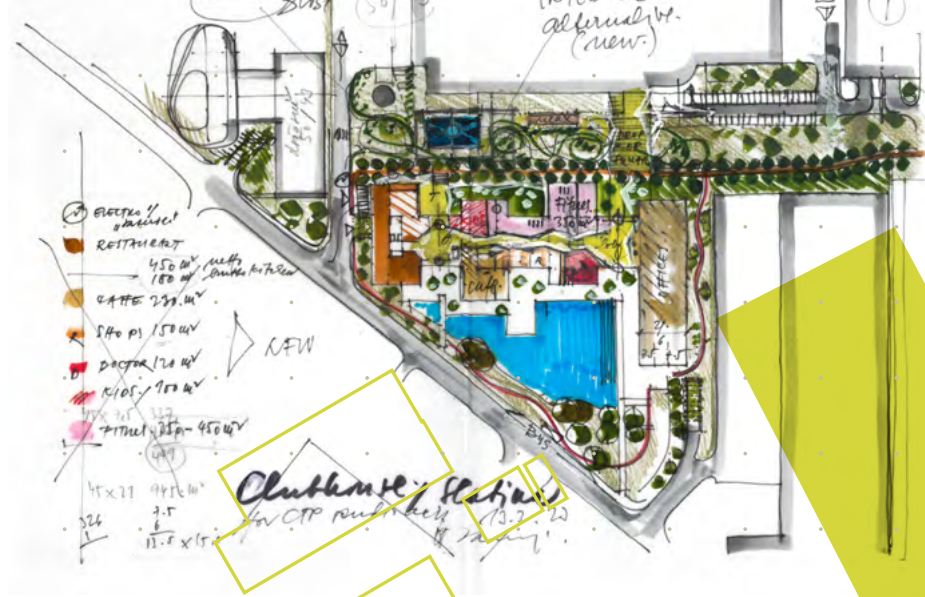
And finally, I would like to emphasise that collaboration must be an essential part of such an organisation. Ground-breaking innovations are the product of various disciplines working together in an effective way. For example, an electric car combines the disciplines of the electronic platform, mechanics, battery technology and design in such a way that the whole is much more than the individual parts. So it is great innovation!

1

Clubhaus at Honeywell Campus

PLANNED REALISATION 2023–2025

CTP is currently planning to redevelop the existing Honeywell Campus building, transforming outside areas into a welcoming green zone, and integrating a Clubhaus with leisure amenities, cafes, doctors' offices, and community meeting spaces for events, discussions, educational events as well as client meetings.

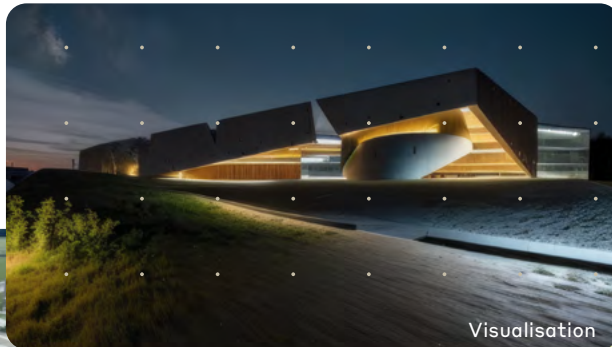


2

Thermo Fisher High Tech Campus

PLANNED REALISATION 2023–2026

The new campus will incorporate Thermo Fisher Scientific's existing electron microscope fabrication facilities with new production labs, offices and residential units. The unique campus is designed for knowledge workers, with modern architecture, low-carbon materials and green landscapes.



Visualisation



Visualisation



CtPark Brno
49.1688588555912,
16.67388957431568

Science Technology Park: Future innovation hub

PLANNED REALISATION 2026–2030

Currently in the concept phase, CTP is working to acquire land adjacent to CTPark Brno to develop a purpose-built science and technology park. The park would transform a currently under-utilised area of the city into a dynamic, high-tech economic zone where universities, local and international businesses and local government can collaborate to develop new, innovative ideas and technologies and put them into practice.



Developing large-scale parks requires the input and support of multiple stakeholders and can only be achieved by aligning goals with the long-term vision of local leadership, with whom we work to develop a strong and stable economy while improving the living standards of the local community.

