TheRockGroup

The Netherlands

A possible new European Financial Hub?

Amsterdam

Busan, 17 December 2017

Outline

1. The Netherlands and its position in Europe
2. European trends
3. How to become a Regional Financial HUB?
   - A. Business environment
   - B. Technology & Innovation
   - C. Sustainability
   - D. Politics
   - E. Communication

Amsterdam
Busan
ARCTIC OCEAN
Greenland
Svalbard (Nor.)
United States of America
Canada
Iceland
Norway
Sweden
Finland
Russia
United Kingdom
Denmark
Ireland
Estonia
Latvia
Belarus
Ukraine
Poland
Germany
France
Spain
Portugal
Italy
Romania
Bulgaria
Greece
Turkey
Georgia
Kazakhstan
Mongolia
Kyrgyzstan
Tajikistan
China
North Korea
South Korea
Japan
Taiwan
Philippines
Vietnam
Laos
Thailand
Cambodia
Malaysia
Indonesia
Papua New Guinea
Solomon Islands
Fiji
Australia
New Zealand
India
Pakistan
Nepal
Bhutan
Bangladesh
Sri Lanka
Myanmar
Iran
Iraq
Kuwait
Saudi Arabia
Jordan
Israel
Lebanon
Syria
Egypt
Libya
Tunisia
Algeria
Morocco
Western Sahara
Mauritania
Mali
Niger
Chad
Eritrea
Sudan
Djibouti
Yemen
Oman
Senegal
Guinea-Bissau
Sierra Leone
Liberia
Cote d' Ivoire
Ghana
Togo
Nigeria
Cameroon
C.A.R.
Ethiopia
Somalia
Gabon
Dem. Rep. of Congo
Rep. of the Congo
Uganda
Kenya
Tanzania
Angola
Zambia
Malawi
Namibia
Zimbabwe
Mozambique
Botswana
Madagascar
Swaziland
Lesotho
South Africa
Mexico
Guatemala
Honduras
Nicaragua
Costa Rica
Panama
Colombia
Ecuador
Venezuela
Guyana
Suriname
French Guiana
Brazil
Peru
Bolivia
Paraguay
Chile
Argentina
Uruguay
PACIFIC OCEAN
ATLANTIC OCEAN
INDIAN OCEAN
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The Netherlands: European Financial Centre

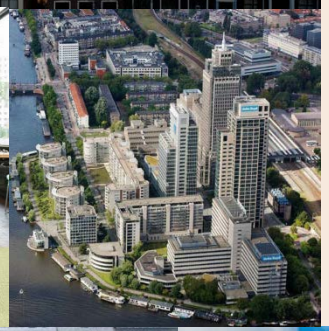
2016

The Netherlands

- Capital: Amsterdam, the country's largest city is also its financial and cultural centre, home to the second-largest port in the Netherlands and Schiphol International Airport
- Currency: euro
- Surface area: 33,800 sq km
- Unemployment rate: 5.5% (average 2007-2015)
- Population: 17.0 million (July 2016)
- GDP per capita: 38,429 euros (IMF 2015)
- Moderate inflation: 1.3% (average 2007-2015)

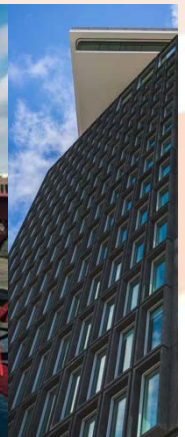
170 *million consumers within **300 miles***

244 *million consumers within **600 miles***



Amsterdam

- Historically centre of Financial activities
- Home to strong financial industry
- A top level international financial services and business centre (> 50 International banks)
- Strong legal and fiscal environment
- Outstanding Real Estate opportunities
- Excellent connections to all major cities around the world
- Talented, multilingual and highly skilled labour force
- Amsterdam is a cultural hotspot and hosts a vibrant international community
- Great range of international schools

