Creating a growth platform for ARCADIS in Asia

Stephanie Hottenhuis, Member Executive Board
Joseph Lee, CEO, Langdon & Seah
Keith Brooks, Director Property and Social Infrastructure, EC Harris

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Agenda

• ARCADIS current position in Asia
• Sectors, services and project highlights
• Q&A
ARCADIS now has a vast geographical footprint across Asia

<table>
<thead>
<tr>
<th>Country</th>
<th>Offices</th>
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<tbody>
<tr>
<td>China</td>
<td>19</td>
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<tr>
<td>HK/Macau</td>
<td>3</td>
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<tr>
<td>Singapore</td>
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<td>Philippines</td>
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<td>Thailand</td>
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<td>Indonesia</td>
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<td>Vietnam</td>
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<td>Korea</td>
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<td>Taiwan</td>
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<td>India</td>
<td>6</td>
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<td>Brunei</td>
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<tr>
<td>Malaysia*</td>
<td>6</td>
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</tbody>
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*) Associated company
Close to 4,000 experts, engineers and consultants active in Asia

Staff numbers Asia per 30/6/2012

*) Malaysia is an associated company
A strong competitive position

- A leading position in the buildings sector in Asia
- Revenues in Asia, including activities for RTKL projects from the US, now amount to some €200m per annum
- Long term presence (L&S >75 yrs; EC Harris > 30 yrs; RTKL > 15 yrs)
- # 1 or 2 in cost consultancy and project management in each geographic market
- Strong profitability compared to more mature markets
- Strong private sector client base; growing public sector opportunities (social infrastructure, water)
- A well filled pipeline of projects and opportunities
Strong and diversified client base
Key Multinational, Regional and National clients served
We are pursuing tangible synergy opportunities

• Architecture, PM and cost consultancy at different phases in projects – so opportunities for joint approaches
• Leveraging Built Asset Consultancy and Project Management to Langdon & Seah clients
• Servicing ARCADIS multinational clients in Asia
• Expanding support to Asian-based multinational clients to other geographies
• Use Asian footprint to expand in Water and Environment
Asian markets offer excellent growth opportunities

- China continues to provide moderate to strong growth
  Short term slow down in Residential, returning to moderate to strong growth
  Other markets, including Retail / Office / Energy / Industry and Social infrastructure / Healthcare / Leisure / Tourism strong growth expected

- Hong Kong moderate growth

- Singapore is mature market with low growth

- Thailand and Brunei offer moderate growth

- Strong growth mid tier markets like Indonesia and Philippines
  Residential and commercial/retail investments; social infrastructure

- India expected to experience moderate growth

- Malaysia to stay at strong growth levels
Focusing in on Chinese market

Architecture:
• General market cooling from hyper-active to heated market
• Clients focus on quality, more stable relationships

Program/project management and cost consultancy:
• Impact of Euro crisis affects exports and market confidence
• Political changes may impact investment timing China / HK
• Current underspending in airports and transportation but demand expected to return
• Increased social infrastructure spend expected
• Growth in backlog achieved in Q2-2012
Langdon & Seah
Joseph Lee, CEO
Core sectors and services

SECTORS
- Offices / Retail
- Hospitality
- Residential
- Transport / Infrastructure
- Healthcare
- Education
- Sports / Leisure
- Public / Private / PPP

SERVICES
- Quantity Surveying / Cost Management
- Development / project management
- Environmental Sustainability
- Due diligence
- Legal support
- Project monitoring
- Construction research
GREENBELT 5 AND SHOPPING CENTER, MAKATI CITY

SHANGRI-LA RESORT AND SPA, BORACAY

RCBC PLAZA, MAKATI CITY, MANILA, PHILIPPINES
NEW SONGDO CITY, KOREA
EC Harris
Keith Brooks, Head of Property & Social Infrastructure
Core sectors and services

SECTORS
• Offices/retail
• Hospitality
• Lenders and Investors
• Retail
• Aviation
• Healthcare
• Education
• Energy and Manufacturing
• Oil and Gas

SERVICES
• Asset investment and finance
• Strategy and transformation
• Program and project management
• Cost, commercial and risk management
• Asset performance and facility management
• Contract solutions
RTKL
Stephanie Hottenhuis, member Executive Board, ARCADIS NV
Core sectors and services

SECTORS

• Commercial
  • Retail
  • Residential
  • Hospitality
• Workplace
• Healthcare

SERVICES

• Architectural Design
• Planning/Urban Design
• Interior Architecture
• Branding/Environmental Graphics
• Retail Interior Design
MARRIOTT HOTEL AND MIXED USE PANJING, CHINA
THE YEAR OF THE TOWER
EIGHT RTKL-DESIGNED TOWERS SET TO OPEN IN 2013

PEARL RIVER NEW TOWN
Chengdu, China

KUNMING RAINBOW CITY
Kunming, China

WUXI SUNING PLAZA
Wuxi, China

CHANGSHA TOWER
Changsha, China

CATIC CITY SHENZHEN
Shenzhen, China

COFCO JOY CITY
Tianjin, China

CI PUTRA WORLD
Jakarta, Indonesia

CHINA LIFE TOWER
Shenzhen, China
CHINA RESOURCE CENTRE
RIZHAO, SHANDONG PROVINCE, CHINA
PARKSON DEPARTMENT STORE
TIANJIN, CHINA
HEALTHCARE
BEIJING UNITED REHABILITATION HOSPITAL
BEIJING, CHINA
Imagine the result

Thank you