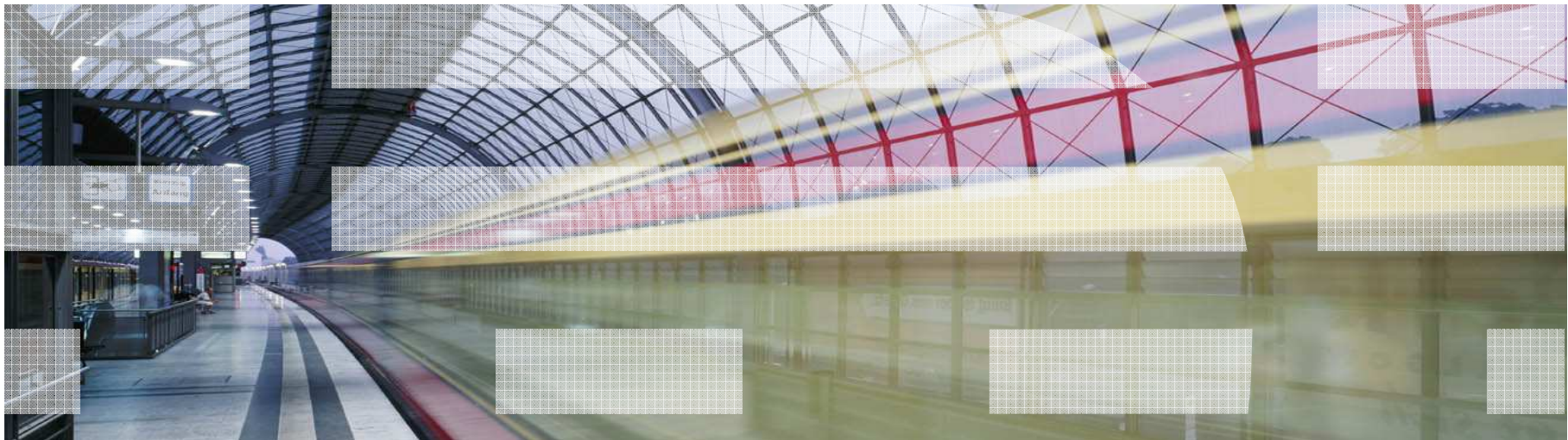


Den Bosch, 27 May 2010



Brabant Investors Day

Roel Spee, IBM-Plant Location International

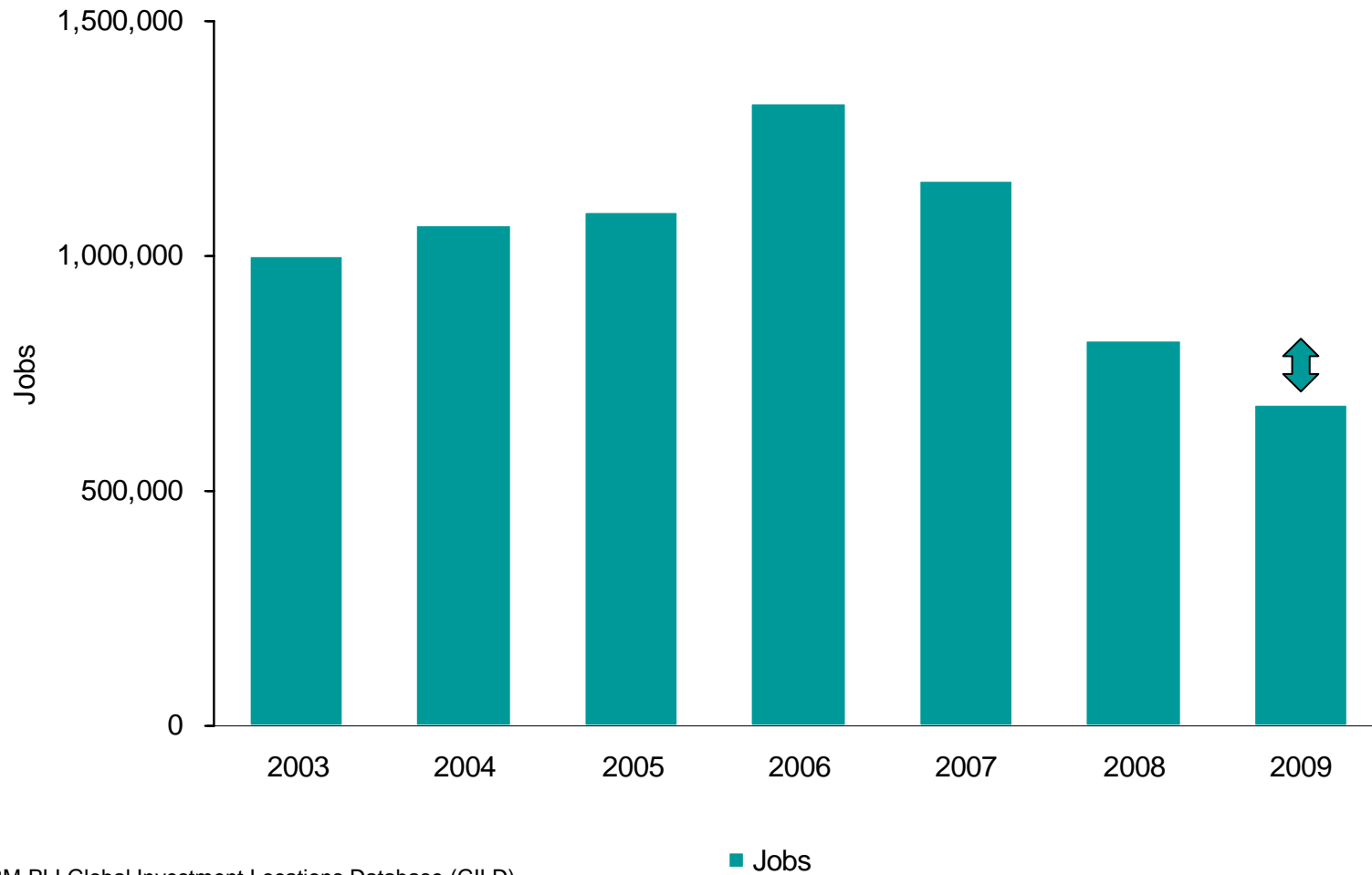


Content

- Global Location Trends
- Position of the Netherlands/North Brabant
- Near future outlook
- How to respond to current market?

Foreign investment was globally impacted by crisis in recent years But signs of recovery are beginning to emerge

Evolution of job creation through foreign investment



Source: IBM-PLI Global Investment Locations Database (GILD)

Highlights of global trends in recent years

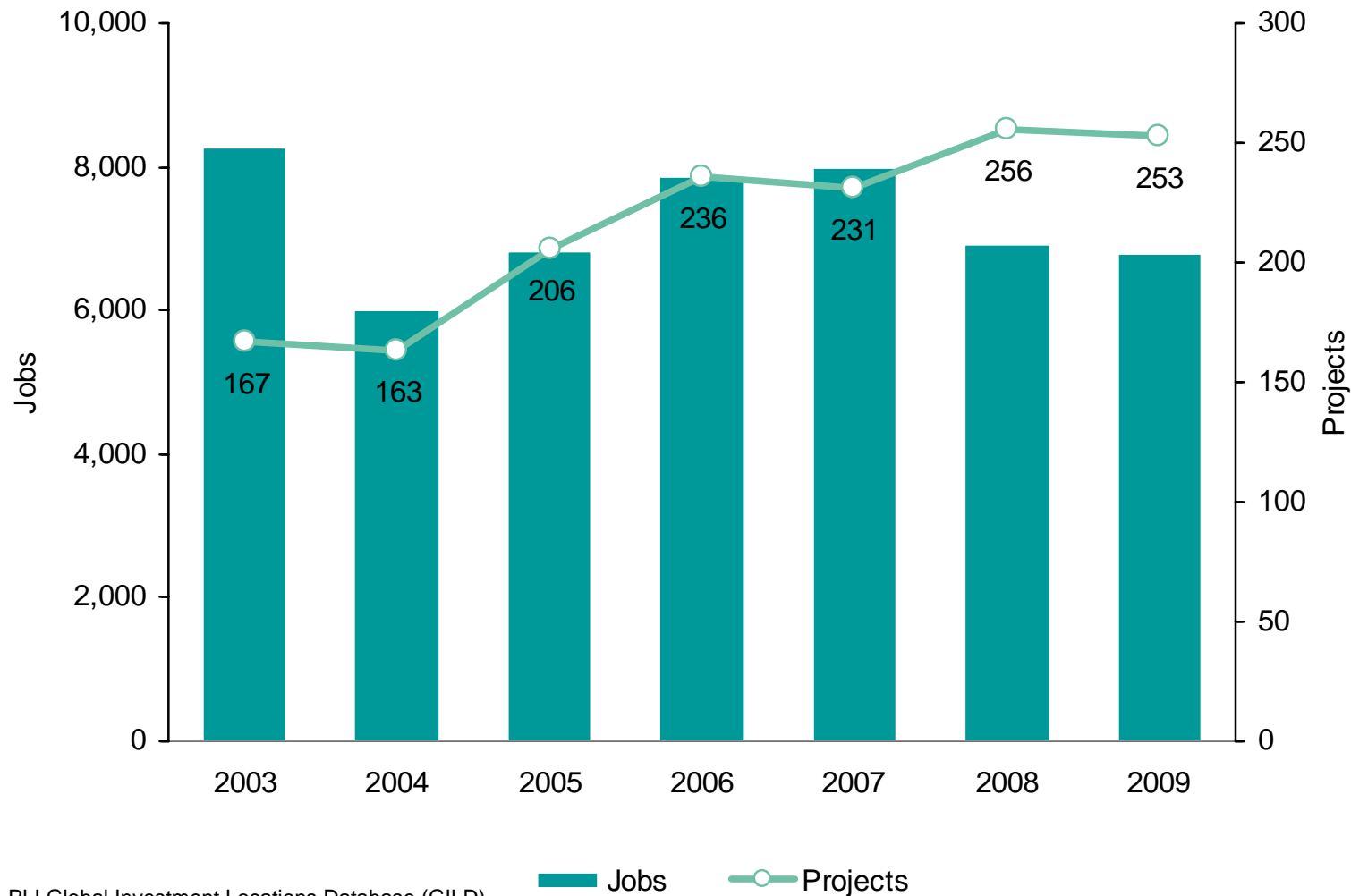
- **Traditional industries** remain leading job generators through foreign investment:
 - Transportation equipment, ICT, Chemicals, Electronics

- **India and China** receive most foreign investment (in jobs created), driven by cost, and access to resources and market
 - But mature, **stable economies** perform relatively well in times of uncertainty

- **Structural widening** of global investment:
 - New countries continuously come up as candidates for investment and emerging economies transform into outward investors
 - Growth markets **China and India** becoming increasingly important

