

Expansion into the US



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1 Profile BCI Global

Corporate clients

- Business strategy development
- Manufacturing footprint strategy
- Location advice
- Supply chain optimization

Profile

- Established in Nijmegen, the Netherlands in 1985
- Offices in
 - Europe: The Netherlands, Frankfurt
 - US: Atlanta, San Mateo, Los Angeles
 - Asia: Shanghai, Singapore, Taipei, Delhi
- 75 professionals
- Performed studies in more than 50 countries worldwide



40 years of experience as a boutique supply chain and implementation firm in the Industry



Clients in High Tech



North America Manufacturing Projects



2 Expanding Operations

Do you recognize one or more of these challenges when discussing expanding in North America?



The US market is complex

Substantial differences exist between US and Europe, but also between individual US States

Economics

- Market size
- Buying power
- Growth/ outlook
- Innovation
- Connectivity
- Etc.

Finance

- Corporate taxation
- Subsidies/
Economic incentives
- Tax deductions
- Etc.

Legislation

- Labor and immigration laws
- Intellectual property
- Export/import
- Etc.

Culture

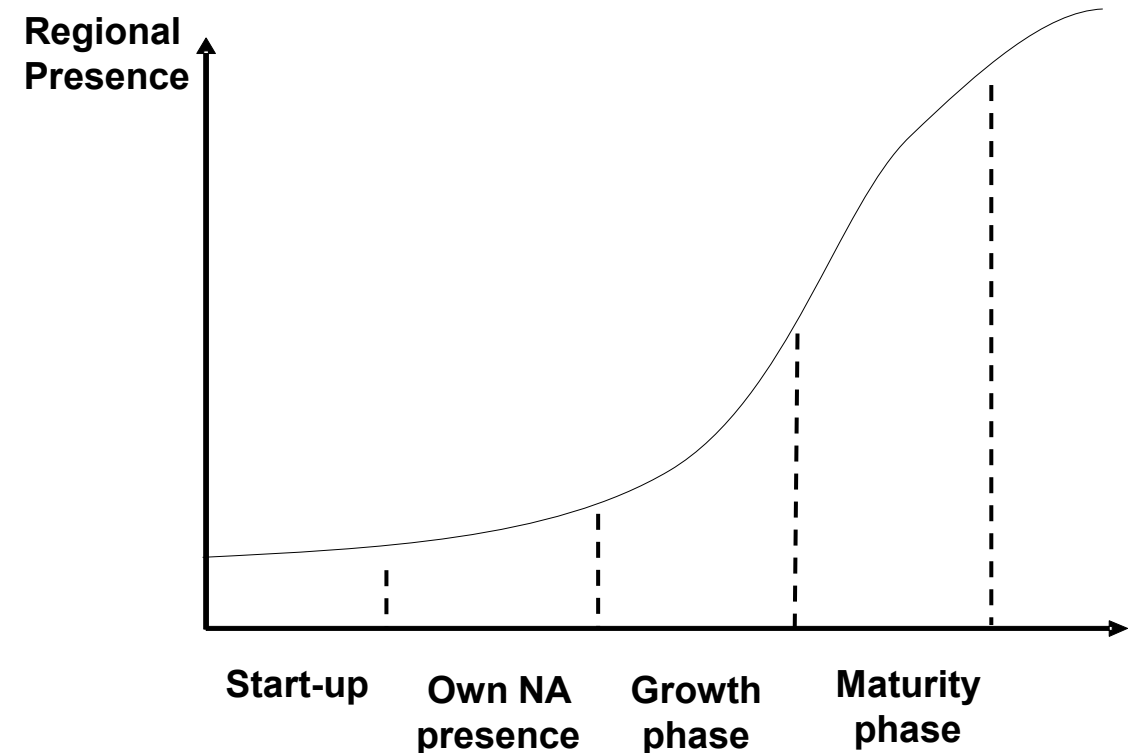
- Language
- International orientation
- Business practices
- Etc.

