

From	██████████ ██████████@rvo.nl)	Date/Time (GMT)	19 Jul 2016 13:37:35
To	██████████ ██████████nfia.nl>	Cc	██████████ ██████████@nfia.co.uk>
Project	BAT		
Subject	BAT - Zevenaar reaching out		
Attachments	No	Flags	NFIA-Only

Project already running for a while
 ██████████ suggested to involve NFIA

Van: ██████████@zevenaar.nl]
Verzonden: dinsdag 19 juli 2016 15:29
Aan: ██████████@nfia.nl'
CC: ██████████@nfia.nl'
Onderwerp: British American Tobacco

Beste ██████████
 Hoe is het met jou?
 Graag zou ik met jou een vraag van een in Zevenaar gevestigd bedrijf, British American Tobacco (BAT) willen bespreken.
 Zij hebben een tender onder 3 PL's uitstaan voor het verplaatsen van hun logistieke operatie.
 Kun je mij hierover bellen?
 Kind regards,

██████████
 Accountmanager BusinessPark 7Poort
 Municipality of Zevenaar
 Tel.

██████████
 Kerkstraat 27
 6901 AA Zevenaar
 PO Box 10
 6900 AA Zevenaar
 The Netherlands
 Economic Affairs e-mail: ██████████@zevenaar.nl
 internet: www.zevenaar.nl

From	[REDACTED]@nfia.co.uk)	Date/Time (GMT)	20 Jul 2016 12:24:42
To	[REDACTED] [REDACTED]@rvo. nl> [REDACTED] [REDACTED]@rvo.nl >	Cc	[REDACTED] [REDACTED]nfia.nl>
Company	British American Tobacco		
Subject	RE: BAT - possible new LSP and relocation from Zevenaar		
Attachments	No	Flags	NFIA-Only

Altijd! HQ zit hier in Londen volgens mij, dus daar zal [REDACTED] ook wel regelmatig zijn. Kennen we ook mensen – zou ook nog wel een relevante voor het [REDACTED] verhaal kunnen zijn trouwens. Als ik met de [REDACTED] hactic kan voorkomen om een dag kwijt te zijn aan reizen, dan heeft dat mijn voorkeur, maar daar komen we wel uit.

En als het goed weer is dan is Southampton ook nog wel aardig J.

Als ze andere landen gaan overwegen lijkt het me sowieso een eventueel behoud project.

Groet,

[REDACTED]

[REDACTED]

[REDACTED]
[REDACTED]

Visit our website
investinholland.com

office [REDACTED]
mobile [REDACTED]
[REDACTED]@nfia.co.uk
www.twitter.com/NFIALondon

Netherlands Foreign Investment Agency
Embassy of the Kingdom of the Netherlands
38 Hyde Park Gate | London | SW7 5DP | United Kingdom

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From: [REDACTED]@rvo.nl]
Sent: 20 July 2016 11:15
To: [REDACTED]
Cc: [REDACTED]nfia.nl
Subject: BAT - possible new LSP and relocation from Zevenaar

Hi [REDACTED] & [REDACTED]

Werd zojuist gebeld door [REDACTED] van gemeente Zevenaar over British American Tobacco. In Zevenaar voert [REDACTED] voor hun de (re)packaging en logistiek uit. BAT heeft het pand in eigendom en verhuurt het aan [REDACTED] BAT heeft het pand in de verkoop gezet en wil er vanaf 1/1/2018 vanaf/uit zijn.

Ze hebben tegelijkertijd een tender uitgeschreven om een nieuw aanbod te krijgen van een LSP. De tender is inmiddels gesloten en er lijken 3 mogelijke kandidaten te zijn: [REDACTED] en [REDACTED]. Het nieuwe center zal voor een groter deel dan nu ook de Belgische en Franse markt moeten gaan bedienen. Van [REDACTED] begrijp ik dat BAT wel graag in NL wil blijven om [REDACTED] redenen.

Het is nog niet duidelijk of dit gepaard gaat met extra arbeidsplaatsen, of dat het ten koste zal gaan van arbeidsplaatsen. Dit alles ter informatie, en ook de vraag, moet ik hiervan een nieuw project maken? Afhankelijk van de LSP die ze kiezen zouden ze namelijk naar een andere regio kunnen gaan en die moeten zich ook kunnen presenteren.

Ik wilde [REDACTED] voorstellen om op gesprek te gaan bij BAT. Ik heb er zelf echter geen ingangen – hij wel, met de [REDACTED] in Groningen [REDACTED] die hiervoor niet per se verantwoordelijk is. Uiteindelijk besluit wordt kennelijk genomen door [REDACTED], [REDACTED] (Southampton als ik het goed begreep).

@ [REDACTED] heb jij er relevante contacten? En @ [REDACTED] heb jij tijd om op korte termijn een gesprek te hebben bij BAT?

Groet,

[REDACTED]

[REDACTED]
Project Manager

+ [REDACTED]
+ [REDACTED]
[REDACTED]@nfia.nl

Visit our website
investinholland.com

Netherlands Foreign Investment Agency
Ministry of Economic Affairs
Prinses Beatrixlaan 2 | 2595 AL | Den Haag – Netherlands
P.O. Box 93144 | 2509 AC | Den Haag – Netherlands

De Rijksdienst voor Ondernemend Nederland (RVO.nl) stimuleert Duurzaam, Agrarisch, Innovatief en Internationaal ondernemen. RVO.nl is per 2014 ontstaan uit de fusie van Agentschap NL en Dienst Regelingen.

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From	[REDACTED]@rvo.nl)	Date/Time (GMT)	20 Jul 2016 13:37:55
To	[REDACTED] [REDACTED]nfia.nl>	Cc	
Project	BAT		
Subject	BAT - description project		
Attachments	No	Flags	NFIA-Only

files

Van: [REDACTED]@zevenaar.nl]
Verzonden: woensdag 20 juli 2016 12:02
Aan: [REDACTED]@nfia.nl'
Onderwerp: tender BAT

Beste [REDACTED]

Hierbij de informatie die ik je net vertelde nog even onder elkaar:

BAT is nu gevestigd aan de Babberichseweg in Zevenaar (BAT-terrein). [REDACTED] verricht hier logistieke werkzaamheden voor BAT voor de Europese markt [REDACTED] [REDACTED]). Bij [REDACTED] in Zevenaar werken [REDACTED] personen, waaronder ca. [REDACTED] uit de sociale werkvoorziening (ompakwerkzaamheden). BAT heeft deze locatie verkocht, waardoor de werkzaamheden voor 1 januari 2018 verplaatst moeten zijn. BAT heeft eind juni de indien termijn voor de tender gesloten onder 6 logistiek dienstverleners, waaronder [REDACTED]. Op het ogenblik worden vervolg gesprekken gevoerd met 3 logistiek dienstverleners, waaronder nog steeds [REDACTED]. Gesproken wordt onder andere over de grootte van het pakket dat getenderd wordt. Is dit alleen voor de Nederlandse markt of worden België en Frankrijk hier ook bij betrokken? Binnen BAT is dit ook niet duidelijk. Bovendien wil BAT de logistiek samen met concurrent [REDACTED] uit gaan voeren, maar dit is nog niet in de tender verwerkt. De keuze van de grootte van het pakket is ook bepalend voor het central point of gravity. De logistiek dienstverleners kunnen nu nog niet bepalen waar in Nederland dit ligt (keuze voor Nederland is op zich wel gemaakt).

De gemeente Zevenaar heeft in overleg met BAT/[REDACTED] een locatie voorstel gedaan voor hervestiging in Zevenaar, op BusinessPark 7Poort (stuur ik je afzonderlijk). Wij zien geen beletsels voor een snelle realisatie van een nieuw logistiek centrum voor BAT. Wij hebben vooral nadruk gelegd op het aspect 'staff'. [REDACTED] is erg content met het huidige personeels bestand en de wijze waarop de werkzaamheden verlopen. Afspraak tussen [REDACTED] en BAT is dat bij vertrek uit Zevenaar, BAT verantwoordelijk is voor de afvloeiing van het personeel van [REDACTED].

Beslisser bij BAT is [REDACTED], [REDACTED]
tel. [REDACTED]
mob. [REDACTED]
email [REDACTED]@bat.com

Mijn contact in Nederland is:

BAT Niemeyer (fabriek Groningen), [redacted], [redacted]

Mob. [redacted]

Email: [redacted]@bat.com

Gesprekken met de logistiek dienstverleners worden vanuit BAT gevoerd door [redacted] (heb ik geen contact gegevens van).

Verder betrokken bij de tender (geen contact mee):

[redacted] [redacted] British American Tobacco Benelux Handelsweg 53 A 1181 ZA Amstelveen Tel : [redacted] Mobile : [redacted] e-mail: [redacted]@bat.com http://www.bat.com	
---	--

Met [redacted] heb ik email contact, met [redacted] telefoon en face-to-face. Nb. [redacted] heeft nog in Zevenaar gewerkt en heeft een positief gevoel bij onze locatie. Contacten met [redacted] en collega's van [redacted] lopen al sinds 2012.

Contacten [redacted]

[redacted]: bij jullie bekend neem ik aan; is op de hoogte van de mogelijkheden bij ons; ik spreek hem regelmatig maar hij is nog niet in beeld omdat er nog niet op een locatie ingezoomd wordt.

[redacted] Supply Chain, [redacted], site manager Zevenaar; spreek ik wekelijks en hij voert op het ogenblik de gesprekken met BAT over de uitwerking van de tender.

Met vriendelijke groet,

[redacted] Accountmanager BusinessPark 7Poort	telefoon [redacted]
--	------------------------

Kerkstraat 27
6901 AA Zevenaar
Postbus 10
6900 AA Zevenaar

Team Ruimte, afdeling Ontwikkeling
Werkdagen: dinsdag t/m donderdag

e-mail: [REDACTED]@zevenaar.nl
internet: www.zevenaar.nl

From	[REDACTED]@rvo.nl)	Date/Time (GMT)	20 Jul 2016 14:17:23
To	[REDACTED] [REDACTED]nfia.nl>	Cc	
Project	BAT		
Subject	BAT - to do's		
Attachments	No	Flags	NFIA-Only

Van: [REDACTED]
Verzonden: woensdag 20 juli 2016 14:17
Aan: [REDACTED]
Onderwerp: BAT - contact London / contact

Beste [REDACTED],

Hierbij koppel ik jullie zodat jullie ook contact kunnen hebben met elkaar als ik half augustus op vakantie ga.

Wat we voor nu hebben afgesproken:

Ø [REDACTED]

Ø [REDACTED]

Ø [REDACTED]

Ø [REDACTED] is va. 15 augustus op vakantie en zal voor achtervang zorgen op het dossier

[REDACTED]

Tot zover.

[REDACTED]

De Rijksdienst voor Ondernemend Nederland (RVO.nl) stimuleert Duurzaam, Agrarisch, Innovatief en Internationaal ondernemen. RVO.nl is per 2014 ontstaan uit de fusie van Agentschap NL en Dienst Regelingen.

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From	[REDACTED]@nfia.co.uk)	Date/Time (GMT)	03 Aug 2016 18:04:13
To	[REDACTED]@nfia.nl>	Cc	
Project	BAT		
Subject	BAT: British American Tobacco & the Netherlands - checking in at HQ		
Attachments	Yes (Click here to go there)	Flags	NFIA-Only

For files

[REDACTED]

[cid:image002.png@01D1EDA8.D0F0DDB0]<<http://www.investinholland.com/>>
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office [REDACTED]
 mobile [REDACTED]
 [REDACTED]@nfia.co.uk
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From: [REDACTED]
Sent: 03 August 2016 17:00
To: '[REDACTED]@bat.com'
Subject: British American Tobacco & the Netherlands

Dear [REDACTED],

Foreign-owned companies are responsible for creating 1-in-6 jobs in the Dutch business sector and, as such, are of key importance to the Dutch economy. As a result, we very much value your presence in the Netherlands.

[REDACTED]

As part of the Dutch Ministry of Economic Affairs, the NFIA's task is to advise and assist foreign-owned companies during every stage of the establishment, or expansion, of their operations in our country. A great number of current investors, including Cisco, Kikkoman, LG Electronics and Apollo Tyres, have made use of the NFIA's expertise and services, in order to define and develop their European expansion plans. Together with our regional 'Invest in Holland' partners throughout the Netherlands, we can provide assistance in:

- * developing a business plan for (re)structuring your European strategy;
- * providing essential information regarding Dutch legislation and regulations;
- * (re)locating employees to the Netherlands;
- * sourcing locations and real estate for your company;
- * arranging quick access to government contacts at local, regional and national level.

All our services are confidential and free of charge.

Please don't hesitate to contact us if you (or one of your colleagues) have any questions, or would like to discuss further opportunities for British American Tobacco in the Netherlands.

Kind regards,

[cid:image001.png@01D1EDA8.83EF4600]<<http://www.investinholland.com/>>
 Visit our website
[investinholland.com](http://www.investinholland.com/)<<http://www.investinholland.com/>>

office [redacted]
 mobile [redacted]
 [redacted]@nfia.co.uk<[mailto:\[redacted\]@nfia.co.uk](mailto:[redacted]@nfia.co.uk)>
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Attachment(s):

Filename	Size (bytes)
NFIA Corporate Brochure light.pdf	2,199,360
image001.png	3,759
image002.png	3,759



Invest in Holland

One of the World's Top Locations for Business





We're Ready to Roll out the Orange Carpet

The Netherlands is one of the best places in the world to do business. Join more than 8,000 international companies – from global giants to fast-growth gazelles – that have already decided to invest in Holland.

The Netherlands Foreign Investment Agency (NFIA) stands ready to help. Our highly knowledgeable staff, supported by an outstanding network of partners, provides free, confidential assistance to streamline every facet of your project. Let us roll out the orange carpet for you.

Europe's Best Country for Business

Ranked No. 8 in Europe by Bloomberg's "Best Countries for Business," the Netherlands is truly a world-class business destination. See for yourself why so many multinational businesses—from small and mid-sized to Fortune 500 leaders—have chosen the Netherlands as their gateway to Europe.

Strategic Location

The Netherlands provides the perfect springboard into the European market—with access to 95% of Europe's most lucrative consumer markets within 24 hours of Amsterdam or Rotterdam.

International Business Climate

Ranked No. 1 on DHL's Global Connectedness Index, the Netherlands has a competitive international climate and is home to 8,000+ foreign companies. In fact, 50% of Dutch GDP is derived internationally.

Superior Infrastructure

Ranked No. 2 in the world for overall logistics performance, the Netherlands is home to world-class seaports and airports, an extensive network of railways and highways and the second highest quality broadband network in Europe.

Competitive Fiscal Climate

With an investment-friendly corporate income tax system, cooperative tax authority, highly attractive innovation and R&D incentives, and competitive corporate income tax rate of 20-25%, the Netherlands is among Europe's most attractive countries for international companies.

Highly Educated, Multilingual Workforce

Holland's highly educated workforce sets the pace for European productivity in a wide range of capabilities. Plus, 90% of Dutch are fluent in English—the lingua franca of international business, science and technology.

Creative and Innovative Environment

Ranked No. 4 on the Global Innovation Index, the Netherlands is home to an attractive test market, adaptive consumers and an open culture. As one of the world's most multicultural hubs for creative talent, Holland is, simply put, a great place to bring ideas to life.

Thriving Sectors

Fueled by world-class research institutes and public-private partnerships between academia, industry and government, the Netherlands has a rich tradition of looking across borders to advance growth of its thriving agrifood, IT, chemicals, high tech systems, life sciences & health, creative and other sectors.

Exceptional Quality of Life

Ranked as the 7th happiest place on earth by the World Happiness Report, the Netherlands has a high standard of living with a lower cost of living than most major European countries.



Active in the Netherlands since 1959, Cargill, an international provider of food, agriculture, financial and industrial products and services, has grown to include more than 2,300 employees at 11 sites throughout the Netherlands.



“Logistics, a pragmatic business environment, certainty when it comes to taxes—all of that is here. The stars align in the Netherlands for a company like Cargill.”

Marcel Smits
Chief Financial Officer
Cargill



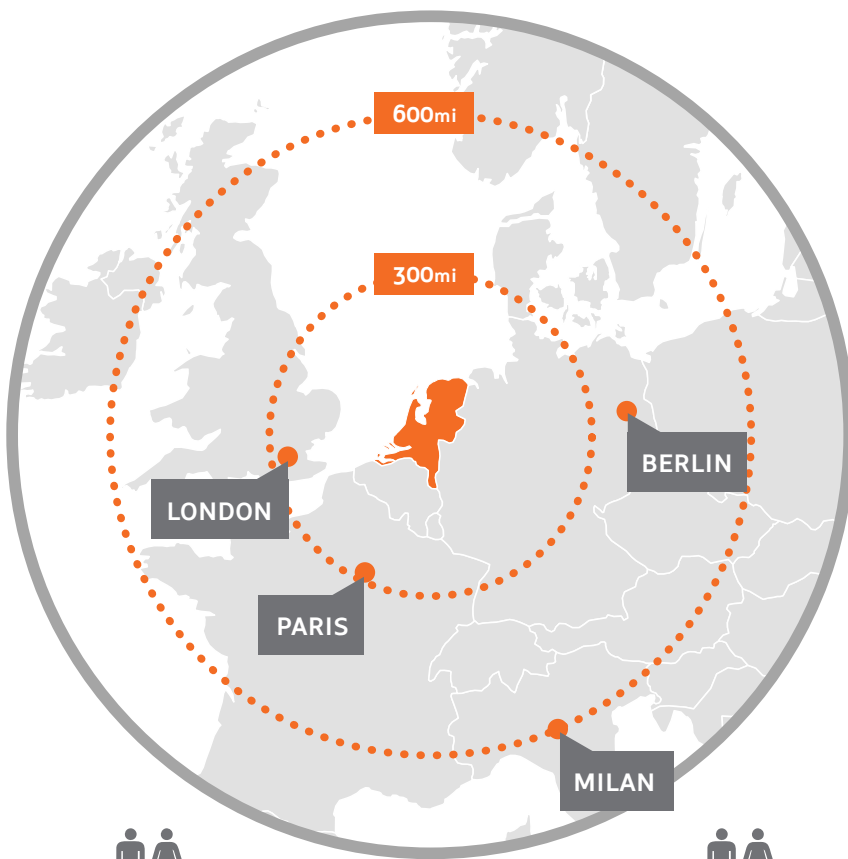
An Unrivalled Gateway to Europe

Holland's location at Europe's front door provides the perfect springboard into the European market—with access to 95% of Europe's most lucrative consumer markets within 24 hours of Amsterdam or Rotterdam.

Ranked No. 1 on DHL's Global Connectedness Index, the Netherlands has an international, pro-business orientation that combined with its strategic location makes it the perfect place for global companies to reach millions of European customers and beyond. In fact, 50% of Dutch GDP is derived internationally.

Add to that the fact that the Dutch workforce is among the most multilingual in Europe and it's no wonder that some of the biggest names in business have chosen the Netherlands as their gateway to Europe.

Proximity to Clients and Customers



170 MILLION Consumers

Within **300** Miles



244 MILLION Consumers

Within **600** Miles



Global IT company Cisco Systems opened its campus in Amsterdam in 2002 and now employs 1,000 people in the facility, which includes the European operations center, Dutch and pan-EMEA sales teams, customer advocacy, internal sales and other activities.

“
Not only is [the Netherlands] the gateway to Europe, but thanks to the country's excellent technical infrastructure and the fact that the AMS-IX Internet hub is located here, it's also becoming the IT Delta of Europe.”

Edwin Prinsen
Managing Director
Cisco Netherlands



Taxes & Incentives

With an investment-friendly corporate income tax system, accessible and transparent tax authorities, attractive innovation and R&D incentives and an extensive treaty network, the Netherlands is among the best in Europe for international companies to set up their businesses.

The Dutch tax ruling practice has a 30-year track record of being fully in line with OECD standards. And thanks to the Netherlands' stable government and highly accessible and cooperative tax administration, companies can feel confident that any adjustments will be implemented in such a way that maintains attractiveness for foreign investors, minimizes impediments for business and guarantees cooperation and transparency from tax authorities.

Investment Friendly Corporate Tax System

The Dutch tax system offers a number of competitive features for companies looking to relocate or expand their operations in Europe:

- A wide network of nearly 100 bilateral tax treaties to avoid double taxation and to provide, in many cases, reduced or no withholding tax on dividends, interest and royalties
- Clarity and certainty in advance on the tax consequences of proposed major investments in the Netherlands
- A broad participation exemption (100% exemption for qualifying dividends and capital gains), which is vital for European headquarters
- An efficient fiscal unity regime, providing tax consolidation for Dutch activities within a corporate group
- No statutory withholding tax on outgoing interest and royalty payments
- Favorable expat tax program with a 30% personal tax income advantage for qualified, skilled foreign employees

Supportive R&D Incentives

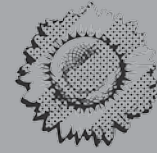
The Netherlands actively promotes engaging in research and development activities in the country through a favorable corporate tax system and specific R&D tax incentives that support innovation throughout the entire R&D life cycle. The following measures may significantly lower a company's R&D cost and taxable base.

R&D Tax Credit (WBSO)

Companies performing particular R&D activities may benefit from a 32% reduction (up to 40% for startups) of the first €350,000 in R&D wage costs and other R&D expenses and investments, and 16% for those costs exceeding €350,000.

For the purpose of this credit, R&D is defined as:

- Development of technically new physical products, physical production processes, software or components thereof
- Technical scientific research seeking to explain phenomena in fields such as physics, chemistry, biotechnology, production technology and IT technology



WIPRO

A multi-year partnership with a local company in Brabant brought India-based Wipro Technologies to High Tech Campus Eindhoven, where it now employs 130 at its IT service center.

“It was Eindhoven’s High Tech Campus and the potential for business growth that particularly attracted Wipro. There is a highly educated talent pool here, an excellent infrastructure and thriving networks of subcontractors, service providers and R&D expertise.”

Timo Fine
Director of Strategic Accounts,
Peripherals & Consumer Electronics, Europe
Wipro



Innovation Box

Companies may benefit from an effective tax rate of only 5% for income from intangible assets— including technological innovations—created by the Dutch taxpayer and for which a R&D tax credit was received.

Allowance for Top Syndicates for Knowledge Innovation (TKIs)

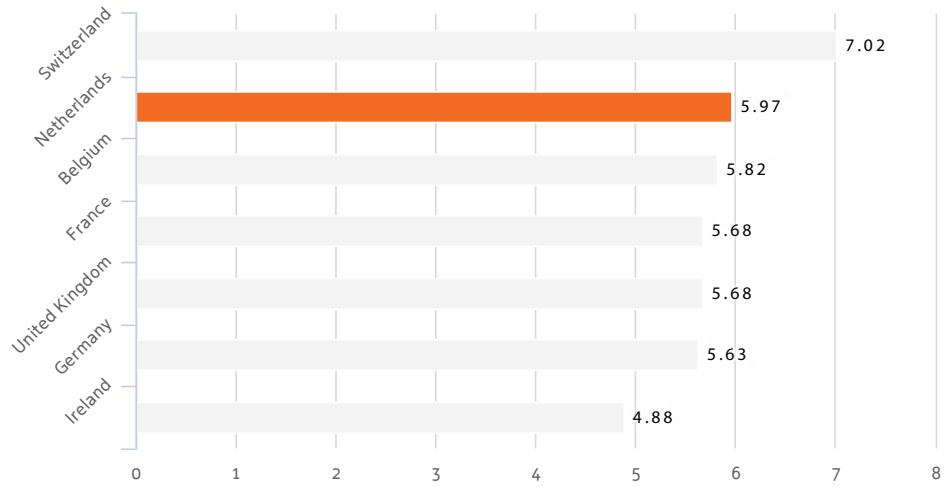
The TKI is a partnership between public entities and private parties or investors. Cash grants of 40% are available on the private investment costs for the first €20,000 and 25% for the excess. In order to receive TKI allowances, the cash grant has to be invested in the R&D project of the partnership.

Innovation Credit

Innovation Credit is a risk-bearing loan from the government, intended for the development phase of a technically new product, process or service, including development of medical products that require a clinical study. Funding may vary from 25% (large companies) to 45% (SMEs) of relevant project costs with a maximum of €10 million, and the remainder being financed by the company's own resources.

Financial Risk Factor

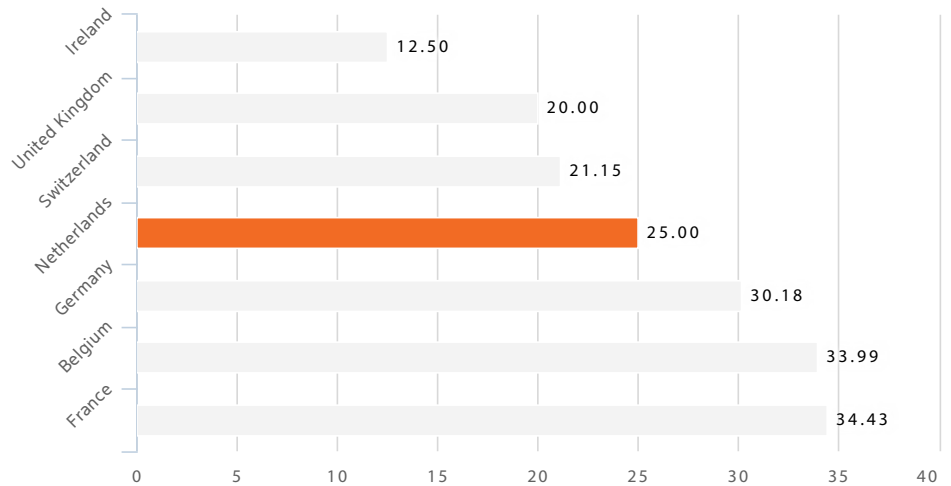
The risk factor in the financial system (new financial instruments, non-performing loans, transparency) is adequately addressed.



Source: IMD WCY 2015

Combined Corporate Income Tax Rates 2015/2016

Rates include both central and sub-central government taxes



Source: OECD.Stat



Netherlands Demographics

The Netherlands has a population of nearly 17 million people. The current and projected population growth is high compared to international standards, which is a promising sign for the future availability of Dutch employees. During the first decade of the 21st century, the relative population growth in the Netherlands was higher than in the European Union as a whole.

The present labor availability matches the needs of businesses, given the composition of the Dutch population and available workforce. A high proportion of the population is in the economically “active” age group of 15-64 years and many recent graduates from universities and higher vocational training institutions are specialized in the fields of technology or economics.

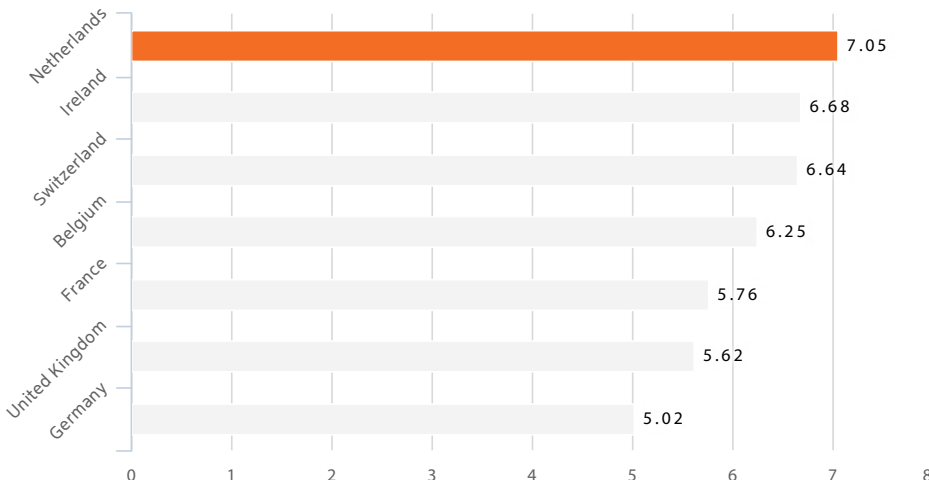
Workforce by Age Group

	Ages 0-14	Ages 15-64	Ages 65+
Germany	13.1%	66.1%	20.8%
Netherlands	16.9%	65.7%	17.3%
Belgium	17.0%	65.2%	17.8%
France	18.6%	63.5%	18.0%
United Kingdom	17.5%	64.8%	17.5%

Source: Eurostat, figures relate to 2014

Skilled Labor

Skilled labor is readily available



Source: IMD WCY 2015

mapscape

A subsidiary of China's leading provider of navigable digital map data, dynamic traffic information and automotive telematics services, Mapscape has a team of 100 employees from 18 different nationalities at its headquarters in Eindhoven.

“
We feel at home in Eindhoven. The high-tech environment provides us with the services and suppliers we need, particularly software engineers, and the Technical University Eindhoven ensures a solid pool of Dutch and international talent.”

Henk Eemers
 Managing Director
 Mapscape



A Robust Talent Pool

Very few places in Europe compare to the Netherlands for sheer volume of highly educated and skilled workers. See for yourself why the Dutch workforce is one of the best on the planet.

Skilled, Productive and Multilingual Workforce

A model of efficiency and dedication, the Dutch workforce sets the pace for European productivity in a wide range of capabilities—from entry level positions to senior executives. Plus, 90% of Dutch are fluent in English and many speak German, French and other languages.

World-Class Education System

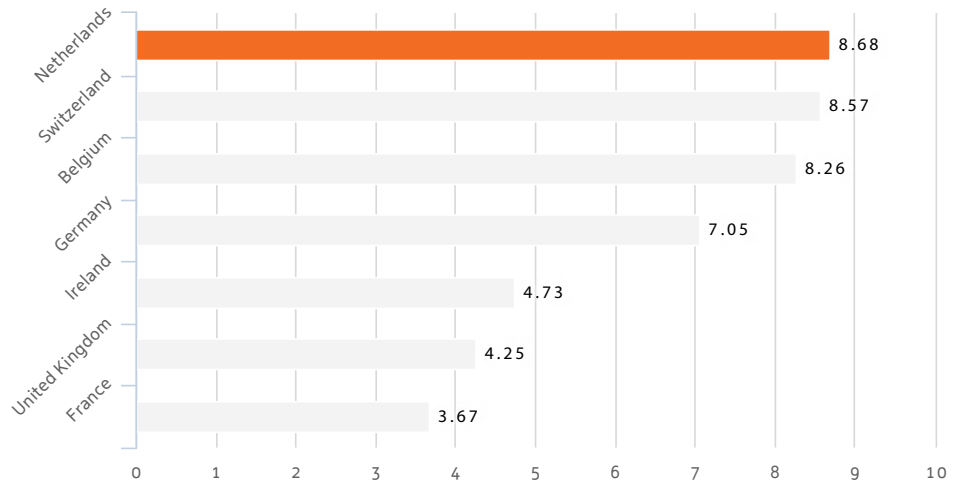
Ranked No. 3 globally, the Dutch higher education system is home to 14 universities, 34 universities of professional education and a variety of specialized training facilities geared towards meeting the needs of today's businesses and keeping the economy competitive by graduating a steady stream of highly skilled workers.

Flexible Labor Relations, Competitive Wages

Thanks to the stability of the Dutch government and its pragmatic approach to business, very little time is lost to labor disputes or labor relations in the Netherlands compared with Europe as a whole. Plus, with its high standard of living and relatively low cost of living, the Netherlands provides a solid foundation for healthy, happy workers and diplomatic employer-employee relations, helping to preserve high worker productivity.

Language Skills

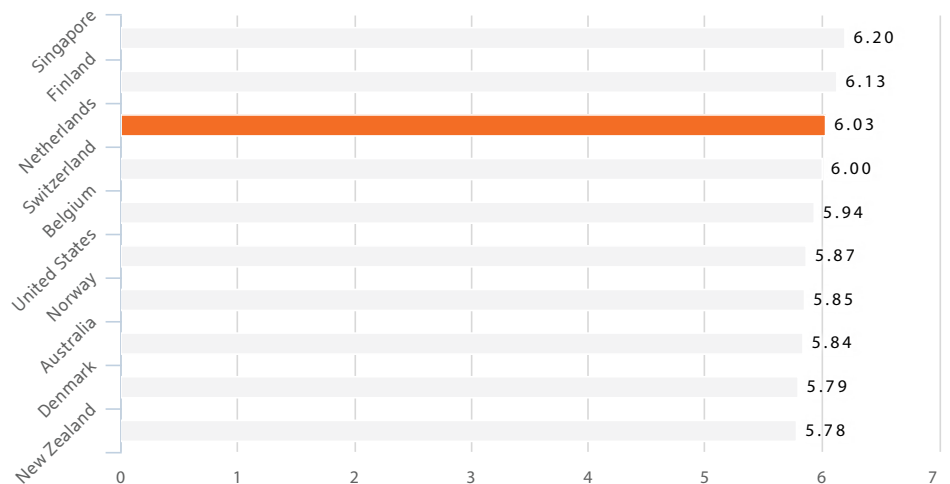
Language skills are meeting the needs of the enterprises



Source: IMD WCY 2015

WEF Global Competitiveness Index 2015-16

Higher education and training



Superior Logistics & Technology Infrastructure



FLUKE

Since opening its EMEA head office in Eindhoven in 1993, Washington-based IT company Fluke Corporation has grown to employ 200 in the Netherlands.