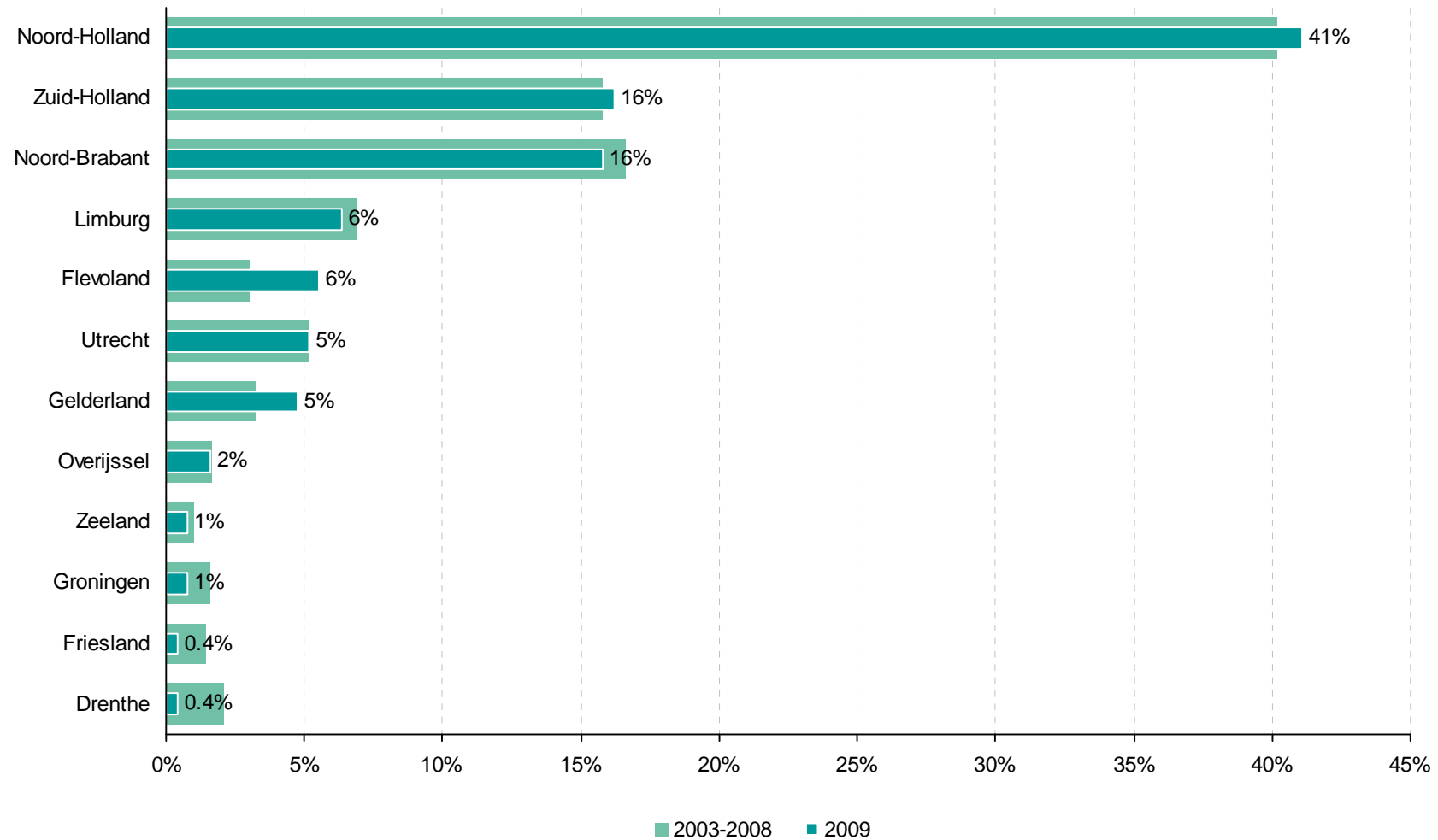
- **USA** remains dominant investor abroad, followed by Japan and Germany

The Netherlands showed relative stable performance in job creation, mainly as a result of higher number of (smaller) projects