From Dutch companies this requires:

- Awareness and taking into account implications of differences with Europe/NL
- Willingness to commit resources to obtain market expertise
- A differentiated US market strategy and a dedicated business plan

In developing your business in North America, the challenges are different in each phase of the business cycle

Phase	Key challenge
1 Start-up	<ul style="list-style-type: none">• Is there a market for our product/services in the US?• Identification & selection of business partners
2 Own NA presence	<ul style="list-style-type: none">• Start-up with a tailor-made market proposition and good after sales & technical support
3 Growth	<ul style="list-style-type: none">• Increase of sales & market share while guaranteeing the right distribution network & customer support organization
4 Maturity	<ul style="list-style-type: none">• Maximize sales with minimal costs while developing new products/technologies



Typical questions that call for an answer in realizing North American expansion opportunities



Technology & Product development

- Does our technology comply with US legislation?
- Can we sell our products (standardized) on a national base or is localization/adaptation necessary?
- Whom can we collaborate with in product development?

Sales & Marketing

- Is there a market for our products?
- What are the most attractive States to do business?
- Do we need to use agents/distributors or we better appoint own sales reps?
- Who is doing the technical support or repair?

Logistics & Distribution

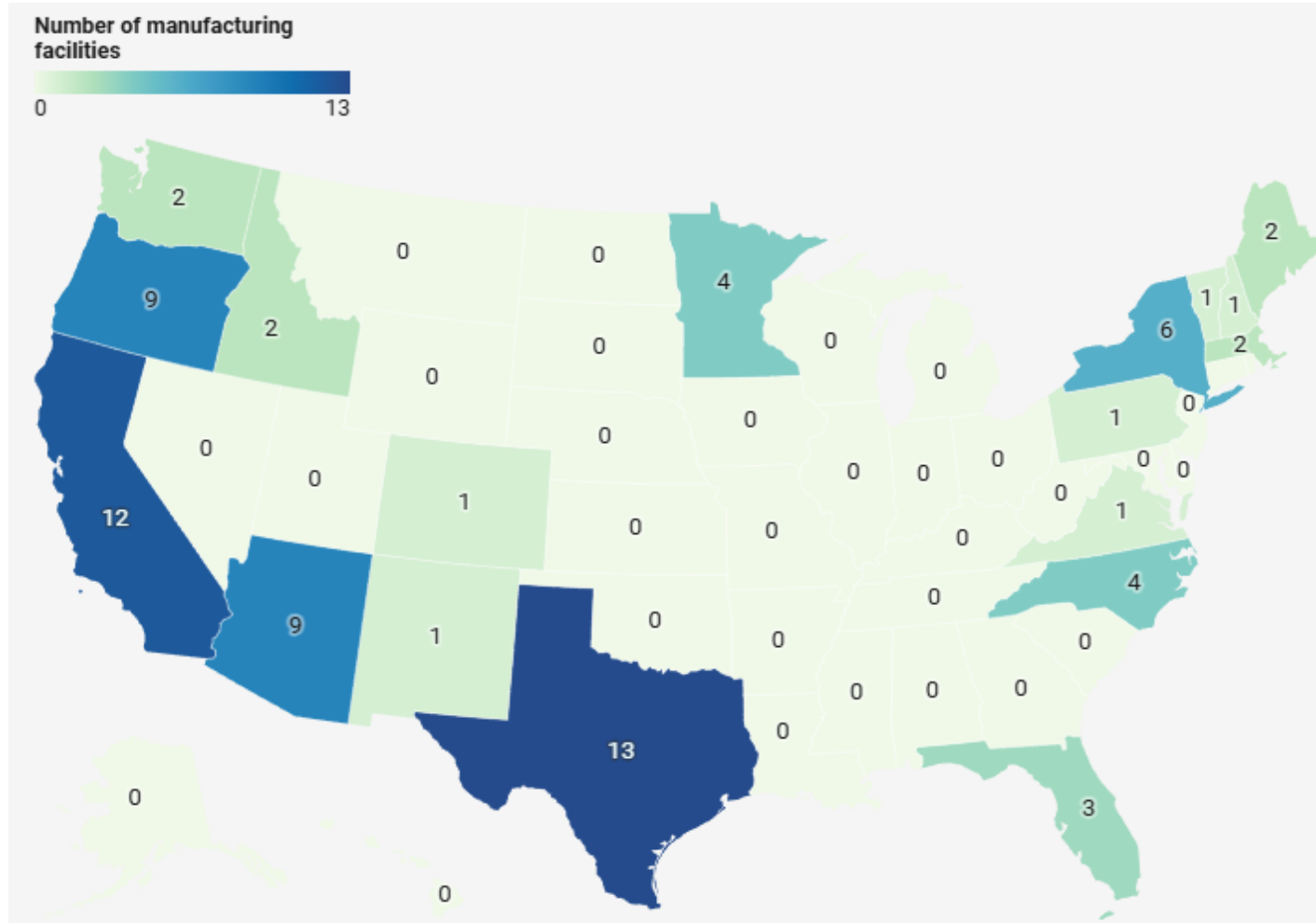
- Where do we keep stock? Who will take care of the physical distribution?
- What is the most efficient way to get our products to our customers?
- Which are the best logistics services providers to work with?