Driven by world-class seaports and airports, an extensive network of roads and rail, and a 100% digital telecommunications network that ranks among the world's best for quality, speed and reliability, Holland's infrastructure is exceptionally good for business.

Airports

Home to award-winning Amsterdam Airport Schiphol and four regional airports that also offer international service, the Netherlands has one of the highest ranking air transport infrastructures in the world. Named the "Best Airport in Europe" for 25 consecutive years by the Business Traveler Awards, Amsterdam Airport Schiphol is Europe's top airport for cargo and passenger transport. It is located within an hour and a half of all major Dutch cities via the country's dense and sophisticated network of highways and secondary roads.

Holland's world-class airports, combined with its strategic location, give companies a significant edge in reaching millions of consumers across Europe, the Middle East and Africa.

Ports

With three deep-water ports, many rivers and a dynamic network of canals, the Netherlands has the best port infrastructure in the world. Cargo from the Port of Rotterdam, Europe's largest and most important harbor, can reach all major industrial and economic centers in Western Europe in less than 24 hours—providing companies with the perfect springboard into the European market. The Port of Amsterdam, Europe's fourth largest port, is another major asset for logistics and distribution operations, while Groningen and Zeeland seaports serve other parts of the country. In all, Dutch ports move more than 500 million metric tons annually and account for 54% of all trade shipping in Western Europe.

“

[The Netherlands'] proximity to international highways and major airports is very important to our operations. This was the case when we first arrived, and it is still the case today. Fluke EMEA is perfectly located in Brabant.

Thieu Hofkes
Senior Director Human Resources EMEA
Fluke



Broadband

With the highest broadband penetration per capita in the world – 99% of all households—as well as one of the world’s fastest average broadband speeds, the Netherlands is one of Europe’s most-wired and cyber-secure countries. It also directly links continental Europe to North America, with 11 out of 15 transatlantic sea cables going directly to the Netherlands.

Holland’s state-of-the-art, 100% digital, advanced fiber-optic network supports a strong community of startups, data centers and multinational digital companies including Microsoft, Cisco, Tata, Infosys, Huawei, Oracle, Intel, IBM, Verizon and Google. Amsterdam, in particular, has become a digital hub in recent years thanks to the presence of AMS-IX: the world’s largest Internet exchange point.

Road & Rail

Holland’s extensive, modern network of roads and highways serves as a major asset to companies looking to establish logistics/distribution operations in Europe. Interlaced with more than 14,000 km (86,000 miles) of road, including 2,235 km (1,389 miles) of limited-access, high-speed motorways, and more than 12,000 transport companies, the Netherlands is responsible for 14% of all international road transport in Europe, making Holland a top European location for international road freight transportation.

The Dutch rail system is no less impressive, with 3,200 km (2,000 miles) of network rail with direct connections to inland container terminals and links to destinations across the EU, Scandinavia and the Middle East. And thanks to Holland’s three high-speed rail lines and the Betuweroute—the double-track freight railway that connects Rotterdam to the German border—companies have fast, direct access to Europe’s major logistics hubs.



The Netherlands’ central location and excellent infrastructure played a key role in Chemtura’s decision to open a second production facility in Amsterdam.

“
The Netherlands has a lot to offer to companies wanting to set up business there, such as its central location in Europe, excellent infrastructure and presence of seaports and airports, all of which are essential to the global company.”

Hans Wierbosch
Amsterdam Site Manager
Chemtura Manufacturing Netherlands B.V.



Thriving Industry Clusters



Nutricia Research, an R&D subsidiary of the French company Danone, established a new innovation center at the Utrecht Science Park. Nearly 400 employees now perform 80% of the company's global medical nutrition R&D activities.

From agrifood to aerospace, the Netherlands is home to thriving industry clusters driven by talent, innovation and collaboration. Some of the biggest and fastest growing companies in every sector have chosen the Netherlands as their gateway to Europe.

Agrifood

Second only to the U.S. for agrifood exports worldwide, the Netherlands boasts more than 4,150 agrifood companies – from farm to fork. In fact, 12 of the world's largest agrifood companies have major production or R&D sites in Holland. With its world-class research institutes for food innovation, medical universities and numerous public-private partnerships, the Netherlands has the second highest private R&D investment in agrifood in Europe.

Information Technology

Considered one of the most wired countries in the world, the Netherlands is Europe's hotspot for leading information and communications technology companies. About 60% of all Forbes 2000 companies active in the IT industry have already established operations here—including Microsoft, Verizon, Wipro, Cisco, Intel, TATA and Google. What's more, Holland is home to the largest cybersecurity cluster and one of the most advanced markets of data centers in Europe.



“*The Netherlands has an extensive knowledge infrastructure in the area of nutrition and health, and many prominent international players in the care industry have a branch here. These were deciding factors for us when we were examining the Netherlands as a potential country in which to establish ourselves.*”

Hanno Cappon
Vice President of R&D
Nutricia Medical Nutrition



Chemicals

One of Europe's leading suppliers of chemical products and services, the Netherlands boasts more than 400 top chemical companies across the entire supply chain. In fact, 19 out of the 25 top chemical companies in the world maintain significant operations here, benefiting from a superior logistics infrastructure, access to important raw materials and world-class R&D institutes—not to mention access to the Port of Rotterdam: one of the largest refining and chemical clusters in the world.

High Tech Systems

With major multinationals like Philips, Bosch, Boeing and ASML thriving here, Holland's high tech industry is among the most innovative in the world. At the heart of Dutch high tech innovation are robust public-private partnerships and cutting-edge R&D ecosystems such as the High Tech Campus Eindhoven. Considered the smartest square kilometer in the Netherlands, and possibly the world, the campus promotes open innovation among more than 100 companies and institutions.

Life Sciences & Health

Home to some 2,500 innovative life sciences and health companies and research organizations, the Netherlands boasts one of the most concentrated life sciences regions in the world. Fueled by world-class health and research institutes, including 12 research universities, 82 hospitals—eight of which are university medical centers—and a number of public-private partnerships between science, industry and government, €2 billion is invested in R&D in this industry annually.

Creative

Whether it's fashion, advertising, entertainment or media, Holland attracts creative minds from all over the map, making it one of the world's most multicultural hubs for creative talent. With more than 1,300 fashion designers and some of the industry's most iconic brands, the Netherlands is rapidly developing into the fashion and apparel gateway to Europe. It has also attracted some of the most cutting-edge advertising agencies in the industry.

Energy

Thanks to its progressive policies, affinity for innovation and forward-thinking, environmentally conscious population, the Netherlands is a leader in offshore, renewable and smart energy. The Netherlands offers world-class R&D facilities, outstanding incentive programs, strategic public-private partnerships and world-class facilities. The Dutch government has also invested heavily in smart grid innovation, facilitating developments in electric vehicles and smart energy technology.

Aerospace

Home to leading international companies such as Boeing, Bombardier, Lockheed Martin and GE Aviation, the Netherlands has a thriving aerospace industry. Holland's world-class logistics infrastructure, strategic location and dedicated, multilingual workforce provide an ideal environment for aerospace operations—whether its maintenance, repair and overhaul (MRO), spare parts logistics, manufacturing, training facilities or office functions.

Industry Clusters in the Netherlands



Amsterdam Utrecht

Creative Hub, Advertising
Software, Multimedia, Gaming
Fashion (European HQ)
Life Sciences
Finance



Rotterdam The Hague
Delft Leiden

Life Sciences
Cyber Security
Telecom



Arnhem Nijmegen
Wageningen

Health Valley
Food Valley NL



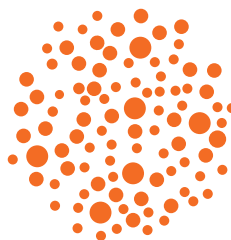
Chemelot Maastricht

Chemical Campus
Open Innovation led by DSM and others
Chemicals, Materials, Life Sciences



Eindhoven

High Tech Campus Eindhoven
Open Innovation led by Philips and ASML
Hardware/Electronics Manufacturing Heart
Highest # of Patents per Capita in the World
Life Sciences
Automotive



Groningen

Healthy Aging
Lifelines



Twente

Nanotech (MESA +)
Hardware Manufacturing
Mathematics (CTIT)
Computer Science
Engineering



Fashion Distribution

Amsterdam
Rotterdam
Bergen op Zoom
Twente
Venlo

Business Operations

Whether you're a Fortune 500 leader or a small to mid-sized business, the Netherlands is a smart choice to locate international business operations. Just ask major players like Cisco Systems, Forever 21, Nike, APM Terminals, Fujifilm, SABIC and Tesla or smaller operations like Optimizely, DoubleDutch, Advantech, Sun Pharma and Lux Research. Regardless of size, there's nothing small about the results businesses see here.

Headquarters

Strategically located at the center of Europe's largest markets, the Netherlands has established itself as a magnet for international companies and a leading site for European or regional headquarters. With a supportive corporate tax structure, a highly educated, multilingual workforce and a superior logistics and technology infrastructure, the Netherlands offers companies a perfect climate to compete successfully in Europe.

Service Centers

The Netherlands' location on mainland Europe, highly developed telecommunications and transportation infrastructure and international, service-oriented culture provide an ideal environment to establish or consolidate a shared service center in Europe. Holland's unrivalled digital infrastructure and multilingual workforce enable any company to effectively serve their customers around the world, as well as customers close to their Dutch home. These factors, in addition to Holland's competitive tax structure, facilitate improved efficiencies and lower costs with savings from 15% to 40% for Netherlands-based service centers.

Marketing & Sales

Home to marketing and sales operations of major multinational companies like IBM, Verizon and UL, the Netherlands is a hub for foreign-owned marketing and sales operations. Holland's strategic location ensures easy access to Europe's most lucrative markets. Plus, tapping into the Netherlands' highly educated, multilingual workforce and presence of international talent means your company can reach a wide range of consumers around the world.

Data Centers

Considered one of the most wired countries in the world, the Netherlands is home to one of the most advanced markets for data center operations in Europe. In fact, about one third of all European data centers are located in the Amsterdam area and take advantage of AMS-IX—the world's largest Internet exchange. The Dutch telecommunications network ranks among the world's best for quality, speed and reliability. In addition, the country's mild climate and robust renewable energy cluster provide sustainable and affordable options for data center energy efficiency needs.



To support its European client base, Taiwan-based IT company Advantech opened a modest office in Eindhoven in 1999, which has now grown to become its European headquarters.

**“
Our mission is to deliver connected, managed and secured solutions to make life, living and working smarter with our partners from different industries. When it comes to the European market, Brabant has proved to be the perfect seed-bed. Establishing our European headquarters in the Eindhoven region has allowed us to come one step closer to achieving that mission.”**

Chaney Ho
Acting General Manager
Advantech Europe



Manufacturing

Holland's highly skilled engineering workforce and advanced, collaborative network of suppliers in a value chain offer major advantages to companies looking to establish or reshore manufacturing operations in Europe. It's no wonder major multinationals in a wide range of industries have already established advanced manufacturing operations here—from agrifood and life sciences (Mars, Coca-Cola, Heinz, BD Diagnostics) to chemicals, maritime industry and IT (Eastman, LyondellBasell, Verizon, IBM, Damen Shipyards).

Research & Development

Fueled by world-class research institutes, supportive R&D tax credits and a number of strategic partnerships between science, industry and government, the Netherlands is a hub for R&D innovation. In fact, as the European R&D location of major companies like Philips, IBM, Intel, Mars, SABIC, Huawei and UL, Holland has the third highest number of patent applications per million inhabitants in Europe.

Logistics & Distribution

Ranked No. 2 in the world for overall logistics performance, the Netherlands is a hub for logistics and distribution operations in Europe. Holland is home to more European distribution centers than all of its major neighbors combined. Holland's logistics infrastructure and presence of top-notch logistic service providers is a major asset to companies looking to establish international logistics/distribution operations in Europe.

Startups

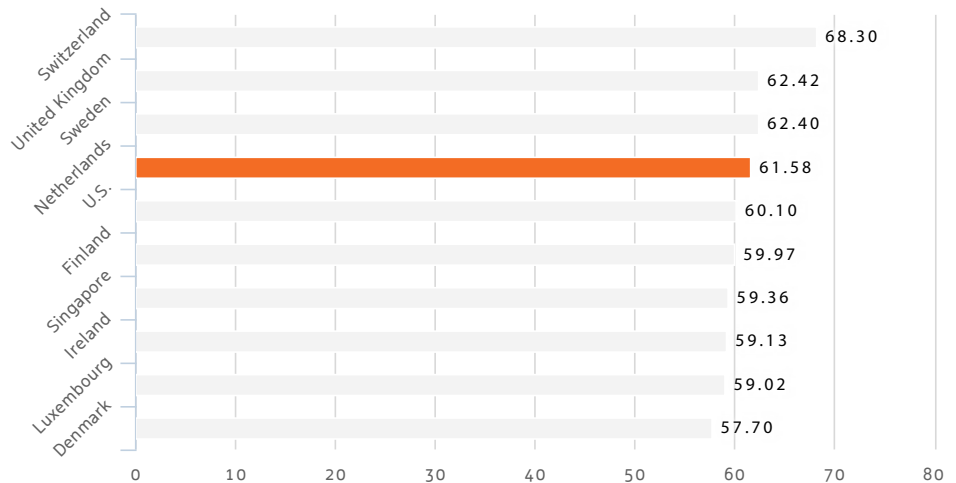
Renowned internationally for its open culture and emphasis on entrepreneurship and innovation, the Netherlands is home to a vibrant, collaborative startup ecosystem. Ranked No. 4 on the 2015 Global Innovation Index, the Netherlands has 10 leading innovation hubs, where startups benefit from world-class

incubators and R&D facilities. As of 2015, a "startup visa" makes it possible for ambitious entrepreneurs outside of the EU to apply for a temporary residence permit. The Dutch government also offers tax incentives to promote corporate R&D and innovation, making the Netherlands one of the best values in Europe for startups.

Competitor Comparison

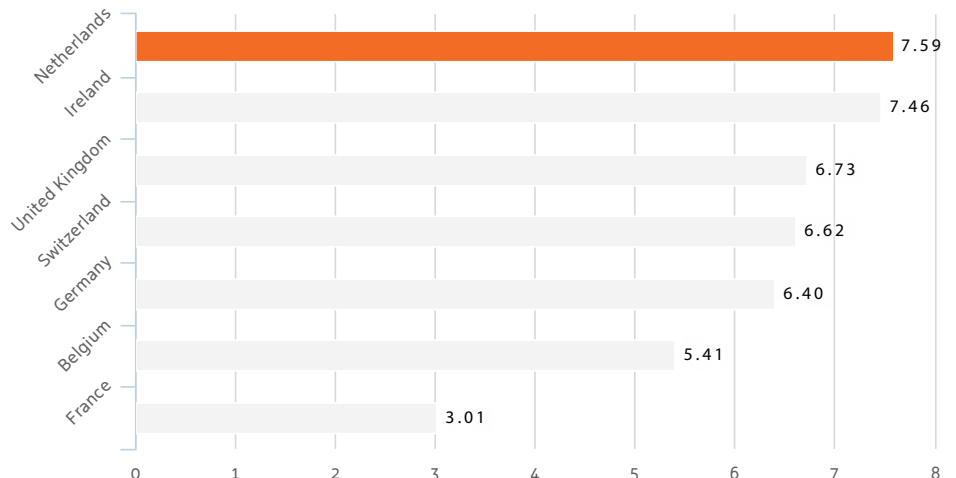
Global Innovation Index 2015 – Top 10

INSEAD, WIPO and Cornell University's Global Innovation Index 2015



Attitudes Toward Globalization

Attitudes toward globalization are generally positive in your society



Source: IMD WCY 2015

How We Can Help

Whether you're considering locating in the Netherlands or have existing operations here, the Netherlands Foreign Investment Agency (NFIA) is prepared to assist your company at every stage of establishing or expanding operations here.

NFIA works closely with the Invest in Holland Network, a powerful team of regional economic development agencies and several large cities, to provide a continuum of free, confidential support services to new foreign investors, as well as existing foreign investors that already have operations in the Netherlands. Start with NFIA and we'll connect you to the right partners in our network to assist with everything from recruiting talent to introducing you to powerful public-private partnerships.

Fact Finding

Starting in your country of origin, the NFIA is prepared to assist your company in every stage of establishing, rolling out or expanding operations in the Netherlands. We organize fact-finding missions and meetings with relevant partners, as well as provide personalized guidance and counsel on tax, government and permit procedures, location options and business solutions. We provide up-to-date, customized information on relevant business locations, Dutch legislation and tax regulations and many other subjects during preliminary in-person meetings; organize customized fact-finding trips; present concrete solutions that simplify and optimize establishment in the Netherlands and offer tailor-made support by NFIA specialists in key sectors.

Advocacy

One of the core aspects of the NFIA's mission is to place the Dutch business climate systematically on the country's political agenda by serving as an advocate and liaison between business and government. In this way, the NFIA and its network of partners serve as a channel through which you can share your views and experiences concerning the business investment climate in the Netherlands with the Dutch government. The NFIA puts your feedback in the right hands so that it may be used as input for future decision-making.



SABIC, a Saudi Arabian petrochemical company, took its first steps in the European market by taking over DSM Petrochemicals in 2002 and now employs 2,500 people in the Netherlands.



“
The NFIA is a true partner that not only advises us, but thinks proactively along with us.”

Simona Maassen
Manager of Public Affairs
SABIC Europe





February 2016



Get in Touch

*Netherlands Foreign Investment Agency
Embassy of the Kingdom of the Netherlands*

38 Hyde Park Gate

SW7 5DP London

Phone: +44 (0)207 590 3286

E-mail: info@nfia.co.uk



Netherlands Foreign Investment Agency

www.investinholland.com

From	[REDACTED]@rvo.nl)	Date/Time (GMT)	16 Aug 2016 18:29:11
To	[REDACTED] [REDACTED]nfia.nl>	Cc	
Project	BAT		
Subject	FW: BAT - contact London / contact		
Attachments	No	Flags	

For files

Van: [REDACTED]
 Verzonden: dinsdag 16 augustus 2016 18:29
 Aan: [REDACTED]
 CC: [REDACTED]@nfia.co.uk'
 Onderwerp: RE: BAT - contact London / contact

Dag [REDACTED]

Deze stond niet in mijn lijstje maar ik kan deze inderdaad (tijdelijk) overnemen.
 Het is een interessante casus.

Ik denk dat het heel waardevol is om [REDACTED] en/of [REDACTED] van BAT daar ook bij aanwezig te hebben.

[REDACTED]
 Best regards / Met vriendelijke groet,

Netherlands Foreign Investment Agency (NFIA)

office [REDACTED]
 mobile [REDACTED]

Visit our new
 website
investinholland.com!

[REDACTED]@nfia.nl
[https://nl.linkedin.com/\[REDACTED\]](https://nl.linkedin.com/[REDACTED])
www.twitter.com/nfiaholland

Netherlands Foreign Investment Agency
 Ministry of Economic Affairs
 Prinses Beatrixlaan 2 | 2595 AL | The Hague | Netherlands

Van: [redacted]@zevenaar.nl]
Verzonden: dinsdag 16 augustus 2016 14:25
Aan: [redacted]
Onderwerp: FW: BAT - contact London / contact

Beste [redacted]

Zie onderstaand overzichtje van [redacted] m.b.t. British American Tobacco (BAT).
Ben jij haar achter vang voor deze weken?
Dan ga ik nl. aan de slag met de afspraak in bij BAT in Groningen die [redacted] voorstelt.
Ik heb al even contact met [redacted] die volgende week weer bereikbaar is.

Kind regards,

[redacted]
Accountmanager BusinessPark 7Poort
Municipality of Zevenaar

Economic Affairs
Werkdagen: dinsdag t/m donderdag

Tel.

[redacted]
Kerkstraat 27
6901 AA Zevenaar
PO Box 10
6900 AA Zevenaar
The Netherlands

e-mail: [redacted]@zevenaar.nl
internet: www.zevenaar.nl

Van: [redacted]@rvo.nl]
Verzonden: woensdag 20 juli 2016 14:17
Aan: [redacted]
Onderwerp: BAT - contact London / contact

Beste [redacted],

Hierbij koppel ik jullie zodat jullie ook contact kunnen hebben met elkaar als ik half augustus op vakantie ga.
Wat we voor nu hebben afgesproken:

Ø [redacted]
[redacted]
Ø [redacted]
[redacted]
Ø [redacted]
[redacted]
Ø [redacted] is va. 15 augustus op vakantie en zal voor achtervang zorgen op het dossier

Tot zover.

[redacted]

From	[REDACTED]@rvo.nl)	Date/Time (GMT)	09 Sep 2016 11:45:47
To	[REDACTED] [REDACTED]nfia.nl>	Cc	
Project	BAT		
Subject	FW: BAT - Contactdetails [REDACTED]		
Attachments	No	Flags	

For files

Van: [REDACTED]@zevenaar.nl]

Verzonden: donderdag 1 september 2016 16:26

Aan: [REDACTED]; [REDACTED]

Onderwerp: RE: BAT

Beste [REDACTED] en [REDACTED]

Ik heb bij de [REDACTED] van [REDACTED] in Zevenaar en [REDACTED], vastgoed [REDACTED] de voice mail ingesproken. Ben benieuwd naar hun verklaring voor Roosendaal vs Zevenaar.

Met vriendelijke groet,

[REDACTED]
Accountmanager BusinessPark 7Poort

telefoon

[REDACTED]
Kerkstraat 27
6901 AA Zevenaar
Postbus 10
6900 AA Zevenaar

Team Ruimte, afdeling Ontwikkeling
Werkdagen: dinsdag t/m donderdag

e-mail: [REDACTED]@zevenaar.nl
internet: www.zevenaar.nl

Van: [REDACTED]@nfia.co.uk]

Verzonden: donderdag 1 september 2016 16:22

Aan: [REDACTED]; [REDACTED]

Onderwerp: RE: BAT

Hoi [REDACTED]

Hartelijk dank voor je e-mail update.

Enig idee of de [REDACTED] en [REDACTED] sites in NL zijn, of misschien elders?

Is het een idee om ons met [REDACTED] in contact te brengen? Ik zou graag eens met [REDACTED] doorspreken. We kunnen dan misschien ook meteen – onafhankelijk – even doorvragen over Zevenaar.

Ik heb verder niets meer gehoord van BAT hier. Zal er nog weer eens achter aan gaan.

Met vriendelijke groet,

[REDACTED]

████████████████████
████████████████████
Visit our website
investinholland.com

office ██████████
mobile ██████████
██████████@nfia.co.uk
www.twitter.com/NFIALondon

Netherlands Foreign Investment Agency
Embassy of the Kingdom of the Netherlands
38 Hyde Park Gate | London | SW7 5DP | United Kingdom

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From: ██████████@zevenaar.nl]

Sent: 01 September 2016 15:03

To: ██████████@nfia.co.uk>; ██████████@rvo.nl>; ██████████@rvo.nl>

Subject: BAT

Beste ██████████,

Vandaag heb ik telefonisch contact kunnen leggen met ██████████ van BAT in België. ██████████ is vandaag net weer gestart na ██████████ vakantie.

De tender gaat naar een afronding toe. De voorstellen die er nu liggen van de 3 nog overgebleven 3 PL's zijn:

██
██
██

██████████ komt bij ██████████ BAT als een prima voorstel over.

Ik moet daarmee tot de conclusie komen dat de kansen voor een nieuwe site in Zevenaar bijna 0 zijn geworden. Of zien jullie dat anders?

Met vriendelijke groet,

██████████
Accountmanager BusinessPark 7Poort

Team Ruimte, afdeling Ontwikkeling
Werkdagen: dinsdag t/m donderdag

telefoon

██████████
Kerkstraat 27
6901 AA Zevenaar
Postbus 10
6900 AA Zevenaar

e-mail: ██████████@zevenaar.nl
internet: www.zevenaar.nl

De Rijksdienst voor Ondernemend Nederland (RVO.nl) stimuleert Duurzaam, Agrarisch, Innovatief en Internationaal ondernemen.

From	[REDACTED]@nfia.co.uk)	Date/Time (GMT)	09 Sep 2016 12:10:32
To	[REDACTED]@nfia.nl>	Cc	
Project	BAT		
Subject	BAT: Reaching out to EMEA Head for logistics BAT		
Attachments	Yes (Click here to go there)	Flags	NFIA-Only

Files

[REDACTED]

[cid:image003.png@01D1F3B4.C8EA0DA0]<<http://www.investinholland.com/>>
 Visit our website
[investinholland.com](http://www.investinholland.com/)<<http://www.investinholland.com/>>

office [REDACTED]
 mobile [REDACTED]
 [REDACTED]@nfia.co.uk<mailto:[REDACTED]@nfia.co.uk>
www.twitter.com/NFIALondon<<http://www.twitter.com/NFIALondon>>

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From: [REDACTED]
Sent: 09 September 2016 11:08
To: [REDACTED]@bat.com' <[REDACTED]@bat.com>
Subject: British American Tobacco & the Netherlands

Dear [REDACTED],

Via my network I have learned about BAT's consideration to [REDACTED]
 activities in the Netherlands and that you are [REDACTED]

[REDACTED]

As part of the Dutch Ministry of Economic Affairs, the NFIA's task is to advise and assist foreign-owned companies during every stage of the establishment, or expansion, of their operations in our country. A great number of current investors, including Cisco, Kikkoman, LG Electronics and Apollo Tyres, have made use of the NFIA's expertise and services, in order to define and develop their European expansion plans. Together with our regional 'Invest in Holland' partners throughout the Netherlands, we can provide assistance in:

- * developing a business plan for (re)structuring your European (supply chain) strategy;
- * providing essential information regarding Dutch legislation and regulations;
- * (re)locating employees to the Netherlands;
- * sourcing locations and real estate for your company;
- * arranging quick access to government contacts at local, regional and national level.

All our services are confidential and free of charge. Our corporate brochure is attached.

Please don't hesitate to contact us if you (or one of your colleagues) have any questions, or would like to discuss further opportunities for BAT in the Netherlands.

[REDACTED]

Looking forward to hearing from you.

Best regards,

[REDACTED]

[REDACTED]

[REDACTED]

[cid:image003.png@01D1F3B4.C8EA0DA0]<<http://www.investinholland.com/>>

Visit our website

[investinholland.com](http://www.investinholland.com/)<<http://www.investinholland.com/>>

office [REDACTED]

mobile [REDACTED]

[REDACTED]@nfia.co.uk<[mailto:\[REDACTED\]@nfia.co.uk](mailto:[REDACTED]@nfia.co.uk)>

www.twitter.com/NFIALondon<<http://www.twitter.com/NFIALondon>>

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Attachment(s):

Filename	Size (bytes)
image001.png	3,759
NFIA Corporate Brochure light.pdf	2,199,360

From	[REDACTED] [REDACTED]@rvo.nl	Date/Time (GMT)	09 Sep 2016 13:52:34
To	[REDACTED] [REDACTED]@nfia.nl>	Cc	[REDACTED] <[REDACTED]@nfia.co.uk> [REDACTED] [REDACTED] [REDACTED]@rvo.nl >
Project	BAT		
Subject	BAT - reaching out to BAT HQ Amstelveen		
Attachments	No	Flags	NFIA-Only

Files

Van: [REDACTED]
Verzonden: vrijdag 9 september 2016 13:52
Aan: '[REDACTED]@bat.com'; [REDACTED]@bat.com'
Onderwerp: BAT & Nederland

Geachte [REDACTED], geachte [REDACTED],

Mijn naam is [REDACTED] en ik ben werkzaam voor het Ministerie van Economische Zaken (het Netherlands Foreign Investment Agency). Ik werk hier onder andere aan het onderhouden van goed contact met buitenlandse bedrijven in Nederland.

[REDACTED]

Enige tijd geleden werden wij benaderd door de gemeente Zevenaar, die ons uitlegde dat uw organisatie overweegt om de logistieke operatie aldaar te verplaatsen.

Graag ga ik hierover met u in gesprek. Wij kunnen u – waar nodig – in contact brengen met interessante partners; u ondersteunen bij de eventuele aanvraag van lokale vergunningen, enzovoorts.

Zou ik een dezer dagen eens bij u langs kunnen komen om met u te verkennen hoe wij u eventueel van dienst kunnen zijn?

Met hartelijke groet,

[REDACTED]
Project Manager

Visit our website
investinholland.com

[REDACTED]
[REDACTED]
[REDACTED]@nfia.nl

Netherlands Foreign Investment Agency
 Ministry of Economic Affairs
 Prinses Beatrixlaan 2 | 2595 AL | Den Haag – Netherlands
 P.O. Box 93144 | 2509 AC | Den Haag – Netherlands

De Rijksdienst voor Ondernemend Nederland (RVO.nl) stimuleert Duurzaam, Agrarisch, Innovatief en Internationaal ondernemen.

Dit bericht kan informatie bevatten die niet voor u is bestemd. Indien u niet de geadresseerde bent of dit bericht abusievelijk aan u is gezonden,

From	[REDACTED] [REDACTED]@rvo.nl)	Date/Time (GMT)	12 Sep 2016 18:12:36
To	[REDACTED] [REDACTED]@bat.com >	Cc	[REDACTED] [REDACTED]@bat.com >
Project	BAT		
Subject	RE: BAT - response for contact BAT		
Attachments	No	Flags	

Dag [REDACTED],

De door u genoemde tijdstippen zijn doorgaands ook bij mij nog mogelijk, waarbij de meeste voorkeur uitgaat naar de Dinsdag.

Met vriendelijke groet,

[REDACTED]

Van: [REDACTED]@bat.com]

Verzonden: vrijdag 9 september 2016 17:42

Aan: [REDACTED]

CC: [REDACTED]

Onderwerp: RE: BAT - Logistics in NL

Geachte [REDACTED],

Dank voor uw mail. Mijn oprechte excuses.

Ik was ten dele op vakantie en business trip, vandaar vertraging in reactie.

Met plezier staan we u te woord en zal een conference call opzetten, samen met een collega van het nederlandse kantoor.

Wacht nog even op [REDACTED] beschikbaarheid, maar moet voor ons zeker lukken aanstaande dinsdag, woensdag namiddag of donderdagnamiddag.

Heeft u restricties in uw agenda die dagen, dan nemen we deze in acht en bevestigen finale timing.

Vriendelijke groeten en alvast een prettig week-end.

[REDACTED]

Sent from my Windows Phone

From: [REDACTED]

Sent: 09/09/2016 12:06

To: [REDACTED]

Subject: RE: BAT - Logistics in NL

Geachte [REDACTED],

Ik heb zojuist uw voicemail ingesproken.

Graag kom ik met u in contact. Is er een moment dat u goed schikt?

Met vriendelijke groet,

[REDACTED]
Van: [REDACTED]
Verzonden: donderdag 1 september 2016 19:28
Aan: [REDACTED]@bat.com'
CC: [REDACTED]@nfia.co.uk'
Onderwerp: BAT - Logistics in NL

Geachte [REDACTED],

Foreign-owned companies are responsible for creating 1-in-6 jobs in the Dutch business sector and, as such, are of key importance to the Dutch economy. As a result, we very much value your presence in the Netherlands.

As part of the Dutch Ministry of Economic Affairs, the NFIA's task is to advise and assist foreign-owned companies during every stage of the establishment, or expansion, of their operations in our country. Thus I would like to underline that we are committed to ensuring that BAT's business continues to grow and thrive in the Netherlands.

Via our regional partner in Gelderland we learned about your tender for consolidating the logistics activities and are nearing a decision. We would very much like to know if we can further aid you in this process and what your motivations are for this tender. This will help us improve our logistical proposition and will aid other clients in finding the best supply chain solutions in the Netherlands.

As such I would be very pleased if we could have a talk, in person or by phone, about the logistical opportunities for British American Tobacco in the Netherlands.

[REDACTED]
[REDACTED]
Best regards / Met vriendelijke groet,

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
Netherlands Foreign Investment Agency (NFIA)

**Visit our new
website
[investinholland.com!](http://investinholland.com)**

office [REDACTED]
mobile [REDACTED]
[REDACTED]@nfia.nl
[https://nl.linkedin.com/\[REDACTED\]](https://nl.linkedin.com/[REDACTED])
www.twitter.com/nfiaholland

Netherlands Foreign Investment Agency
Ministry of Economic Affairs
Prinses Beatrixlaan 2 | 2595 AL | The Hague | Netherlands

From	[REDACTED] [REDACTED]@rvo.nl)	Date/Time (GMT)	15 Sep 2016 17:03:16
To	[REDACTED] [REDACTED]@rvo.nl>	Cc	[REDACTED] [REDACTED]@nfia.co.uk> [REDACTED] [REDACTED]nfia.nl >
Project	BAT		
Subject	Re: BAT - call notes		
Attachments	No	Flags	

Hi all,

Decision of final 3 tenders will be made in the next 2-3 weeks.
Transfer to the new site would be most efficient between May - Sept 2017.