Dear Mr. Vos,

Thank you for the repeated involvement of CTP in Brno city projects. I am pleased that you are actively involved not only in the development of the locations where the company operates, but also in the events in the city. Among other things, I can mention, for example, the support and assistance provided in the construction of a day centre on Vlhká Street (a facility for the care of homeless people).

At the same time, I would like to thank Mr. Michal Dospěl, the regional manager of your company in Brno, for his excellent long-term cooperation and helpfulness, and for his great contribution to the successful implementation of joint projects.

I very much appreciate the cooperation so far and I believe that we will be involved in further projects together.

Sincerely
Markéta Vaňková,
Mayor of Brno





CONSTRUCTION DIARY

BUDAPEST SZIGETSZENTMIKLÓS



H1 2023

PROJECTS UNDER CONSTRUCTION



Key

DELIVERY
2023

DELIVERY
2024+



COUNTRY 63 projects 1,845,000 sqm



CZ 27 projects 577,000 sqm

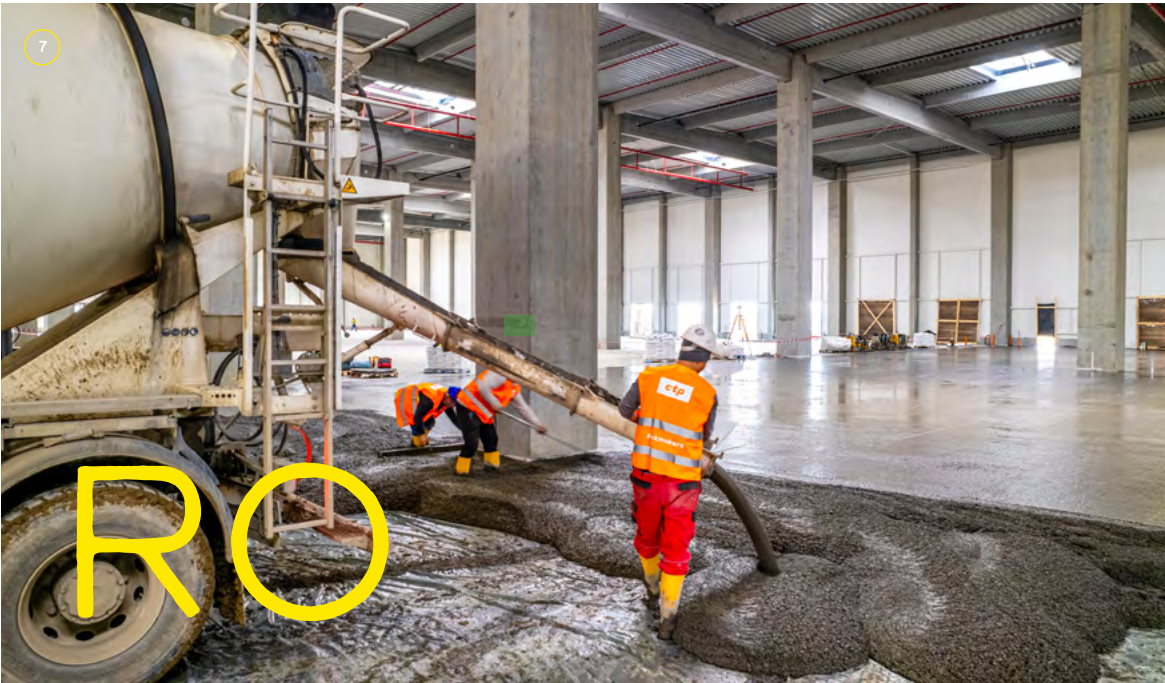
1	2	PRAGUE NORTH 4: 95,000	3	5	OSTRAVA PORUBA 2: 39,000
4		CERHOVICE 1: 20,000	7	8	BLUČINA 1: 53,000
6		ŽATEC 3: 82,000	9		BRNO 2: 37,000



1 2 3 GDAŃSK PORT 1: 38,000
4 SULECHÓW 1: 84,000

5 IŁOWA 2: 78,000
6 ZABRZE 3: 66,000

PL 11 projects 448,000 sqm



AT 2 projects 48,000 sqm
SK 4 projects 48,000 sqm
RO 4 projects 186,000 sqm

- 1 Vienna East 2: 51,000 – Delivered H1 23
- 2 ST. PÖLTEN NORTH 2: 48,000
- 3
- 5 AMSTERDAM 1: 120,000 – Delivered H1 23