Manufacturing

- Which part of manufacturing do we keep in-house versus what do we outsource to specialized CMOs?
- Where to locate a production/assembly plant?
- How to compare States in the US with NL on (production) costs, quality of the business environment and risks?

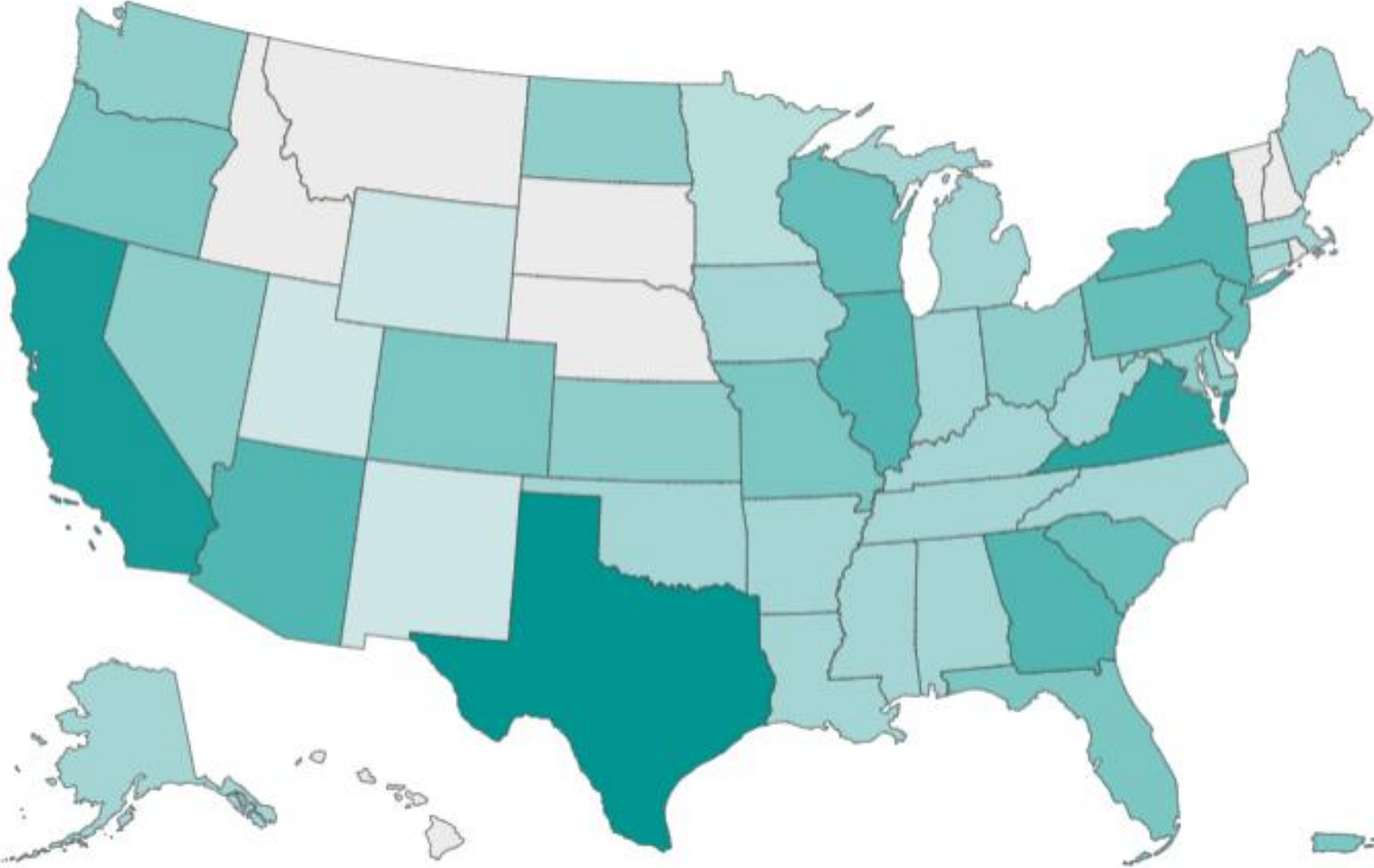
3 The US Investment Landscape

Semiconductor Manufacturing facilities in the United States



Source: Technology in Global Affairs, 2026

Regional pattern of Greenfield FDI 2017-2024 in Semica



Source: FDI, 2025

Huge variety of companies involved in the semicon value chain

Fab

**Lithograph
machines**

Chip design

MPU production

Metrology

Lasers

**Wafer
processing
equipment**

Industrial gases

.

