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DEVELOPERS ASSOCIATION

FDI in a Changing World:
Trends, Drivers, and Opportunities for Michigan

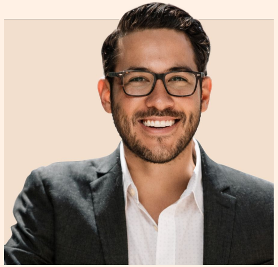
The Michigan Economic Developers Association
5 August, 2026

Contents

01 Introduction

Nice to meet you!

FDI in a Changing World: Trends, Drivers, and Opportunities for Michigan



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Guillermo has 19+ years of experience in FDI & Trade, and economic development Guillermo has worked with and educated thousands of government, corporate, and economic development leaders worldwide, with extensive experience advising economic development organisations on their digital marketing, branding and investment promotion strategies.

Guillermo's expertise in developing compelling global marketing and attraction strategies, along with his deep understanding of global economic development trends and effective location positioning, makes him an invaluable asset for clients looking to improve their organizational performance and investment attraction capabilities.

Areas of expertise

- Marketing for investment promotion
- Diagnostic evaluation of IPAs
- Marketing and strategy
- Development of the FDI narrative
- Digital lead generation
- Training and professional development

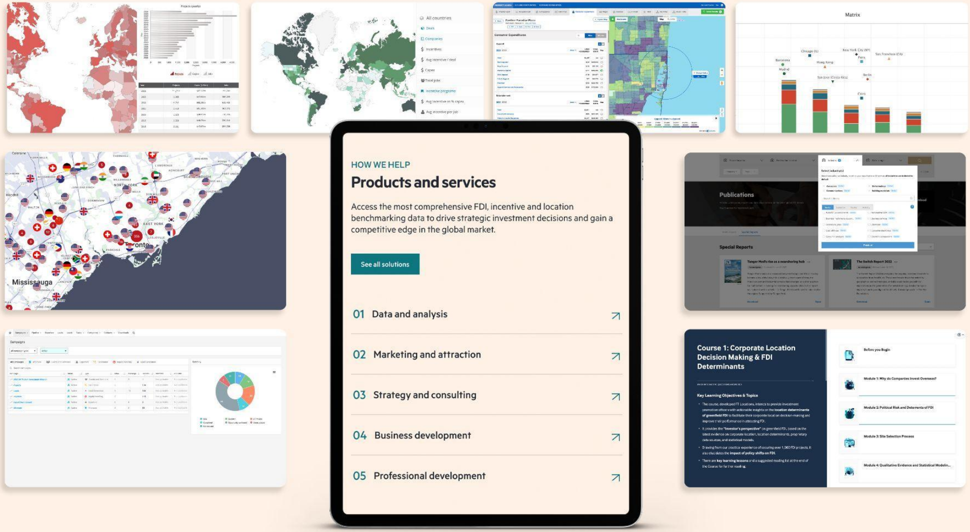
FT Locations - A world leader in investment attraction & FDI solutions

Trust insights over instinct, decisions driven by intelligence

FT Locations, a distinguished business unit of the Financial Times Group, is the global leader in foreign direct investment (FDI) and location intelligence solutions.

Our dedicated team of over **80+ FDI experts** offers bespoke insights and strategies to drive investment and stimulate economic growth for our clients.

Through our suite location intelligence solutions, we provide the data-driven insights, sector expertise and tools to help our investment promotion clients compete for investment with confidence. As the most comprehensive provider of FDI products and consulting, we are the only firm in the world that can utilise the full extent of FT's media platforms, editorial insights, data, and subscriber base to craft impactful, data-driven investment promotion strategies.