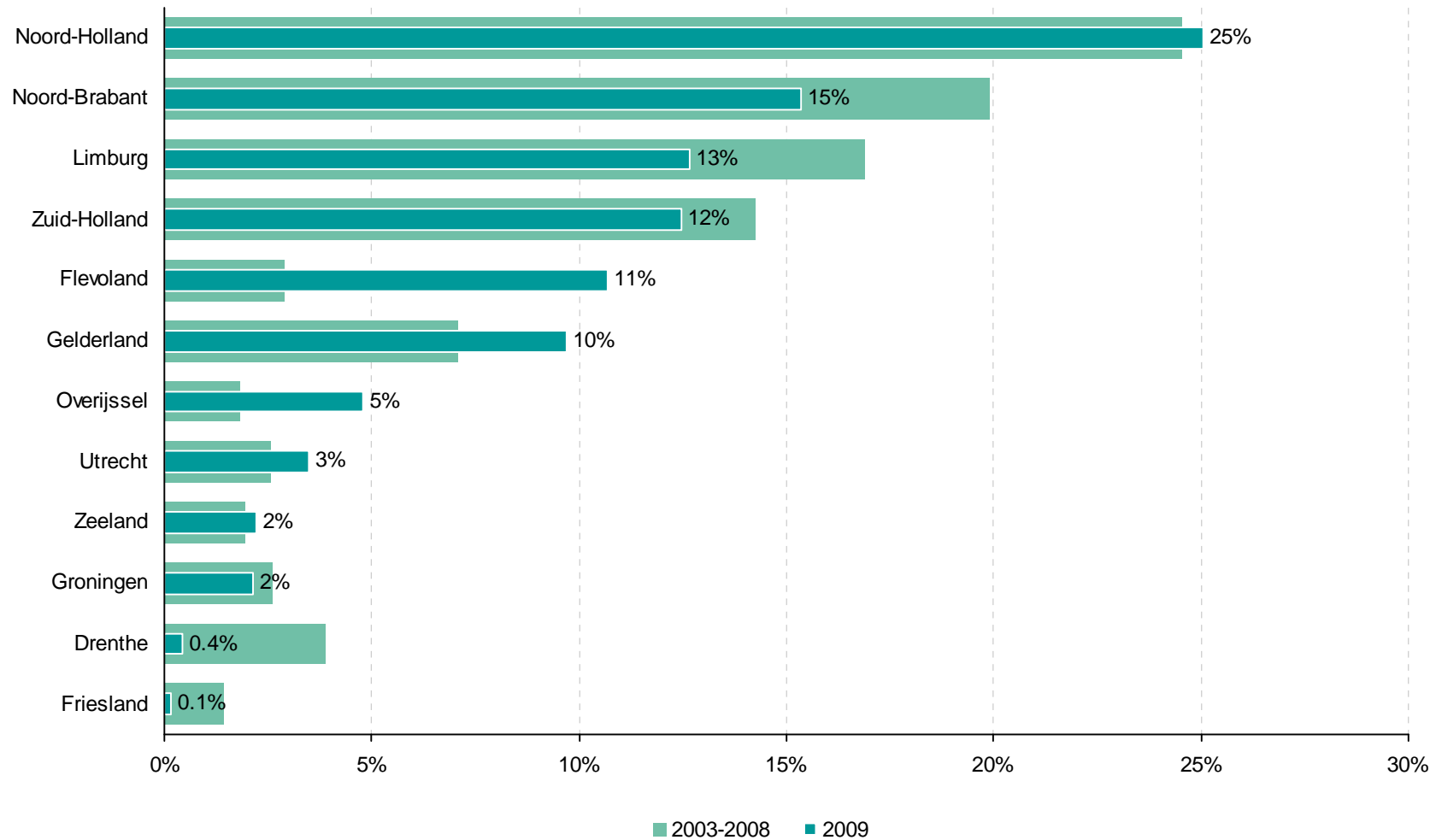
Source: IBM-PLI Global Investment Locations Database (GILD)

North Brabant is strong performer in number of projects: 40 greenfield investments and expansions – 16 % of NL total



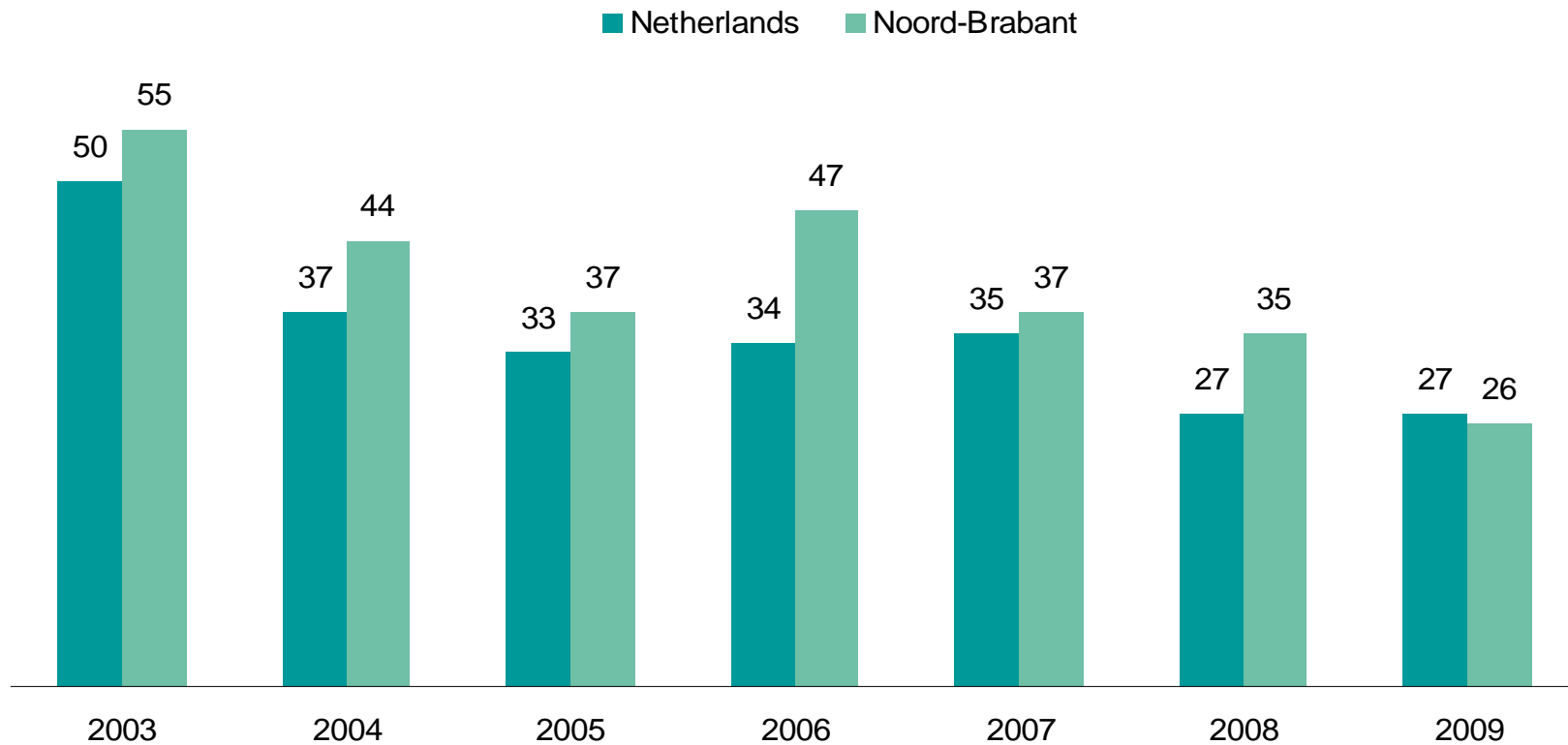
Source: IBM-PLI Global Investment Locations Database (GILD)