. with all different sets of location requirements

How to Find a New Location?

Framework - The proven BCI methodology ensures a balanced comparison of locations:

Cost + Quality + Risk



Site Selection Process: narrowing down from long list to site level

Stage A

Start up:
Definition investment profile and location requirements

Stage B

Quick scan:
Limiting the search area to target areas

Stage C

In-depth assessment selected target areas

Stage D

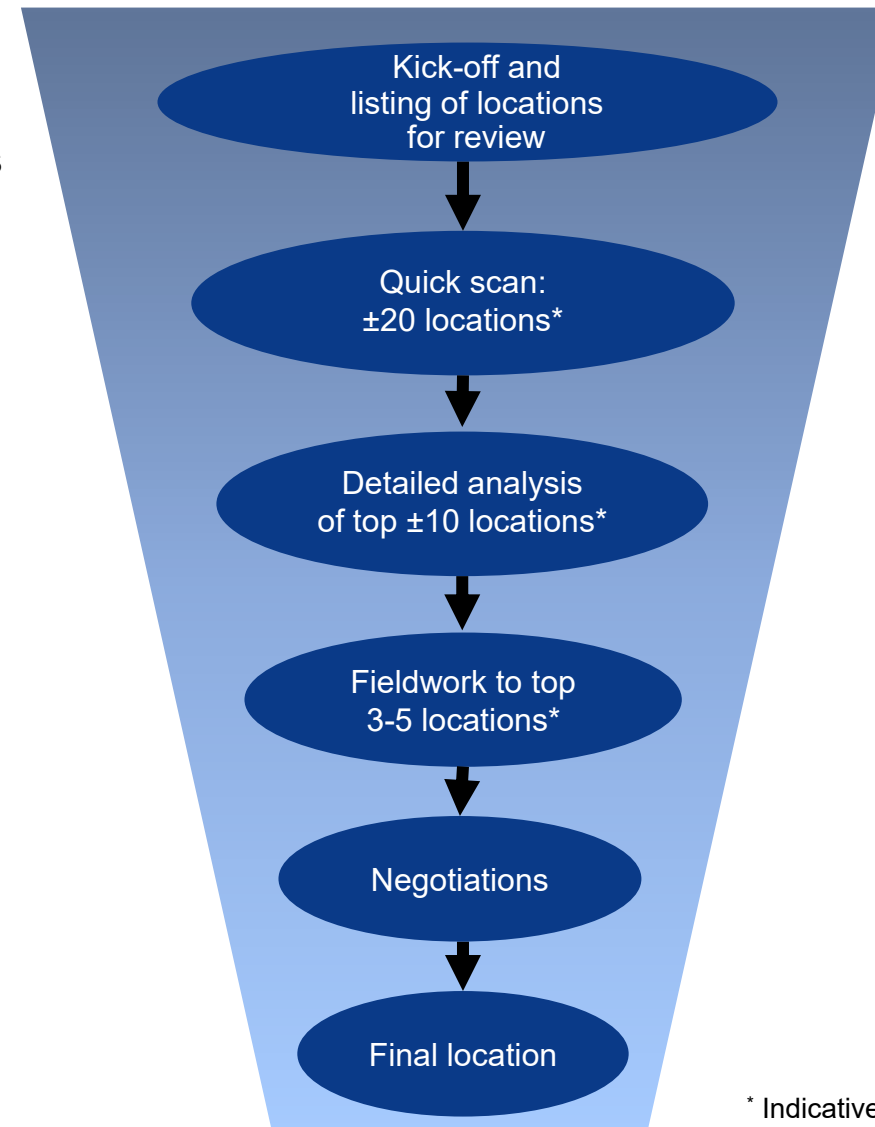
Identification of sites and fieldwork

Stage E

Negotiations

Stage F

Final choice



* Indicative number

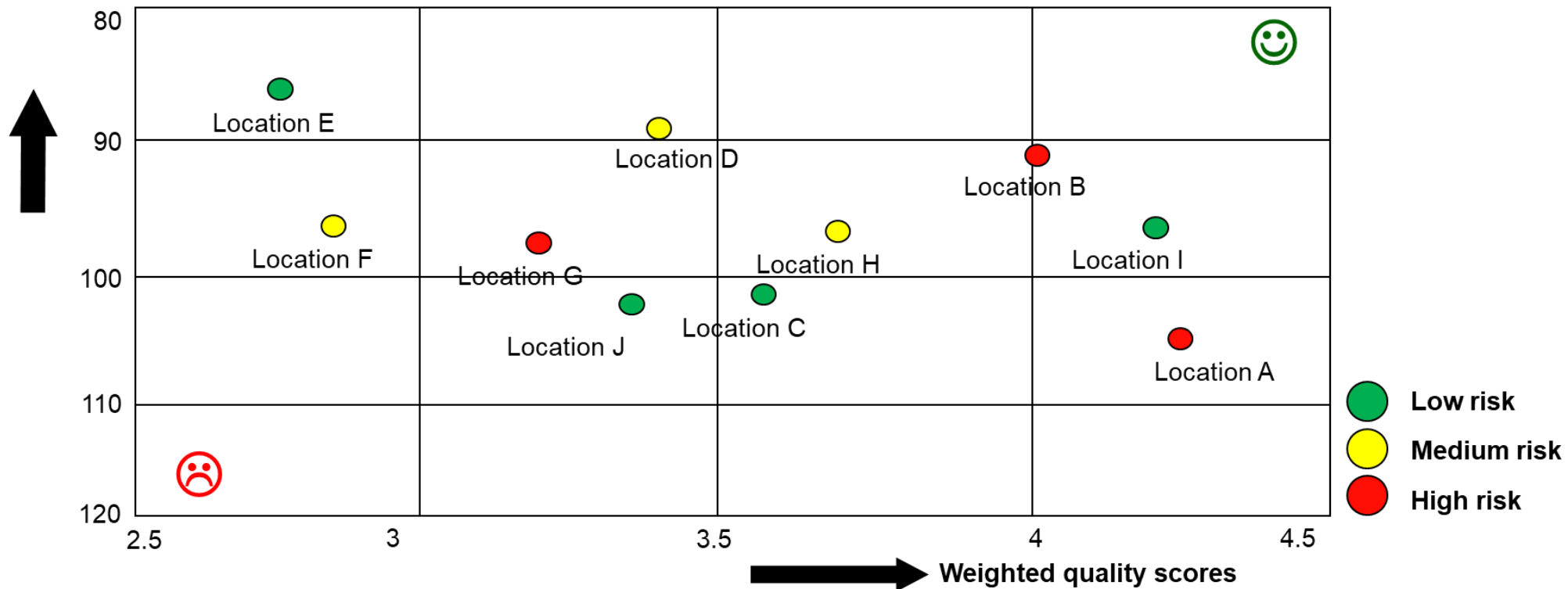
CQR-Matrix (including incentives)

EXAMPLE



Example: Project specific site selection results for a production plant in perspective: cost-quality-risk assessment

Index Total costs in million USD/Euro for first 5 years (all operating costs -/- investment incentives)



Low risk
Medium-low risk
Medium risk

Incentives & Taxes

View of BCI

- Economic incentives will never make a bad location a great location
- The new operations will run for 10-15 years, incentives are often one-time benefits

But also

- Incentives can substantially reduce investment costs and annual operating costs
- Incentives can bring other locations into the game

Key Benefits

- Minimization of front end CAPEX
- Reduction of one-off infrastructure/ utilities connection costs
- Reduction or (partial) exceptions of taxes/ tax liabilities
- Reduction of real estate costs (investment or lease costs)
- Reduction of personnel costs (social security contributions; recruitment costs; training costs)

Realistic-Ambitious

Wide variety of incentive issues

Type of project

- Greenfield
- Expansion
- Retention
- M & A

Types of incentives

- Investments
- Land / sites / buildings
- Technology/ R&D
- Talent
- Taxes
- Energy & environment

Stakeholders at different geographic levels involved

- Country / State
- Region / metro
- City
- Industrial or office park / building

Euros / Dollars

- Eligibility criteria
- Upfront vs ongoing
- Amount
- Timing
- Approval processes
- Red tape during incentive period