1.8k

Active clients

Across all products and services

1.3m

FDI data points

Analysed through our proprietary databases

FT LOCATIONS

How we got here

A deep focus on the data and analysis products and services that support investment attraction

2001

fDi Magazine
fDi Magazine was launched as a publication from the Financial Times Group

2008

fDi Intelligence
Financial Times Group acquires products from OCO Consulting and the fDi Intelligence brand is launched

2017

GIS Planning
Financial Times Group acquires Silicon Valley company GIS Planning

2023

Wavteq
Financial Times Group acquires Wavteq product and consulting assets

Three brands combine to launch FT Locations, a specialist division of the Financial Times dedicated to location intelligence

2024

FT LOCATIONS

FT Locations is special business unit of the Financial Times Group who works to help economic development, corporate and government organizations **analyse, promote and attract** investment through through the world's most powerful suite of our software and consulting solutions.

How are we different

Unmatched value backed by the full power of the Financial Times

As the most comprehensive private sector FDI organisation with over 80+ specialists, we provide the data-driven insights, sector expertise and tools to help them compete for investment with confidence.

We are the only firm in the world that can utilise the full extent of FT's media platforms and business units, editorial insight, and subscriber base to craft impactful, data-driven investment promotion strategies.

FT LOCATIONS

Provides products and consulting for investment attraction and analysis

fDi Intelligence

Produces custom content and reporting on global investment trends and opportunities.

FT LIVE

Hosts targeted lead generation events and roundtables for thought leadership and prospect development

FT STUDIO

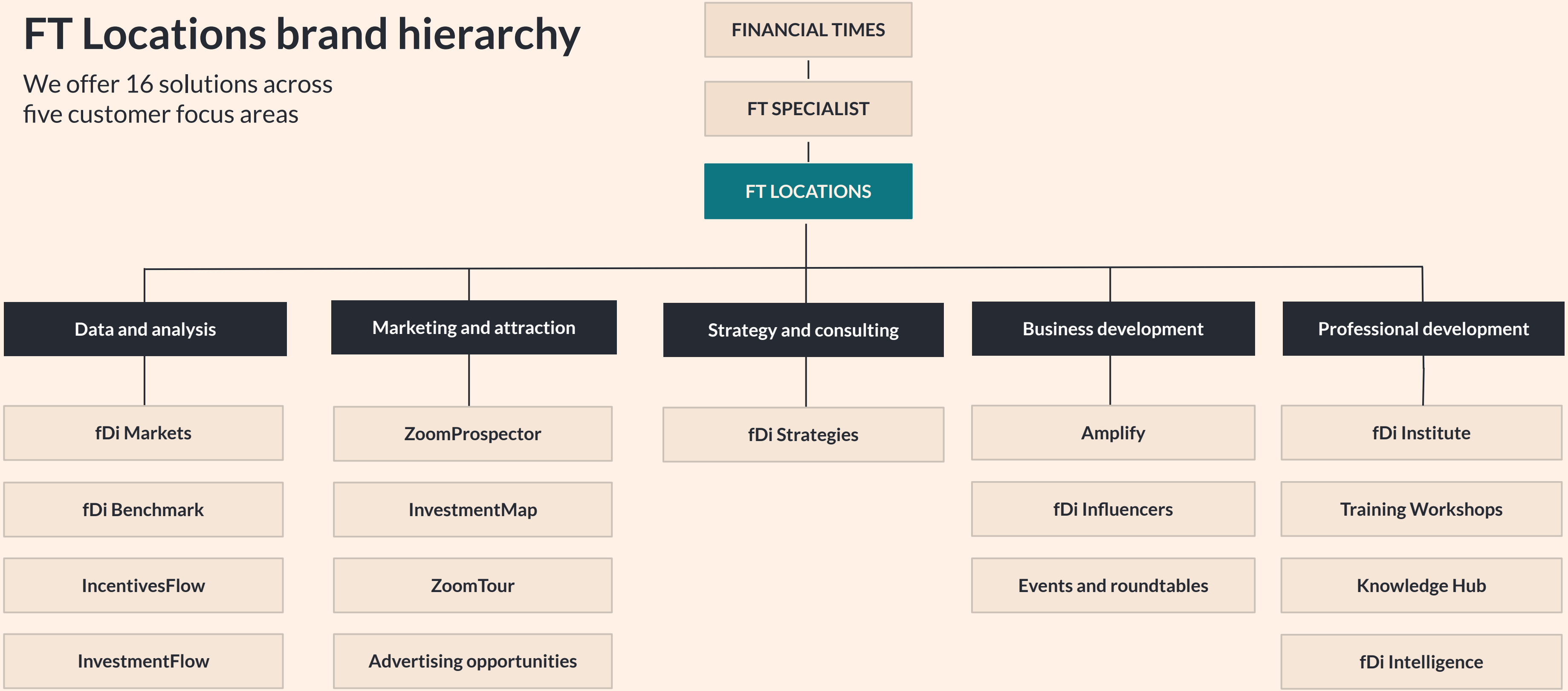
Creates branded multimedia content for impactful storytelling