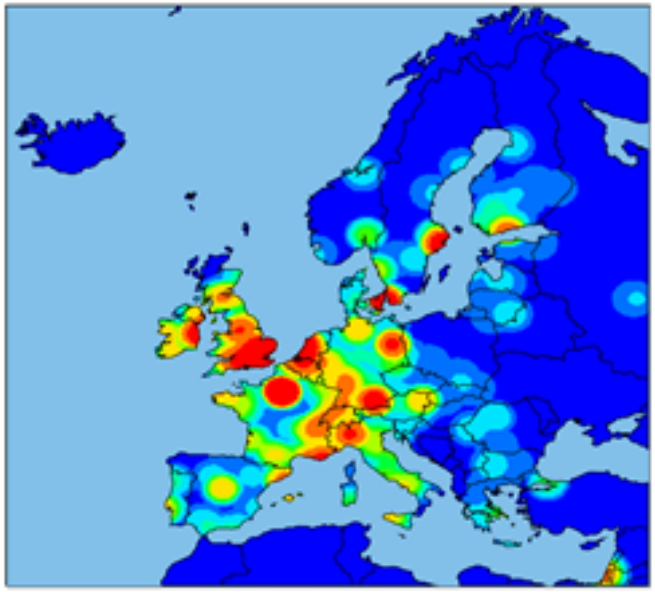


Euro

EU budget: Who's to pay for Brexit?

How should a government respond?

Impression of venture capital landscape of Europe



'Heatmap'/ representation of the geographic dispersion of EIF-backed investments.

Note: Cumulated initial and follow-on investments as of end 2014. All amounts expressed in EUR 2005 prices.

8

20
16
12
8
4
0

Calculation based on average data 2014-2015

Sources: Eurostat, EC, Deutsche Bank Research

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   B. Technology & Innovation
   C. Sustainability
   D. Politics
   E. Communication

A. Business environment

The Netherlands is home to:

53 banks and 43 branches of credit institutions established in EU countries, and 4 branches of credit institutions established in non-EU countries (2016Q2)

186 life- and non-life insurance companies (2016Q2)

298 pension funds (2016Q2)

Dutch Financial Sector: Assets Under Management

Dutch Banks:
€2.6 trillion

Dutch Pension Fund Industry:
€1.3 trillion

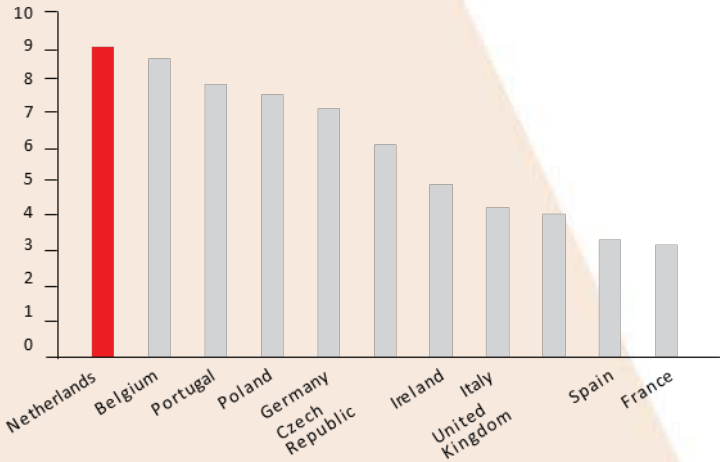
Dutch Insurance Companies:
€505 billion

Dutch Investment Funds:
€767 billion

Source: Dutch Central Bank

Language skills are meeting the needs of enterprises

Executive Opinion Survey (2016) based on an index from 0 to 10



Facts & figures regarding the financial and business services industry in the Amsterdam Metropolitan Area

