Client focus at ARCADIS
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Imagine the result
Global growth and continued leadership

- Ambition: Leadership position in each of our business lines
  - Environment: expand global leadership with private sector clients

- Key Elements:
  - Client focus
  - One firm
  - Seamless delivery
Main market driver: Globalization

- Globalization
- Regulation
- Quality
- Technological innovation
Client-focus as a growth platform

- Select clients
- Disciplined approach
- Global and local
- Partners in business
- Long-term horizon
- Unmet needs
Client-Focus: key to growth acceleration

- **Why focus on MNC’s?**
  - Global needs
  - Above average growth
  - Above average spend
  - Long-term relationships
  - ARCADIS footprint + technology = competitive advantage

- **Why focus on Key National Clients?**
  - Consistent long-term spend
  - Quality work rewarded
  - Nationals become multinationals
Heavy industry offers vast opportunities

<table>
<thead>
<tr>
<th>Sectors of activity</th>
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<tbody>
<tr>
<td>1. Oil &amp; Gas</td>
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<td>2. Automotive/Aerospace</td>
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<td>3. Chemical/Pharmaceutical</td>
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<td>4. Metals &amp; Mining</td>
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<td>5. Electronics/Conglomerates</td>
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<td>6. Energy</td>
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<td>7. Real Estate</td>
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- Current focus on 60 multinational clients
- Annual growth rate approx. 30%/year
- Consistent profitability
Leading the way in environment

- Solving critical global issues:
  - Energy, climate change, sustainability, product safety, water, remediation, etc.

- Balancing:
  - Economic development and sustainability for the future.
  - The earth’s resources, and clients’ economic objectives
  - Today and tomorrow
Client-Focus:
Solid basis for further growth

- Clients: world industry leaders and key national clients
- Solving the critical global issues of our time
- Shaping our company for best alignment with our goals and with our clients goals.
- The leader in environmental services for private sector clients – for the foreseeable future
Imagine the result