FT PROFESSIONAL

Provides corporate surveys and insights focused on a corporate audience

FT Locations brand hierarchy

We offer 16 solutions across
five customer focus areas



02 Understanding FDI: Fundamentals and importance

What is FDI?

Foreign Direct Investment

Simply put, FDI is when a company establishes business operations abroad.

For the most part, foreign direct investors merge with or acquire businesses that already exist overseas or set up brand new operations of their own (known as greenfield FDI).

Why Care?

FDI is a viable tool to diversity your economy

Foreign firms in the United States **hire more skilled workers** and **invest more in worker training** than domestic firms.

Spend more than double the private sector average on benefits per worker.

Research suggests **$1 in FDI Leads to $1 in domestic investment**

Projects tend to **have a larger multiplier effect on the economy.** (ie 1 FDI manufacturing job creates 3 in direct local jobs *)

The indirect benefits of FDI are company, project and location-specific and are influenced by the government policies to help foreign investors do more in a particular location.

Source: World Economic Outlook, International Monetary Fund, 2019, Brookings, Source: fDi Intelligence based on IFC studies, Driffield and Hughes (2003) and Richards and Schaefer (February 2016

EDOs' strategic approach to traditional FDI vs non-traditional FDI

Traditional FDI

- New physical operations (greenfield)
- Brownfield investment (in existing sites, typically by a new company)
- Business expansion / Re-investment (of an existing operation)

Non-traditional FDI

- Mergers and acquisitions (M&As)
- Joint ventures (JVs)
- Non-equity modes (NEMs): Subcontracting, licensing and franchising
- Public-private partnerships (PPPs)

Source
FT Locations, *fDi Institute*, 2026

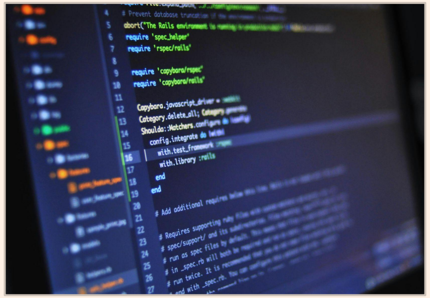
The four fundamental factors driving companies' investment

Resource-seeking

Companies seek natural resources such as oil, minerals, or agricultural products.

Market-seeking

Expanding into new markets to overcome trade barriers, transport costs, and tap into local demand.



Strategic asset-seeking

Acquiring local knowledge, technology, infrastructure, or innovation.

Efficiency-seeking

Companies look for cost advantages, such as lower production or labour costs.

Source
Dunning, J.H. (1993). *Multinational Enterprises and the Global Economy, 1993*