But North Brabant experiences reducing share in number of jobs: 1,000 new jobs through foreign investment



Source: IBM-PLI Global Investment Locations Database (GILD)

Average project size gradually reducing in North Brabant In 2009, for first time below national average



Source: IBM-PLI Global Investment Locations Database (GILD)

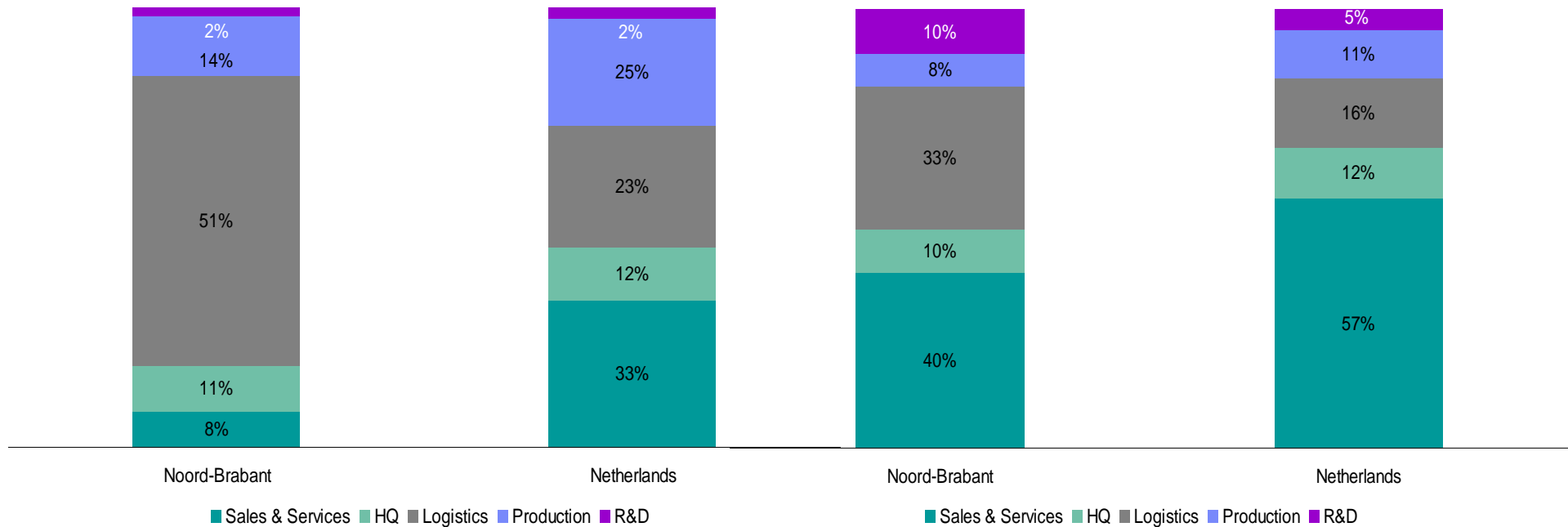
Logistics increasingly important for North Brabant; Investment in production is decreasing; R&D activity relatively high

Breakdown by business function, 2009

Breakdown by business function, 2009

JOBS

PROJECTS



Source: IBM-PLI Global Investment Locations Database (GILD)