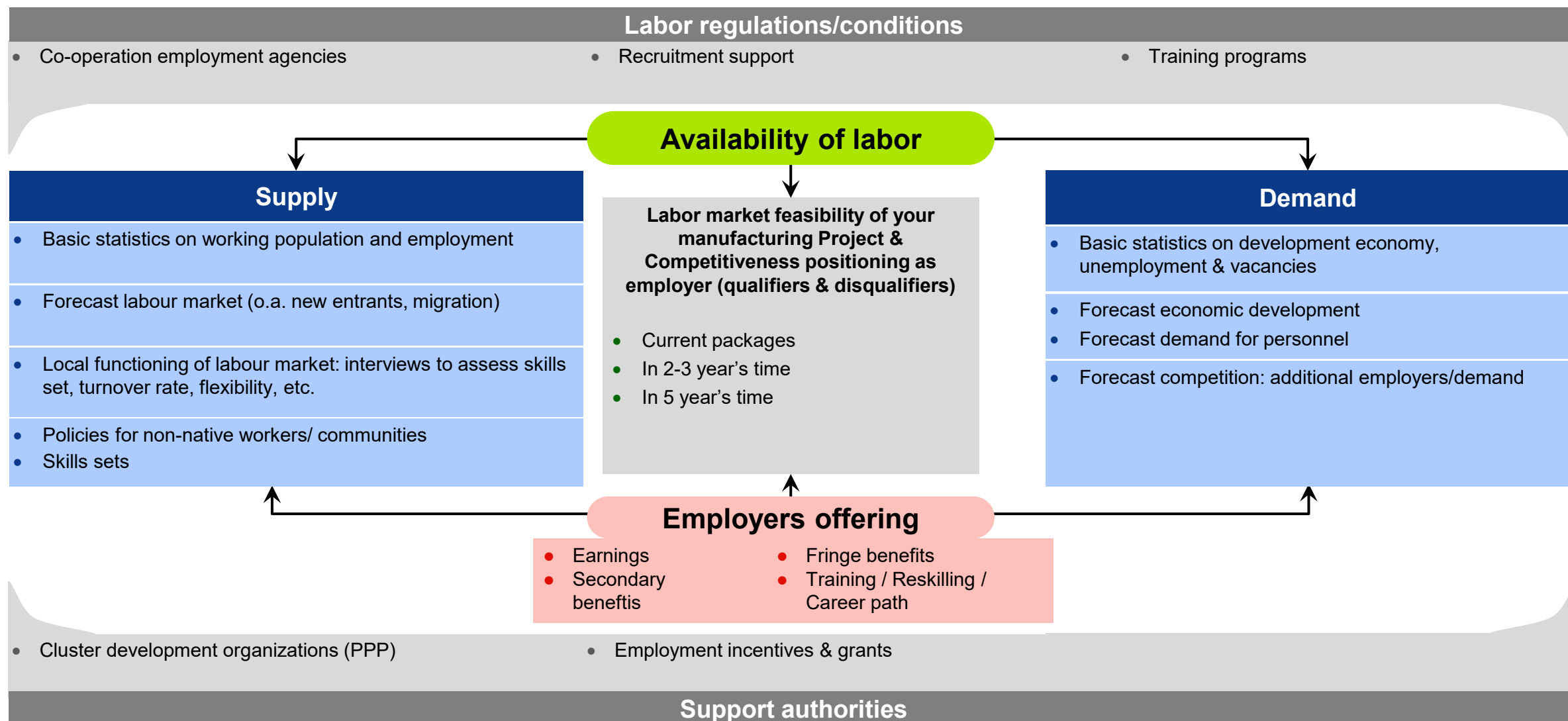
Soft incentives

- One-stop-shop
- Permitting
- Recruitment assistance
- Supplier search

Different practices in different geo's

- US
- Mexico
- Canada
- LATAM

Assesing Labor Markets: BCI's IDEAL-method for labor market analysis



Employer Offering & Branding - Re-define your employee value proposition



A Earnings

- Difference between levels (entry-experienced)
- Gross wages
- Standard performance bonus (mandatory)
- Overtime compensation
- Shift premiums
- Expected wage increase

B Secondary benefits

- Vacation days
- Insurance benefits
- Paid sick leave
- Pension
- Education tuition
- Performance bonus (specific)

