

LOCATION ANALYSIS

Analyzed close to 150 locations across the globe

ABOUT THE OFFERING

- Region/Country/Location Analysis
 - Includes comparison across 150 locations
 - Future outlook and policy level analysis
 - Customized database creation
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- Service offerings can be used for
 - Growth Strategy
 - Location Analysis
 - Capacity Expansion
 - Policy Advisory

SUITABILITY ASSESSMENT FRAMEWORK

Suitability Assessment	
Macroeconomic Environment	<ul style="list-style-type: none"> Czech Republic is one of the most stable and prosperous of the post-Comm. GDP grew at a rate of ~6% in 2005 and 2006 – faster than average world Czech currency, Koruna, appreciated ~10% against the U.S. dollar last year trade performance; Koruna is expected to appreciate by ~3% annually Moderate wage growth and strong Koruna have kept inflation under control
Infrastructure	<ul style="list-style-type: none"> Quality of infrastructure in Czech Republic exceeds that of almost all other Czech Republic boasts 100% paved roads and 112 cell phone connections Czech Republic has only one SEZ and no major technology park
Labor Economics, Availability and Quality	<ul style="list-style-type: none"> Czech Republic's key strength is its highly skilled low cost labor work force High demand in the automotive sector has put inflationary pressure - wages Czech labor force is more tightly regulated than that of other Eastern European Unemployment rate in the Czech Republic is ~3%
Services expertise	<ul style="list-style-type: none"> Low costs, good cultural compatibility with Western countries and strong language skills have established Czech Republic as an international service provider Financial Services, Help Desk, Sales & Marketing are the key strengths of the Czech Republic's service industry DHL is shifting activities from Britain to Czech Republic, as labor cost is 30-40% lower
Domain expertise	<ul style="list-style-type: none"> Automotive sector is an important contributor to the Czech economy – accounting for ~15% of the economy Importance of the automotive sector is demonstrated by the impact changes in vehicle production have on industrial performance OEMs in the Czech Republic include Skoda, Hyundai, KIA, Peugeot, Toyota, and Citroen Local parts content is high – ~80% in case of Toyota Peugeot-Citroen plant The high popularity of the Czech Republic as a production base in the recent years has eroded some of its competitive edge – with surrounding low cost countries gaining popularity as a result

- Macroeconomics
- Cost Modeling
- Infrastructure
- Labor Regulations
- Talent Pool
- Service Expertise
- Domain Expertise

FDI INVESTMENT ANALYSIS

Food & Beverage...

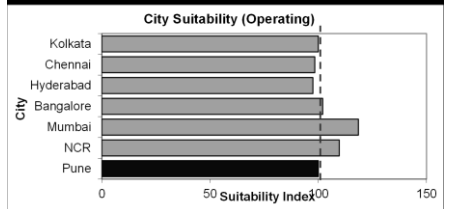
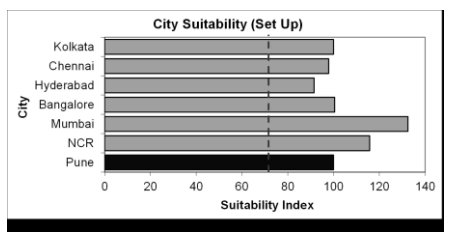
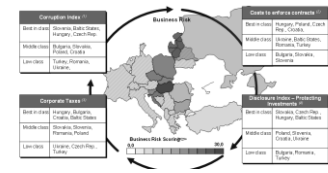
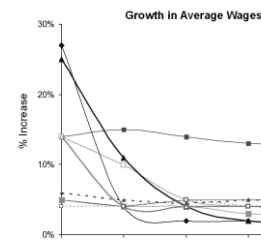
- DANONE
- Coca-Cola
- KRAFT
- U
- bel
- Peugeot-Citroen