Best / Met vriendelijke groeten,
[REDACTED]

Verstuurd vanaf mijn iPad

Op 15 sep. 2016 om 16:44 heeft [REDACTED]
<[REDACTED]@rvo.nl<mailto:[REDACTED]@rvo.nl>> het volgende geschreven:

Hey [REDACTED]

We just talked to BAT concerning their relocation. Please find call notes hereunder:

- Site Zevenaar [REDACTED]
- Will keep activity in NL, but will be less
- Due to the EU excise (accijns) rules, it is necessary for BAT to run an operation in each country they are selling products in.
- For them – servicing BeNeLux + France it is most cost efficient to run a bigger operation in [REDACTED] and smaller operations in the other countries.
- Preferably they'd do everything in [REDACTED] but the excise rules make this a sub optimal option
- Currently tendering the NL operation to 3 parties in [REDACTED]
- Operation to cater [REDACTED] market might move as well, leaving NL with [REDACTED] FTE of BAT distribution
- These will stay either way due to excise practice [REDACTED]
- In Antwerp they co-locate with [REDACTED] and [REDACTED]
- IT also looking to rearrange logistics, they keep each other informed on the process and the companies they talk to, looking to continue co location
- Volume: [REDACTED] pallets/year
- [REDACTED] has investigated the excise practice in depth for them, and this was outcome.

· NFIA introduced services (connections to tax & port authorities/ info/ FFT's/ municipalities etc etc.

è NFIA will send comparative study BE NE LUX FR and GE (FDI benchmark)

So concluding, there isn't much we can do but keep them fed with optimal information on logistics in NL to minimize damage for NL. Meeting with HQ in London not essential for now, but I'd say keep trying - always good to be on the radar.

Also, this move has all to do with excise legislation. There isn't much we can do about that. There are tight restrictions regarding communication on policy with tobacco companies. [REDACTED]

[REDACTED] anything to add?

Rgs

[REDACTED]
Project Manager

< image003.png > < http://www.investinholland.com/ >
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[REDACTED]
[REDACTED]
[REDACTED]@nfia.nl <mailto:[REDACTED]@nfia.nl>

Netherlands Foreign Investment Agency
Ministry of Economic Affairs
Prinses Beatrixlaan 2 | 2595 AL | Den Haag - Netherlands
P.O. Box 93144 | 2509 AC | Den Haag - Netherlands

De Rijksdienst voor Ondernemend Nederland (RVO.nl) stimuleert Duurzaam, Agrarisch, Innovatief en Internationaal ondernemen.

Dit bericht kan informatie bevatten die niet voor u is bestemd. Indien u niet de geadresseerde bent of dit bericht abusievelijk aan u is gezonden, wordt u verzocht dat aan de afzender te melden en het bericht te verwijderen.

De Staat aanvaardt geen aansprakelijkheid voor schade, van welke aard ook, die verband houdt met risico's verbonden aan het elektronisch verzenden van berichten.

This message may contain information that is not intended for you. If you are not the addressee or if this message was sent to you by mistake, you are requested to inform the sender and delete the message.

The State accepts no liability for damage of any kind resulting from the risks inherent in the electronic transmission of messages.

From	[REDACTED] [REDACTED]@rvo.nl)	Date/Time (GMT)	19 Sep 2016 12:08:33
To	[REDACTED] [REDACTED]@rvo.nl> [REDACTED] [REDACTED]@nfia.co.uk>	Cc	[REDACTED] [REDACTED]nfia.nl >
Project	BAT		
Subject	RE: BAT - data study for BAT please reflect		
Attachments	Yes (Click here to go there)	Flags	

Hi [REDACTED]

I don't think all of the input is required for BAT. We can also incorporate a few other slides to show our strength.

- I would start with the slides where we are at the top (start with the good news, end with the bad)
- I would include a message with the salaries that we are overall cheapest (NL always #2, behind France or Belgium) and that we have the most flexible labor laws of the 4.
- I would include slide about NL Customs being best according to OECD
- I would leave out slides 11-16 about #companies in transportation/warehousing. This info is non-relevant if it is not per capita.
- Of each section I would also leave out either the summary/intro slide (1) or the table slide (3). The graph is the most powerful and is what people will remember. No need to show 3 slides about the same topic.
- I have included another FDI benchmark comparison that I used recently, which includes quality of infrastructure etc. That is more relevant, I'd say.

[REDACTED]

Van: [REDACTED]
Verzonden: vrijdag 16 september 2016 10:39
Aan: [REDACTED]; [REDACTED]
CC: Projects
Onderwerp: BAT - data study for BAT please reflect

Hi [REDACTED]

I made a data study for BAT including all kinds of logistic data. Could you please take a look and reflect? I think the study provides an honest and positive image of NL. We are not no. 1 in all data points, but our competitors score much less balanced than we do + we are no. 1 in storage & warehousing. My estimate is that we can share this with BAT to help them create a clearer picture of the differences between the countries they are active in.

Let me know what you guys think.

Rgs

[REDACTED]
Project Manager

+ [REDACTED]
+ [REDACTED]
[REDACTED]@nfia.nl

Netherlands Foreign Investment Agency
Ministry of Economic Affairs

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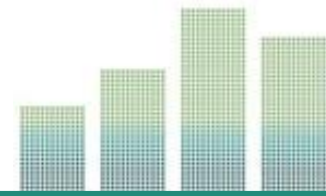
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Attachment(s):

Filename	Size (bytes)
FDI Logistics Location NW-EU short.pptx	933,468
NL Customs most trade friendly.pptx	357,199
	850

F12.a





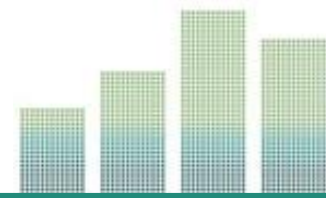
Overall infrastructure quality

Description: Assessment of the quality of general infrastructure (e.g., transport, telephony, and energy) in the country (1= extremely underdeveloped; 7= extensive and efficient by international standards).

Unit type: Rating from 1 to 7

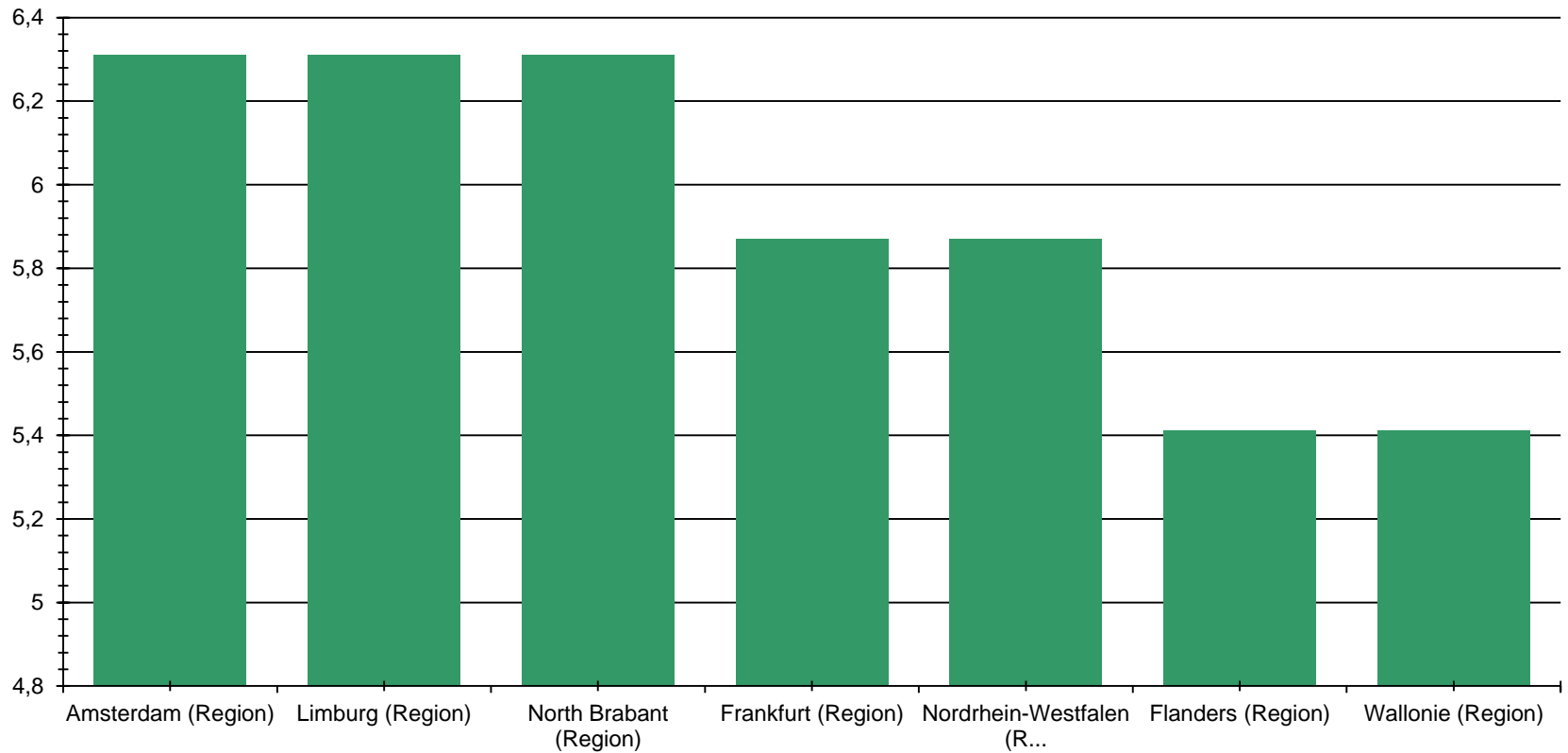
Source: Global Competitiveness Report, World Economic Forum, Switzerland, 2015-16.

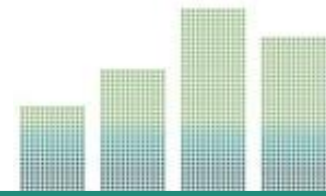
Tier 2 sub category: Quality of local infrastructure



Overall infrastructure quality - Chart

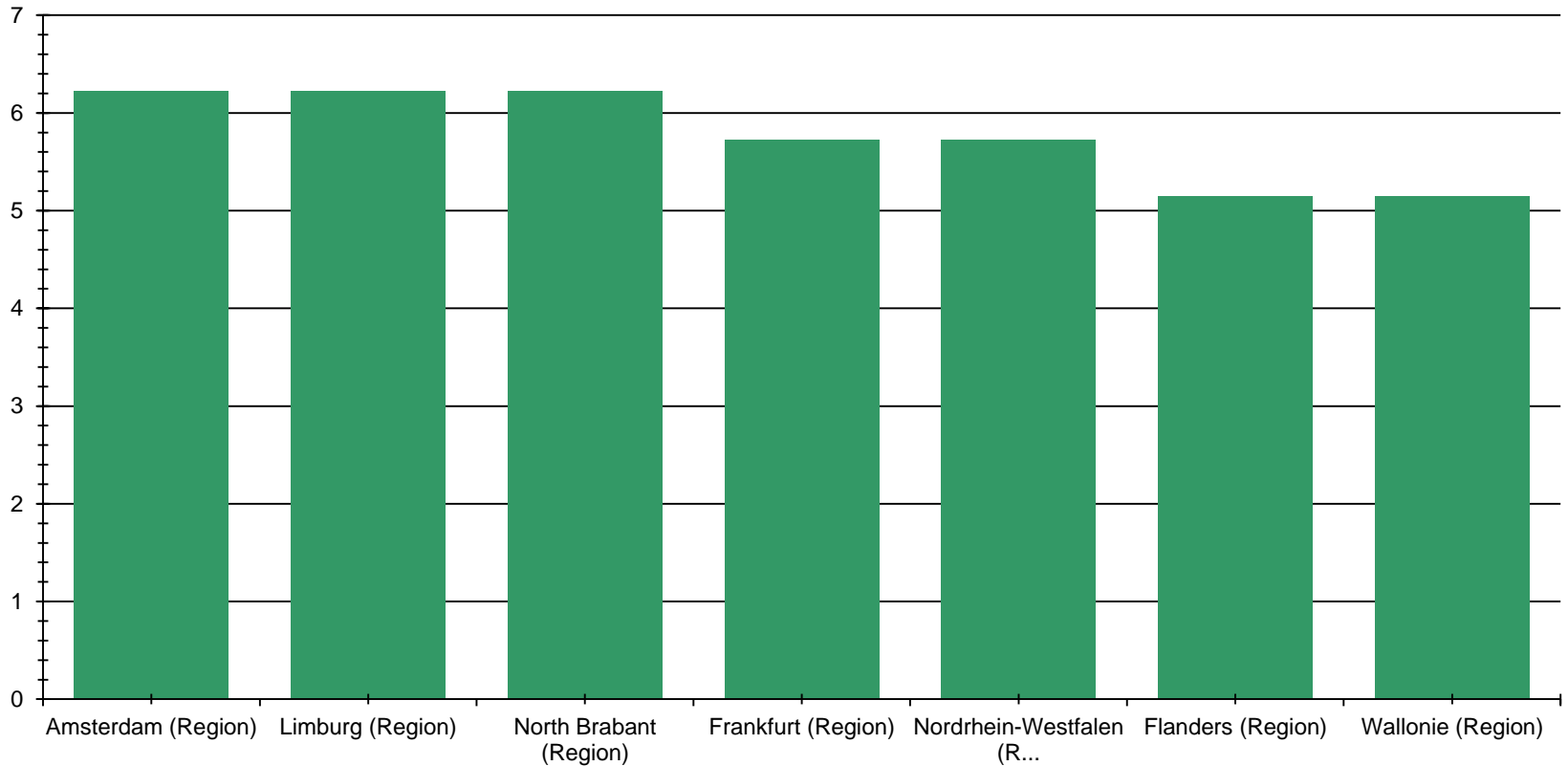
This chart shows **Overall infrastructure quality** across the 7 locations, expressed as Rating from 1 to 7.

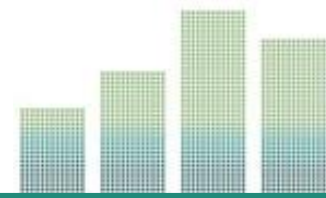




Quality of roads - Chart

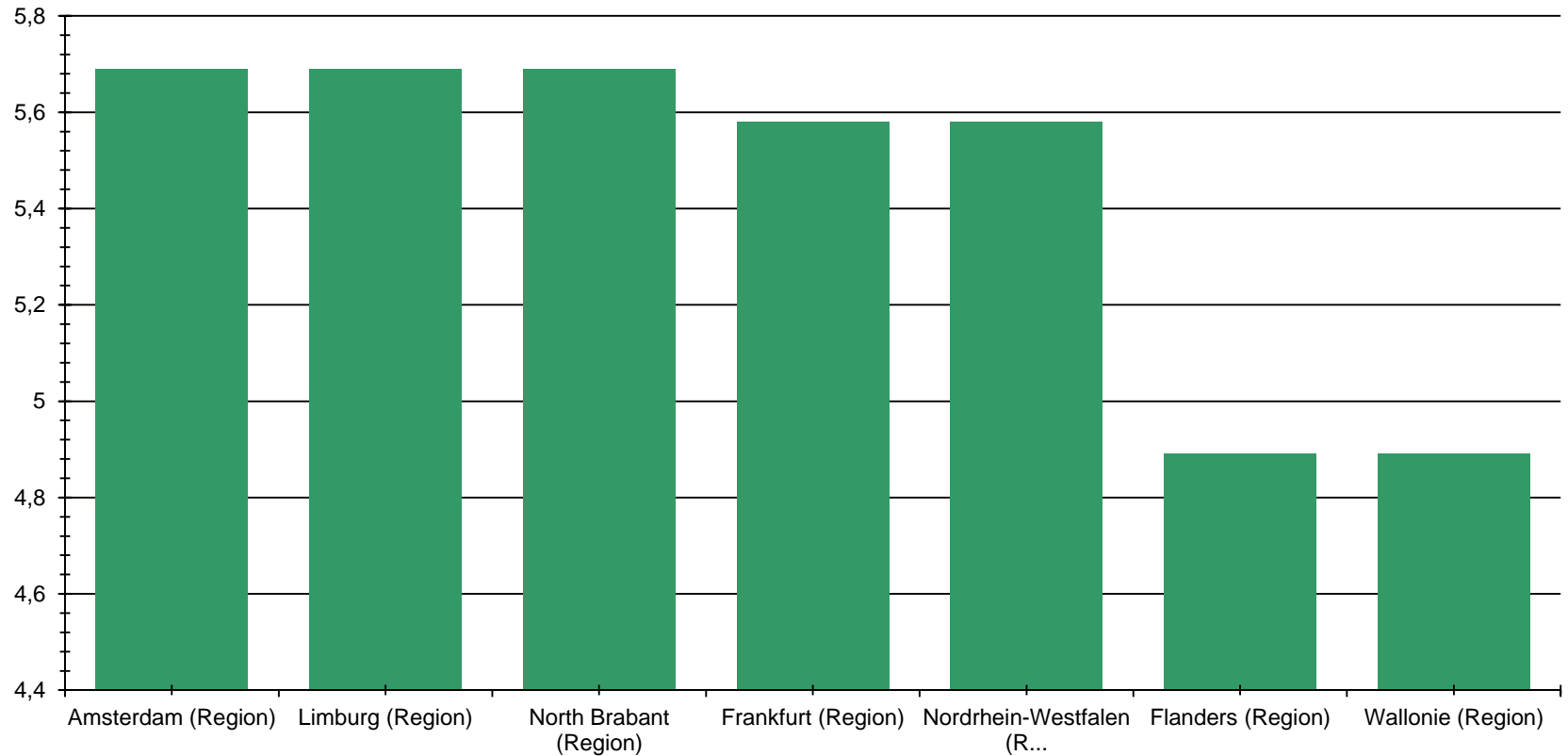
This chart shows **Quality of roads** across the 7 locations, expressed as Rating from 1 to 7.

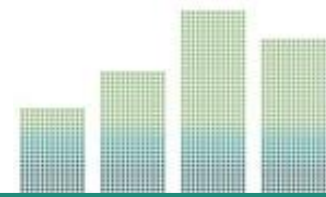




Railroad infrastructure development - Chart

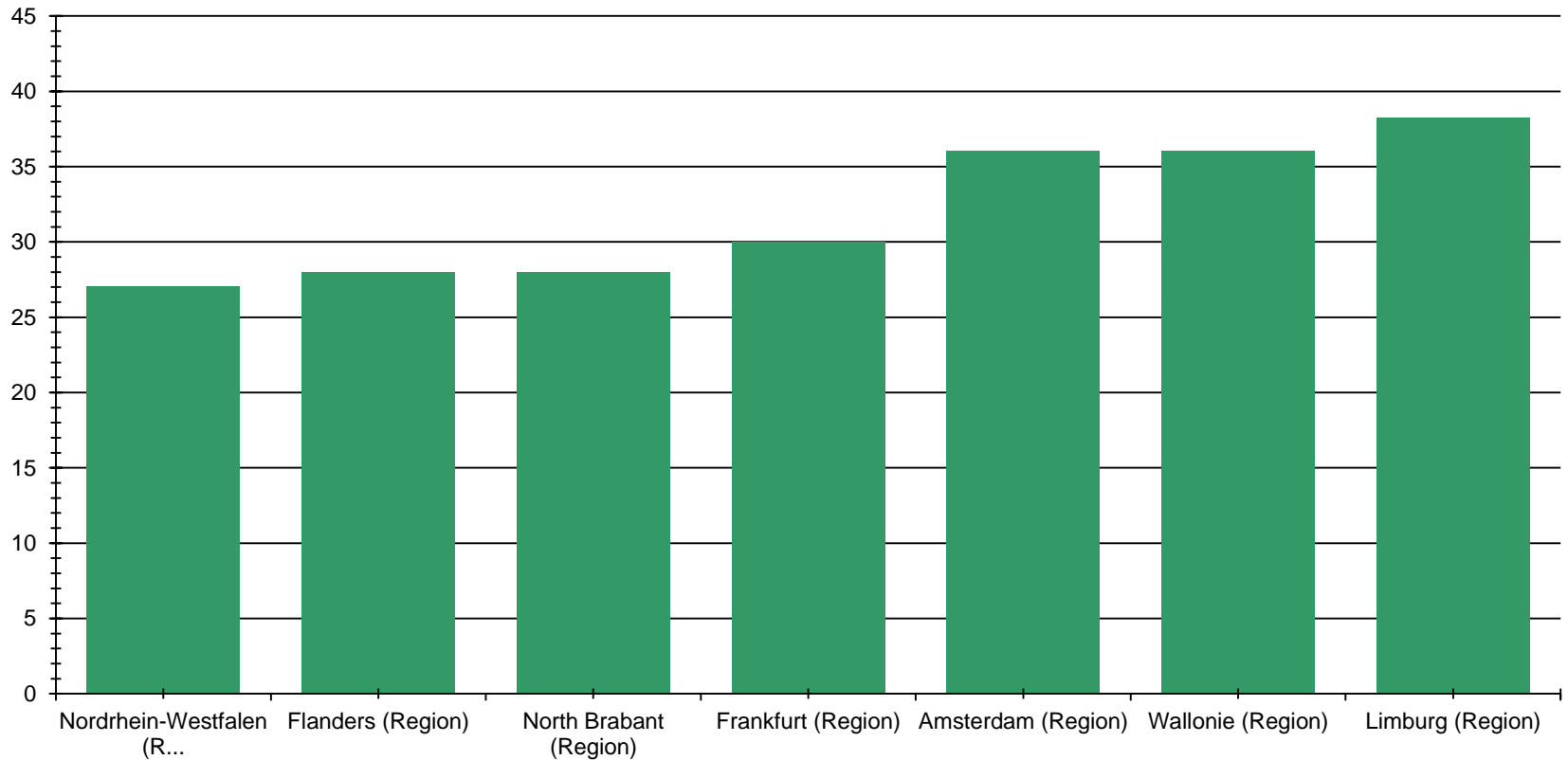
This chart shows **Railroad infrastructure development** across the 7 locations, expressed as Rating from 1 to 7.

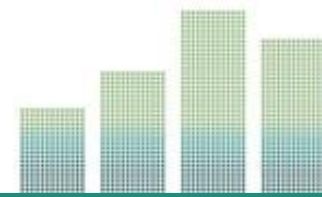




Average commute time - Chart

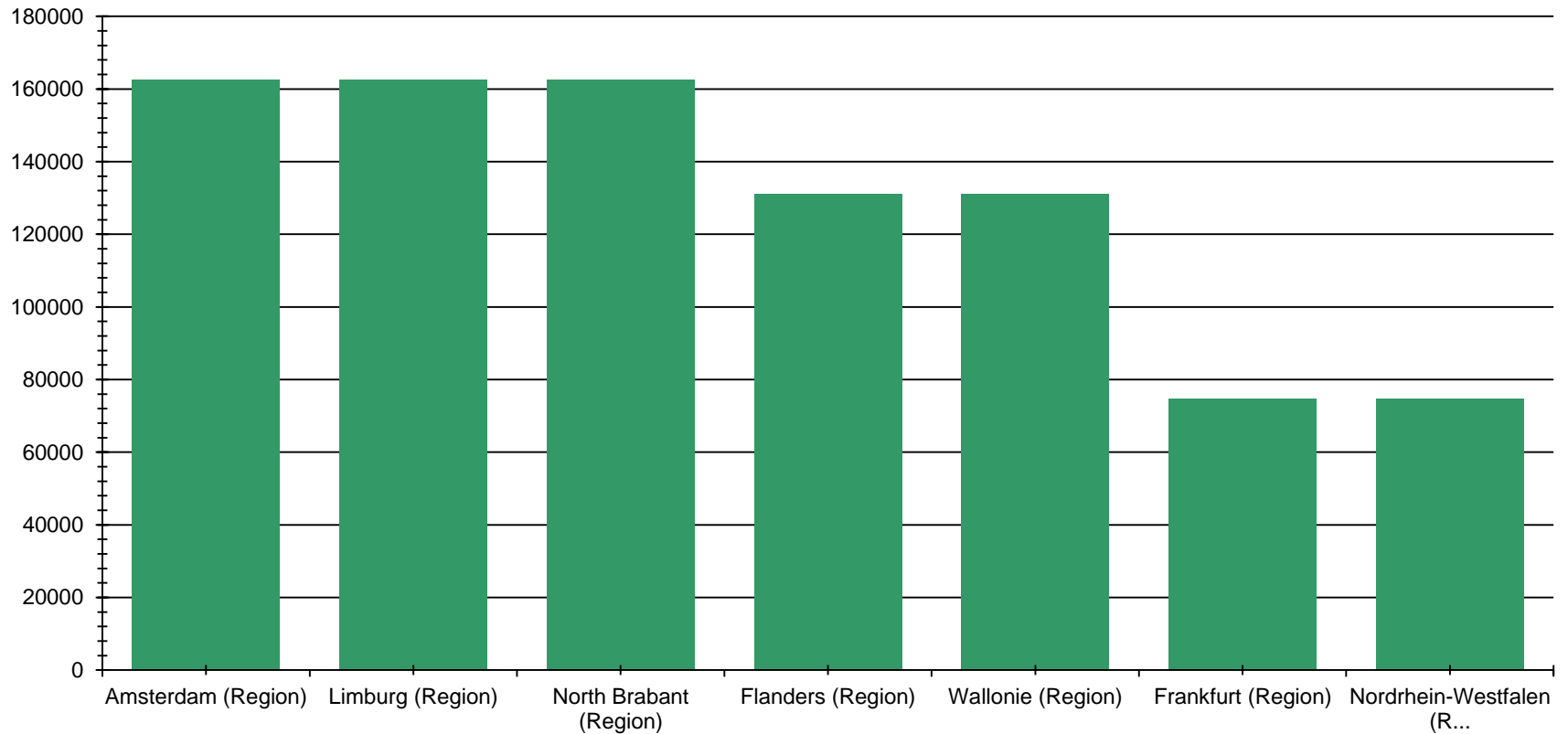
This chart shows **Average commute time** across the 7 locations, expressed as Minutes.

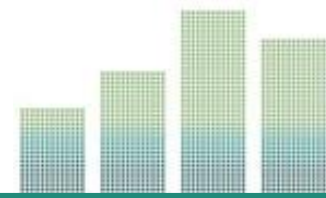




International internet bandwidth (bits per person) - Chart

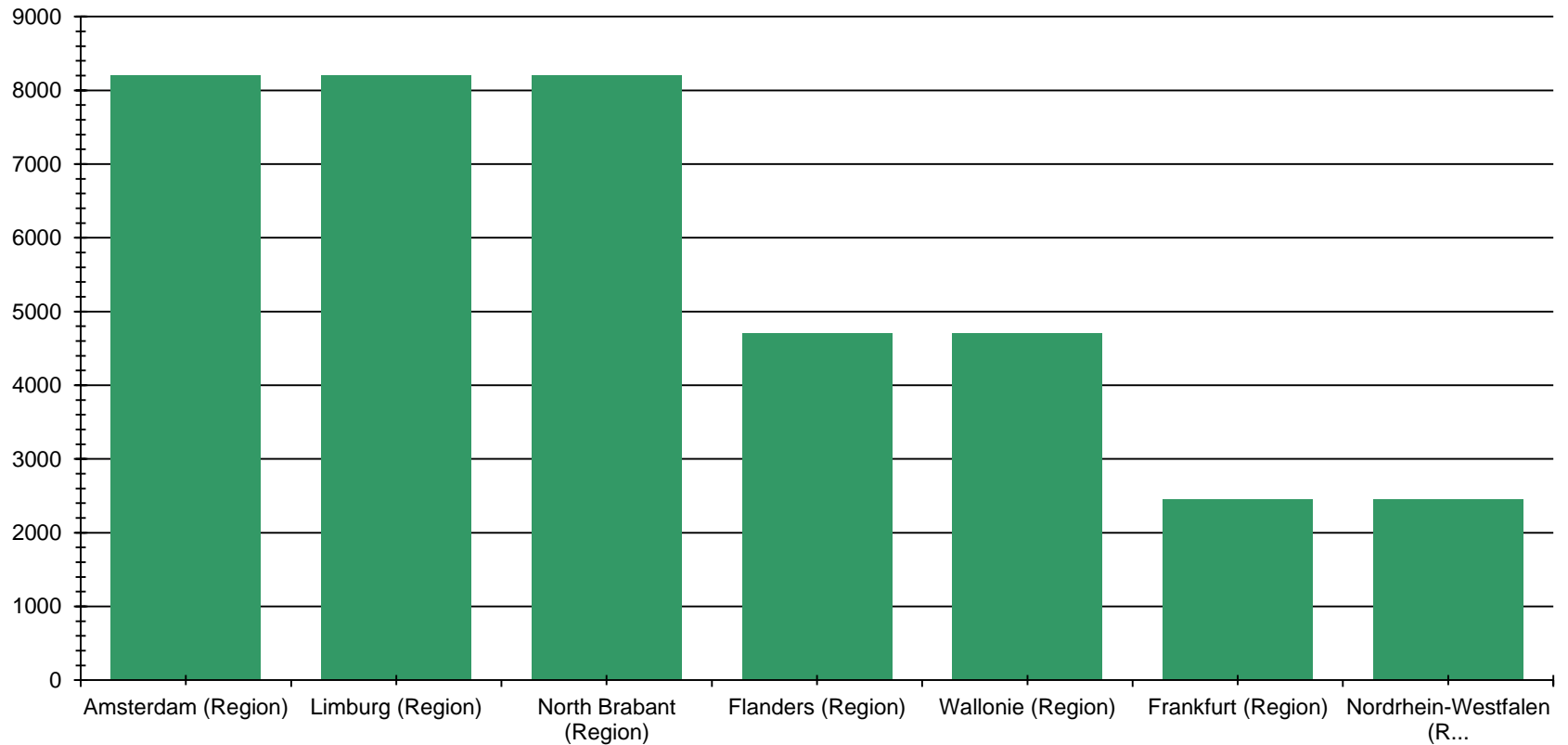
This chart shows **International internet bandwidth (bits per person)** across the 7 locations, expressed as Unit Value.

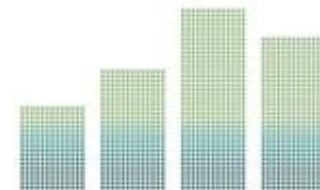




Internet penetration (hosts) - Chart

This chart shows **Internet penetration (hosts)** across the 7 locations, expressed as Computers per 10,000 population.



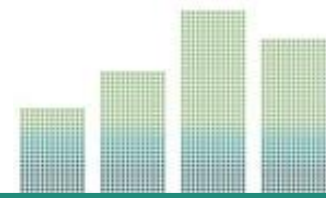


Internet penetration (hosts) - Data table

The table below shows the rank and total score of each location for this data point.