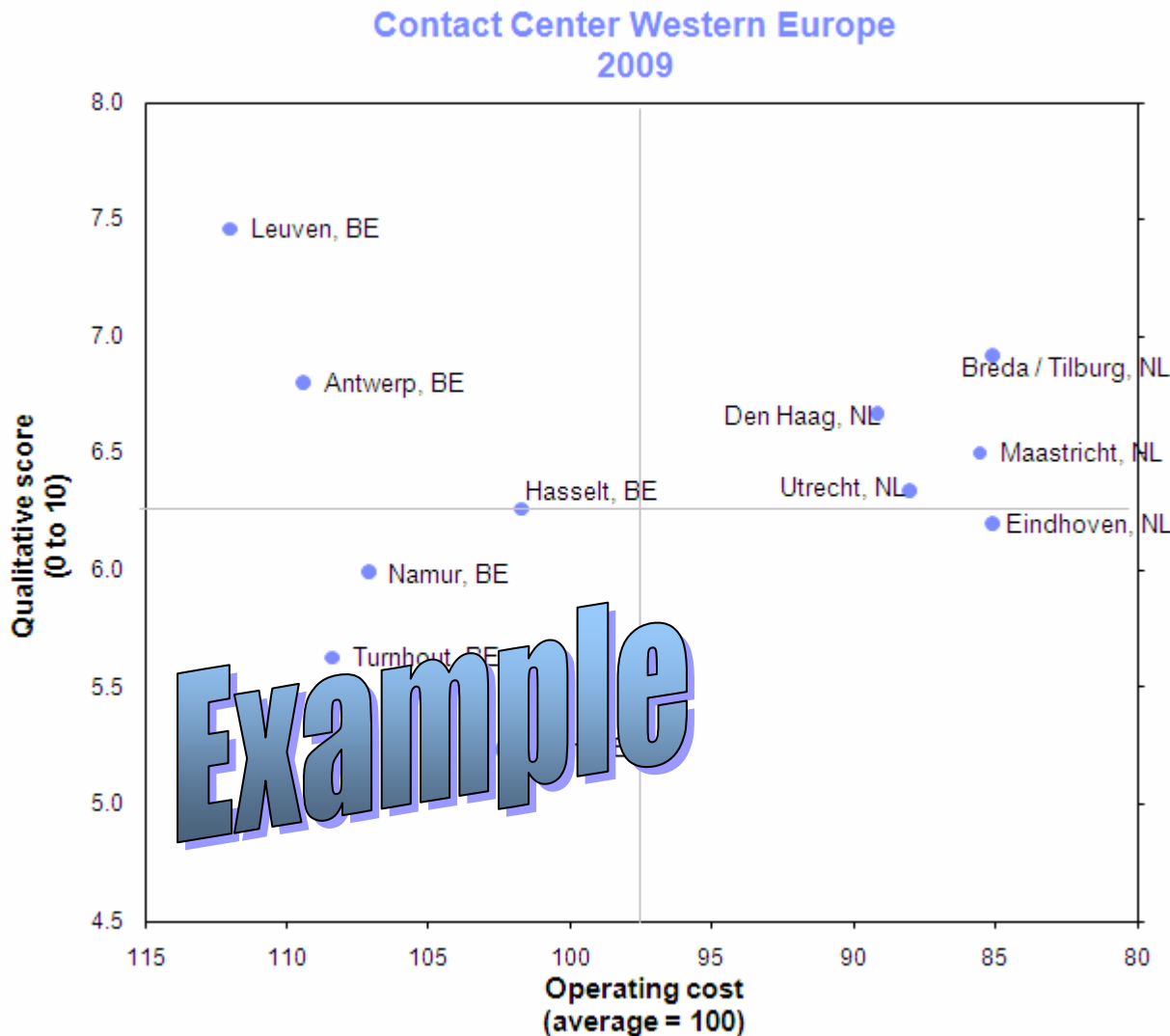
Outlook for Netherlands/North Brabant

Production	<ul style="list-style-type: none"> • Increasing competition from Emerging markets • Focus on market serving production • North Brabant not uniquely positioned in NL
Logistics	<ul style="list-style-type: none"> • Benelux remains strong base (Belgium equal to NL!) • Stable Unique Selling Points • North Brabant very well positioned
Back/middle offices	<ul style="list-style-type: none"> • Growth market (functional split), but very cost sensitive • Difficult to compete, apart from higher end/customer focused • Opportunity for smaller, language sensitive centers
Head offices	<ul style="list-style-type: none"> • Traditional EHQ disappearing? Regional centers • Netherlands very well positioned, but not leveraging • North Brabant well positioned for Benelux offices
R&D	<ul style="list-style-type: none"> • Less greenfield investment, many partnerships • Seeking access to knowledge/competence • North Brabant scores well, but difficult market

How to respond to market dynamics and competitive environment?

1. Responsive and flexible operating model for investment promotion
2. Unique value propositions required for location marketing
3. Stronger focus on 'Investor Development' than on 'New Investment Attraction'
4. Matchmaking function to focus on partnership driven 'investment'
5. Stronger industry expertise required in investment promotion
6. Stronger involvement of private sector in economic development

Identify business segments for which unique propositions exist



- Seek unique propositions of North Brabant for targeted sectors/functions
- What makes North Brabant different?
- Proposition based marketing helps increase awareness for real offer

Thank you!

Plant Location International (PLI)

Global Location Strategies

A service of IBM Global Business Services

Web-site: www.ibm.com/gbs/pli

Roel Spee

Global Leader

+32 475 915 832

Roel.Spee@be.ibm.com

Global Location Trends reports can be downloaded at www.ibm.com/gbs/pli



Annex: Introduction to IBM-PLI



Plant Location International (PLI): IBM's center of excellence for Global Location Strategies and Economic Development