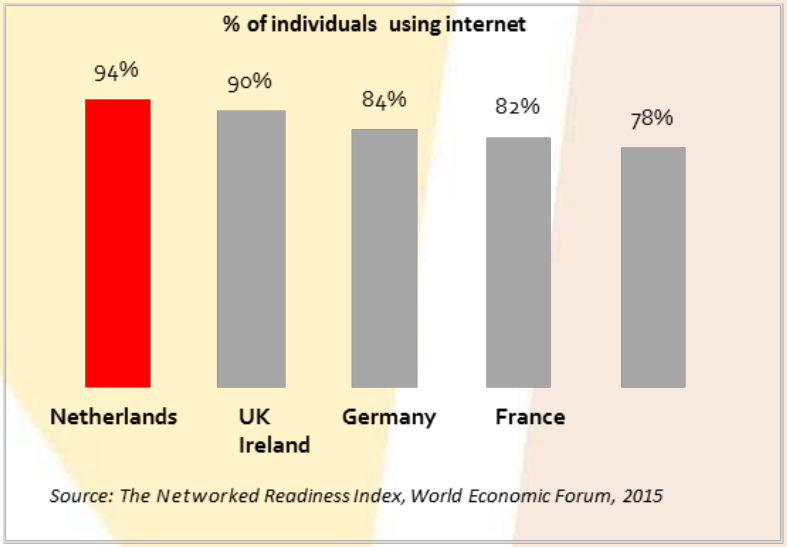
- Largest cluster in the Amsterdam Metropolitan Area
- 25% of the regional economy (gross domestic product of the region)
- 255,000 jobs
- 19% of the employment market

Source: 2016 Economic Outlook of the Amsterdam Metropolitan Area

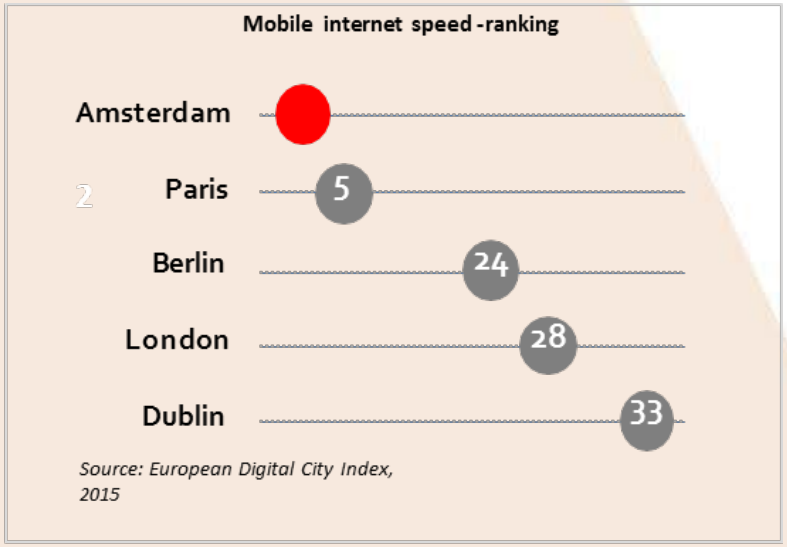
A. Business environment

1. Stable environment
2. Economic boosting .. maritime finance centre?
3. Good commuting possibilities
4. Good office locations
5. Presence of
   - clearing houses
   - international law and accountancy firms
   - International education
6. Leisure & sports well organised