- 4 PREŠOV SOUTH 1: 27,000
- 6
- 7
- 8
- 9 BUCHAREST WEST 1: 88,000



1 SOFIA WEST 1: 33,000

3 SOFIA EAST 1: 26,000

4 PLOVDIV AIRPORT 1: 8,000

5 BELGRADE WEST 1: 39,000

6 8 BELGRADE NORTH 1: 19,000

7 BELGRADE CITY 2: 135,000

2 BUDAPEST
SZIGETSZENTMIKLÓS 2: 121,000

9 NOVI SAD EAST 1: 24,200

10 BREMEN 1: 28,000



DE	1 projects	28,000 sqm
BG	3 projects	66,000 sqm
HU	5 projects	194,000 sqm
RS	6 projects	250,000 sqm

Our portfolio of premium mixed-use properties in Brno and Ostrava in the Czech Republic are jewels in the CTP crown. We've been busy lately enhancing the parks with new buildings, new features, and expanded services. And we're excited to be expanding our premium mixed-use city-centre concept to Slovakia with an historic brownfield urban revitalisation project.

New Clubco at CTPark Prague East

62

CLUBCO



Two new floors
in Vlněna

First Clubco
in Prague

Underway
in Ostrava

Clubco is CTP's unique co-working space with something for everyone. First launched at *Vlněna* in Brno, the concept has proven so successful, with 97% occupancy, that we have expanded *Clubco* at *Vlněna* with two new floors, bringing its total size to 4,000 sqm. Due to demand, we also opened a new *Clubco* at *CTPark Prague East* (550 sqm) following a refurbishment of offices there—ideal for smaller companies or independent contractors who need modern office space but who don't need to venture to the city centre. We are also planning to launch this year our third and largest *Clubco* location to date in the Czech Republic at *IQ Ostrava* with 5,000 sqm space, demonstrating the success of our co-working concept amidst the on-going change of office usage and working routines.



B

C

O

Clubco, CTP's co-working space, is on the move

Clubco at *Vlněna*



Clubco, *Vlněna*
Adriana Sniegonová
Head of Co-working CZ
adriana.sniegonova@ctp.eu



ASK
US

...

Clubco, *IQ Ostrava*
Kateřina Camerino
Community Manager
katerina.camerino@ctp.eu



Clubco, *CTPark Prague East*
Lucie Marešová
Coworking Manager
lucie.maresova@ctp.eu



Vlněna continues to grow with one Europe's most advanced office properties

T

CTP's most ambitious mixed-use project, *Vlněna*, continues to transform the former 19th century brownfield site into Brno's new city-centre destination. We are currently building one of Europe's most advanced office buildings at Vlněna—a 16-floor, 61-metre high-rise with a completely glazed "sawtooth" glass facade that maximises the amount of floorspace illuminated by natural light—the first of its kind in Europe.

The building, which is being built to *BREEAM Outstanding* standards, comes equipped with cutting-edge energy management system technologies, including sensors that detect the number of people in an area and regulate the intensity and usage of lighting and climate control accordingly. The iconic building's rooftop will also feature Europe's first drone helipad for tenant deliveries. The building is scheduled for completion in Q2 2024, bringing Vlněna's total gross lettable area to 80,000 sqm.

PONĀVKA

Ponāvka nears completion with its new landmark building

Ponāvka is the place to be in Brno, with its eclectic mix of property types and activities at one convenient and historic location.

We recently broke ground there on a next-generation, 22,500 sqm building with offices and amenities that at completion will be Ponāvka's landmark. The new building, which is scheduled for completion in H1 2024, is being built to *BREEAM Outstanding* standards and features several smart-building solutions, including autonomous lighting systems that respond to fluctuations of sunlight and movement within the building, sophisticated grey water and rainwater management systems, and a rooftop photovoltaic plant for onsite solar power generation. With its highly aesthetic glass-encased design and hanging gardens, the new building unites the park, which is at full occupancy, including our unique *Domeq* residential buildings for students and young professionals.