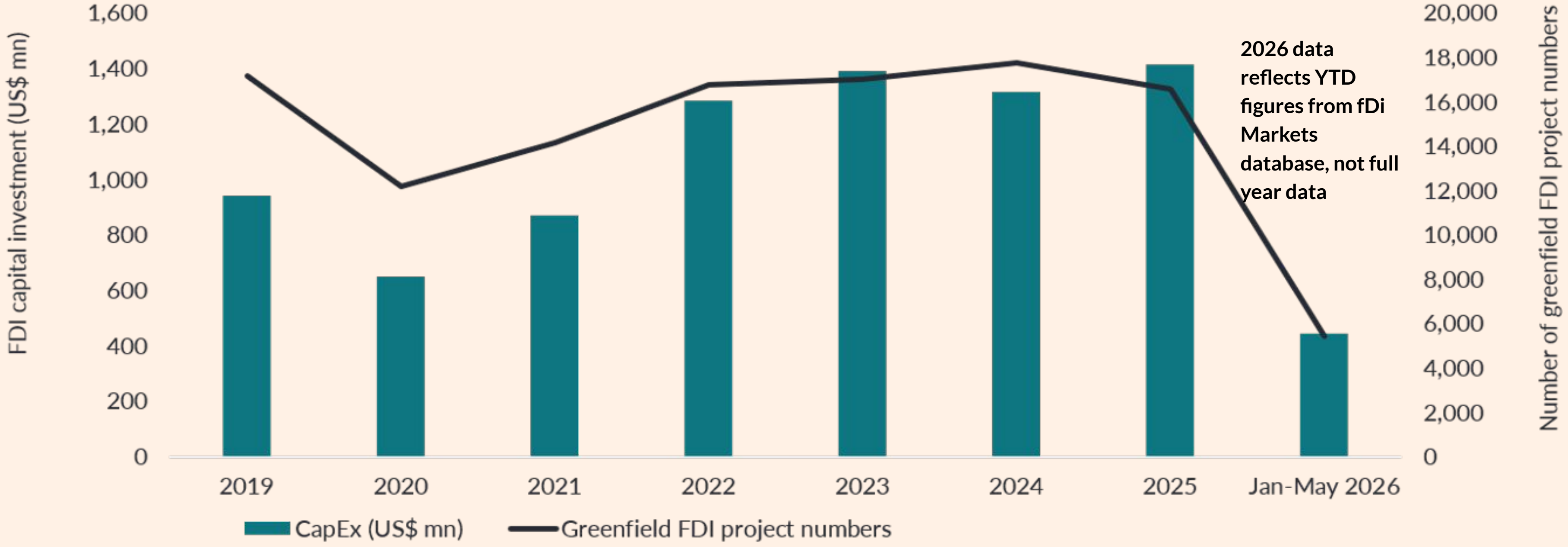
The strategic policy objectives behind FDI attraction

Source
FT Locations, *2026*

03 Global FDI trends in a transforming world

Global greenfield FDI facing early headwinds in 2026

Global greenfield FDI projects and capital investment, 2019-May 2026



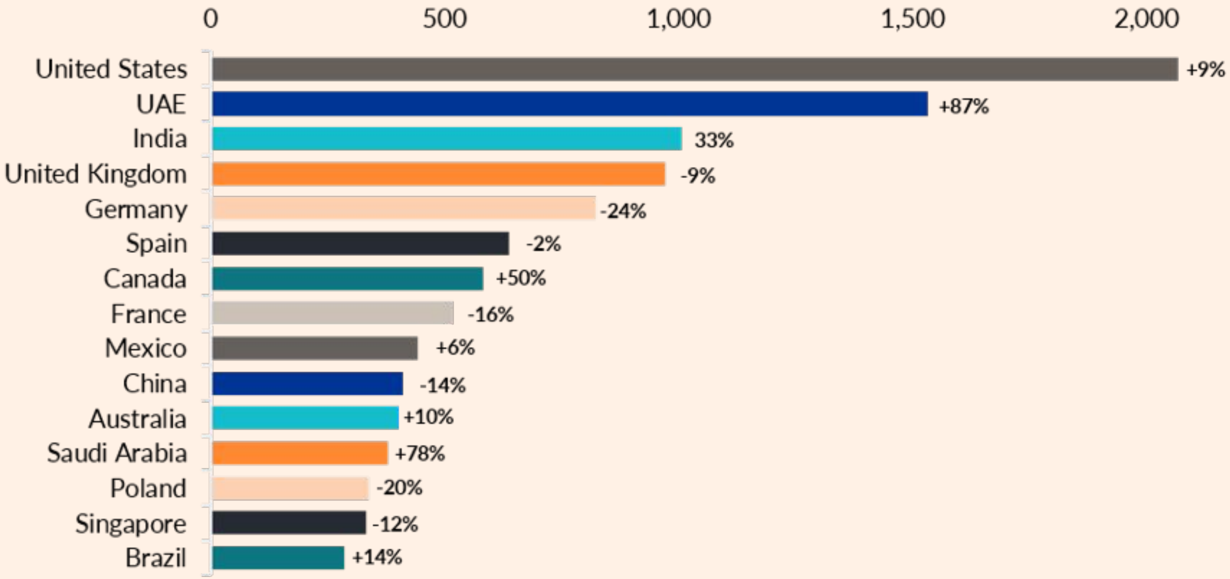
Source
FT Locations, *fDi Markets*, 2026
*Capital investment data includes estimates