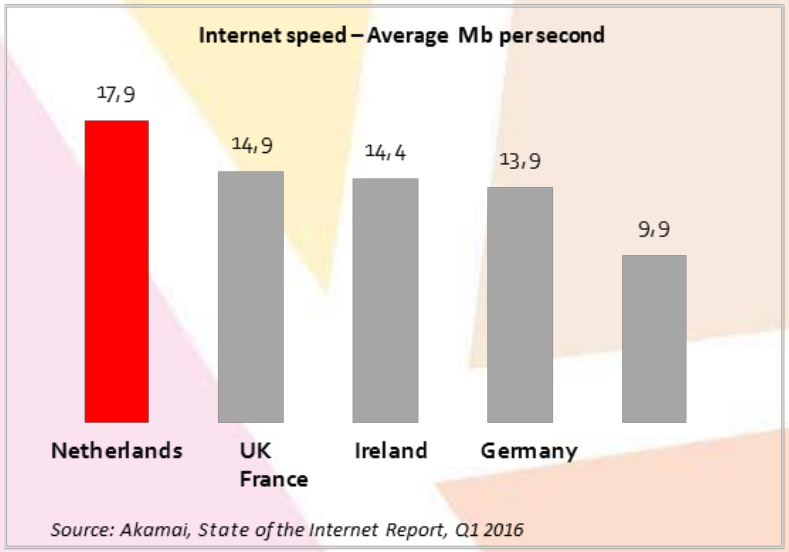
B. Technology & Innovation



Source: The Networked Readiness Index, World Economic Forum, 2015



Source: European Digital City Index, 2015



Source: Akamai, State of the Internet Report, Q1 2016

B. Technology & Innovation

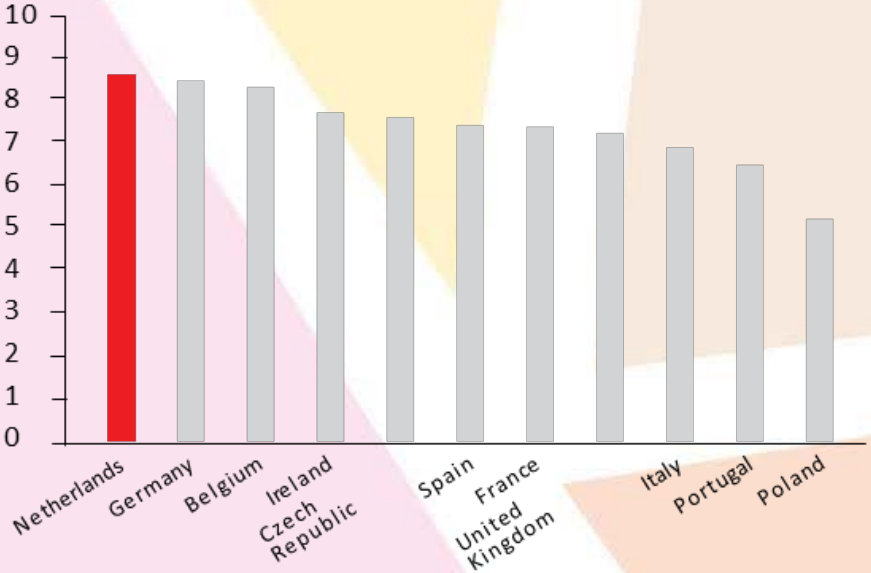
7) Excellent digital connections
8) Breeding ground for Innovations
   - Start-up bootcamps
   - Parallel exchange market
9) Strong focus on Fintech (Blockchain, Crowd Funding, Payments&Clearing)