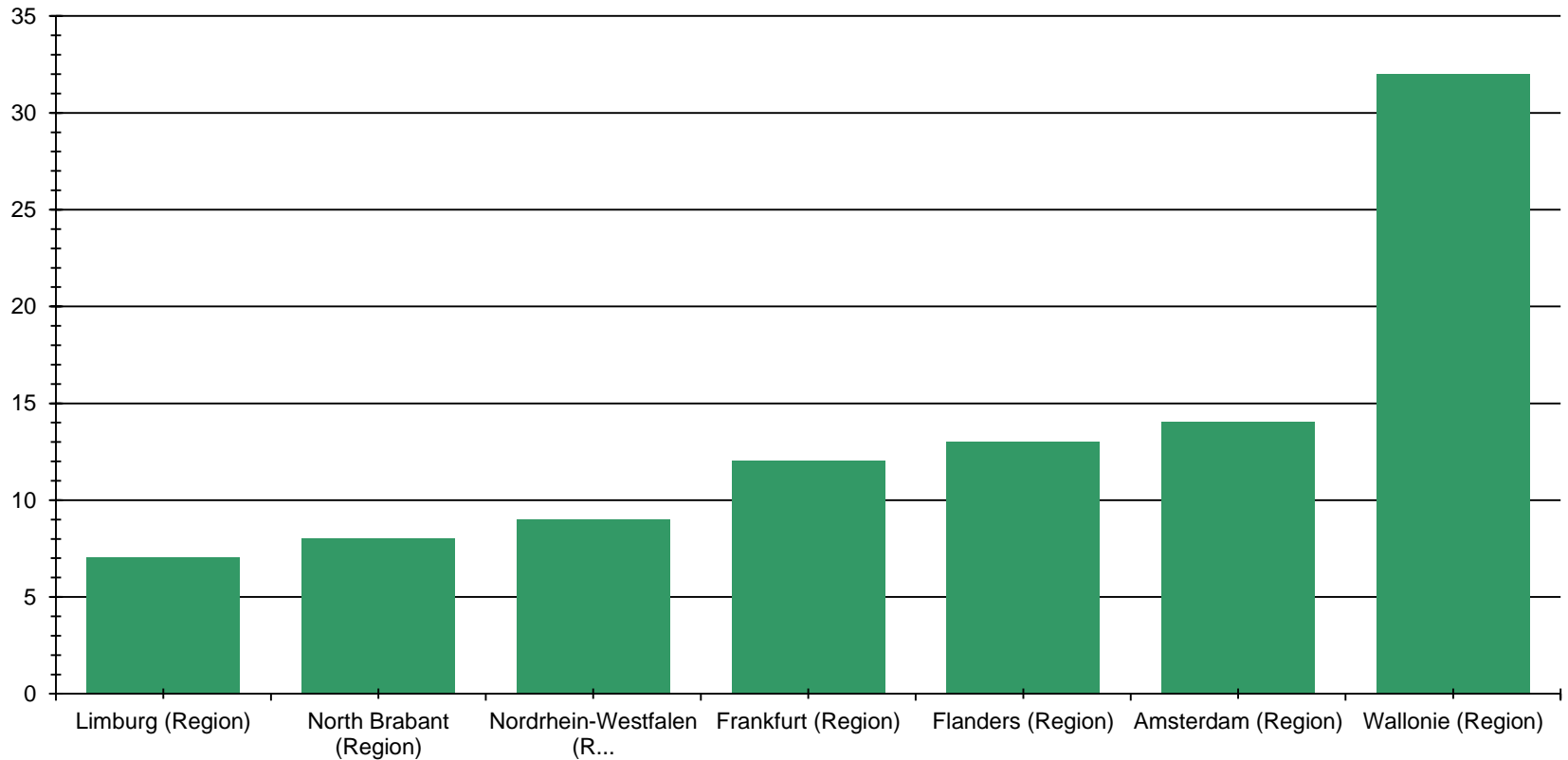
Location	Rank	Data	Year	Data location	Avg dev %	Data (PY)	Year (PY)	% Change
Amsterdam (Region)	1st	8,206.40	2012	Netherlands	47.6%	n/a		n/a
Limburg (Region)	=1st	8,206.40	2012	Netherlands	47.6%	n/a		n/a
North Brabant (Region)	=1st	8,206.40	2012	Netherlands	47.6%	n/a		n/a
Flanders (Region)	4th	4,699.60	2012	Belgium	-15.47%	n/a		n/a
Wallonie (Region)	=4th	4,699.60	2012	Belgium	-15.47%	n/a		n/a
Frankfurt (Region)	6th	2,450.31	2012	Germany	-55.93%	n/a		n/a
Nordrhein-Westfalen (Region)	=6th	2,450.31	2012	Germany	-55.93%	n/a		n/a

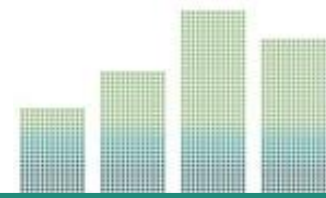
Sources: fDi Intelligence based on CIA: The World Factbook and World Bank World Development Indicators (November 2013)



Distance to nearest international airport - Chart

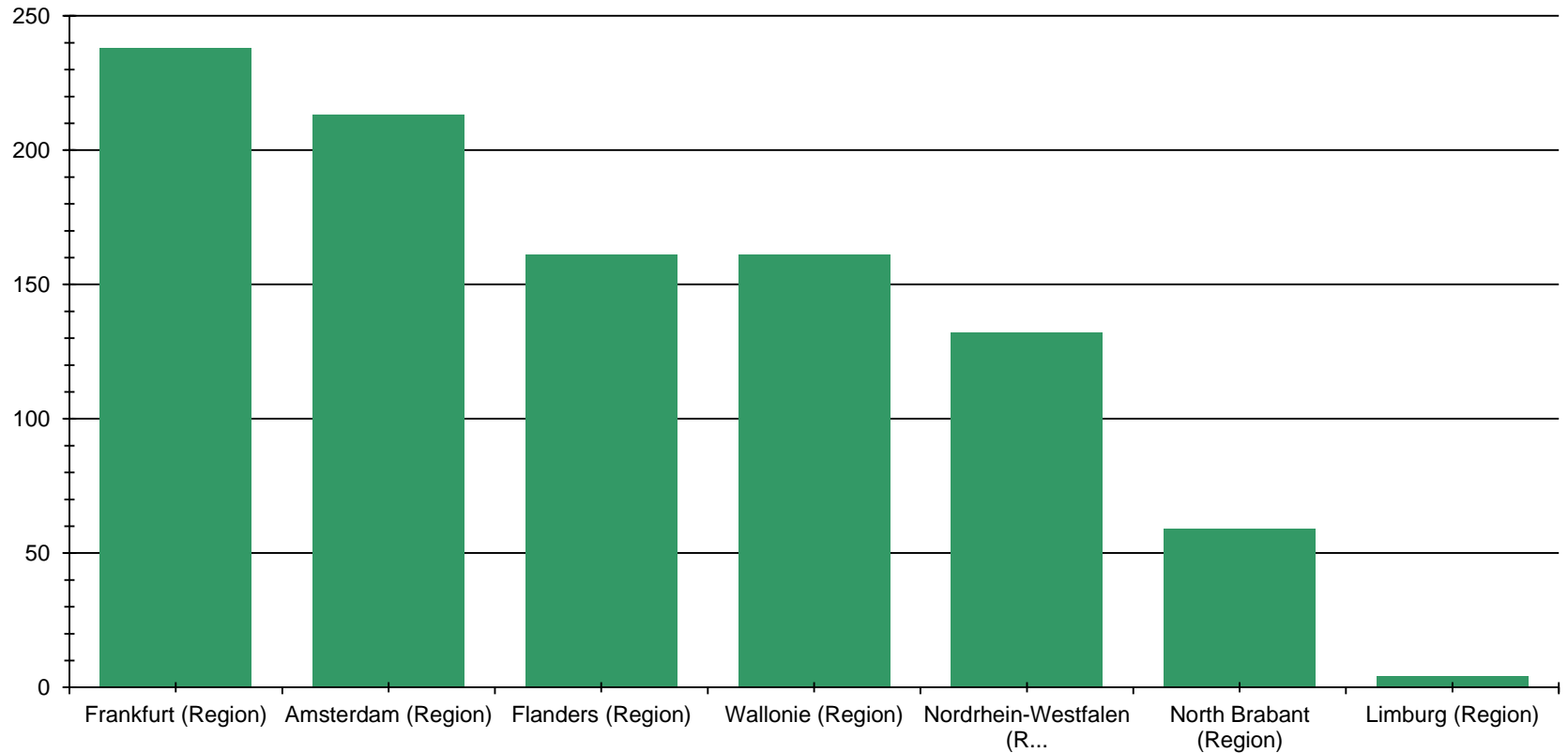
This chart shows **Distance to nearest international airport** across the 7 locations, expressed as Kilometres.

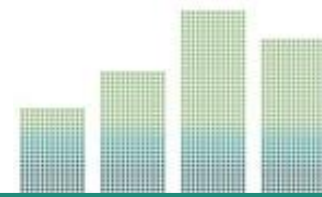




Number of international destinations served from airports - Chart

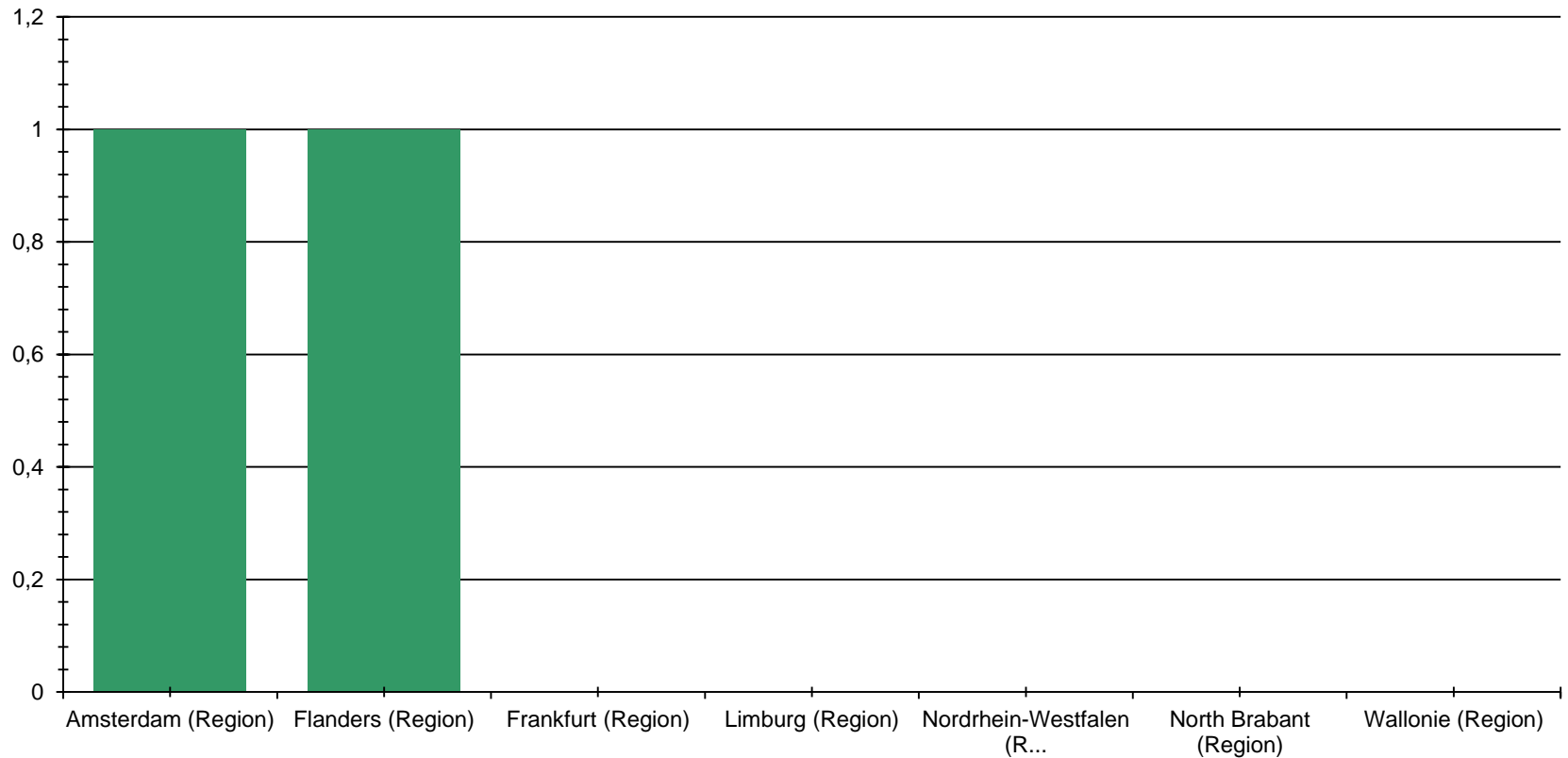
This chart shows **Number of international destinations served from airports** across the 7 locations, expressed as Destinations.

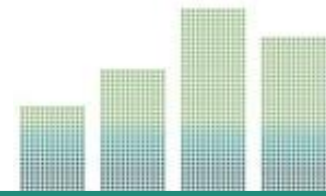




Number of Top 100 Ports by total cargo volume - Chart

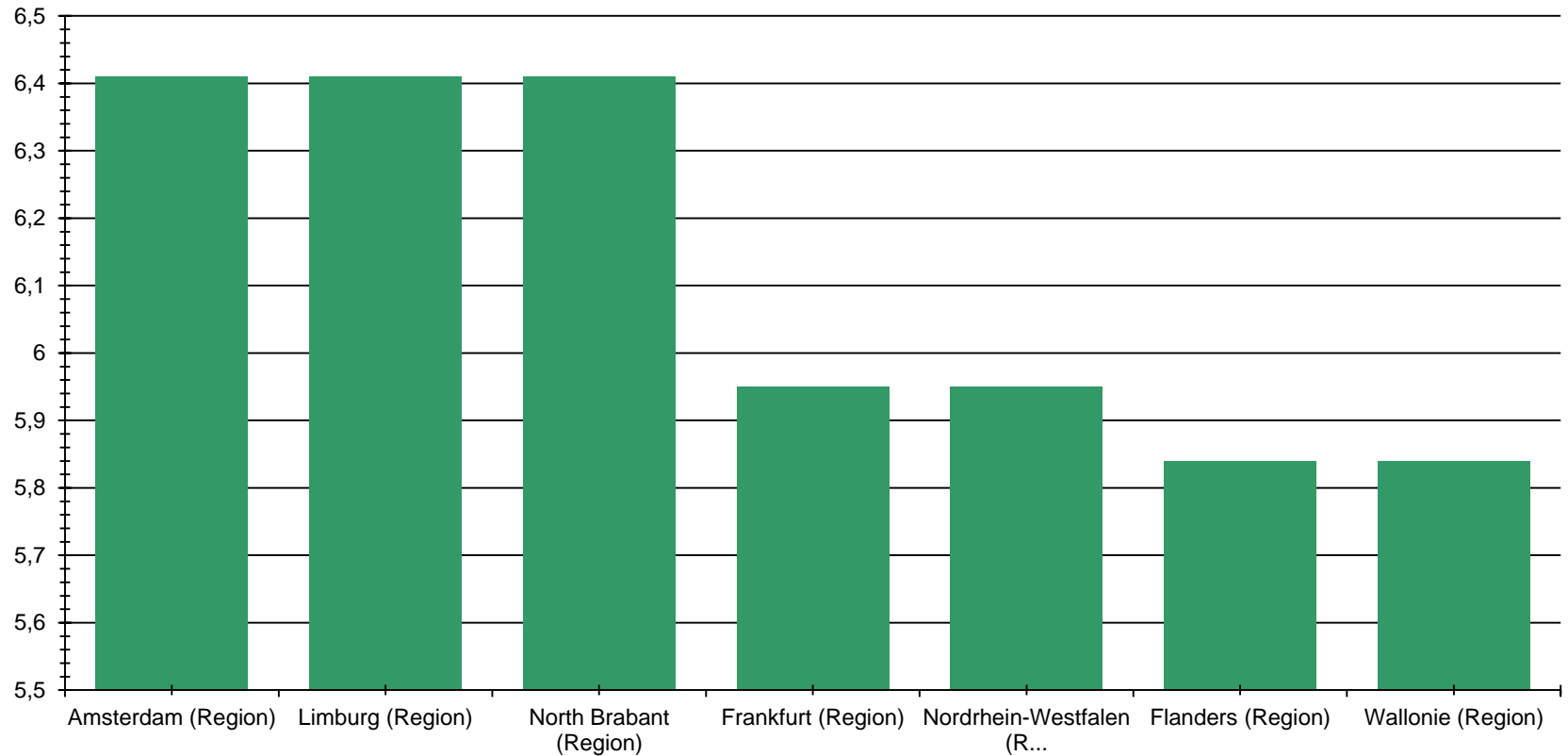
This chart shows **Number of Top 100 Ports by total cargo volume** across the 7 locations, expressed as Port.

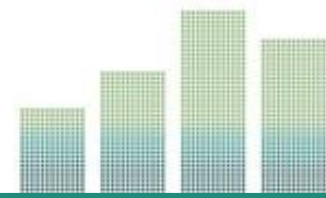




Quality of air transport infrastructure - Chart

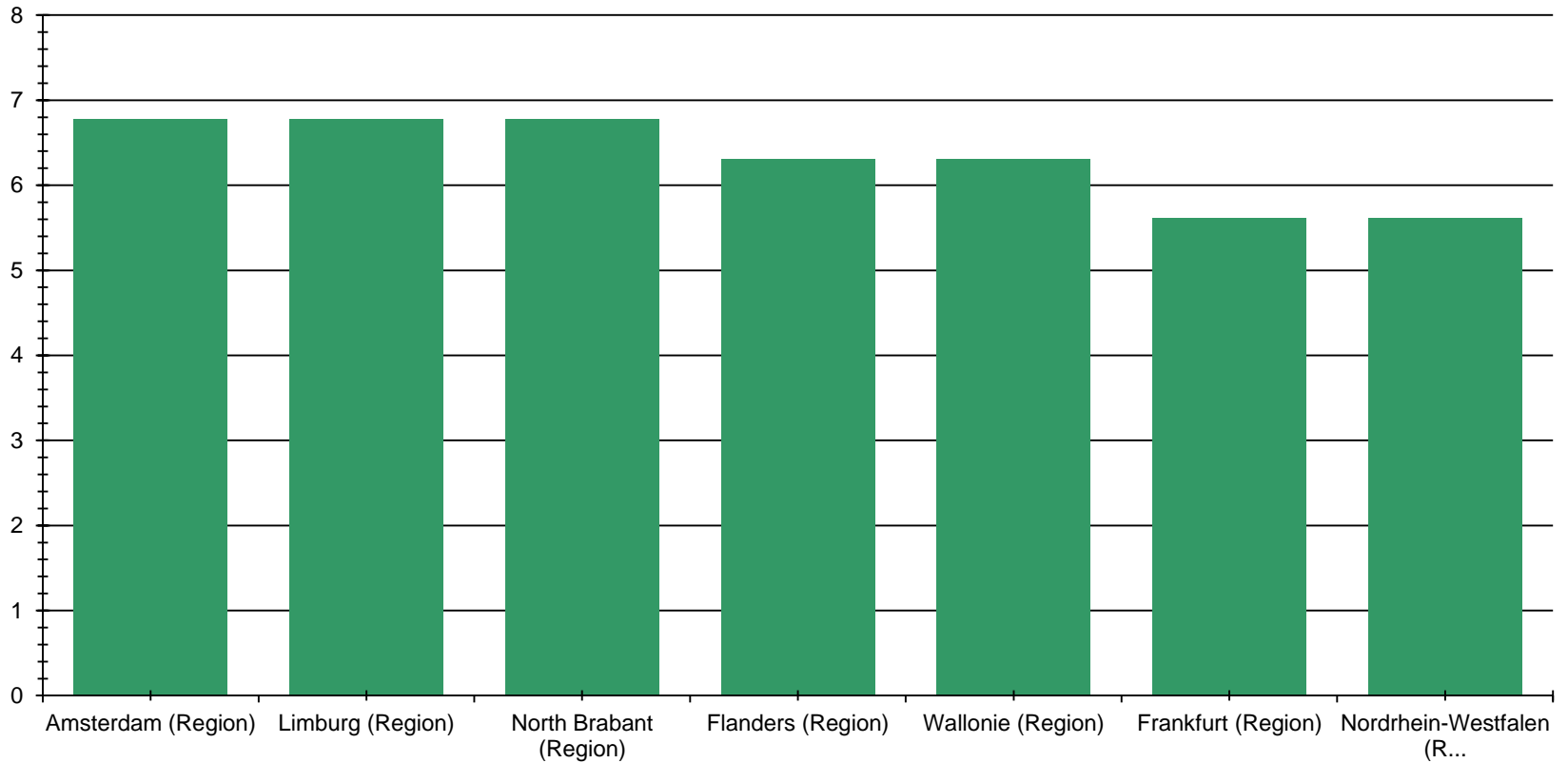
This chart shows **Quality of air transport infrastructure** across the 7 locations, expressed as Rating from 1 to 7.

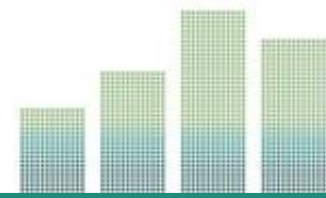




Quality of port infrastructure - Chart

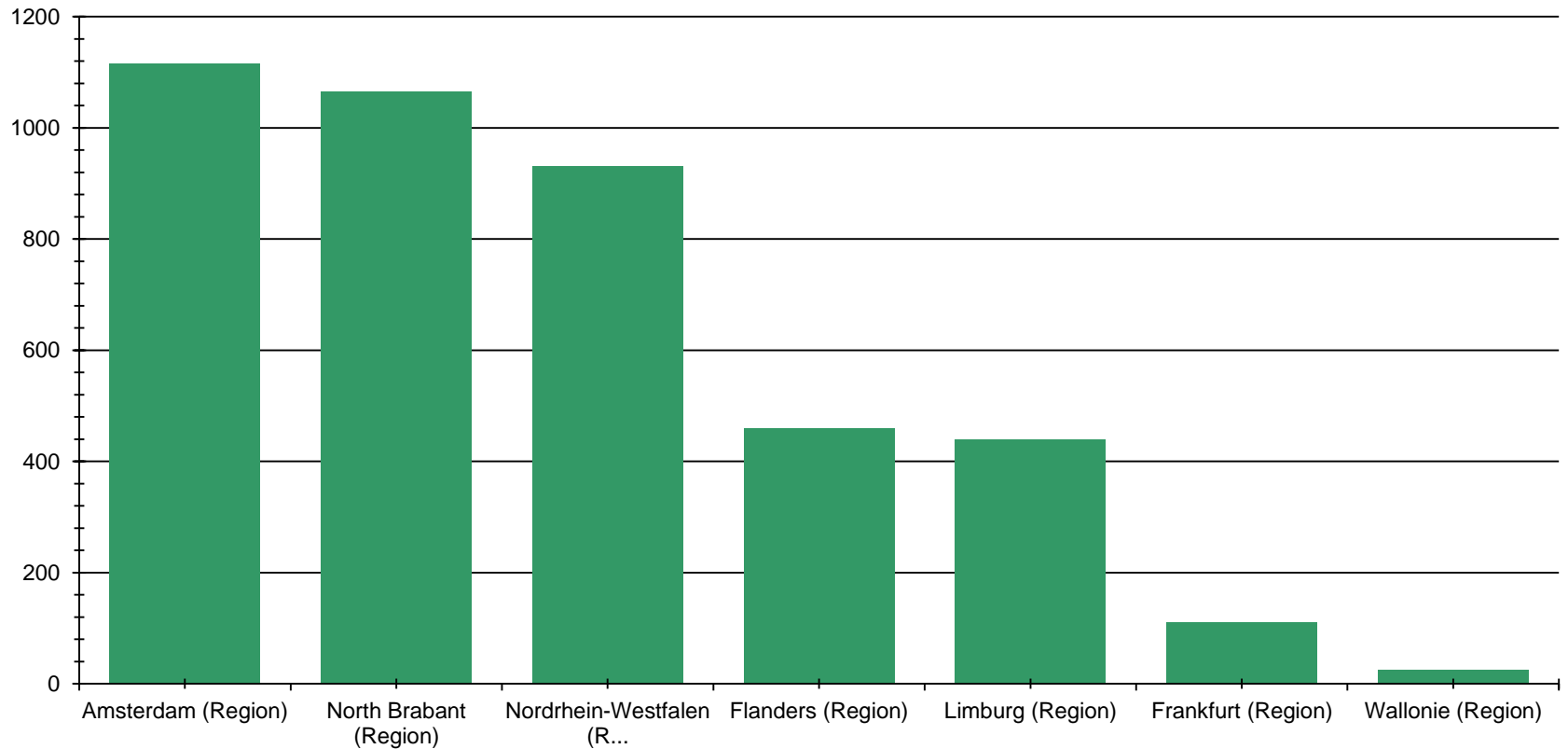
This chart shows **Quality of port infrastructure** across the 7 locations, expressed as Rating from 1 to 7.

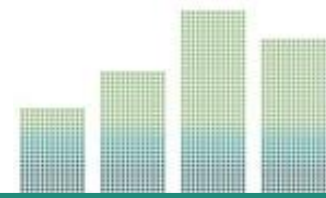




Companies in water transportation - Chart

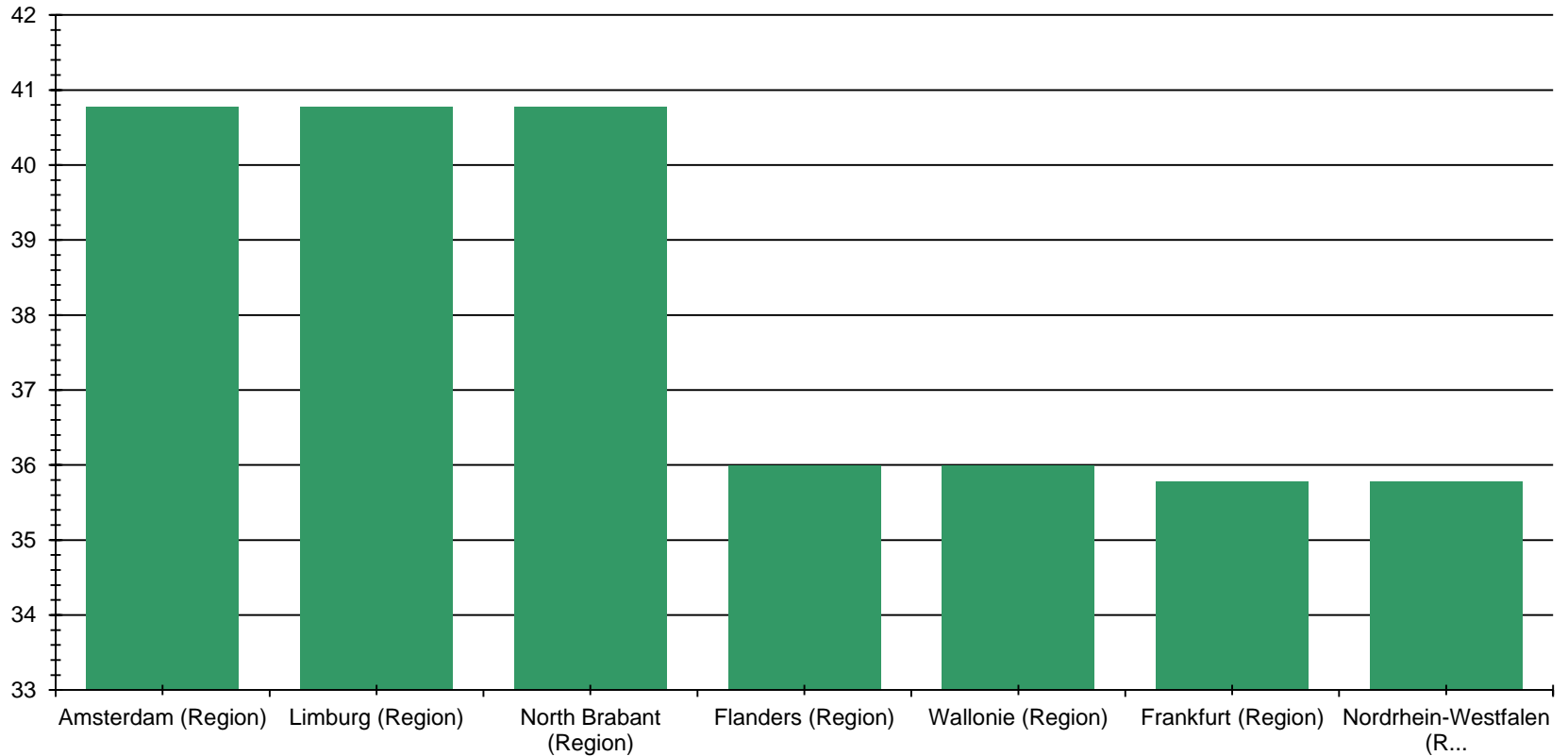
This chart shows **Companies in water transportation** across the 7 locations, expressed as Number of companies.

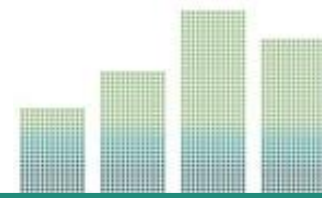




Fixed (wired) broadband subscriptions - Chart

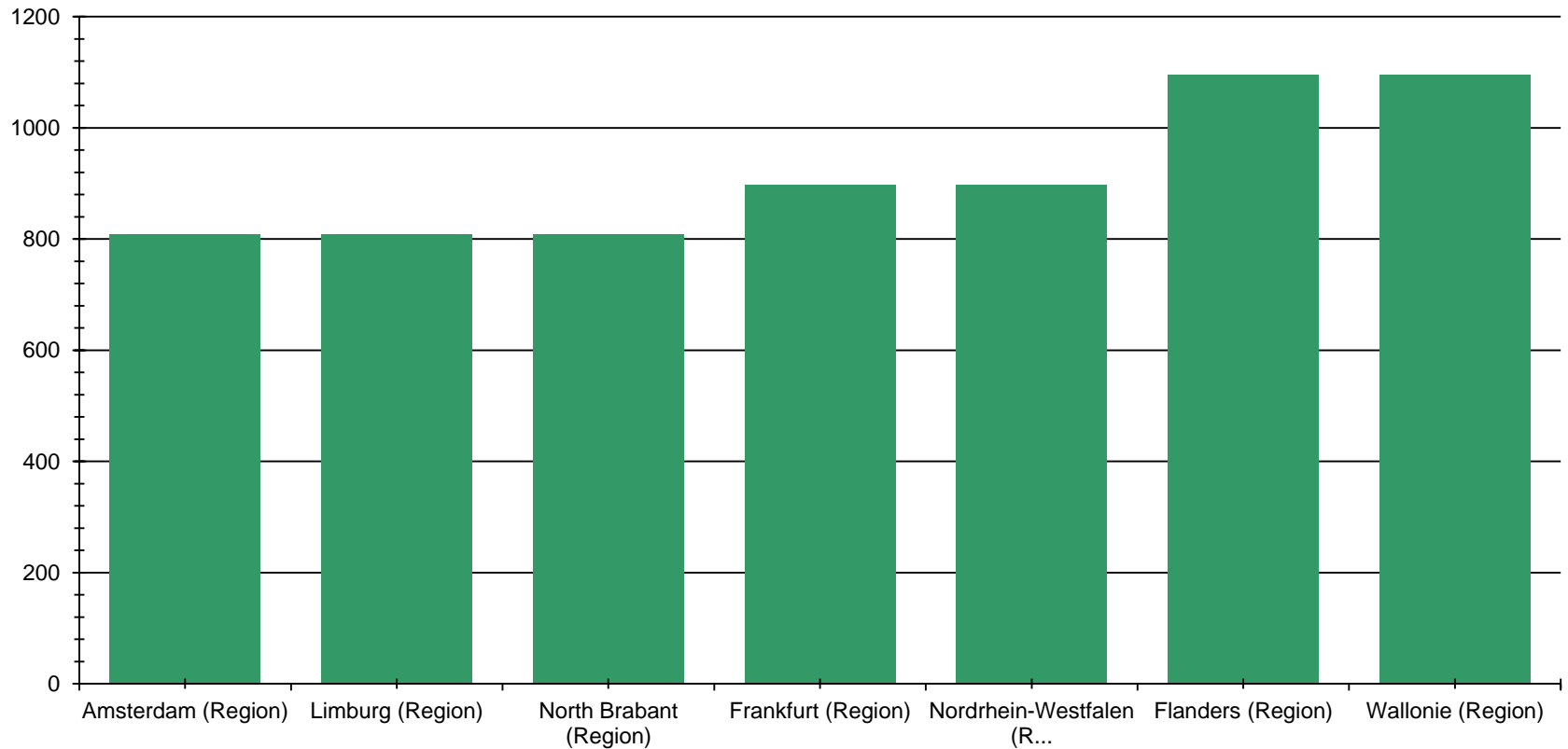
This chart shows **Fixed (wired) broadband subscriptions** across the 7 locations, expressed as Subscriptions per 100 people.

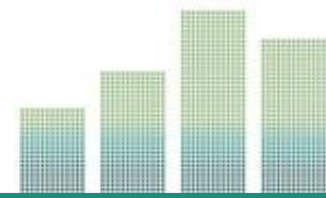




Cost to export - Chart

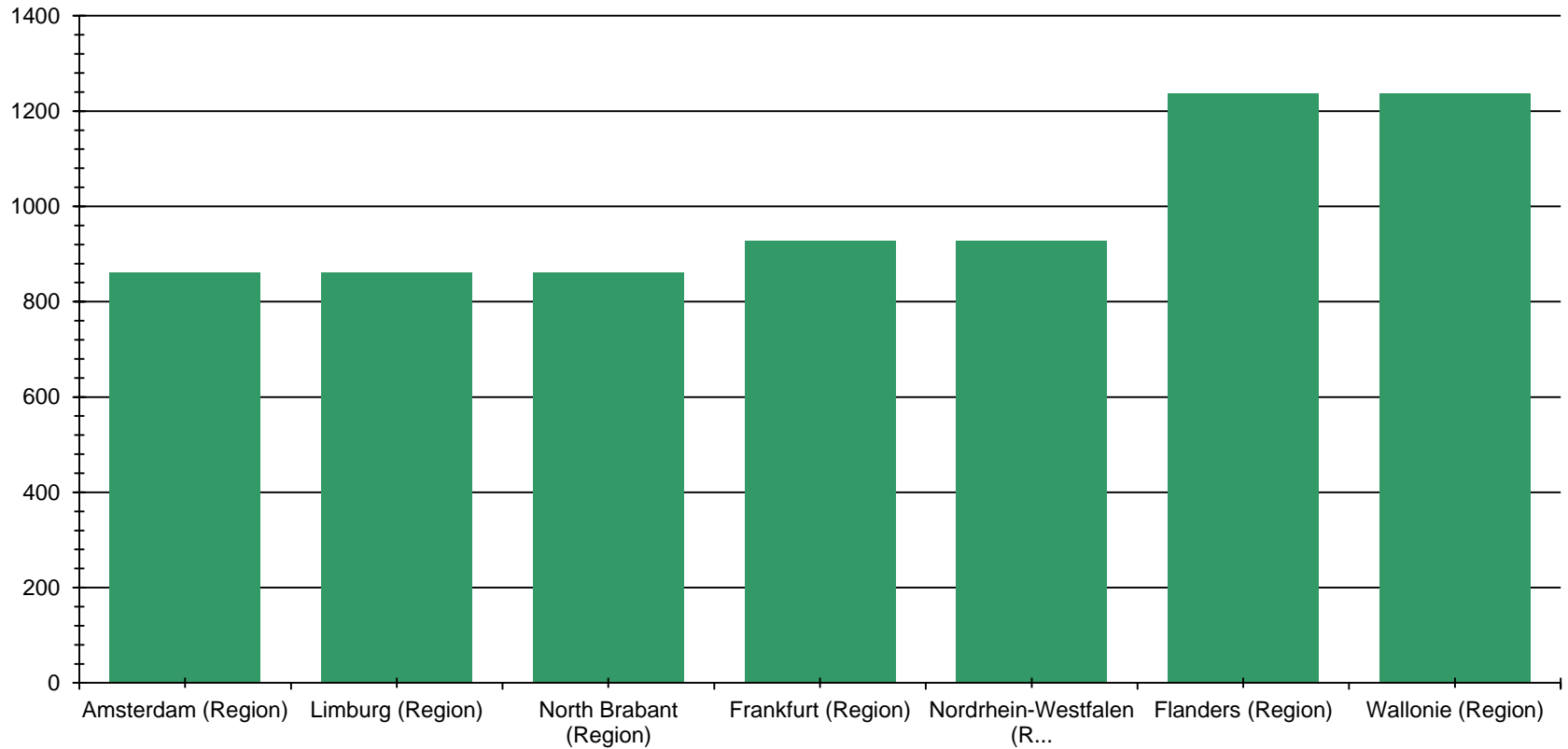
This chart shows **Cost to export** across the 7 locations, expressed as EUR - Euro.