A4

At the start of the year, CTP began reconstruction of the iconic *Dunaj* (Danube) department store, a national cultural monument, and the adjacent *Dom Odievania* (House of Clothing) in downtown Bratislava—bringing our premium mixed-use development concept to Slovakia for the first time. CTP will transform the currently dilapidated structures—*Dunaj* was built in 1936, while *Dom Odievania* was added in the 1980s—into a modern mixed-use urban revitalisation development combining retail, residential and gastro units with our *Clubco* co-working office space, while simultaneously maintaining as much of the historic “look and feel” and *genus loci* of the historic city-centre location as possible. The project, which is expected to be completed in H1 2025, is aiming for *BREEAM Outstanding* certification and will feature state-of-the-art energy management systems, as well as a large public atrium and pedestrian passageway connecting a side street to Námestie SNP, one of the Slovak capital’s most prestigious addresses.

Dunaj



CTP is bringing new life to a Bratislava city-centre icon

Dunaj visualisation
by Bogl Architects







CTFest
2023

CTFest was launched in 2017 to bring the whole CTP Parkmaker team together for a day of fun, relaxation, entertainment, and to celebrate the achievements of long-term colleagues in an enjoyable summer-time atmosphere.





**TUG-O
WAR**



2023 → SK WINNERS AGAIN





MANAGEMENT MEETINGS (CZ)

Each quarter, CTP management gathers to review progress on KPI's, discuss new initiatives and long-term strategy, and exchange ideas on how best to reach company goals.



BRUNCH FOR PARKMAKERS AND TENANTS (RO)

We started a new tradition at CTPark Bucharest West's Clubhaus that brings tenants and Parkmakers together over a tasty brunch.



PLAYGROUND OPENING (HU)

Peter Tar, our Senior Business Development Manager, and the Mayor of Üllő cutting the ribbon at a new playground for a local school.



ROOFTOP PARTY (CZ)

Shared successes need to be celebrated! That is why we host our annual Rooftop Party for all the brilliant agents in the Czech Republic that we work with each year—to enjoy a fun evening with one of the best views of Prague and pay tribute to the top deals.



LET'S BIKE TOGETHER (CZ)

Over the course of one day, 31 Parkmakers, one business partner, two wives, one husband and one son grouped up into five teams to cycle through five different cities and regions across the country.



Collectively, they covered 2,280 km across 10 CTParks! Each team also fulfilled a charity goal, so that five bikes were donated to children's homes.



TREE PLANTING (RO)

Networking and team building over planting shrubs and trees? We loved it! Over 50 Parkmakers and tenants got together to get their hands dirty and plant 230 shrubs and trees at CTPark Bucharest West.





FLOWER ARRANGEMENT WORKSHOPS (RO)

Parkmakers and tenants getting together to share some floral creativity in a flower arrangement workshop at CTPark Bucharest.

YOGA AT CTPARK BRNO UNDER THE TREES (CZ)

Tenants, Parkmakers and neighbouring residents enjoying a moment in *sukhasana* position together as part of regular yoga classes offered at CTPark Brno.



BIKE TOUR (SK)

#Fullspeed isn't just a hashtag with our team! Over four days and 819 kilometres, Ivan Šimo and Martin Pariza cycled from our westernmost park in Slovakia to our easternmost park, from CTPark Bratislava to CTPark Prešov.



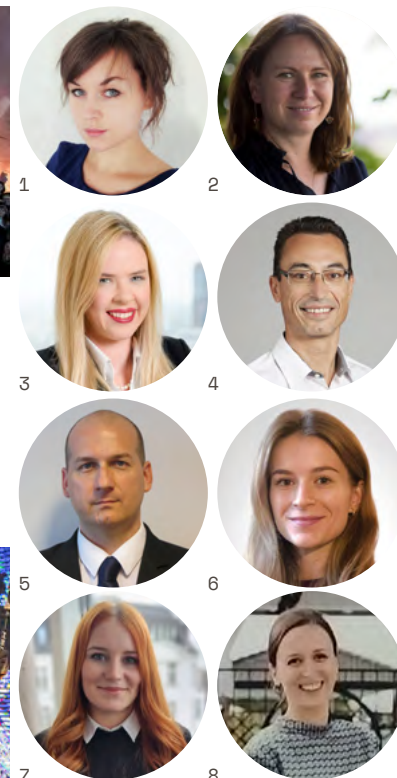
GALA BRNO (CZ)

16 December 2022 was a special day for CTP. It brought together around 500 Parkmakers from across all ten of our countries to Brno for our annual CTGala—an evening of awards, dancing, and dinner, all dressed to the nines!