C. Sustainability

PLANET

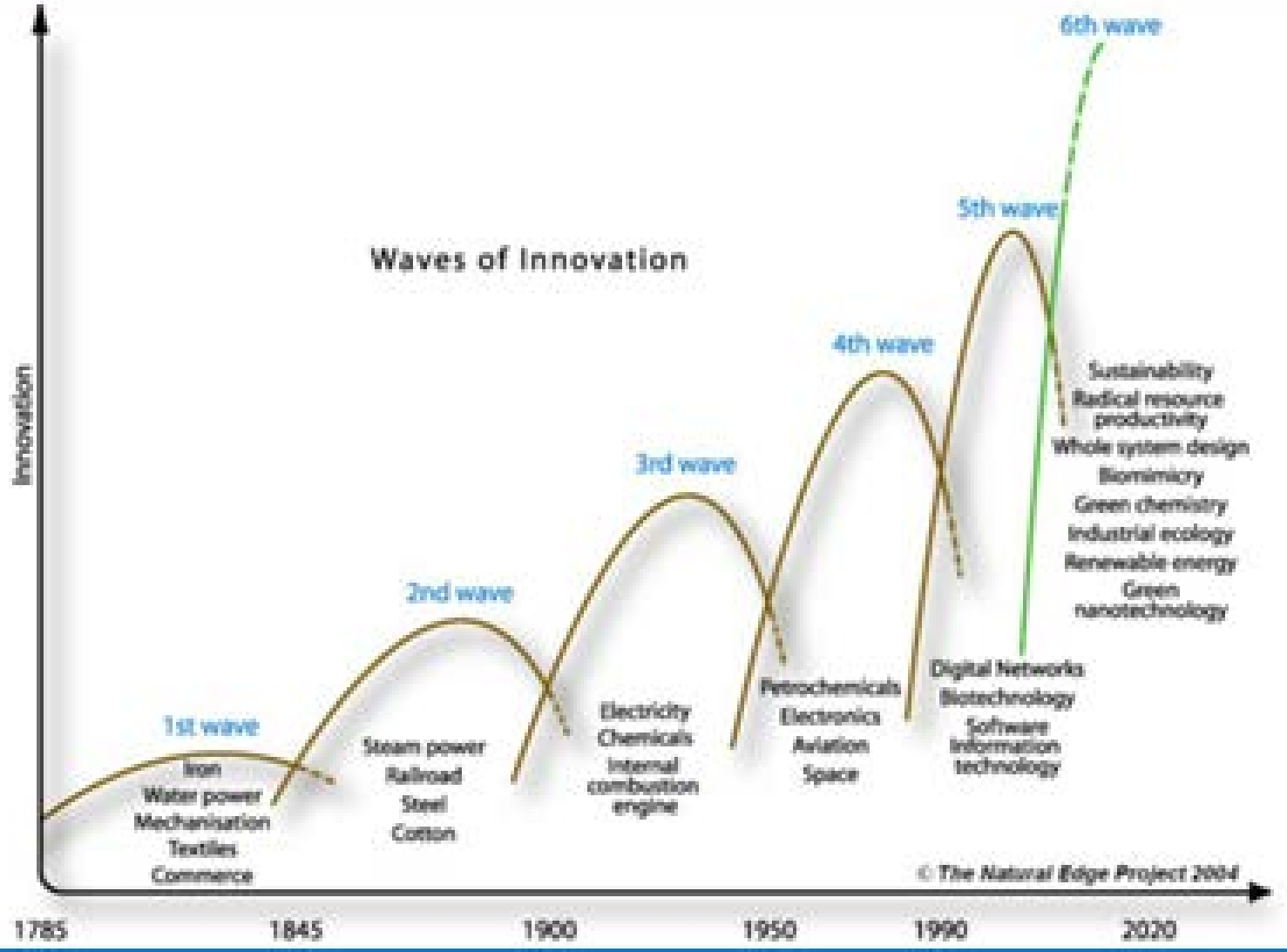
PEOPLE

Quality of Life - Executive Opinion Survey (2016) based on an index from 0 to 10



Source: IMD World Competitiveness Online, 2016

Global changes / transitions: from a linear towards a circular economy



C. Sustainability

10. Focus on circular economy and a sustainable supply chain
11. Ensure that food and energy supplies are guaranteed for future generations
12. Create good conditions for all people of the working population
13. Establish a pleasant and healthy environment
14. Consider to apply with the GRI (Global Reporting Initiative) standards

D. Politics

15. Enabling laws
16. Fiscal regime (Special tax regime for expats)
17. A stable political environment
18. Solid Financial supervision and licensing

Why go Dutch

1. You can't beat its location. The Netherlands is on the Continent, close to Europe's 500 million consumers, not to mention your business customers.

2. The infrastructure is first class. Its world-class airport, top-ranked seaports and high-speed road, rai and broadband networks are second to none.

3. The Dutch are ranked number one globally with regards to English-language skills for countries with a different mother tongue.

4. The Netherlands has an awesome business climate. Just ask Google, TOMS shoes, MTV, Tommy Hilfiger, Netflix, Calvin Klein and hundreds of other foreign multinationals thriving in the Netherlands

5. The Netherlands rolls out the orange carpet. The Netherlands Foreign Investment Agency offers free, confidential services that make it easy to start up, roll out and expand your company here.

E. Communication

www.iamsterdam.com/en/business/news/2016/amsterdam-wins-european-capital-of-innovation-award