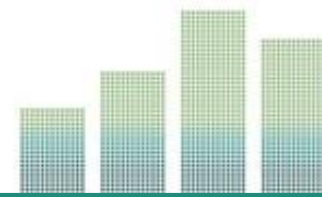




Cost to import - Chart

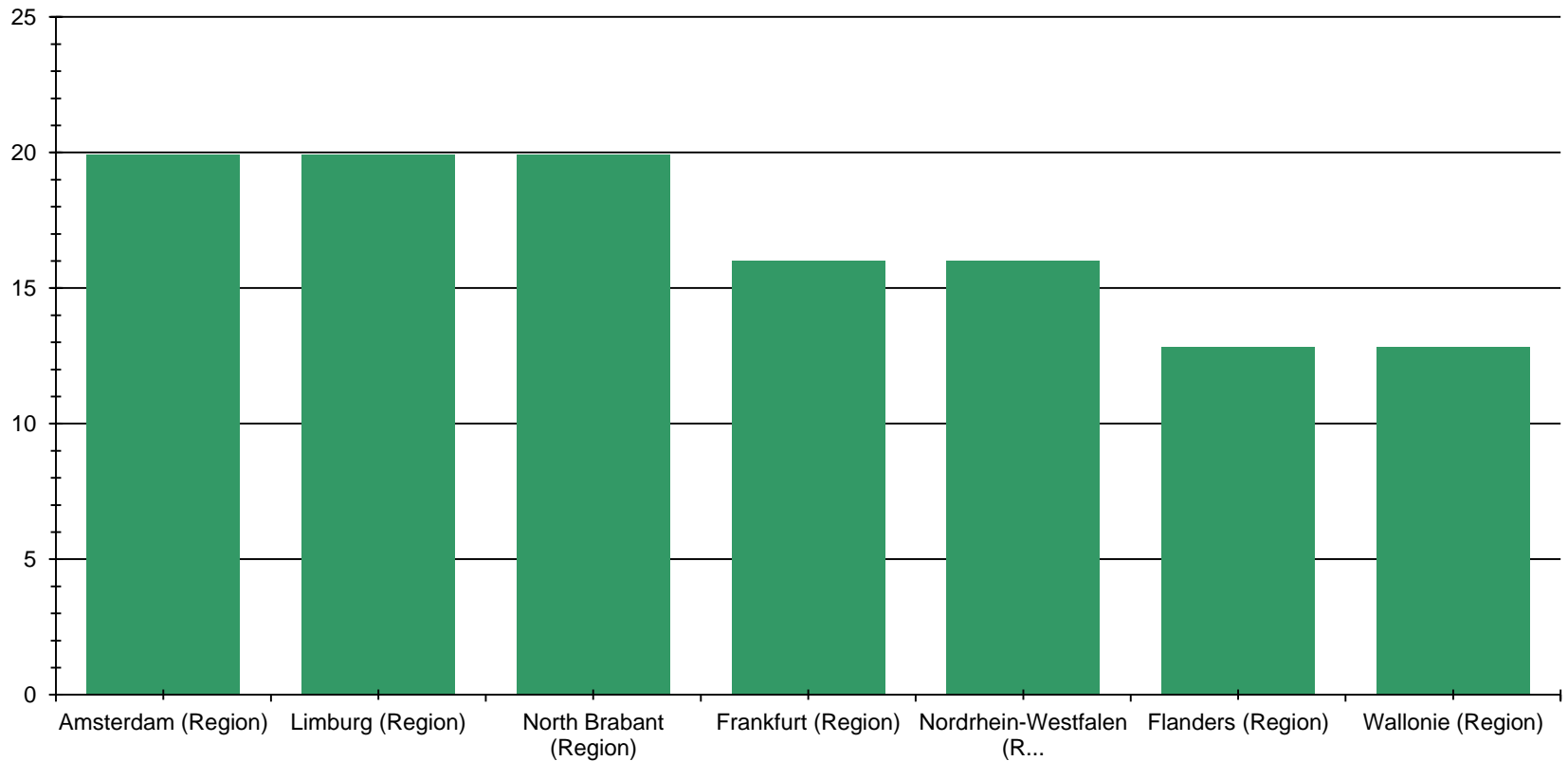
This chart shows **Cost to import** across the 7 locations, expressed as EUR - Euro.

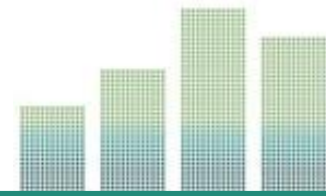




High-technology exports (% of manufactured exports) - Chart

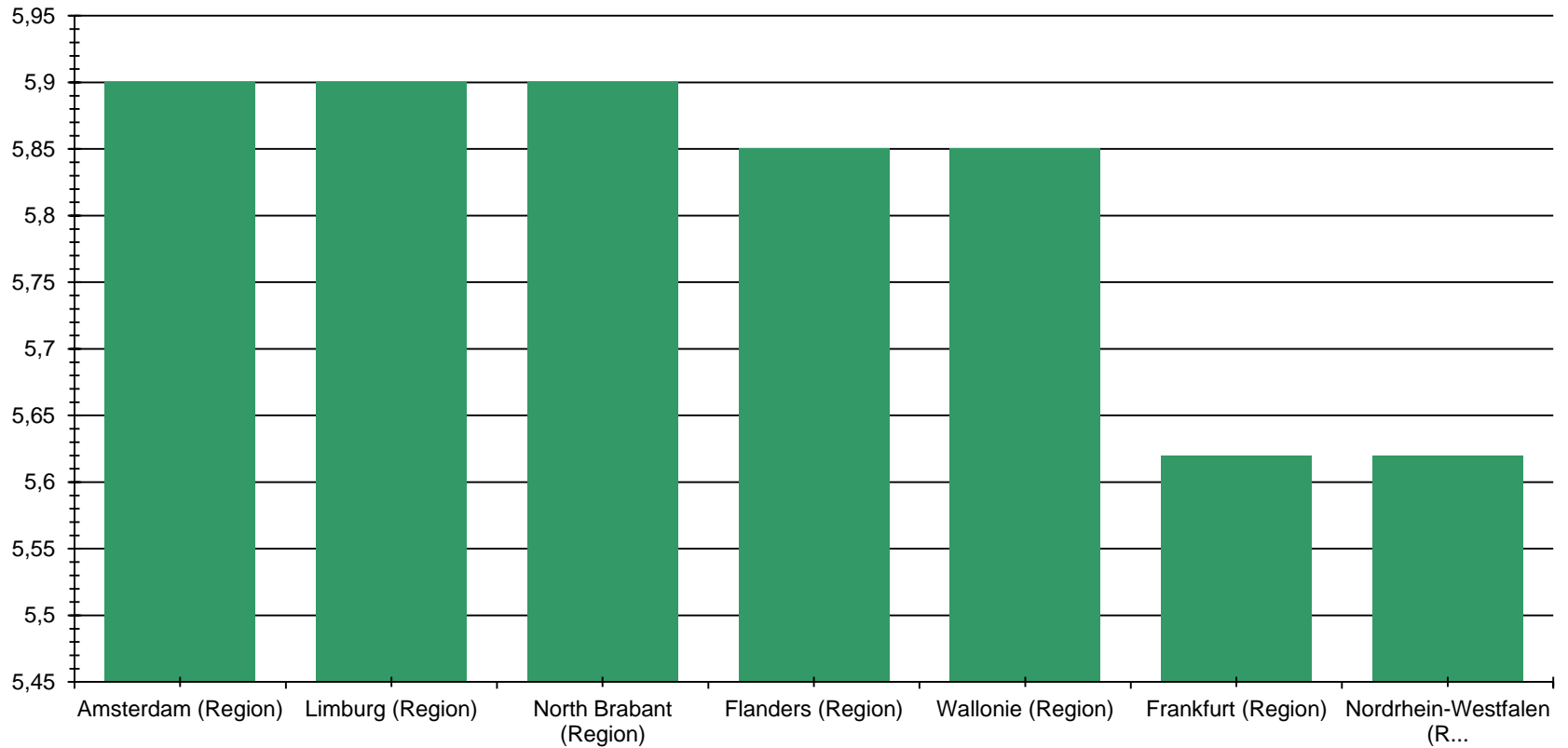
This chart shows **High-technology exports (% of manufactured exports)** across the 7 locations, expressed as Percentage.

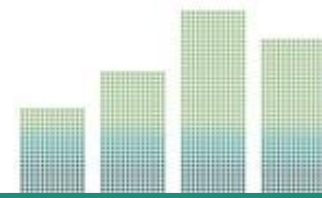




Availability of financial services - Chart

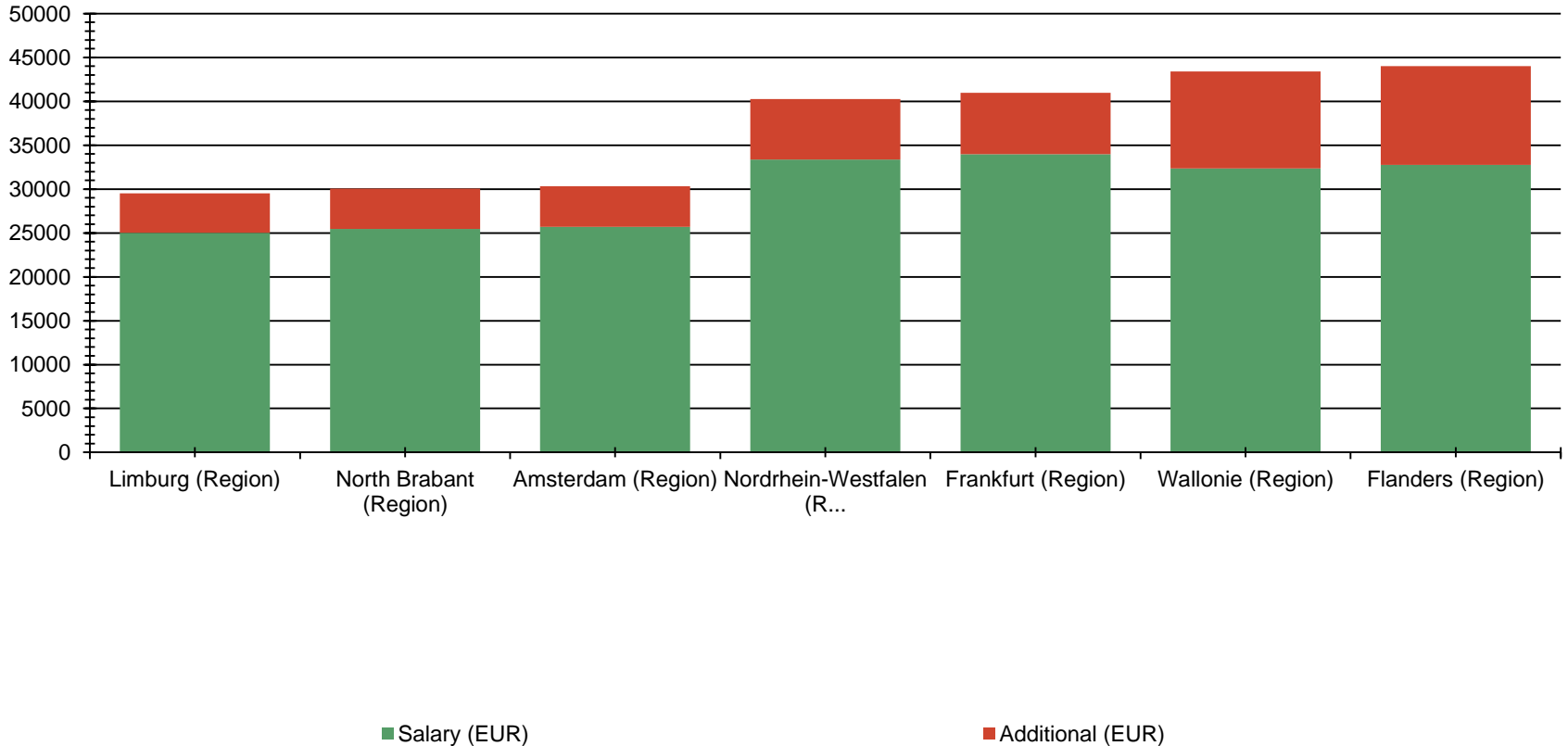
This chart shows **Availability of financial services** across the 7 locations, expressed as Rating from 1 to 7.

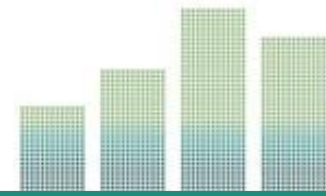




Junior Warehouse Operative (unit costs) - Chart

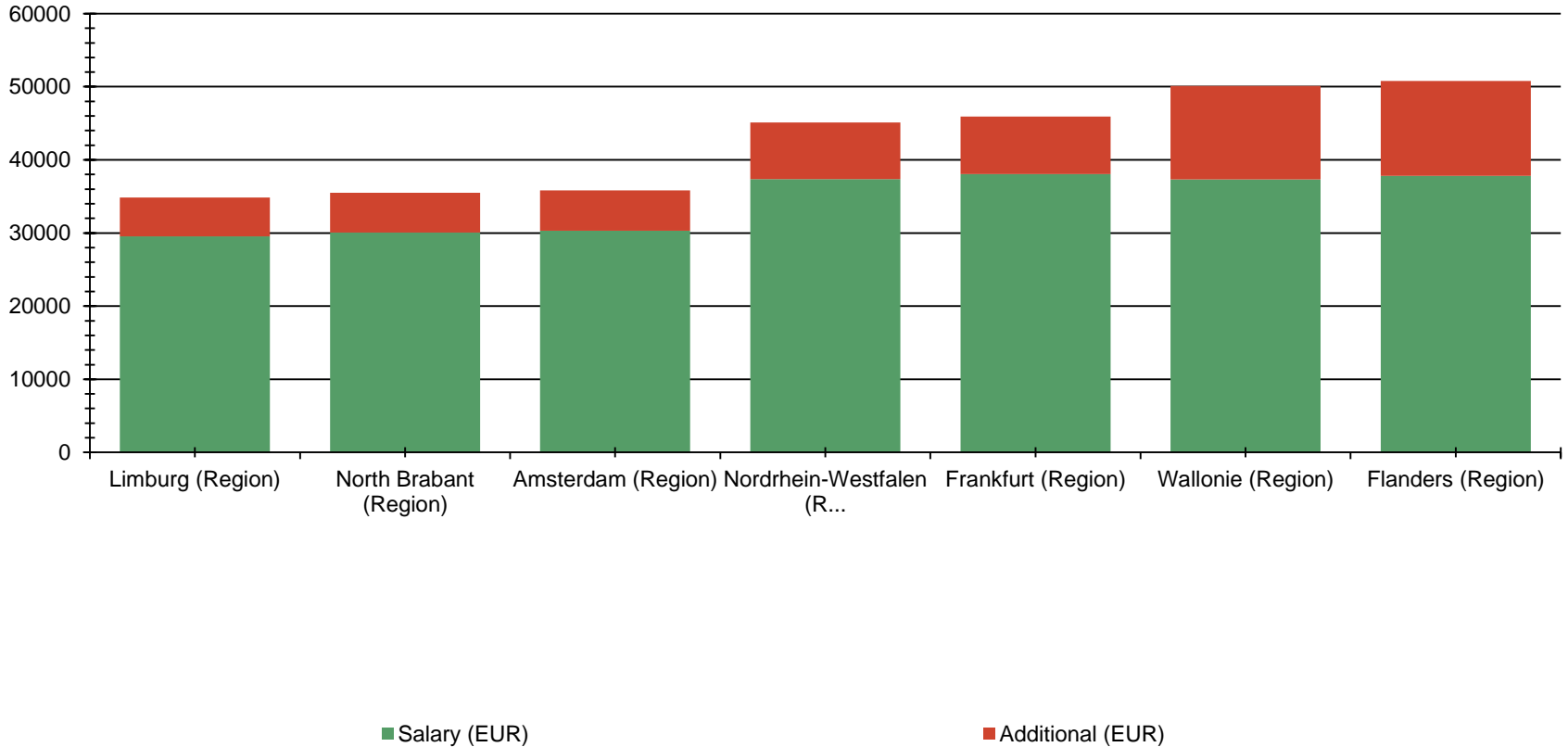
The chart below shows total unit costs for job title: Junior Warehouse Operative for each location, broken down by salary and additional costs

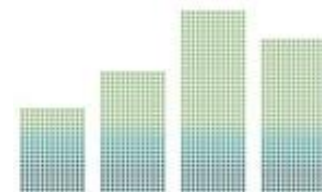




Warehouse and Distribution Operative (unit costs) - Chart

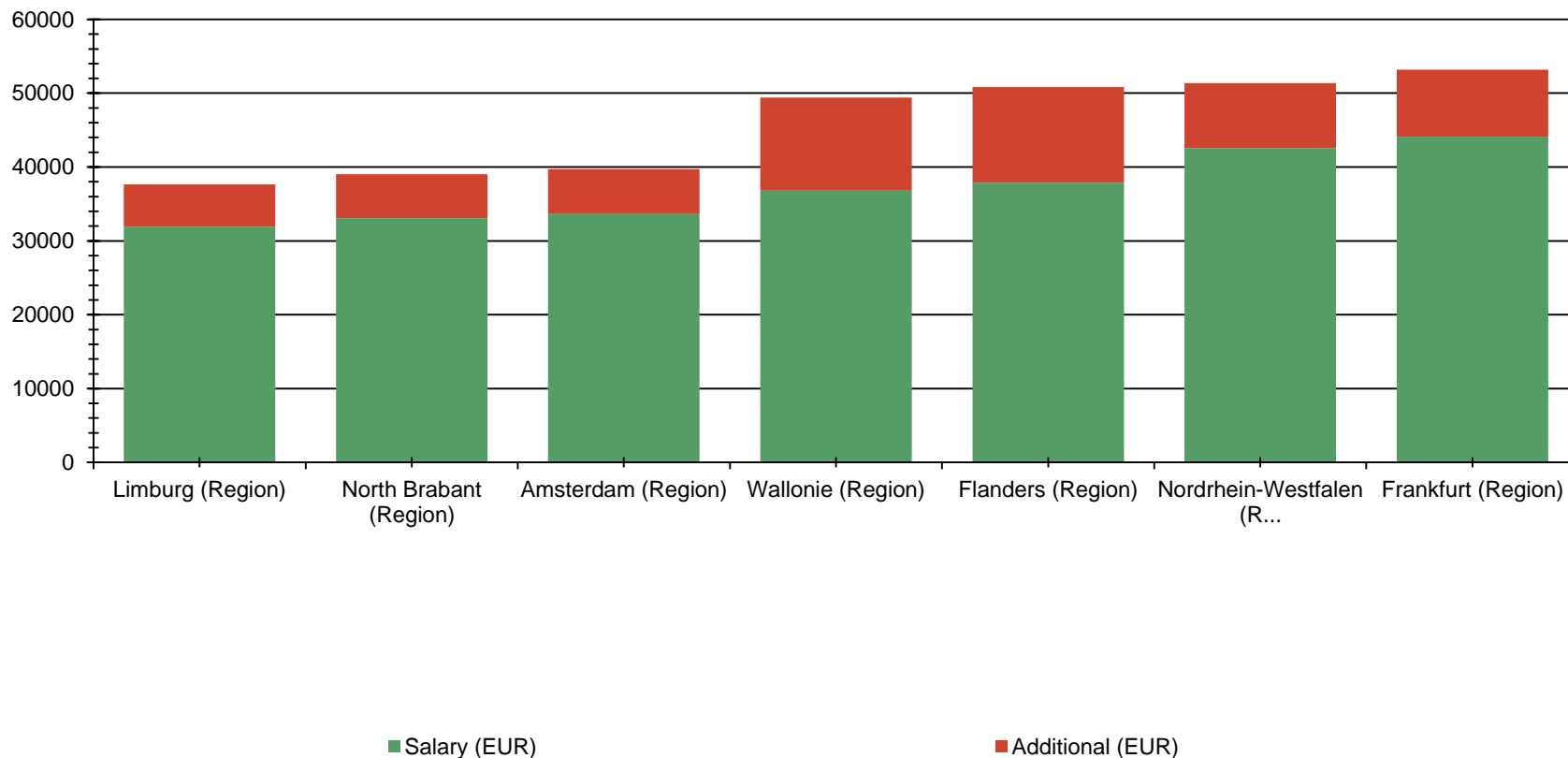
The chart below shows total unit costs for job title: Warehouse and Distribution Operative for each location, broken down by salary and additional costs

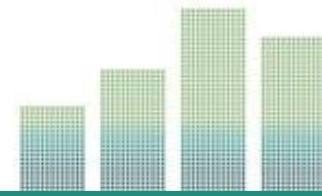




Warehouse Supervisor (unit costs) - Chart

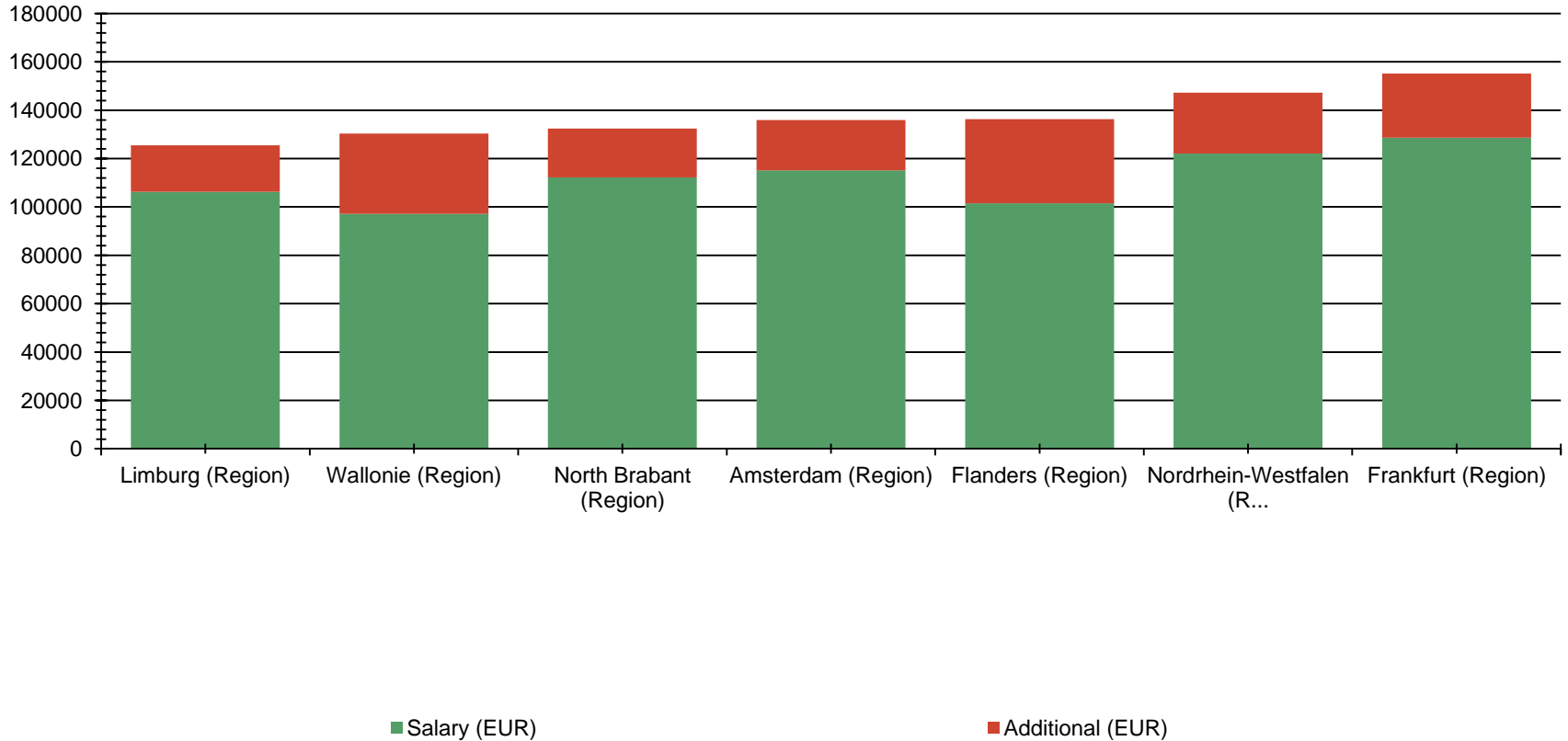
The chart below shows total unit costs for job title: Warehouse Supervisor for each location, broken down by salary and additional costs

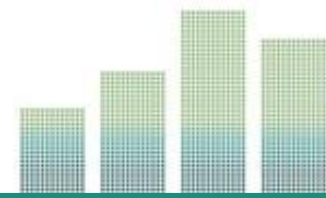




Head of Logistics (unit costs) - Chart

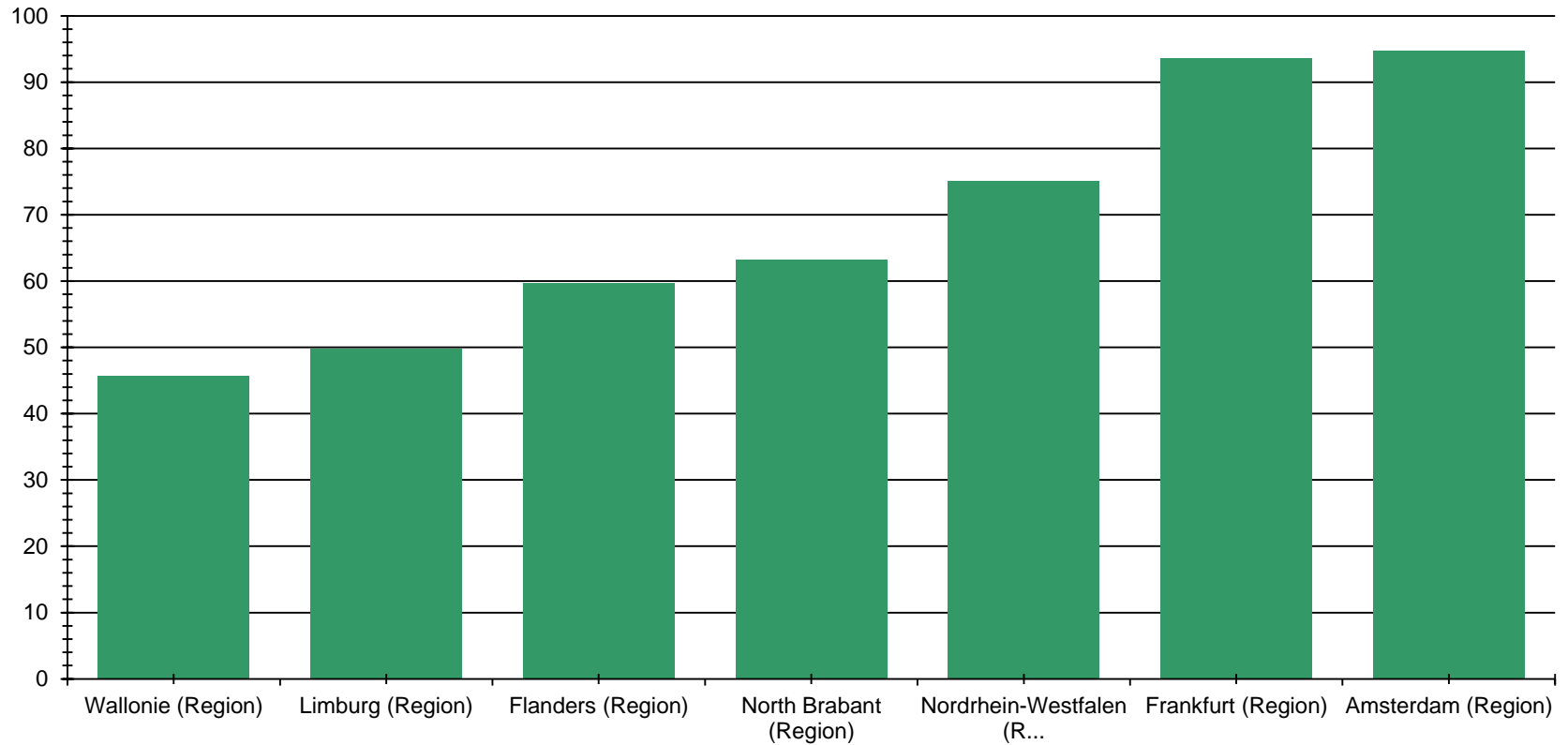
The chart below shows total unit costs for job title: Head of Logistics for each location, broken down by salary and additional costs

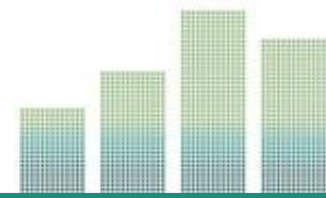




Industrial space (unit cost) chart

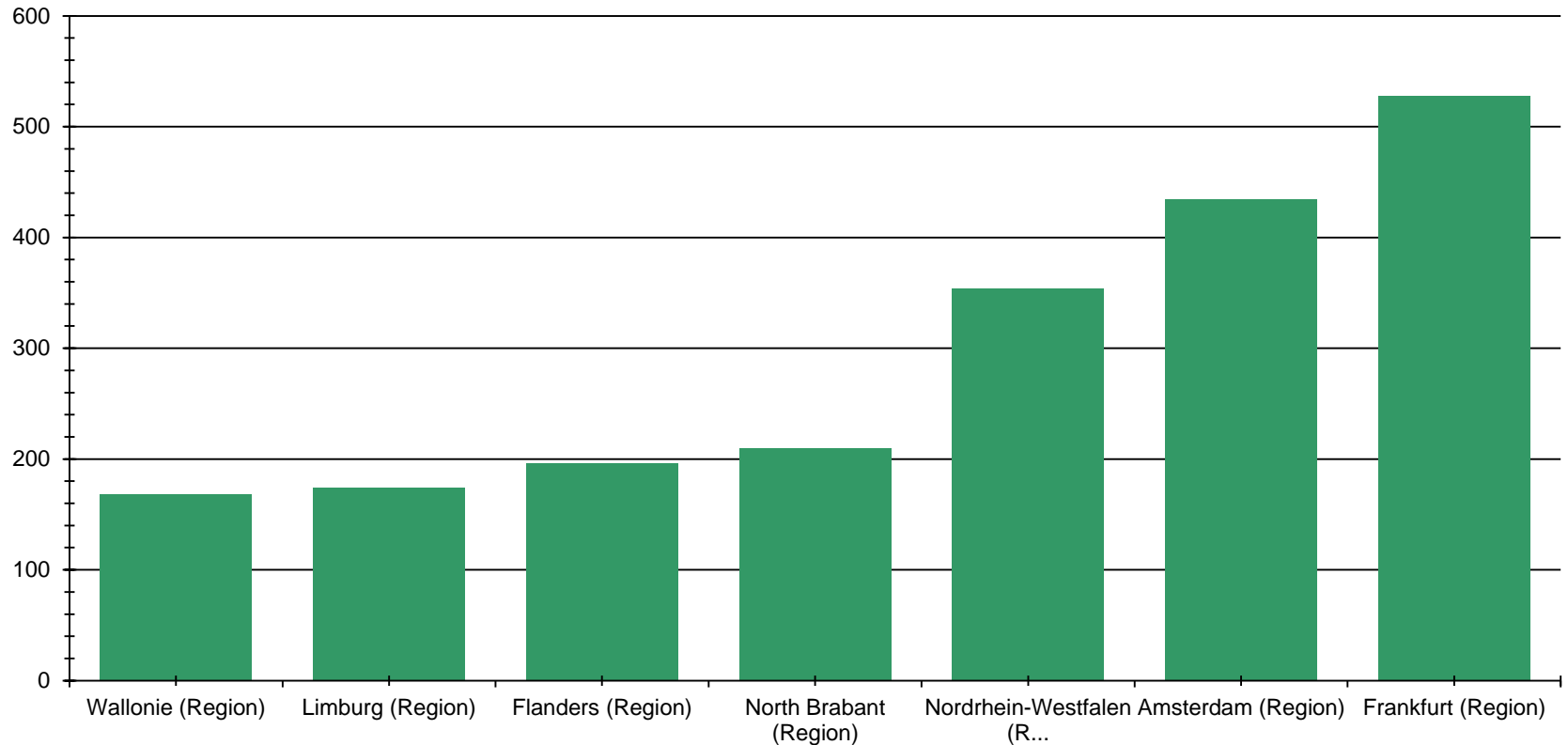
The chart shows the unit costs for Industrial space across each location.