Notes
Data includes announced and opened projects and does not capture all FDI projects. Data excludes retail FDI

Inbound: The US, UAE, and India retain the top three places for greenfield FDI attraction in 2025

Top destination countries by number of greenfield FDI projects in 2025

±% = Percentage change 2025 vs. 2019-2024 average



Key trends

- US retains global leadership in greenfield FDI
- The UAE and India consolidate their position among the world's leading destinations
- Emerging markets such as Saudi Arabia, Brazil, and Mexico continues to grow as inward investment hubs
- Europe and China remain under pressure from economic and geopolitical headwinds

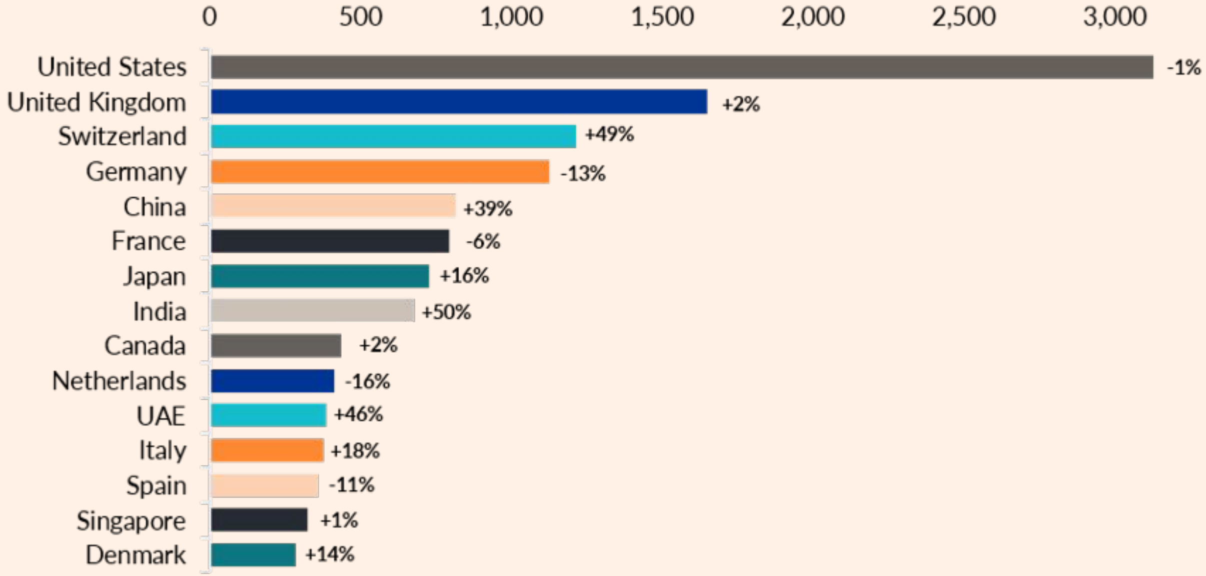
Source
FT Locations, *fDi Markets*, 2026.
Available at ftlocations.com/fdimarkets