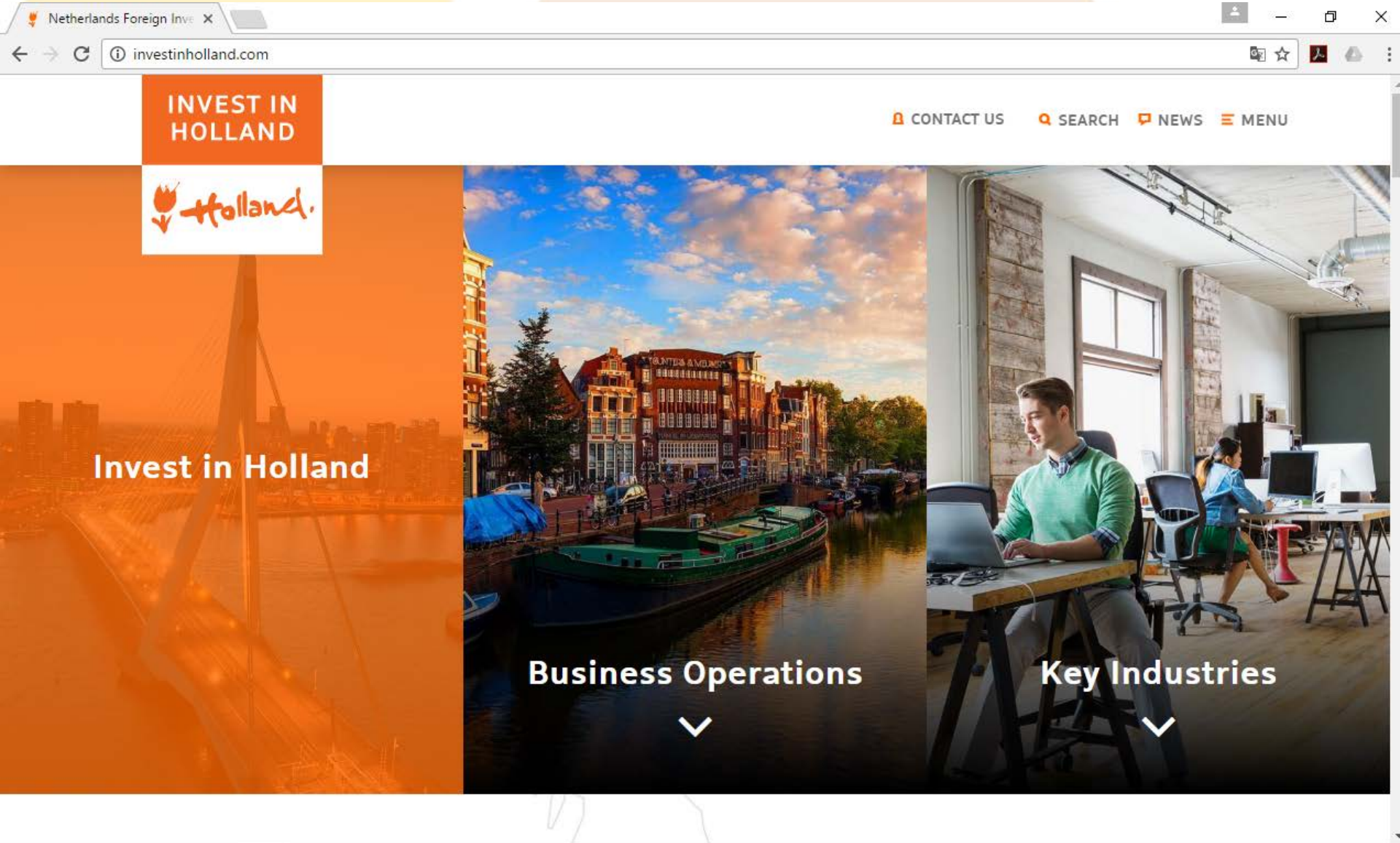
I AMBUSINESS INVEST STARTUPAMSTERDAM MEETINGS AMSTERDAM IMPACT LANGUAGES

Amsterdam Business News / 2016 Business news / **Amsterdam wins European Capital of Innovation award**