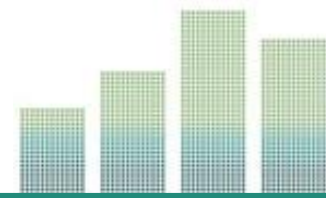




Office space (unit cost) chart

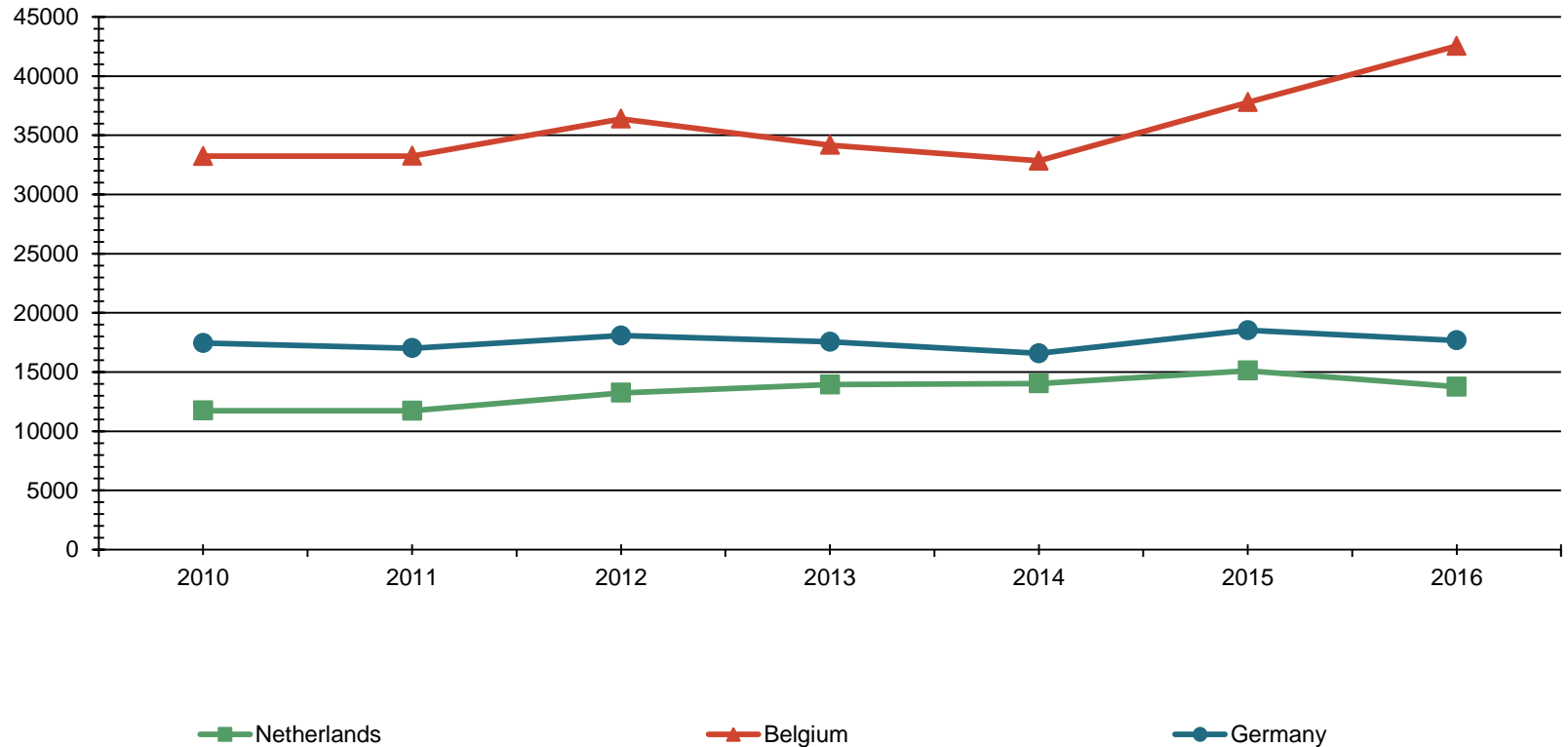
The chart shows the unit costs for Office space across each location.

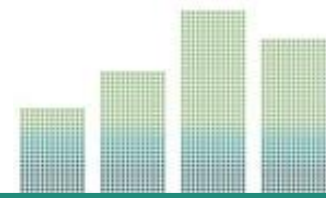




Electricity set up costs (*time-series*) - Chart (2010 - 2016)

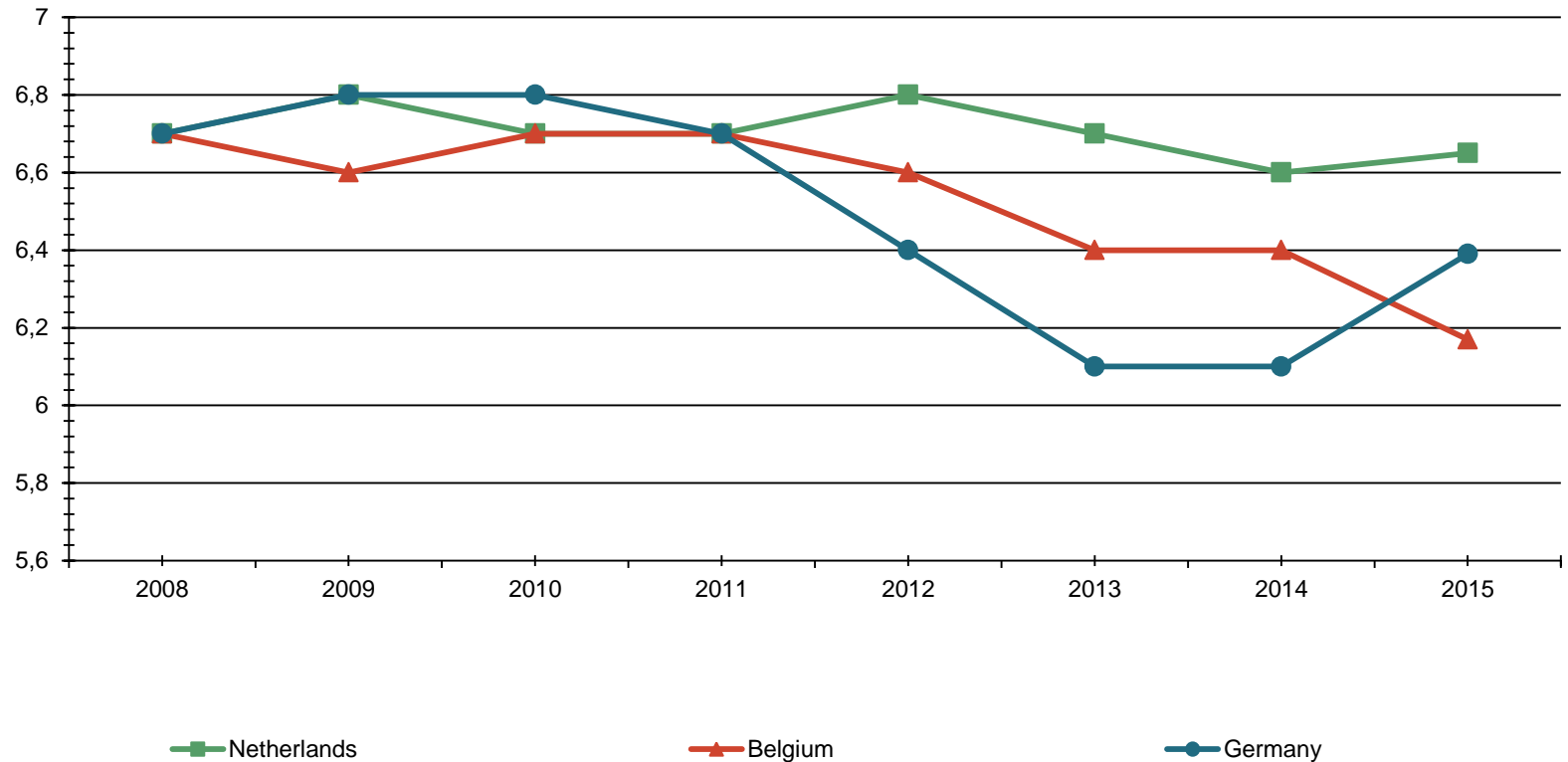
This chart shows the time series data for 3 locations, from **2010** to **2016**. Flanders (Region) and Wallonie (Region) use data from Belgium. Frankfurt (Region) and Nordrhein-Westfalen (Region) use data from Germany. Amsterdam (Region), Limburg (Region) and North Brabant (Region) use data from Netherlands.

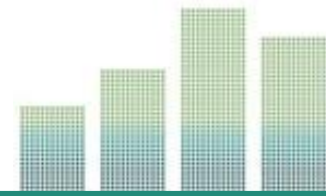




Quality of electricity supply (*time-series*) - Chart (2008 - 2015)

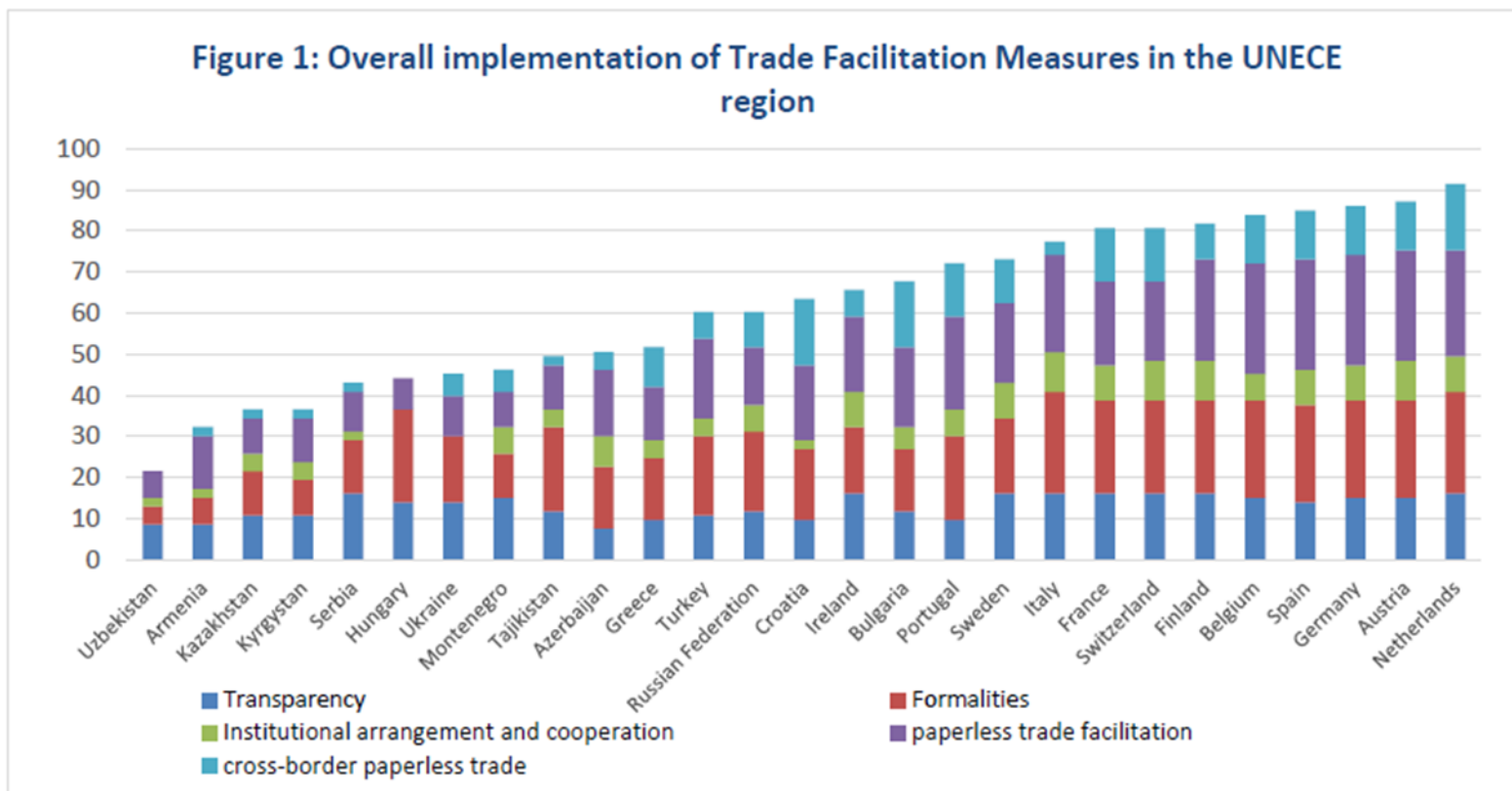
This chart shows the time series data for 3 locations, from **2008** to **2015**. Amsterdam (Region), Limburg (Region) and North Brabant (Region) use data from Netherlands. Frankfurt (Region) and Nordrhein-Westfalen (Region) use data from Germany. Flanders (Region) and Wallonie (Region) use data from Belgium.





Disclaimer: This report was automatically created by fDi Benchmark using the criteria selected by the user. Whilst care has been taken in programming the analysis and presentation of data, anomalies may occur. The Financial Times Ltd accepts no responsibility for the completeness, accuracy or otherwise of the content of the report. The report does not constitute any form of advice, recommendation, representation or endorsement and is not intended to be relied on in making (or refraining from making) any specific investment or other decisions. Appropriate independent advice should be obtained before making any such decision. Any information received through fDi Benchmark may have ceased to be current at the time it is received.

III. Trade Facilitation: Key Findings of the Survey



From	[REDACTED] [REDACTED]@rvo.nl)	Date/Time (GMT)	19 Sep 2016 16:46:39
To	[REDACTED] [REDACTED]nfia.nl>	Cc	[REDACTED] [REDACTED]@nfia.co.uk>
Project	BAT		
Subject	BAT - sent information after call		
Attachments	Yes (Click here to go there)	Flags	

files

Van: [REDACTED]
Verzonden: maandag 19 september 2016 16:46
Aan: [REDACTED]@bat.com'; [REDACTED]@bat.com'
CC: [REDACTED]
Onderwerp: Informatie naar aanleiding van telefoongesprek

Geachte [REDACTED] -

Beste [REDACTED],

Graag wil ik jullie nog bedanken voor het open en informatieve gesprek dat wij afgelopen donderdag hadden.

Bijgesloten vinden jullie zoals afgesproken een aantal slides. Het eerste gedeelte betreft wat algemene informatie over logistiek in Nederland. Daarna volgt een aantal slides die vergelijkende informatie bevatten. Ik heb de landen die we tijdens het gesprek benoemden (BE, NL, DU, LUX en FR) met elkaar vergeleken op diverse punten. Dit gedeelte (vanaf slide 12) bestaat uit telkens een korte uitleg en vervolgens een tabel met de vergelijking.

Over het algemeen komt Nederland goed uit de vergelijking: loonkosten zijn gemiddeld laag, en kwaliteit van infrastructuur is erg hoog. Mochten jullie naar aanleiding van deze informatie (of anderszins) vragen hebben dan ga ik gaarne voor jullie op zoek naar een antwoord.

Tot zo ver. Wij blijven graag in contact met jullie.

Mede namens [REDACTED]

Hartelijke groet,

[REDACTED]
Project Manager

Visit our website
investinholland.com

[REDACTED]
[REDACTED]
[REDACTED]@nfia.nl

Netherlands Foreign Investment Agency
 Ministry of Economic Affairs
 Prinses Beatrixlaan 2 | 2595 AL | Den Haag – Netherlands
 P.O. Box 93144 | 2509 AC | Den Haag – Netherlands

Attachment(s):

Filename	Size (bytes)
BAT - regional logistics center - information + data study.pdf	2,274,166
	850



Logistics & Infrastructure – *General & Comparative information*

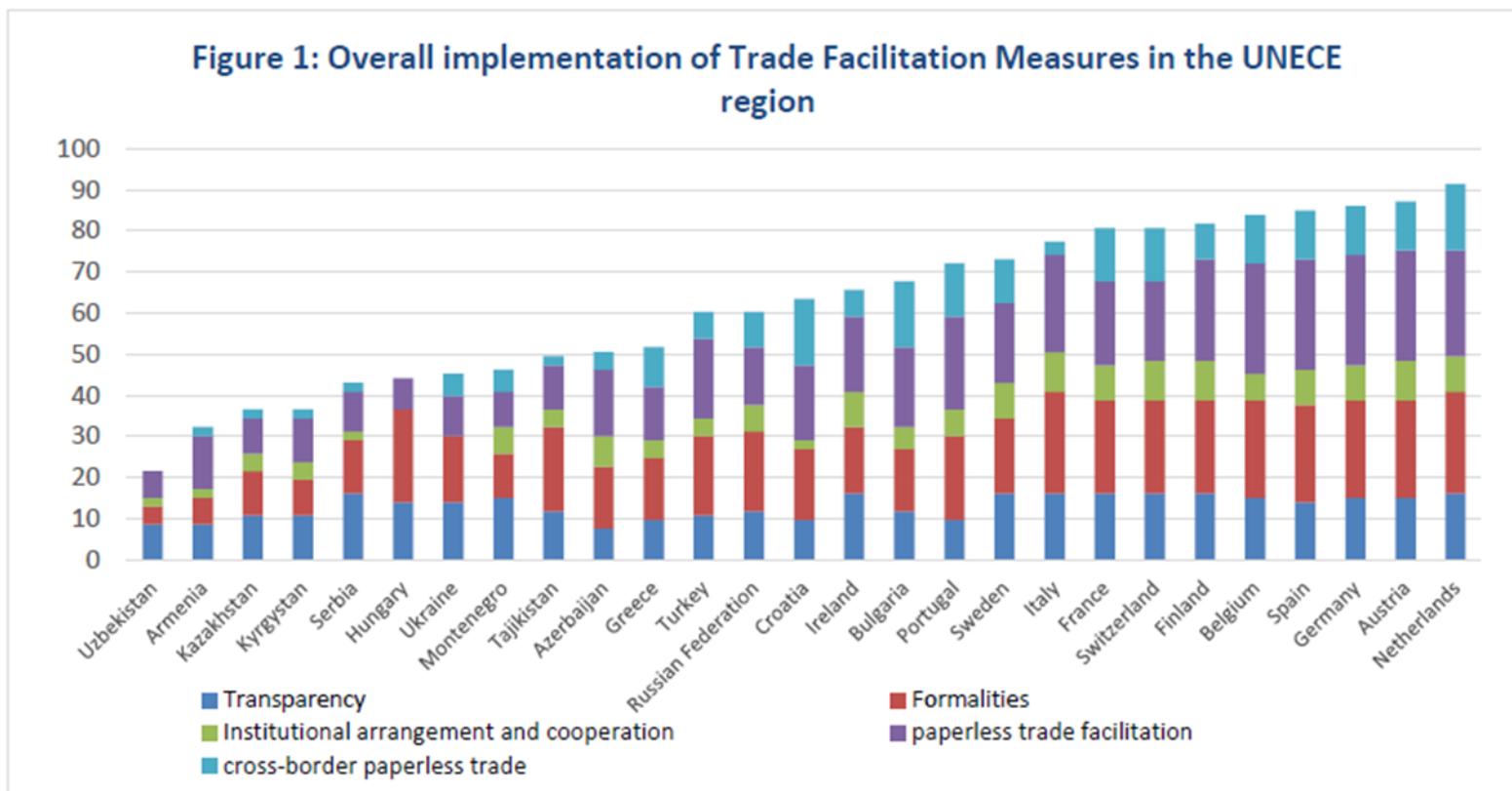


Logistics in the Netherlands – General	3
Road Transport	7
Comparing NL, BE, GE, FR and LUX	12



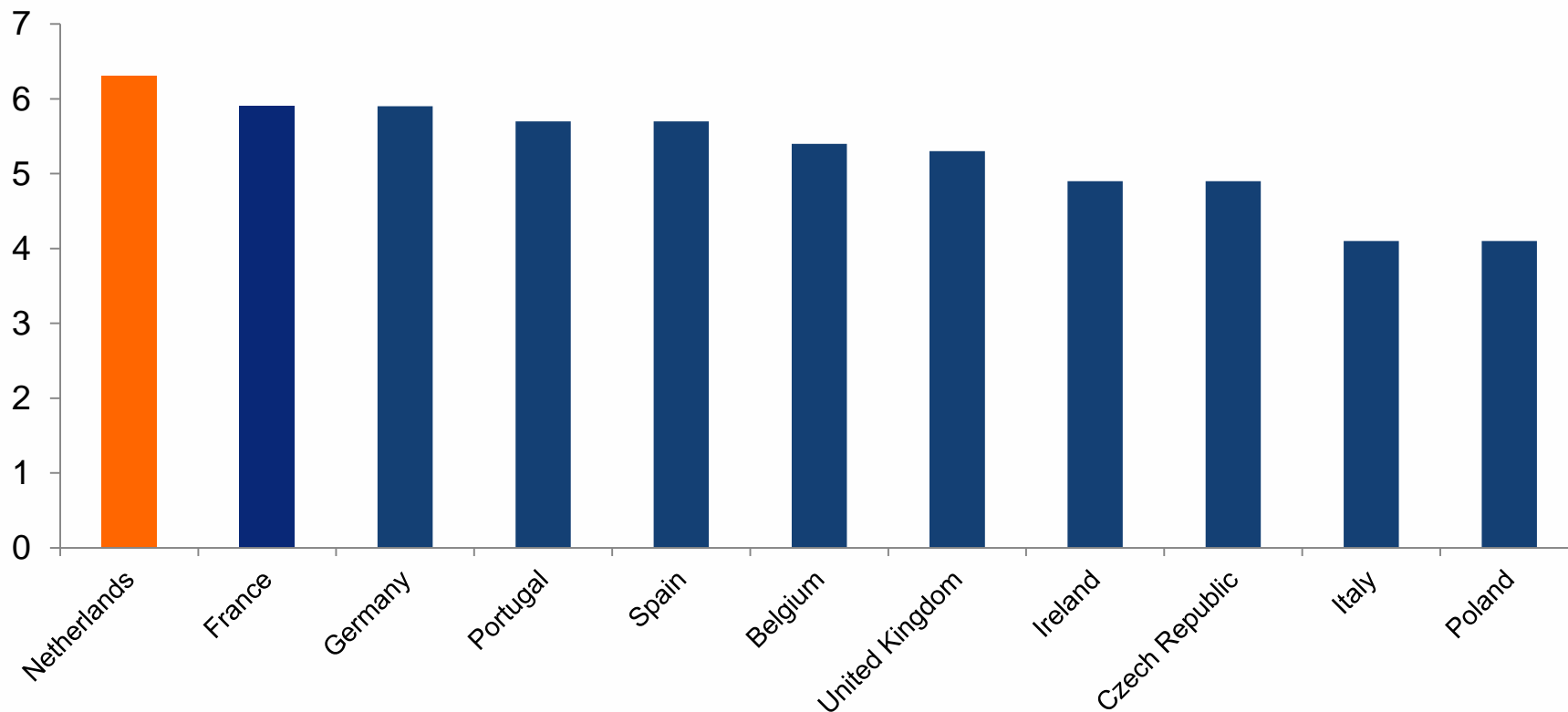
“Logistics, a pragmatic business environment, certainty when it comes to taxes—all of that is here. The stars align in the Netherlands for a company like Cargill
Marcel Smits - Chief Financial Officer, Cargill

III. Trade Facilitation: Key Findings of the Survey



Quality of overall infrastructure (e.g., transport, telephony, and energy)

How do you assess the general state of infrastructure (e.g., transport, communications, and energy) in your country? [1 = extremely underdeveloped – among the worst in the world; 7





“The Dutch have a focus on innovation, and highly educated resources, which allow them to conduct groundbreaking research.

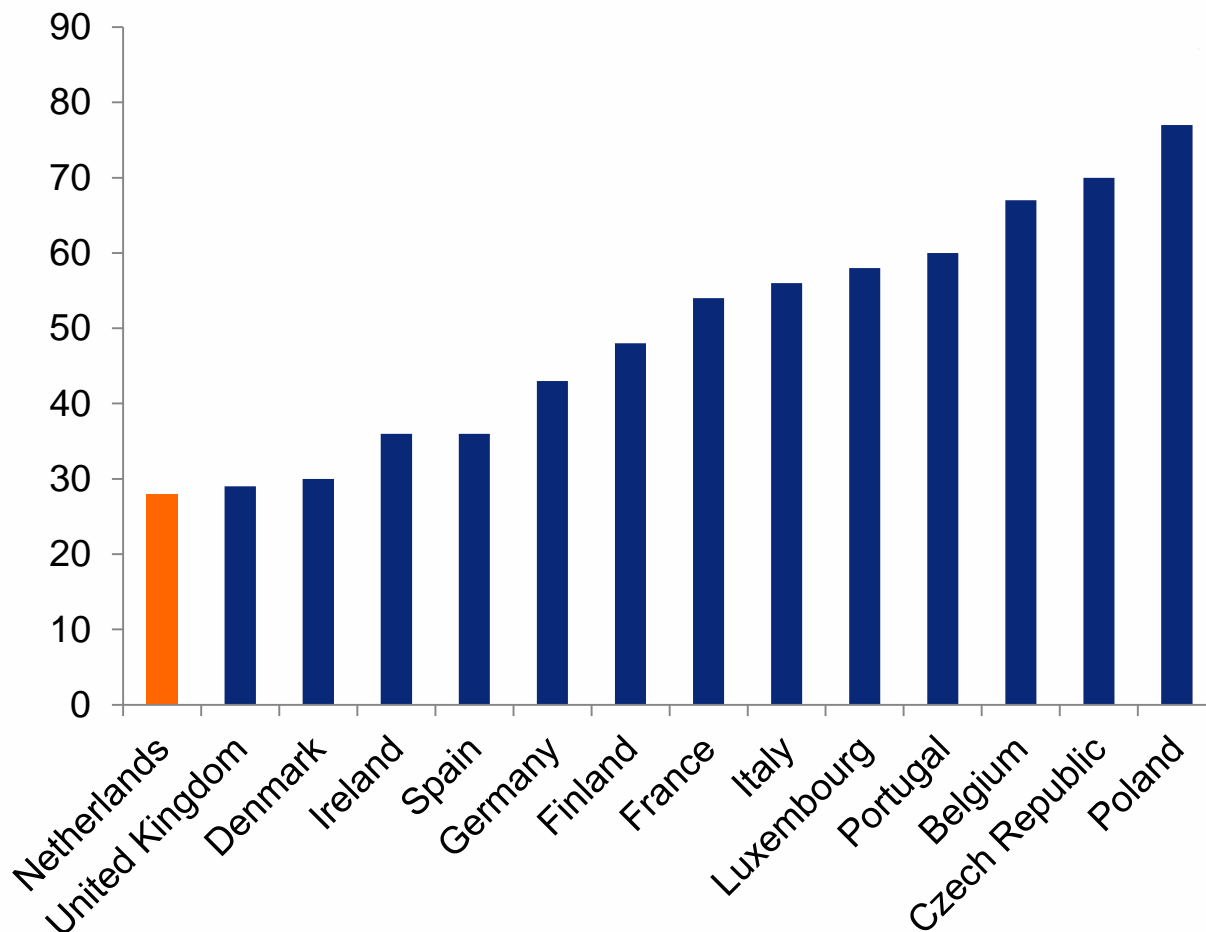
Harry van Dorenmalen - Chairman, IBM Europe



Road Transport

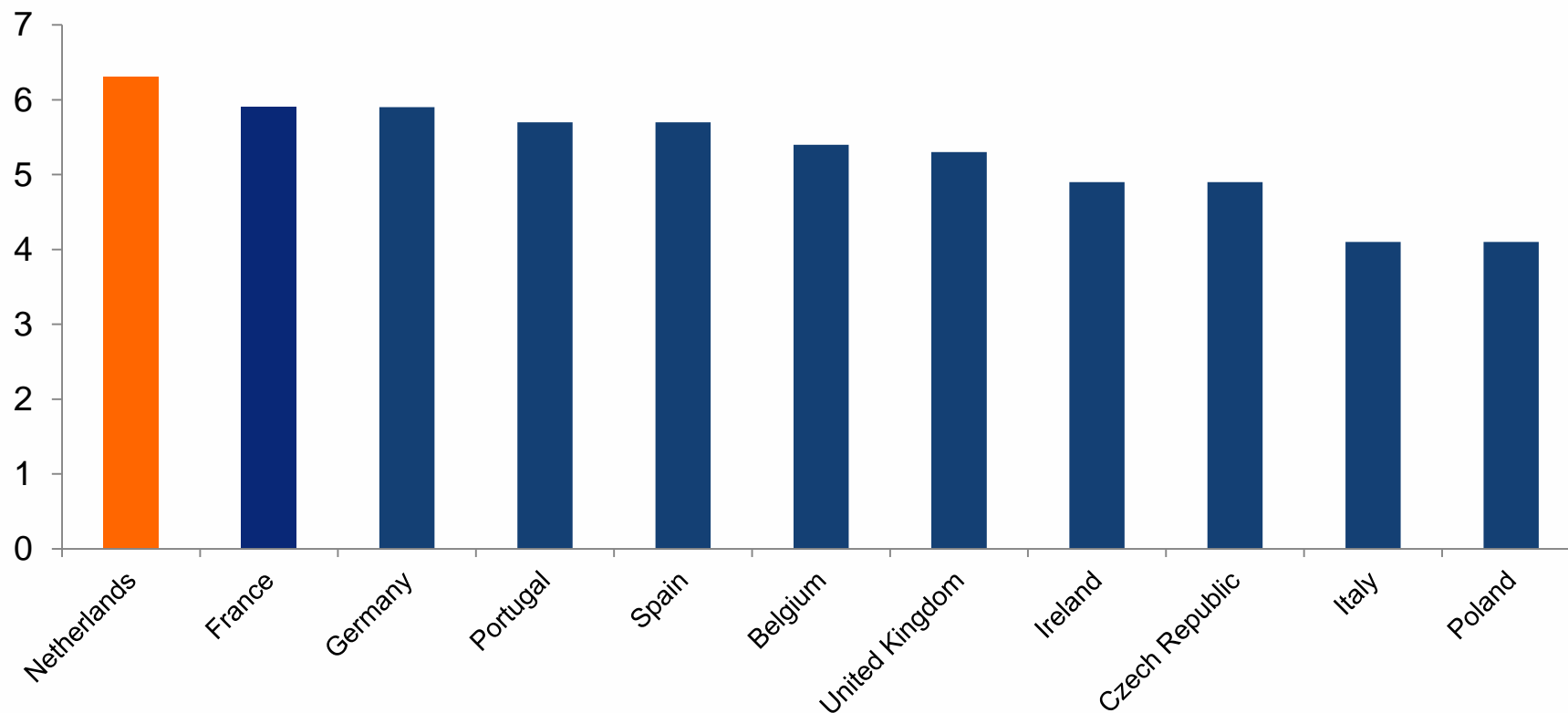
The Netherlands is 3rd safest country in Europe when it comes to safe roadways. Last year there were 28 traffic accidents fatalities per million habitants in the country.