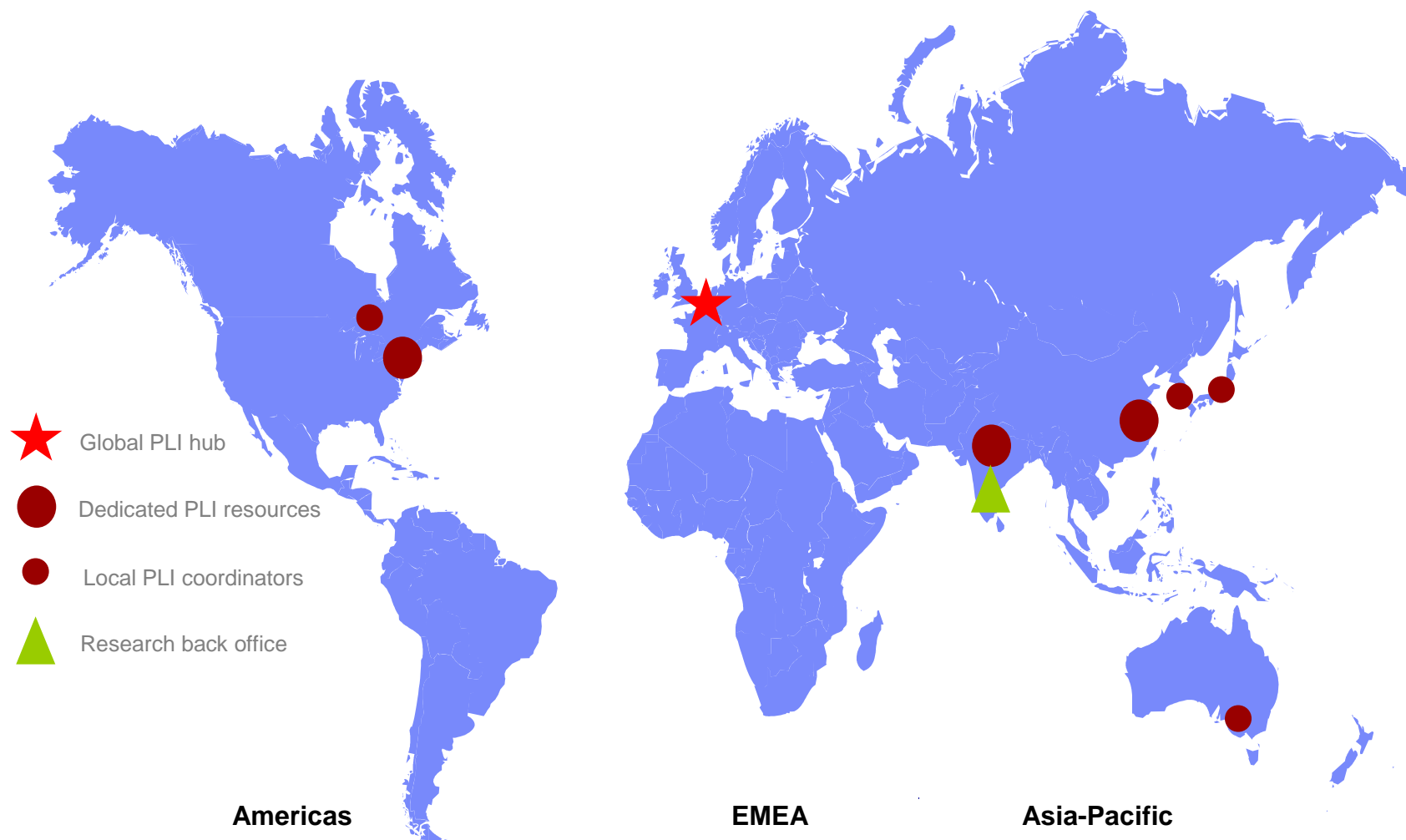
1. Corporate Executives

- Support with location strategies: *where* should we operate?
 - Define global footprints, screening countries/regions, local site selection, incentives negotiations
- Across all industries
- Across all relevant business functions: manufacturing, distribution, R&D, HQs, shared services, contact centers, data centers, etc
 - ***IBM-PLI is a global market leading dedicated corporate location consultant!***

2. Economic Development Organizations (frequently Public Sector)

- Support with efforts to attract and retain business
 - Improvement of business environment
 - Inward investment strategies
- Based on our unique insight in the investor's perspective
- Services do not include investment attraction (conflict of interest)!
 - ***IBM-PLI is unique in advising EDOs on the basis of its unrivalled corporate experience!***

Global resources of Plant Location International



Brief history

1960	Plant Location International (PLI) founded as independent consulting firm in Brussels, Belgium. Focus on location advisory services
1989	PLI fully acquired by Price Waterhouse, becomes PW-PLI
1996	US-team established to serve Americas market Brussels based PLI serves as key practice for EMEA and Asia-Pacific
1998	Price Waterhouse merges with Coopers & Lybrand: PwC-PLI
2002	PwC Consulting acquired by IBM: IBM Global Business Services becomes new home of IBM-PLI
2006	Global operating model agreed with IBM global management: PLI transforms into virtual globally integrated operation
2009	PLI: Global team of 25 dedicated location consultants, supported by wide network of industry experts and local strategy consultants around the world