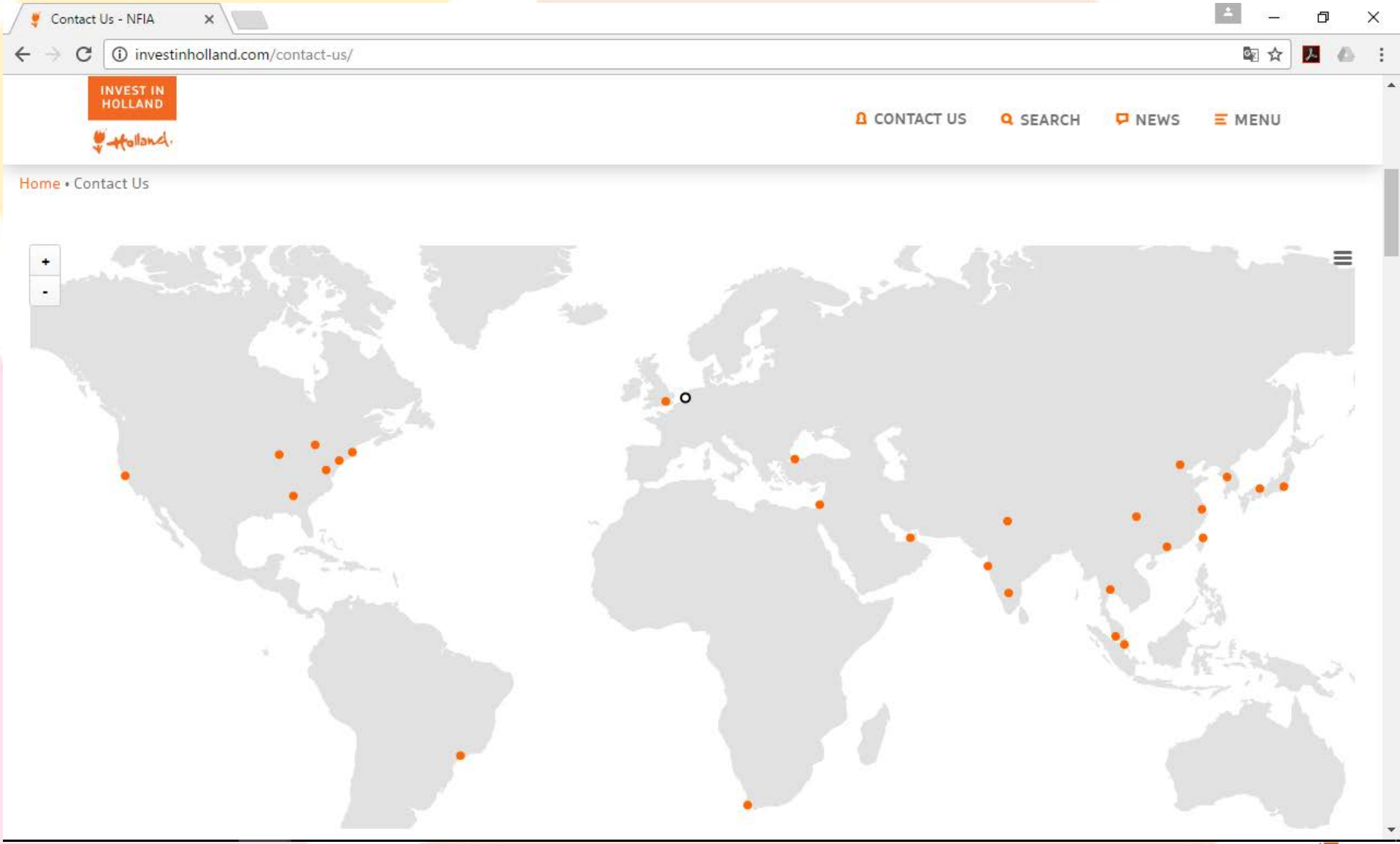
Amsterdam wins European Capital of Innovation award

Amsterdam won the award for its innovative approach to governance, economics, social inclusion, and quality of life.

E. Communication



E. Communication



E. Communication

How the Netherlands ra

campaignlive.co.uk/article/netherlands-ranks-global-creative-powerhouse/1417944#mQ2fwcj9Cqm6DE3v.01

campaign

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PROMOTED

Invest In Holland | December 08, 2016 | How long? | 2-3 minutes

INVEST IN HOLLAND

Holland.

How the Netherlands ranks as a global creative powerhouse

Yes, Holland's creative industry ranks among the world's top 10 for trade, jobs and brands. But it doesn't end there...

More from Campaign Goes Dutch...