Traffic deaths per million habitants (2015)



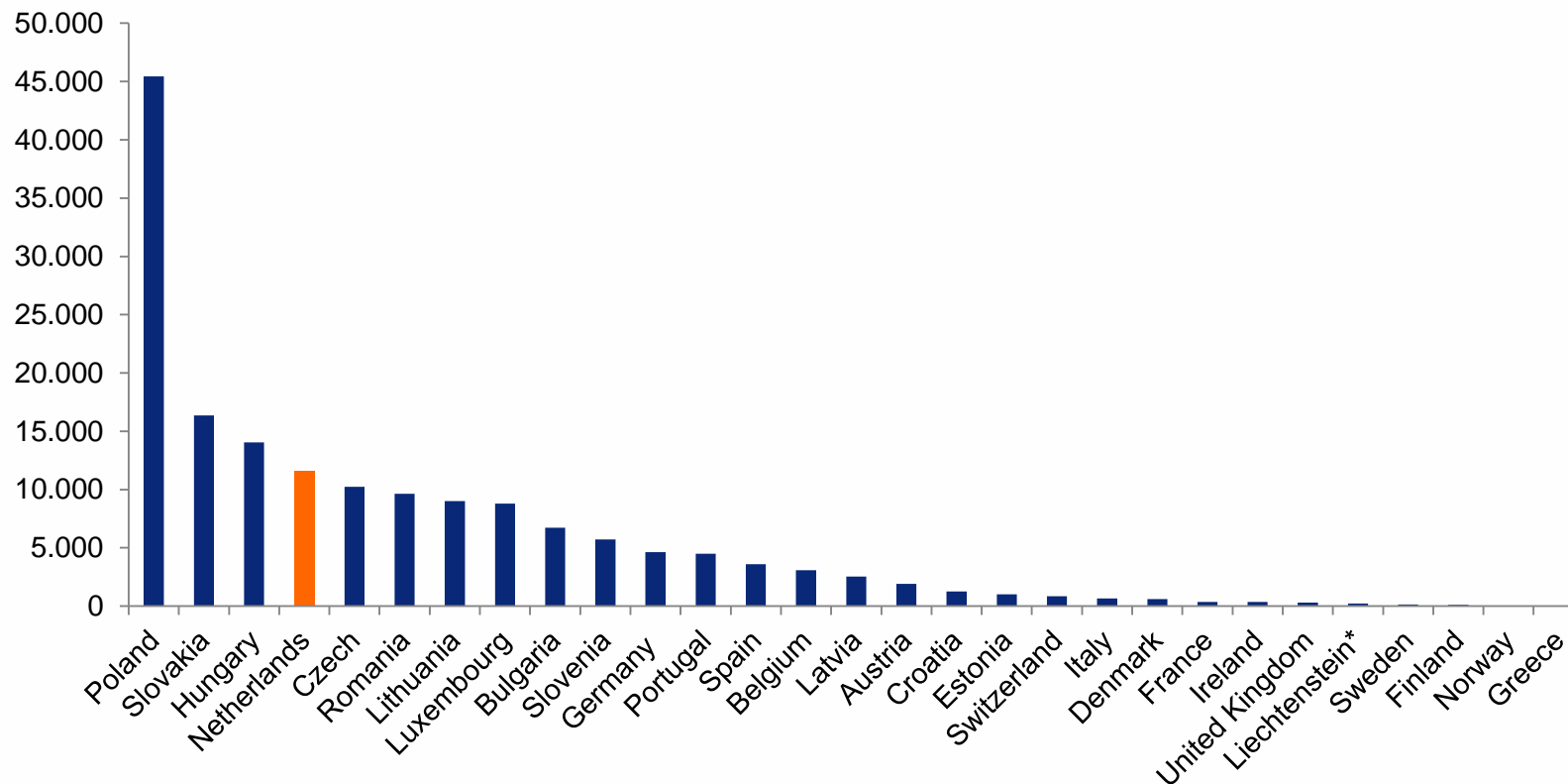
Quality of overall infrastructure (e.g., transport, telephony, and energy)

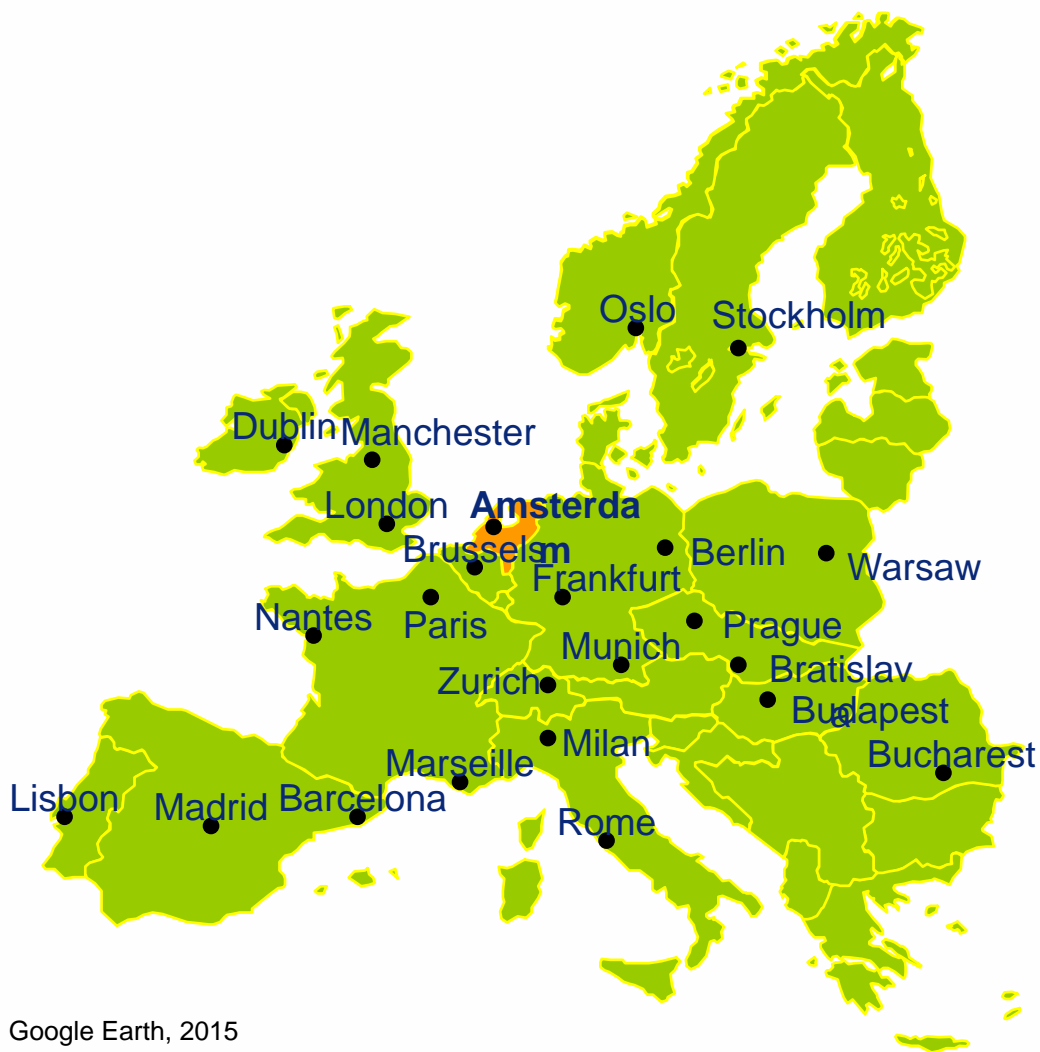
How do you assess the general state of infrastructure (e.g., transport, communications, and energy) in your country? [1 = extremely underdeveloped – among the worst in the world; 7



Annual cross-trade freight road transport (in thousands of tonnes, 2014)

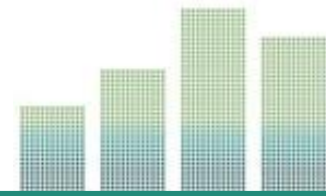
Cross-trade is international road transport between two different countries performed by a road motor vehicle registered in a third country. A third country is a country other than the country of loading/embarkation and than the country of unloading/disembarkation. This transport is reported by the country in which the vehicle is registered.





From Amsterdam			
Destination	Country	Duration (hours)	Distance (miles)
Barcelona	Spain	± 14:03	970
Berlin	Germany	± 6:14	410
Bratislava	Slovakia	± 11	766
Brussels	Belgium	± 2:12	131
Bucharest	Romania	± 25	1,377
Budapest	Hungary	± 12:28	868
Dublin	Ireland	± 13:32	703
Frankfurt	Germany	± 4:12	275
Lisbon	Portugal	± 21:4	1,393
London	UK	± 6:26	334
Madrid	Spain	± 16:45	1,101
Manchester	UK	± 9:23	550
Marseille	France	± 11:14	769
Milan	Italy	± 10:15	669
Munich	Germany	± 7:30	513
Nantes	France	± 8:20	551
Oslo	Norway	± 14:38	773
Paris	France	± 4:55	316
Prague	Czech Rep.	± 8:20	548
Rome	Italy	± 15:30	1,033
Stockholm	Sweden	± 14:42	893
Warsaw	Poland	± 12:36	751
Zurich	Switzerland	± 7:30	511





Specialisation in warehousing and storage

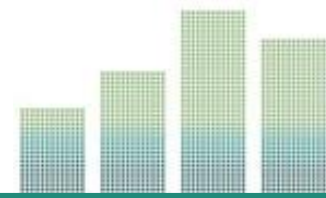
Description: Companies in warehousing and storage per 100,000 population (SIC 4214, 422, 423).

Unit type: Number of companies per 100,000 population

Source: fDi Intelligence from the Financial Times based on Dun & Bradstreet (SIC 4214, 422, 423)

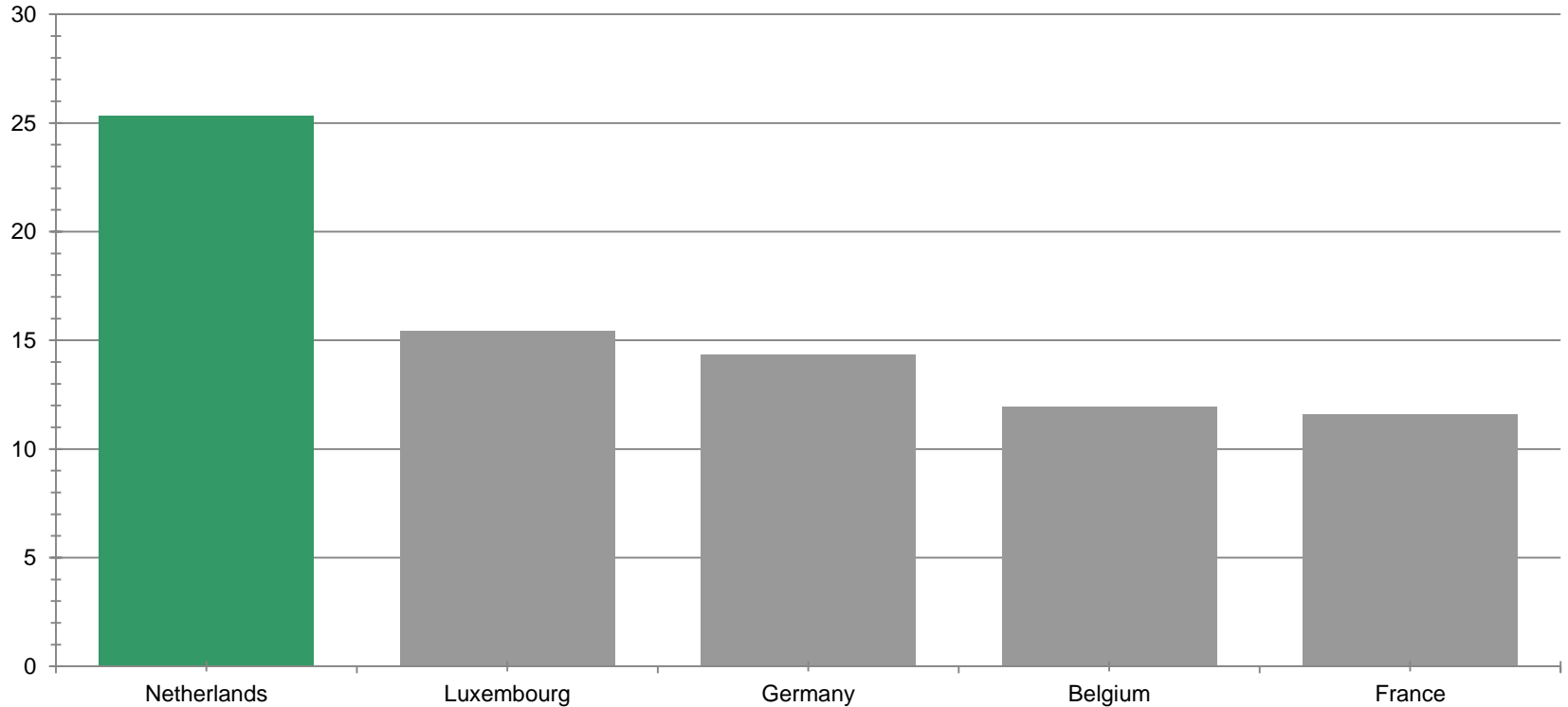
Tier 2 sub category: Industry Specialisation

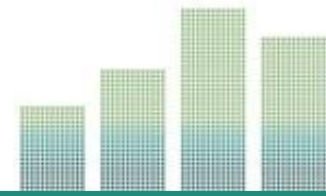
Netherlands ranks **1st** for this data point with 25.31 companies per 100,000 population. This is 61% above the study average of 15.71 companies per 100,000 population (across the 5 locations).



Specialisation in warehousing and storage - Chart

This chart shows **Specialisation in warehousing and storage** across the 5 locations, expressed as Number of companies per 100,000 population.





Quality of port infrastructure

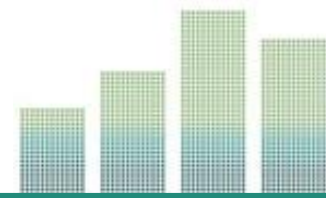
Description: Assessment of the quality of the country's seaports (For landlocked countries: How accessible are seaport facilities?) [1 = extremely underdeveloped among the worst in the world; 7 = extensive and efficient among the best in the world]

Unit type: Rating from 1 to 7

Source: Global Competitiveness Report, World Economic Forum, Switzerland, 2015-16.

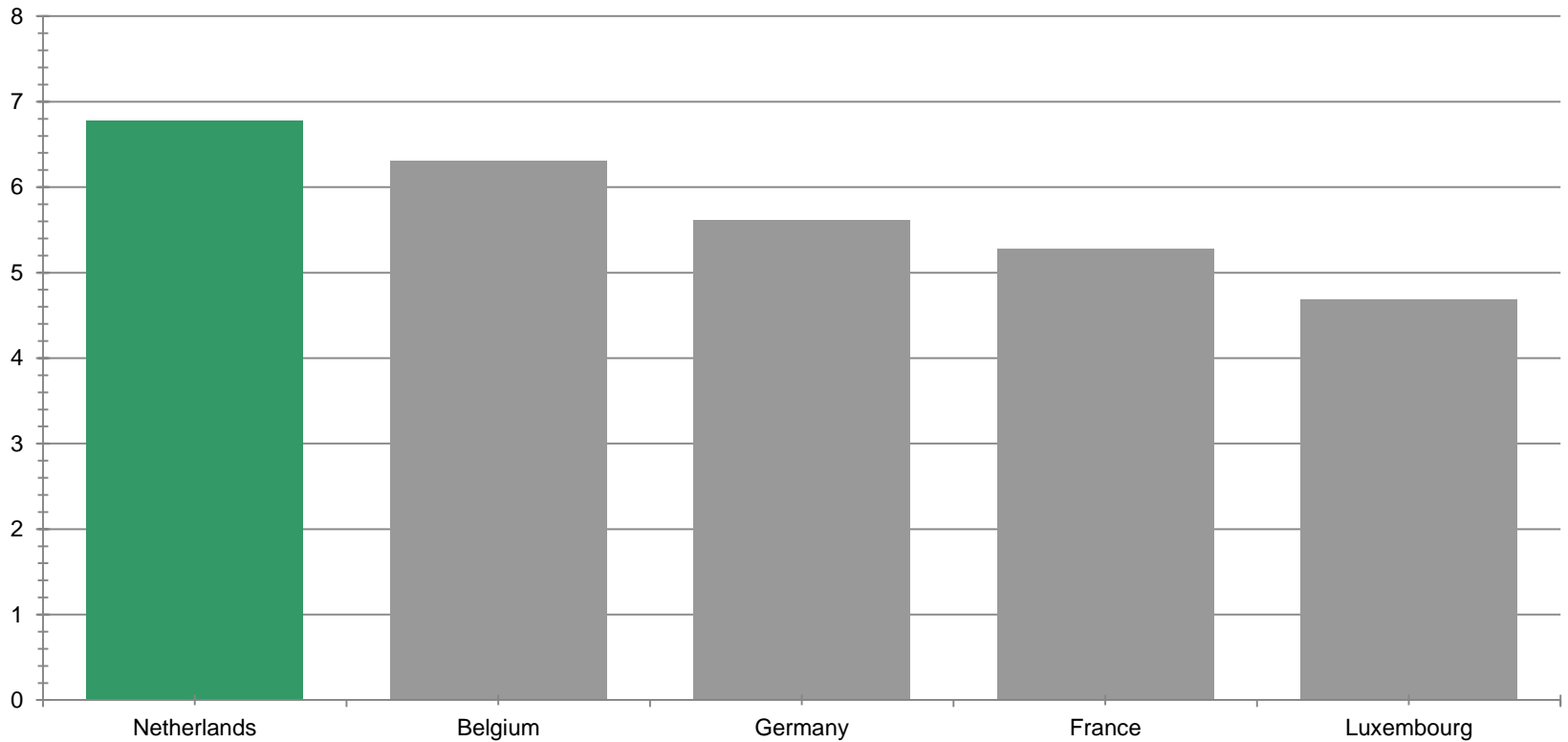
Tier 2 sub category: Access to major overseas markets

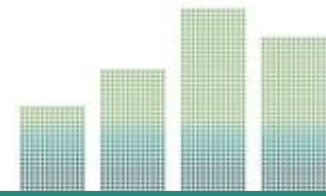
Netherlands ranks **1st** for this data point with 6.8 out of 7. This is 18% above the study average of 5.7 out of 7 (across the 5 locations).



Quality of port infrastructure - Chart

This chart shows **Quality of port infrastructure** across the 5 locations, expressed as Rating from 1 to 7.





Cooperation in labour-employer relations

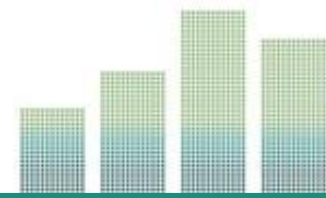
Description: Perceived character of labour-employer relations (1= generally confrontational, 7= generally cooperative).

Unit type: Rating from 1 to 7

Source: Global Competitiveness Report, World Economic Forum, Switzerland, 2015-16.

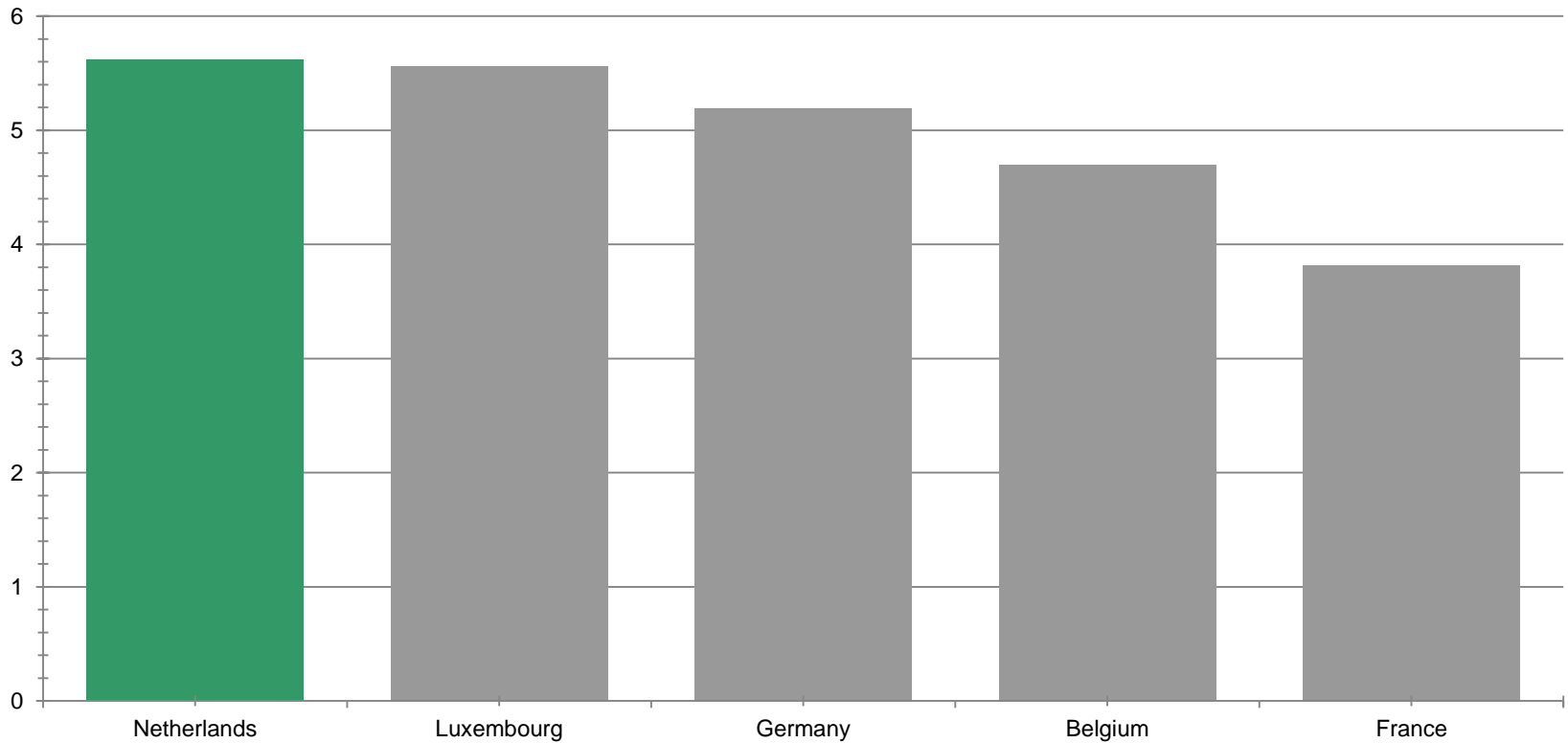
Tier 2 sub category: Flexibility of labour regulations

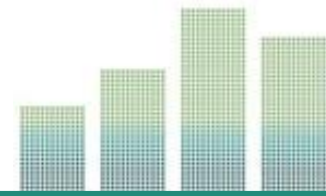
Netherlands ranks **1st** for this data point with 5.6 out of 7. This is 13% above the study average of 5.0 out of 7 (across the 5 locations).



Cooperation in labour-employer relations - Chart

This chart shows **Cooperation in labour-employer relations** across the 5 locations, expressed as Rating from 1 to 7.





Annual vacation days

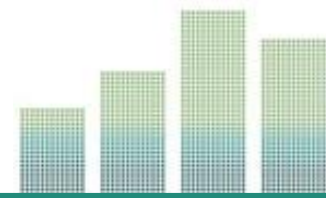
Description: Paid annual leave is the time that employees are granted leave with social protection and income. Paid annual leave is in addition to public holidays, sick leave, weekly rest, and maternity and parental leave.

Unit type: Days

Source: World Bank Doing Business

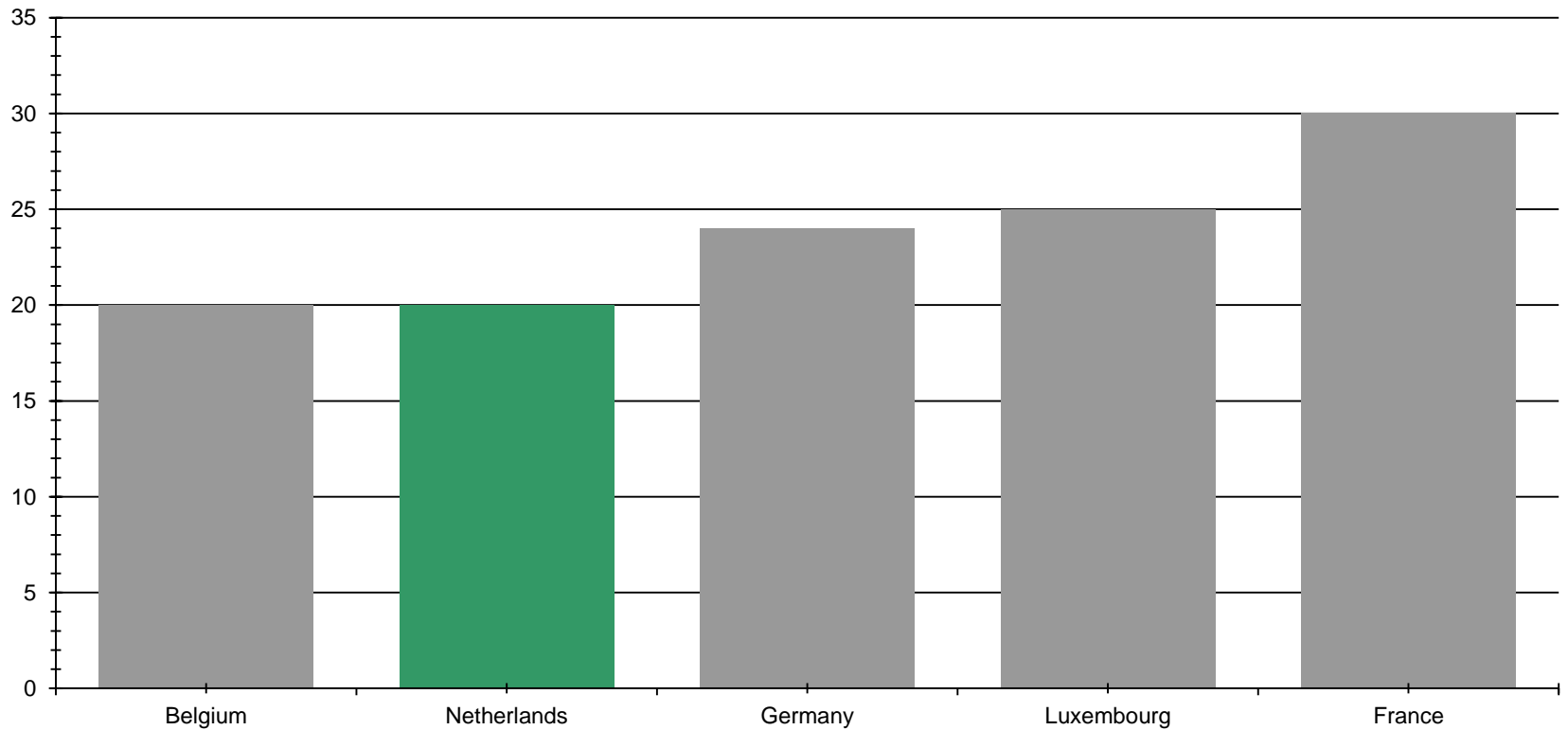
Tier 2 sub category: Flexibility of labour regulations

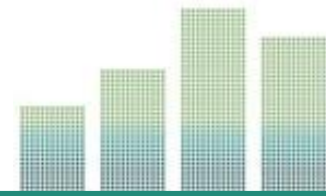
Netherlands ranks **1st** (equal with Belgium) for this data point with 20 days. This is 16% below the study average of 24 days (across the 5 locations).



Annual vacation days - Chart

This chart shows **Annual vacation days** across the 5 locations, expressed as Days.





Burden of government regulation

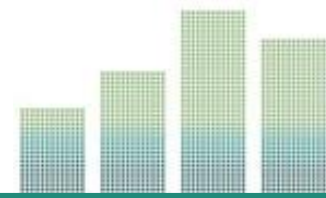
Description: Measures how burdensome it is for businesses to comply with governmental administrative requirements eg. permits, regulations and reporting. Where 1 = extremely burdensome and 7 = not burdensome at all.

Unit type: Rating from 1 to 7

Source: Global Competitiveness Report, World Economic Forum, Switzerland, 2015-16.

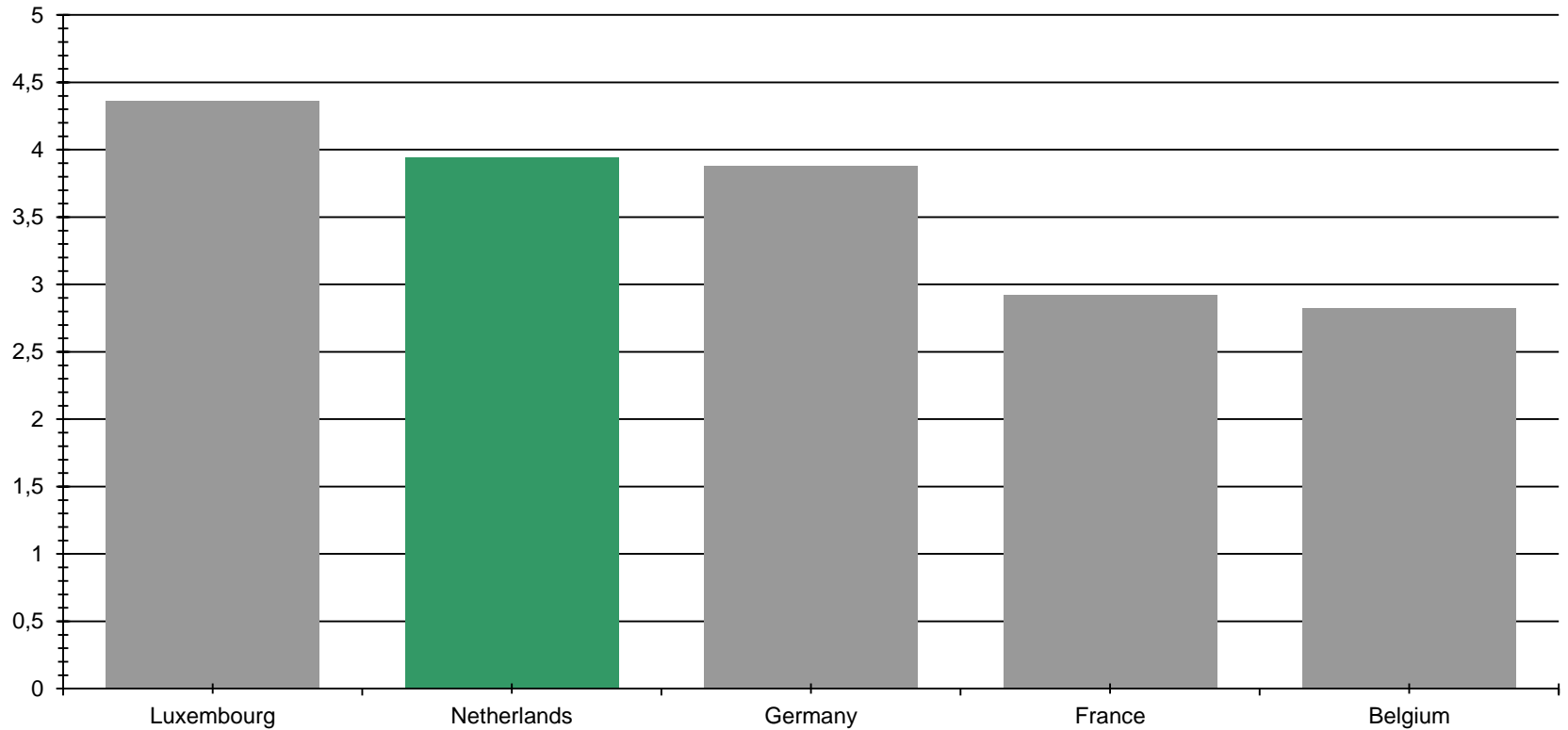
Tier 2 sub category: Regulatory environment

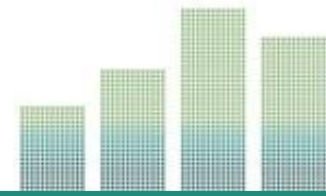
Netherlands ranks **2nd** for this data point with 3.9 out of 7. This is 10% above the study average (across the 5 locations).



Burden of government regulation - Chart

This chart shows **Burden of government regulation** across the 5 locations, expressed as Rating from 1 to 7.





Hiring and firing practices

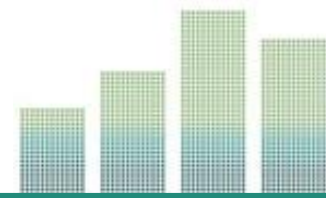
Description: Perceived difficulty in the hiring and firing of workers (1 = heavily impeded by regulations; 7 = extremely flexible).

Unit type: Rating from 1 to 7

Source: Global Competitiveness Report, World Economic Forum, Switzerland, 2015-16.

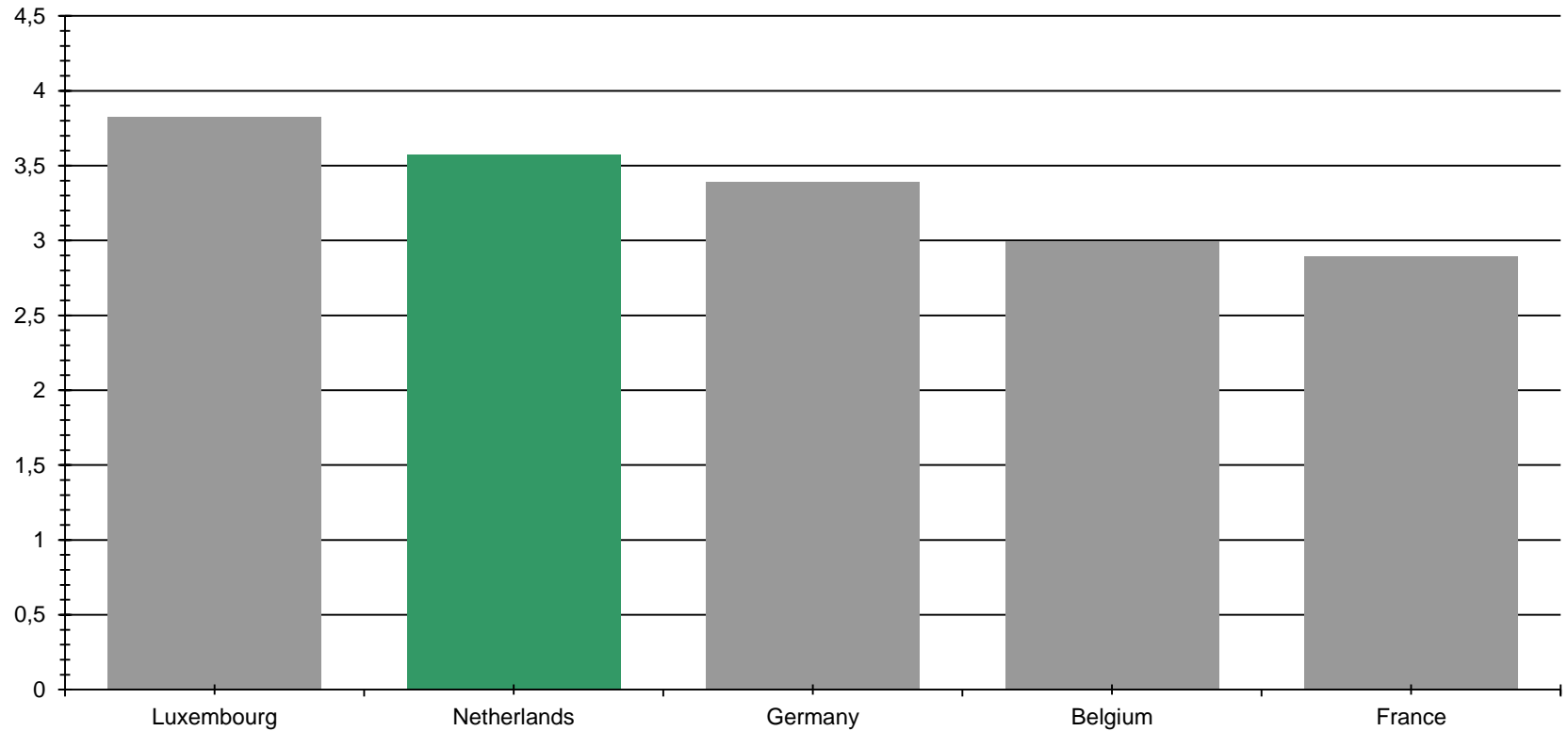
Tier 2 sub category: Flexibility of labour regulations

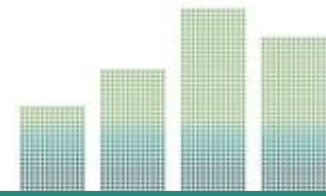
Netherlands ranks **2nd** for this data point with 3.6 out of 7. This is 7% above the study average of 3.3 out of 7 (across the 5 locations).