COLOURS OF OSTRAVA (CZ)

Colours of Ostrava is one of the Czech Republic's oldest and largest music festivals and takes place at a heritage industrial site. This year, we were happy to help make the event more accessible to those with mobility challenges.



NEW FACES

These are some of our new colleagues. Can you correctly link them to their childhood photo below. Have fun!



STUDENT TOUR (SK)

35 high schoolers visited CTPark Košice to learn about high-tech industry. After the lesson, students, tenants and Parkmakers alike enjoyed a local food truck that came to the park for this special day.





Białowieża Forest

Where the buffalo roam



The Białowieża Forest—which spans the Polish-Belarus border and includes Białowieża National Park and the UNESCO-designated

Białowieża Forest World Heritage site—is one of Europe's last and largest remaining tracts of primeval, lowland forest of the kind that once stretched from the Atlantic to the Urals.

Although parts of Białowieża Forest are managed, large tracts have been under strict protection for more than a century. Ancient oak, elm, lime and other trees have grown naturally to create a complex forest ecosystem with exceptionally rich biodiversity, including many threatened species of mammal (59), birds (over 250), amphibian (13) and reptile (7). Most famously, the Białowieża Forest is the world's last refuge for European bison—the largest wild land animal on the European continent. Once endemic to the European Plains, the massive herds were hunted to near-extinction during the 18th century. Although set aside as a protected area before WWI, the last wild bison in Białowieża Forest was killed illegally in 1919.

As a response, forest managers brought in zoo-born bison, who were at first kept in fields like cattle. In 1952, the bison were released into the wild. Today, the Białowieża herd numbers around 800, representing over 30% of the world's free-ranging European bison.



NEW FACES ANSWERS

1F Maryna Bryhadyr
2C Kateřina Camerino
3E Maria Ciechomska

4B Karol Michaliak
5A Richárd Simon
6D Barbora Drobná

7H Jelena Grozdanović
8G Lysanne Leka

UPCOMING EVENTS

CTP EVENT	PLACE	DATE
Doksyrace 2023	Doksy (CZ)	16/09
Capital Markets Day	Brno	20-21/09
EXPO REAL	Munich	4-6/10

LOOK FOR US HERE!	PLACE	DATE
Green Building Week	Bratislava	18-29/09
CEE Property Forum	Vienna	20-21/09
Property Investment Forum	Budapest	28/09
Logistika, Logistics Business Conference	Sofia	10/10
SEE Property Forum	Bucharest	24/10
Balrec, Real Estate Conference	Sofia	3/11
CEE Property Investment Update	London	23/11
SLOVLOG	Bratislava	23-24/11
Balkans Property Forum	Belgrade	30/11

PARKMAKERS EXPO 2023
SPECIAL WITH BASTIAN SCHWEINSTEIGER
8x GERMAN CHAMPION FOOTBALLER



DAY 1
ESG PANEL (DE)
INTERVIEW WITH
BASTIAN SCHWEINSTEIGER
CTPARTY

DAY 2
INDUSTRIAL REAL ESTATE
PANEL DISCUSSION (EN)
CEE PARTY

DAY 3
MEET THE PARKMAKERS
SIGNED FOOTBALL TOMBOLA

See u at EXPO!

Messe Munich
October 4-6
Booth A3.410



BAR & LOCAL FOOD FEST ALL DAY



CTP DOKSYRACE 2023

BIGGEST TURNOUT EVER!

...AGAIN!

REAL ESTATE CUP

16/09

Doksy 2023 is just around the corner, and it's going to be bigger than ever with over 40 Parkmakers signed up to participate. Looking forward to getting on the podium at the Real Estate Cup.
Good luck to all participants!

Swim 2 km

Bike 90 km

Run 21 km

GRID 09

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Special guest: **Bastian Schweinsteiger**
8x German Champion Footballer