...continued

- NESTLE
- SAB MILLS
- Other
- SIEMENS
- Gaithemal
- DELPHI
- Volvo
- BOSCH

DETAILED ANALYSIS ON KEY ATTRIBUTES



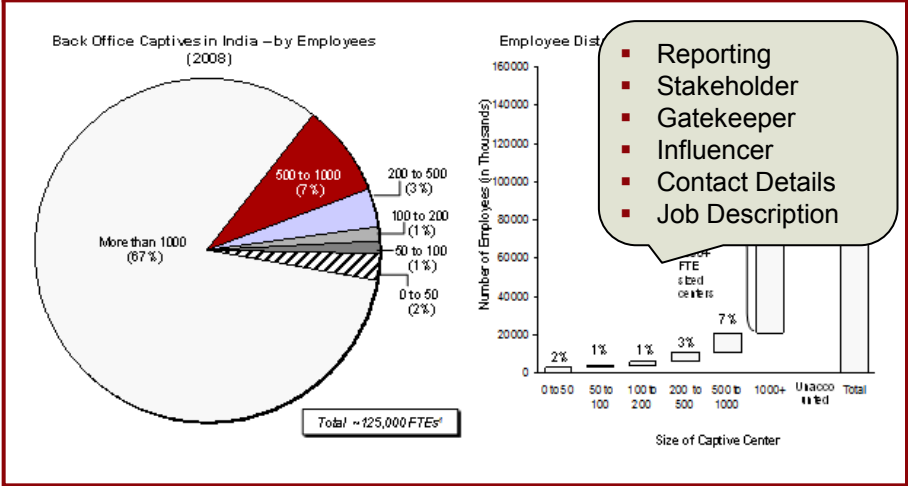
TALENT POOL ANALYSIS

Done across IT/ITeS, technologies, engineers, and trained blue collar workers for major locations

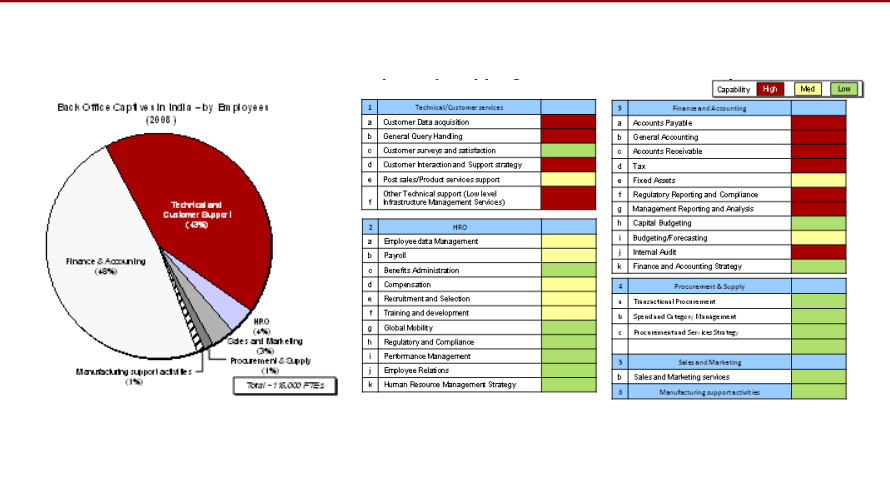
ABOUT THE OFFERING

- Understanding around various skill sets
 - Detailed talent pool database creation
 - Flexible talent-pool modeler
 - Mapping wages/soft issues and future projections
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- Service offerings can be used for
 - Location Analysis
 - Capacity Expansion
 - Cost Benchmarking