Hiring and firing practices - Chart

This chart shows **Hiring and firing practices** across the 5 locations, expressed as Rating from 1 to 7.





Labour costs, forecast growth (p.a.)

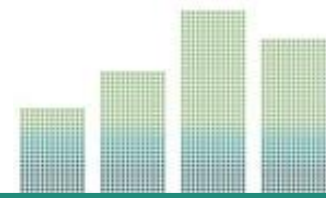
Description: Forecast - average annual growth in labour costs over the period 2016-2020.

Unit type: Percentage

Source: fDi Intelligence from the Financial Times based on Economist Intelligence Unit

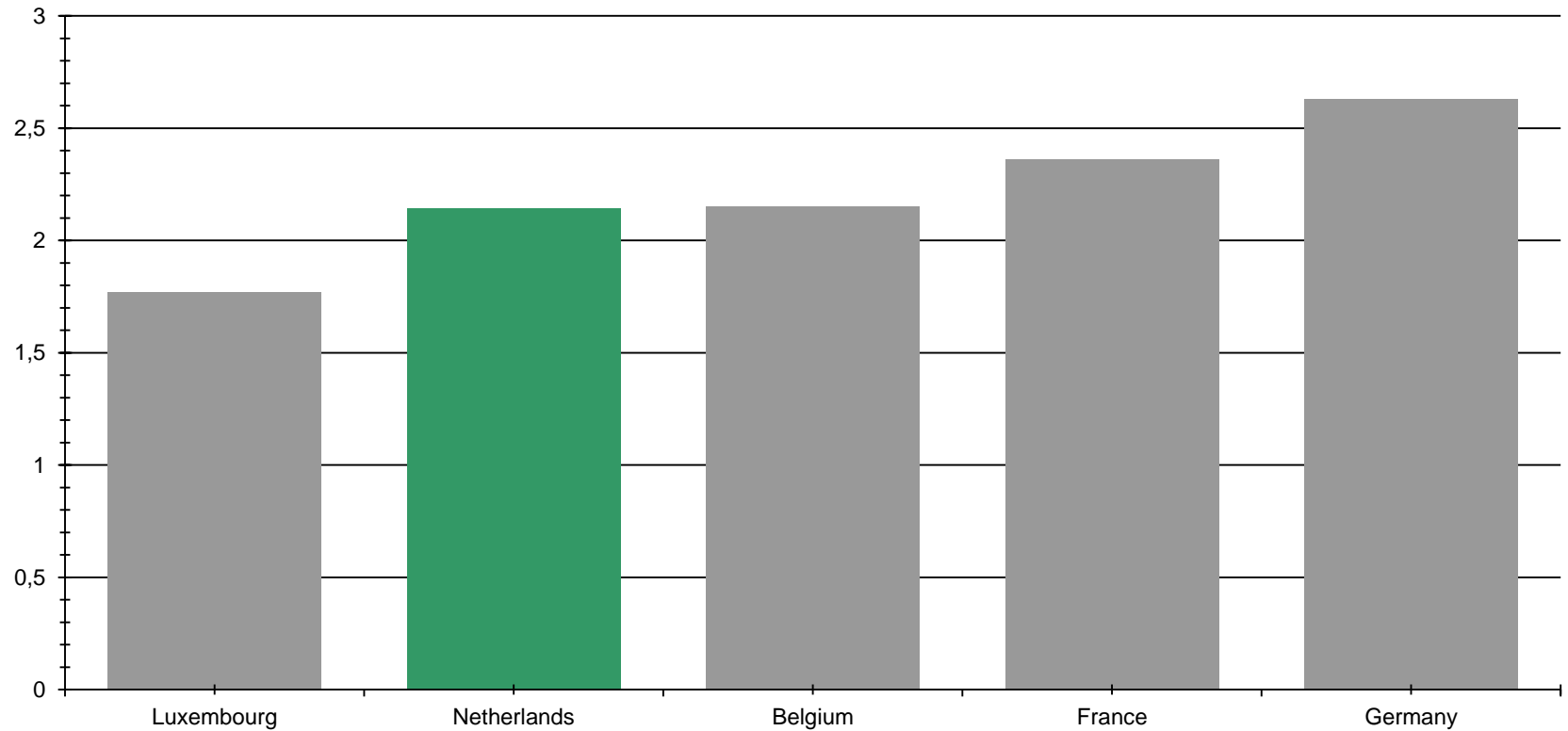
Tier 2 sub category: Operating risk

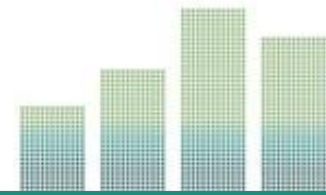
Netherlands ranks **2nd** for this data point with 2.14 %. This is 3% below the study average (across the 5 locations).



Labour costs, forecast growth (p.a.) - Chart

This chart shows **Labour costs, forecast growth (p.a.)** across the 5 locations, expressed as Percentage.



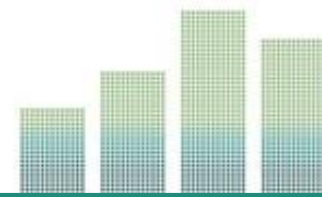


Driver Light Vehicles

Description: Responsible for delivering stock within an agreed time frame using a light vehicle. Reports to the logistics officer. Requires a minimum of one years relevant experience.

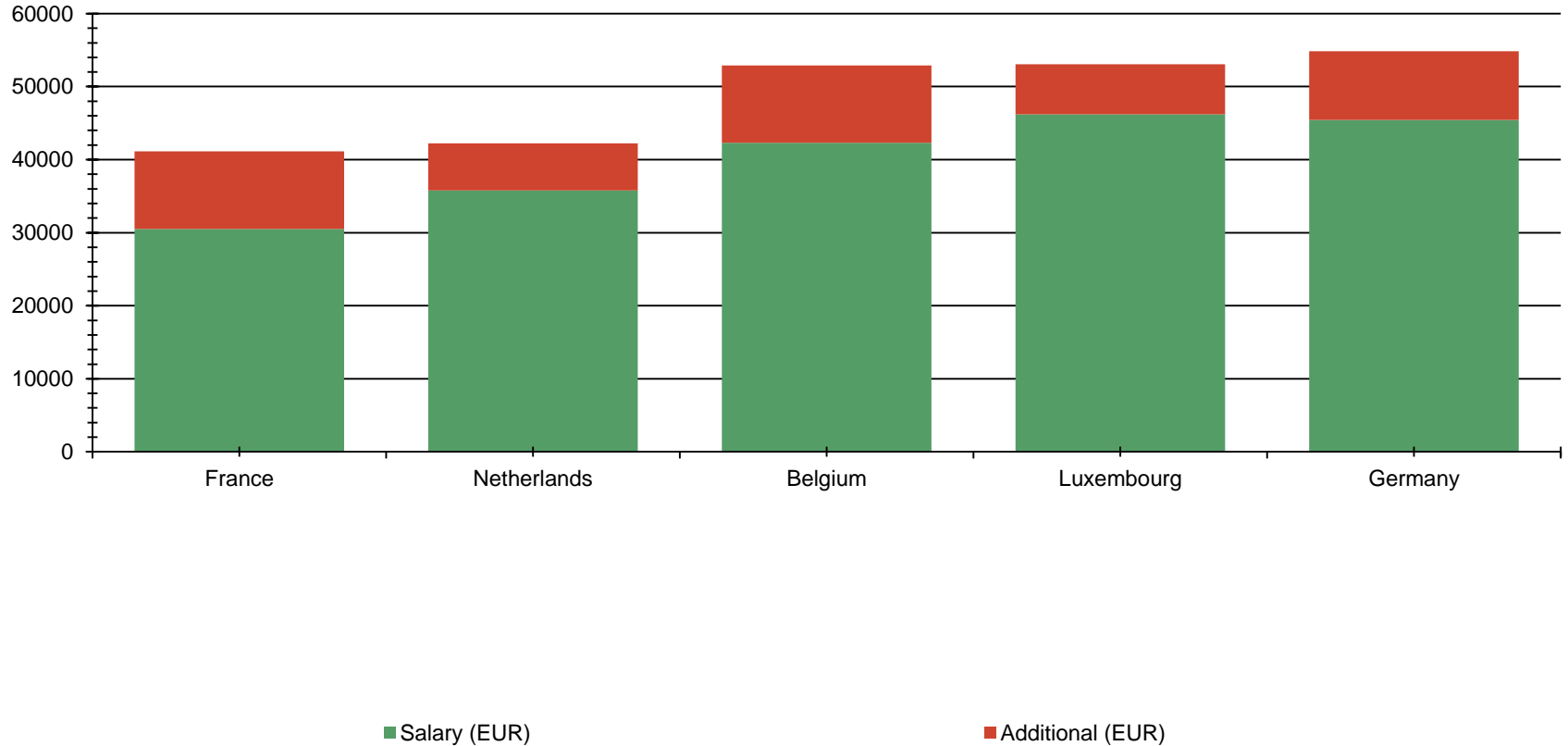
Category: Logistics and Purchasing

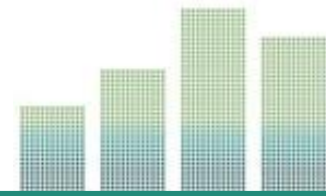
Netherlands has the **2nd lowest** costs for this job title of all 5 locations with a total unit cost of EUR 42,231 per annum. Netherlands is therefore 14% lower than the study average cost of EUR 48,835 per annum.



Driver Light Vehicles - Chart

The chart below shows total unit costs for job title: Driver Light Vehicles for each location, broken down by salary and additional costs



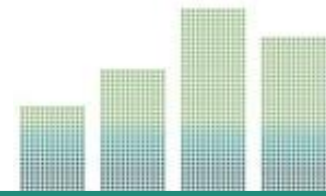


Head of Logistics

Description: Head of Logistics plays a key role in setting company's strategy in order to ensure the cost-effective flow of materials inside and outside the company. Directs the purchase of capital and assets and will play a key role in long-term contract negotiations. Will have at least ten years' management experience.

Category: Logistics and Purchasing

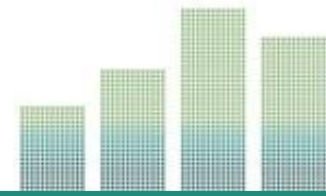
Netherlands has the **2nd lowest** costs for this job title of all 5 locations with a total unit cost of EUR 132,510 per annum. Netherlands is therefore 3% lower than the study average cost of EUR 136,220 per annum.



Head of Logistics - Chart

The chart below shows total unit costs for job title: Head of Logistics for each location, broken down by salary and additional costs



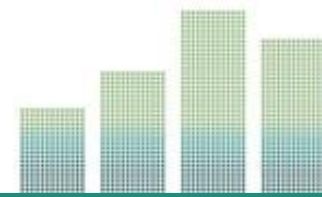


Junior Warehouse Operative

Description: Is a new operative who has not yet acquired full competency in all duties.

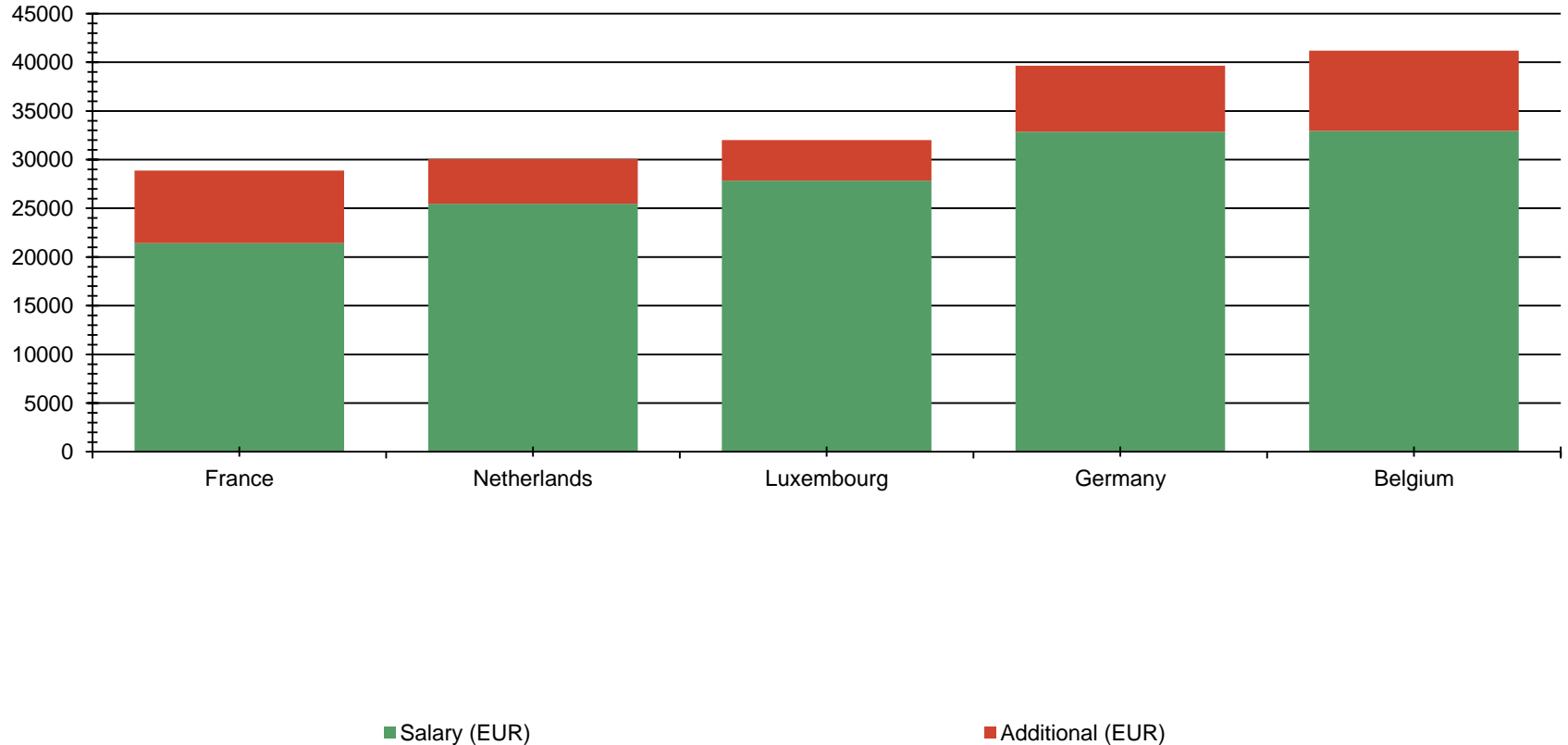
Category: Logistics and Purchasing

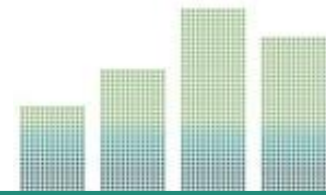
Netherlands has the **2nd lowest** costs for this job title of all 5 locations with a total unit cost of EUR 30,070 per annum. Netherlands is therefore 12% lower than the study average cost of EUR 34,358 per annum.



Junior Warehouse Operative - Chart

The chart below shows total unit costs for job title: Junior Warehouse Operative for each location, broken down by salary and additional costs



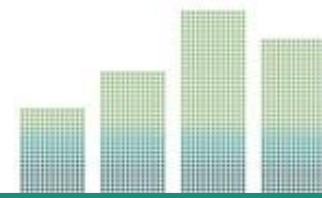


Logistics Clerk

Description: Responsible for recording and coordinating the flow of materials between departments, examining orders for goods and preparing production schedules. Reports to the logistics officer. Requires a minimum of one years relevant experience.

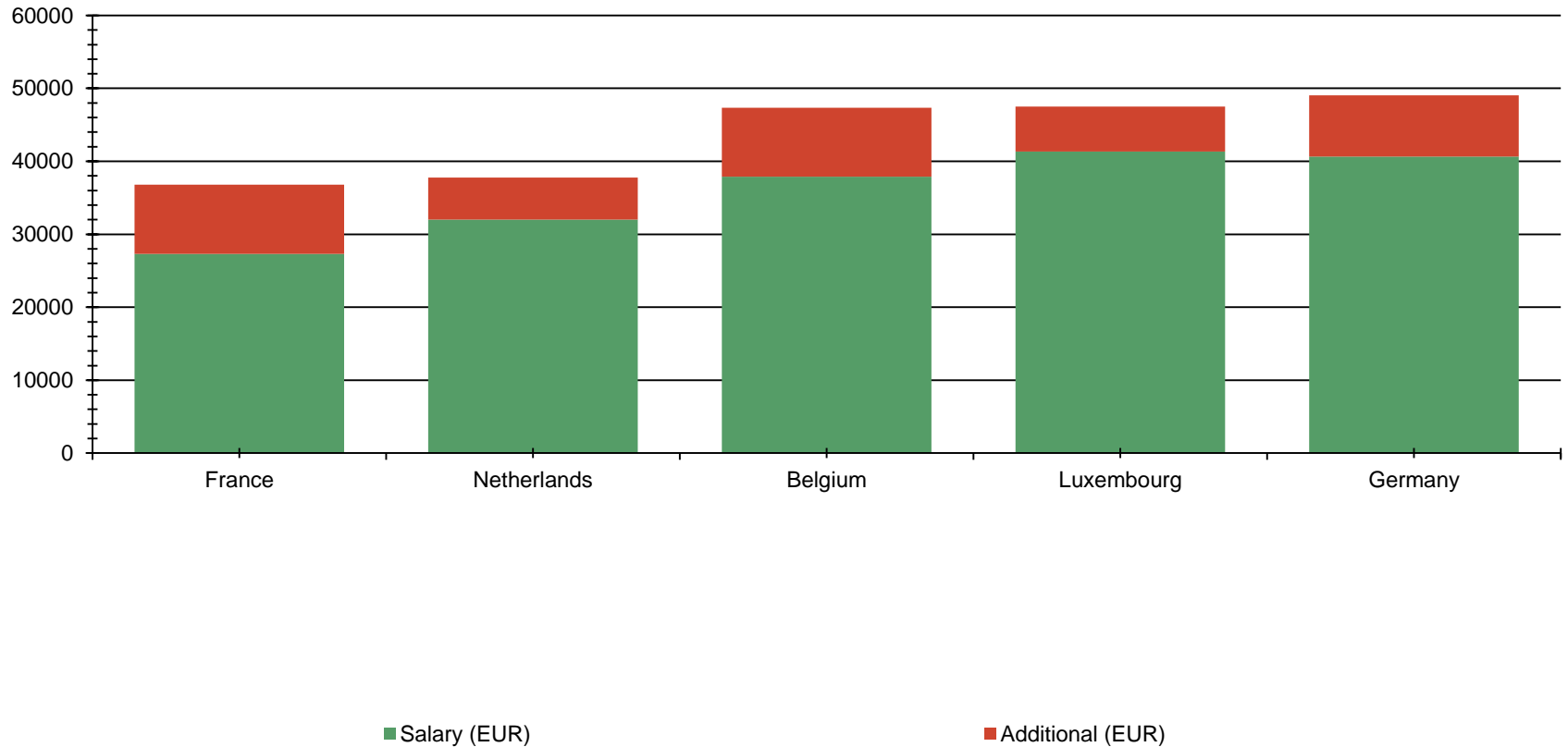
Category: Logistics and Purchasing

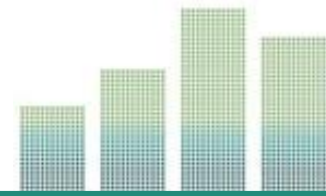
Netherlands has the **2nd lowest** costs for this job title of all 5 locations with a total unit cost of EUR 37,782 per annum. Netherlands is therefore 14% lower than the study average cost of EUR 43,690 per annum.



Logistics Clerk - Chart

The chart below shows total unit costs for job title: Logistics Clerk for each location, broken down by salary and additional costs



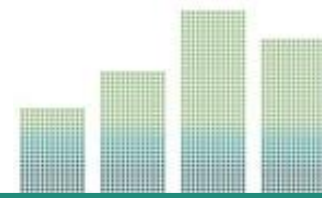


Senior Warehouse Operator

Description: Carries out any of the warehouse duties competently in any of the areas. Will have responsibility for checking own work to ensure company standards are maintained. Has at least 6-12 months experience.

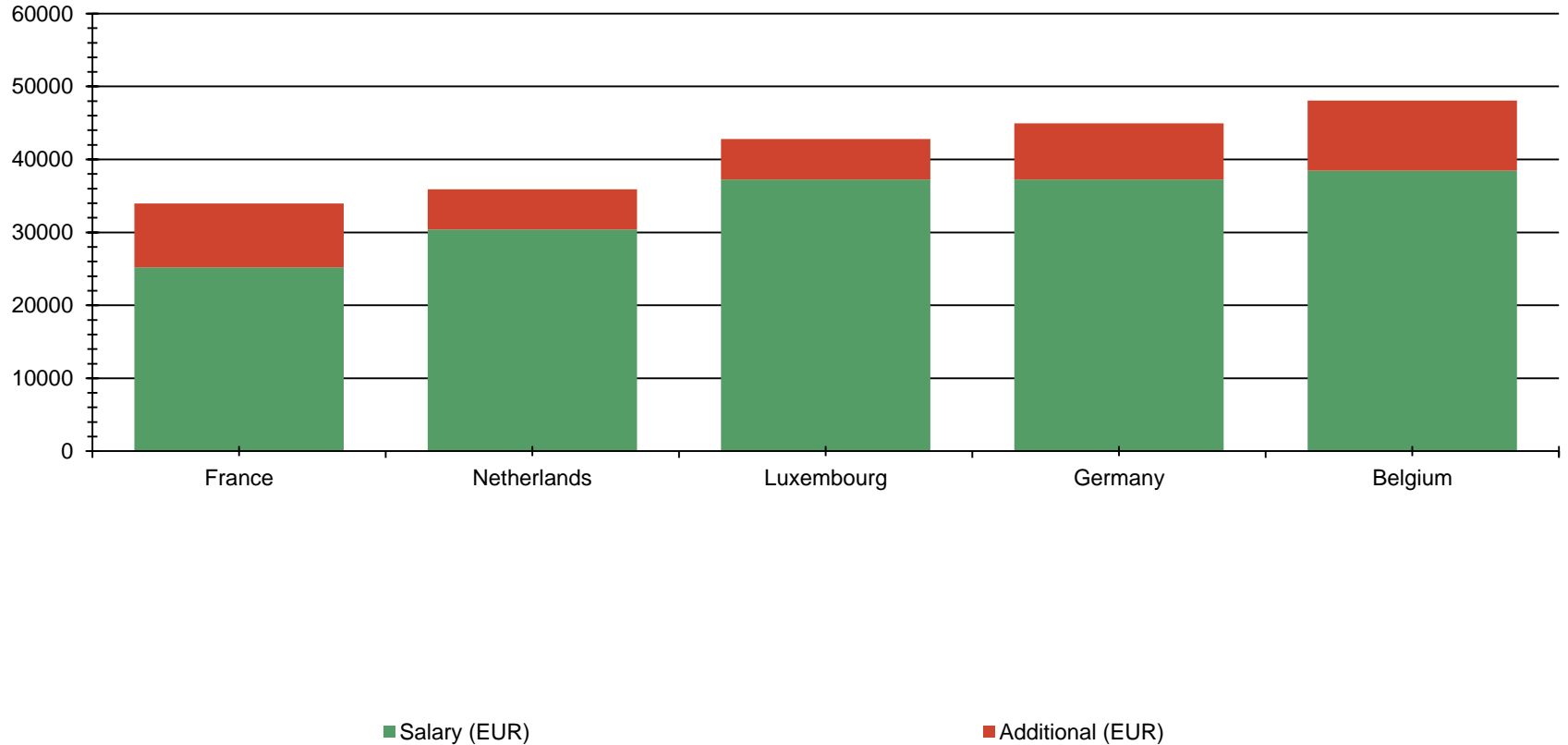
Category: Logistics and Purchasing

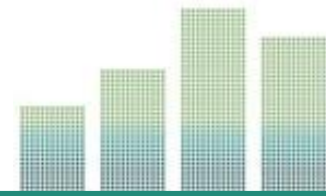
Netherlands has the **2nd lowest** costs for this job title of all 5 locations with a total unit cost of EUR 35,899 per annum. Netherlands is therefore 13% lower than the study average cost of EUR 41,130 per annum.



Senior Warehouse Operator - Chart

The chart below shows total unit costs for job title: Senior Warehouse Operator for each location, broken down by salary and additional costs



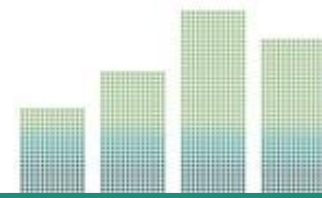


Truck driver (heavy and tractor-trailer)

Description: To operate industrial trucks or tractors equipped to move materials around a warehouse, storage yard, factory, construction site, or similar location.

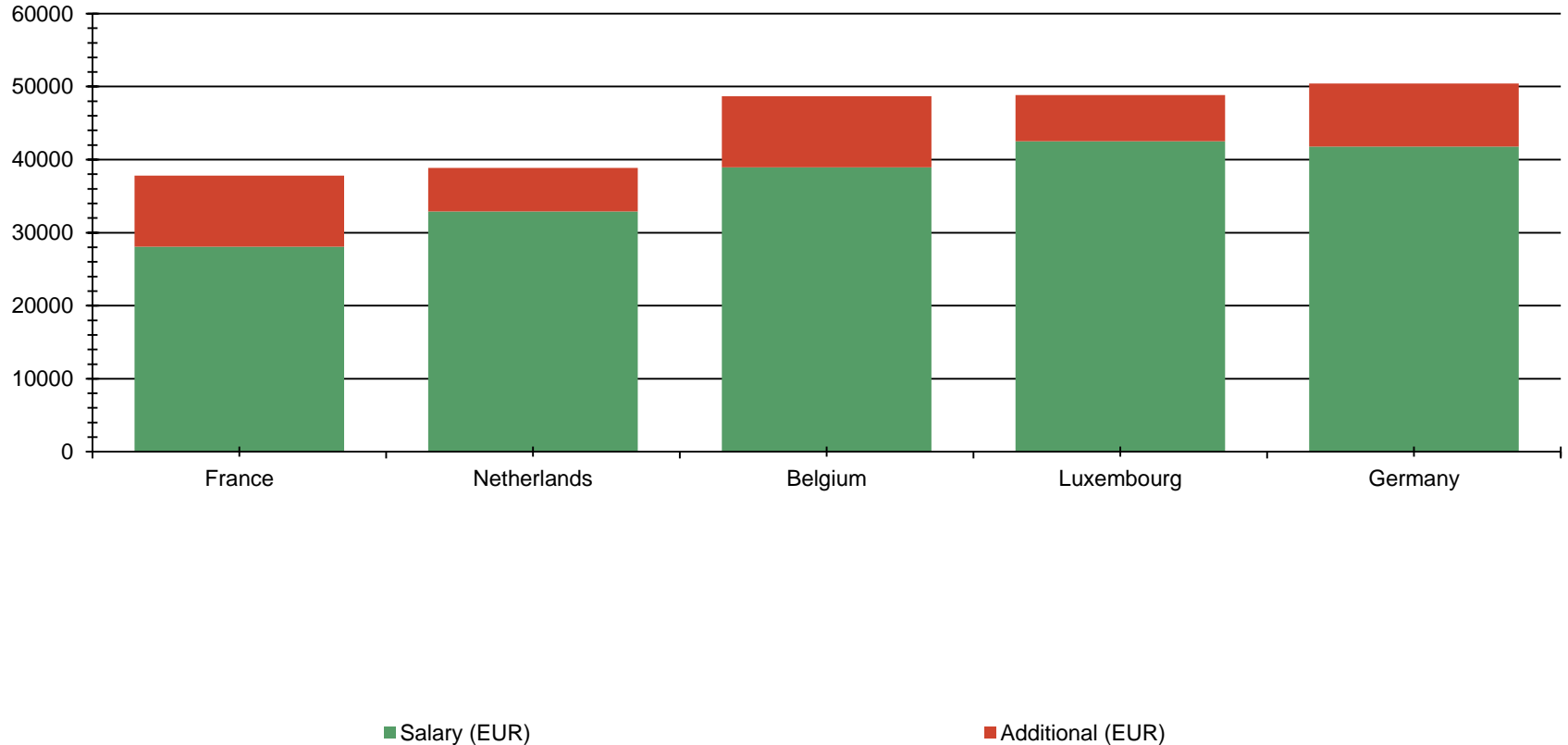
Category: Logistics and Purchasing

Netherlands has the **2nd lowest** costs for this job title of all 5 locations with a total unit cost of EUR 38,850 per annum. Netherlands is therefore 14% lower than the study average cost of EUR 44,925 per annum.



Truck driver (heavy and tractor-trailer) - Chart

The chart below shows total unit costs for job title: Truck driver (heavy and tractor-trailer) for each location, broken down by salary and additional costs



From	[REDACTED] [REDACTED]@rvo.nl)	Date/Time (GMT)	19 Oct 2016 16:35:44
To	[REDACTED] [REDACTED]@nfia.co.uk>	Cc	[REDACTED] [REDACTED]nfia.nl>
Project	BAT		
Subject	BAT - checking in: asking about state of affairs		
Attachments	No	Flags	

files

Van: [REDACTED]
Verzonden: woensdag 19 oktober 2016 16:35
Aan: [REDACTED]@bat.com'; [REDACTED]@bat.com'
CC: [REDACTED]
Onderwerp: Stand van zaken

Beste [REDACTED],

Een tijdje geleden hadden wij telefonisch contact over de herziening van jullie logistieke operatie in Nederland. Daartoe had ik wat informatie gestuurd. Ik hoop dat deze informatie goed bij jullie is aangekomen, en van pas kwam.

Als ik me goed herinner zouden jullie rond deze tijd de knoop doorhakken ten aanzien van de logistieke dienstverlener en site in Nederland, klopt dat? Uiteraard zou ik graag willen weten of jullie inmiddels een keuze hebben kunnen maken. Weet dat wij graag met jullie kijken of we jullie verder van dienst kunnen zijn.

Hartelijke groet,

[REDACTED]

[REDACTED]
Project Manager

Visit our website
investinholland.com

[REDACTED]
[REDACTED]
[REDACTED]@nfia.nl

Netherlands Foreign Investment Agency
Ministry of Economic Affairs
Prinses Beatrixlaan 2 | 2595 AL | Den Haag – Netherlands
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Van: [REDACTED]
Verzonden: maandag 19 september 2016 16:46
Aan: [REDACTED]@bat.com'; [REDACTED]@bat.com'
CC: [REDACTED]
Onderwerp: Informatie naar aanleiding van telefoongesprek

Geachte [REDACTED] -

Beste [REDACTED],

Graag wil ik jullie nog bedanken voor het open en informatieve gesprek dat wij afgelopen donderdag hadden.

Bijgesloten vinden jullie zoals afgesproken een aantal slides. Het eerste gedeelte betreft wat algemene informatie over logistiek in Nederland. Daarna volgt een aantal slides die vergelijkende

informatie bevatten. Ik heb de landen die we tijdens het gesprek benoemden (BE, NL, DU, LUX en FR) met elkaar vergeleken op diverse punten. Dit gedeelte (vanaf slide 12) bestaat uit telkens een korte uitleg en vervolgens een tabel met de vergelijking.

Over het algemeen komt Nederland goed uit de vergelijking: loonkosten zijn gemiddeld laag, en kwaliteit van infrastructuur is erg hoog. Mochten jullie naar aanleiding van deze informatie (of anderszins) vragen hebben dan ga ik gaarne voor jullie op zoek naar een antwoord.

Tot zo ver. Wij blijven graag in contact met jullie.

Mede namens [REDACTED]

Hartelijke groet,

[REDACTED]
Project Manager

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