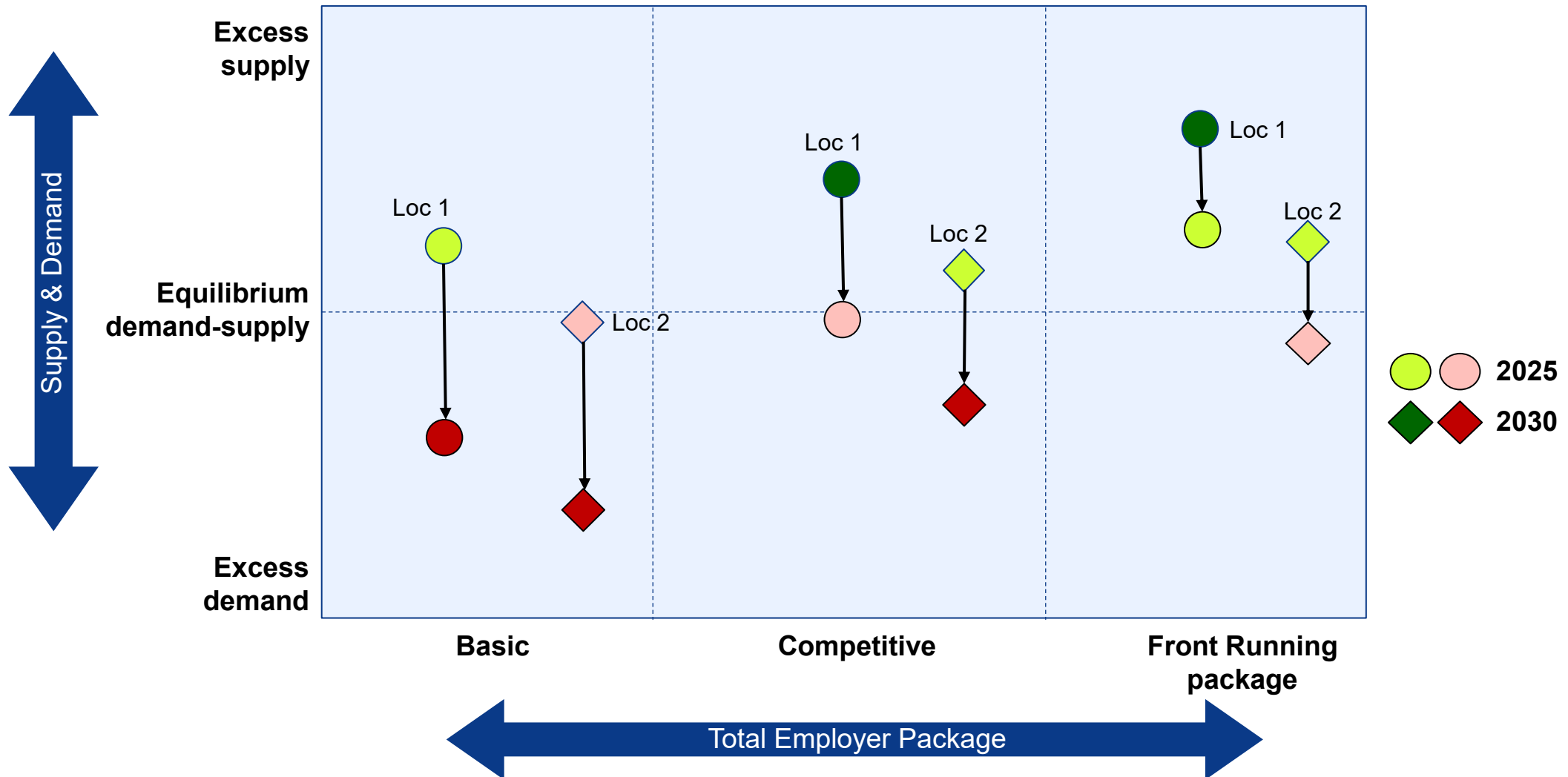
C Fringe benefits

- Flexibility in working schedules
- On-site childcare
- Wellness/fitness program
- Facilitation transport

D Career development

- Clear career path
- Education
- Formal trainings
- Certificates

Results of IDEAL



4 Conclusions

Opportunities

- Growth of the market
- High speed of developing and adapting new knowhow/ technology
- Strong regional ecosystems
- Substantial financial support

Challenges

- Conquering position in a crowded market
- Labor market challenges (including Visa)
- Expect 'NL Problems' – lack of large sites, utilities, environmental regulations
- Continuity & consistency in Governmental policies