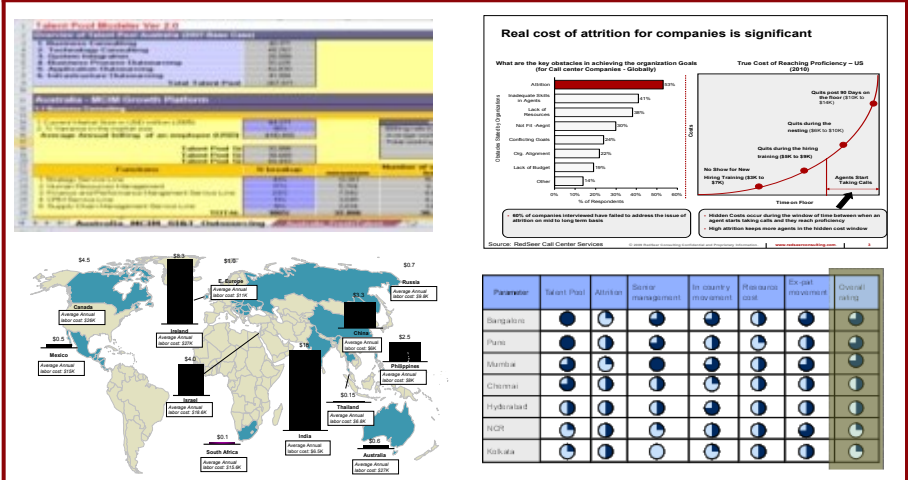
DASHBOARD ON TALENT POOL



BY SKILL SET TALENT ANALYSIS



ANALYZING THE KEY ATTRIBUTES



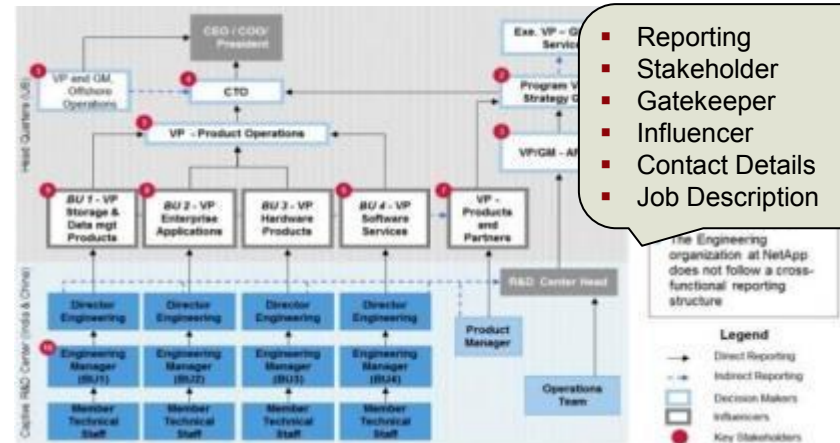
ORGANIZATION MAPPING

Done close to 12 exercises across 5 industries and all major geographies

ABOUT THE OFFERING

- Mapping and analysis of detailed organization structure
 - Identifying the key positions and its role
 - A detailed description of decision making criteria and agenda and issues at every level
 - Brief outlook on how the future strategy might look like
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- Service offerings can be used for
 - Organization Structuring
 - Sales force Effectiveness
 - Operation Benchmarking

ORGANIZATION MAPPING FRAMEWORK



KEY STAKEHOLDER ANALYSIS

Position	Name	Location	Description
President and Chief Executive Officer	Gerard Kleiweide	Netherlands	• Is the Chairman of Philips Board of Management and Group Management Committee
CTO - Corporate research & Technology group	Rick Harwig	Amsterdam, NL	• Corporate responsibilities: Technology Management, Research Applied Technologies, Incubation, Intellectual Property & Standards, Molecular Diagnostics
CEO of Philips Healthcare	Steve Rusckowski	Netherlands	• Rusckowski was previously the CEO of the Imaging Systems business group of Philips Healthcare. He was appointed Chief Executive Officer Philips Healthcare and member of the Group Management Committee in 2007
CEO of Philips Lighting	Rudy Provoost	Netherlands	• Is responsible for Lighting Sector and Sales Leadership Board
CEO of Philips Consumer Lifestyle	Andrea Ragnetti	Netherlands	• Corporate responsibilities: Consumer Lifestyle Sector, Design
Storage Business Group - GM	NA	NA	NA
Connectivity Business - GM	NA	NA	NA
Digital Video Business - GM	NA	NA	NA
Display Business Group Head	NA	NA	NA
Sr. VP of Philips International BV and Head of Corporate Sustainability office	Henk de Bruijn	Netherlands	NA
Vice-Chairman and Managing Director, Philips India	R. Ramachandran	India	• Handles India Operations
Vice President - Healthcare	Nick Padula	New York, US	• Responsible for leading large teams, and driving significant market share growth of capital equipment and services
R&D Director	Claude Simon	Greater South Area	NA

ANALYZING THE KEY ATTRIBUTES

Prioritization of Decision Making Criteria