Examples of corporate clients for location advisory services

** Multiple assignments, only most recent names used*

ABN-AMRO*	Brunswick	Ford Motor*	John Deere*	Norske Skog	SKF
AGFA*	Cadbury Schweppes	GAP	Johnson & Johnson*	Novartis*	Société Général
Alza*	Campbell Foods*	GATX	JP MorganChase*	Nuon	Sony*
American Express	Caterpillar	General Electric*	JVC	Orica Mining*	Standard Chartered Bank*
Amgen	Chiquita	General Motors*	KBC	Owens Ollinois	Stork
Anheuser-Busch	Citibank*	Gillette*	Kellogg	Paramount	Sun Electric
AstraZeneca*	Claire's	GlaxoSmithKline*	Kimberly Clark*	Pepsico*	Sun Microsystems
Avaya*	Compaq Computer*	Goodyear/Dunlop*	Knauf Insulation	Phillip Morris*	Swissair
Aventis*	Concert (AT&T/BT)	Guardian	Kodak*	Philips*	Tandem
Avery Dennison	Corning*	Heinz*	Kohler*	Procter & Gamble*	TDK
Avis*	Daikin*	Henkel	Kone	PricewaterhouseCoopers*	Technicolor
Avnet	DHL*	Hercules	Kraft Foods	Prudential Investment	Telia
BAT	Delphi	Hertz	Level 3	Quintiles	Telxon
Baxter*	Deutsche Bank*	Hewlett-Packard*	Levi Strauss	Radnor	Tetra Pak*
Bayer*	Diageo	Hoechst	Mattel*	Ralston Purina	Toyota*
Becton Dickinson*	Disney	Holcim*	Medtronic*	Raychem	TPG Group
Bekaert	Dow Chemical*	Hoogovens	Merck*	Reader's Digest	UBM
BF Goodrich*	Dresdner Bank	HSBC	Meritor	Reckitt & Colman	Unilever*
Biogen	DSM	IBM*	Mitsubishi	Reuters*	UPM-Kymmene
BMW	Duty Free Shoppers*	ICON*	Monsanto*	Rohm & Haas	Vaillant
BOC International	Eastman Chemical	IFF	Motorola	Samsung*	Visteon
Bombardier	Eaton	Inbev	Nashua	SAS Airlines	Wellman
Bose*	Engelhard	Indspec	National Instruments*	Saville Systems	Westvaco
Boston Scientific*	Ericsson	Ingersoll Rand	Nestlé*	Schering	Whirlpool
BP Amoco*	Esco	Intel	Netscape*	Scott Paper	WL Gore
Bristol Myers Squibb*	FMC	International Paper	Nike*	Shell*	Xerox
Brunswick	Fokker	James Hardie*	NKT Cables	Siemens*	Xircom

Examples inward investment & economic development clients

* Multiple assignments

Albania	Foreign Investment Promotion Center	Ghana	Ghana Investment Promotion	Spain	PromoMadrid*
Antilles	Government of Curaçao	Guadeloupe	Port of Guadeloupe	Suriname	Government of Suriname
Australia	Invest Australia*	Hong Kong	ITC Hong Kong	Sweden	ISA Invest in Sweden Agency*
	City and Port of Brisbane	Hungary	ITD Hungary*	Switzerland	Canton of Schaffhausen
	DSRD New South Wales**	India	Government of Gujarat SEZ	Tanzania	Tanzania Investment Centre
	Invest Victoria*		Positra SEZ	Thailand	Industrial Authority Estate of Thailand
Austria	Austrian Business Agency*	Ireland	Enterprise Ireland*	Tunisia	Government of Tunisia
	Vienna International Airport		IDA Ireland*	Trinidad Tobago	Port Authority of Trinidad & Tobago
Azerbaijan	Port of Baku	Israel	Israeli FEPZ	UAE	Jebel Ali Port Authority, Dubai
Belgium	Brussels Airport	Italy	PROMOS Milan	UK:	
	Flanders Foreign Investment Office*		Sviluppo Italia*	- England	Advantage West Midlands*
	Office for Foreign Investm. Wallonia*	Kuwait	Kuwait		Creative Sheffield
	Port of Antwerp*	Luxembourg	Ministry of Transport		East Midlands Development Agency*
Canada	Industry Canada	Malaysia	Port Klang		MIDAS Manchester*
	Invest Canada/DFAIT*	Mexico	Industrial Port Development Board		North West Development Agency*
	Montreal International	Morocco	Government of Morocco		UK Trade & Investment*
	Province of Quebec	Namibia	Namibia Investment Centre	- Scotland	Edinburgh IFC
	Toronto	Netherlands	Airport Amsterdam-Schiphol*		Scottish Development International*
Cape Verde	Promex		Airport Maastricht-Aachen	- Northern Ireland	Invest Northern Ireland*
Caribbean	Caribbean Inward Investment Office		Netherlands Foreign Investm. Agency*	- Wales	Welsh Development Agency*
China	Xi'an Pharma Park, Shaanxi		Ports of Amsterdam and Rotterdam	USA	Commonwealth of Pennsylvania*
Costa Rica	CINDE*	New Zealand	Auckland City Council		Greater Jamaica, NY
Czech Rep.	CzechInvest*		Investment New Zealand		Greater Phoenix Economic Council*
Denmark	Copenhagen Capacity*	Philippines	Cagayan		Maryland DBED*
	Invest in Denmark*	Poland	Industrial Development Agency		Michigan EDC
	Ministry of Economy		PAIZ Polish Inward Investment Agency*		New York State
Djibouti	Government of Djibouti		Special Economic Zones (various)		Research Triangle Park, NC*
Estonia	Port of Tallinn	Portugal	AIP Regio Norte		State of Florida
Ethiopia	EIA Ethiopian Investment Authority		Embassy of Portugal/ICEP*		State of Indiana
France	Ile de la Réunion	Puerto Rico	Instituto de Fomento		State of Louisiana
	Ile de France, Paris	Russia	Moscow		TexasWorkforce Commission
	Invest in France/Datar*		St. Petersburg		Toledo, OH
	Languedoc-Rousillon	Saudi Arabia	APEC	International organisations	Asian Development Bank*
	Nord-Pas de Calais Developpement*		General Investment Authority		COMESA
Germany	Frankfurt Airport	Singapore	Ministry of Finance		European Commission*
	HWF Hamburg		PSA Port of Singapore Authority*		FIAS/World Bank/MIGA*
	IIC (former East German States)*		Singapore Econ. Development Board*		OECD*
	Nordrhein Westfalen*	South Africa	COEGA*		UNCTAD*
	Saxony Economic Development Corp*		Trade and Investment South Africa		WAIPA*

Contact details

Plant Location International (PLI)

Global Location Strategies

A service of IBM Global Business Services

Website: www.ibm.com/gbs/pli

Roel Spee

Global Leader

+32 475 915 832

Roel.Spee@be.ibm.com