PROMOTED | December 08, 2016

Campaign goes Dutch - Claire Beale explains why

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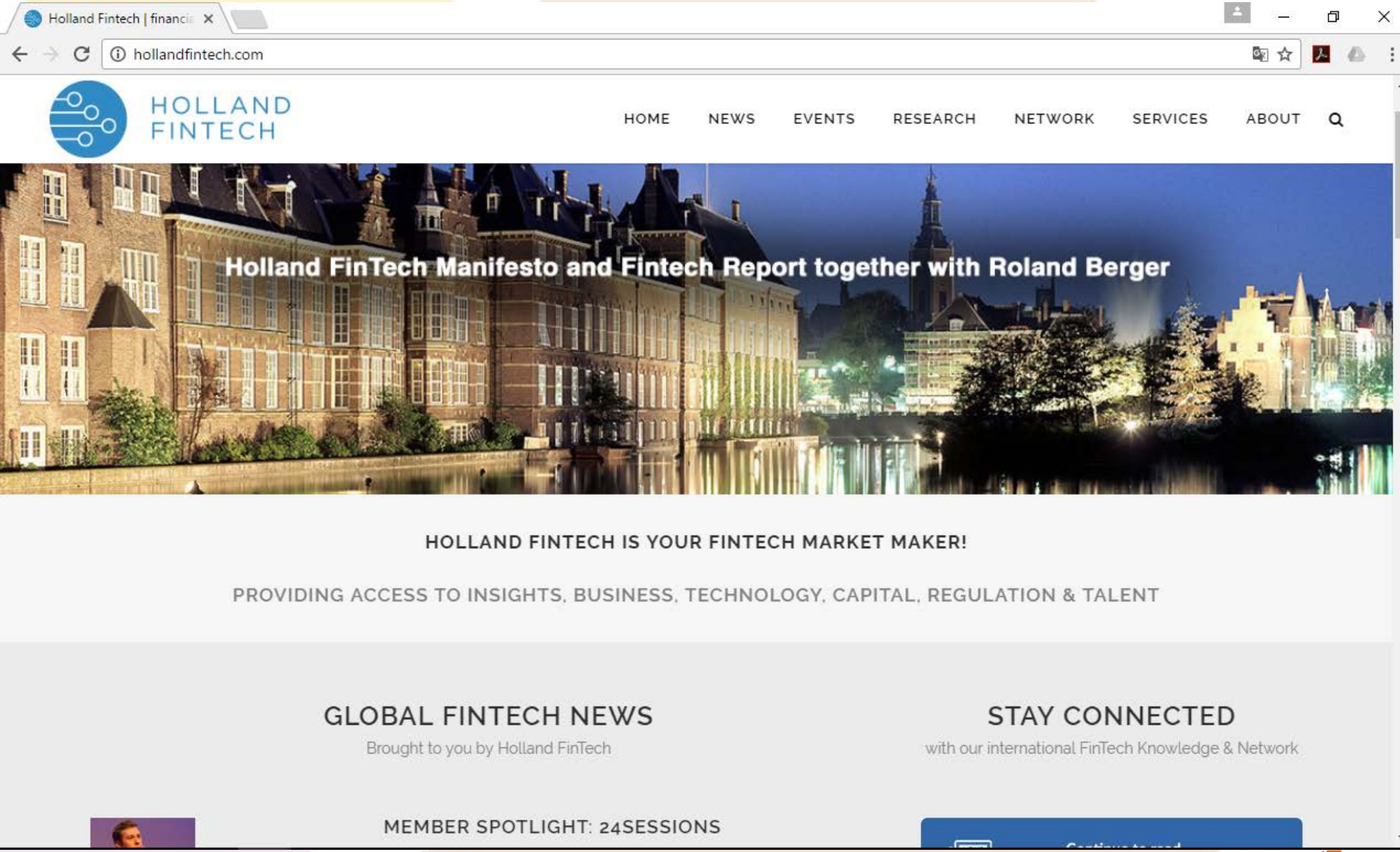
E. Communication



E. Communication

19. Stimulate associations
    - Dutch Bank Association
    - Foreign Bankers' Association
    - Holland FinTech
    - Sustainable Finance Lab
    - Dutch Association of Insurers
    - Dutch Fund and Asset Management Association
20. "Cést le ton qui fait la musique!"

Thanks for your attention!

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