Notes
Data includes announced and opened projects and does not capture all FDI projects.
Data excludes retail FDI

Outbound: The US and European countries remain the largest source markets, however traditional sources of capital are scaling back investments

Top source countries by number of greenfield FDI projects in 2025

±% = Percentage change 2025 vs. 2019-2024 average



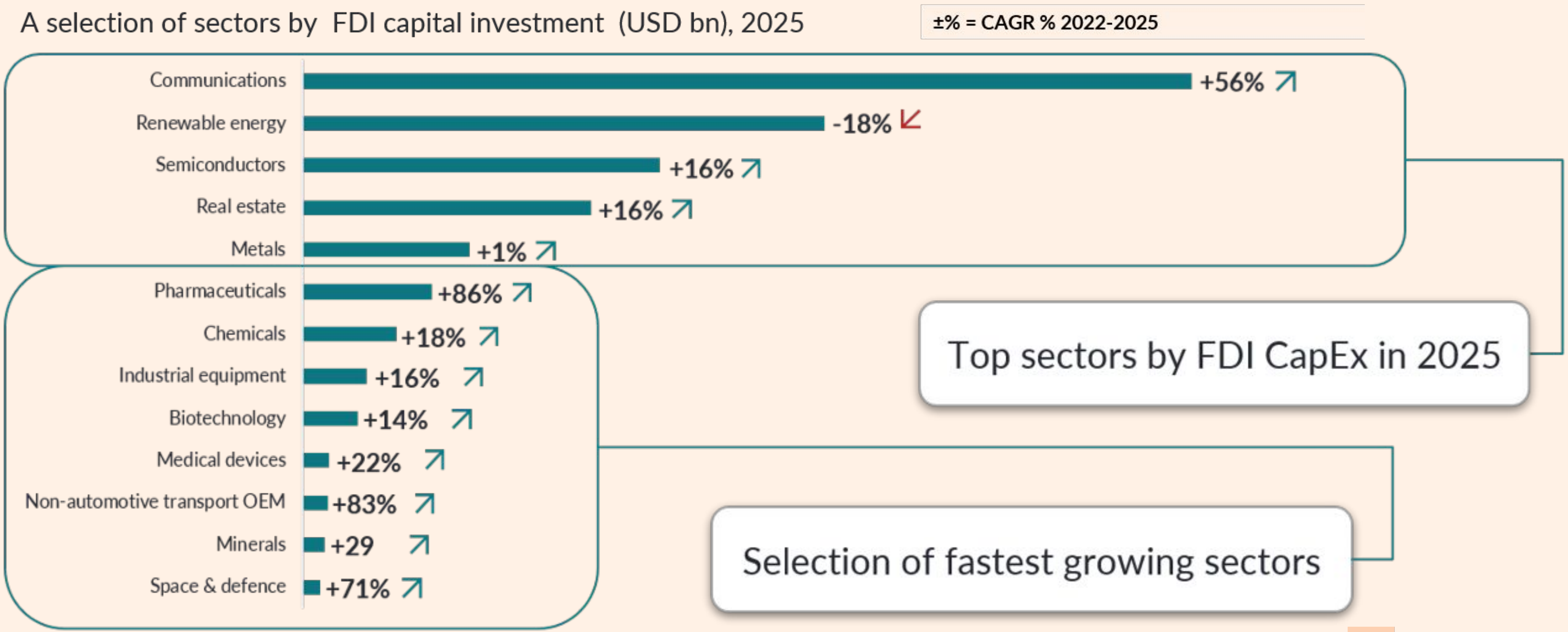
Key trends

- The US remains the world's largest source of greenfield FDI despite a stagnation in outward investment numbers
- European firms remain major investors despite weaker outward investment growth
- Asian source markets are expanding, led by China, Japan, India and the UAE
- Capital is being sourced from increasingly more geographically diversified markets

Source
FT Locations, *fDi Markets*, 2026.
Available at ftlocations.com/fdimarkets

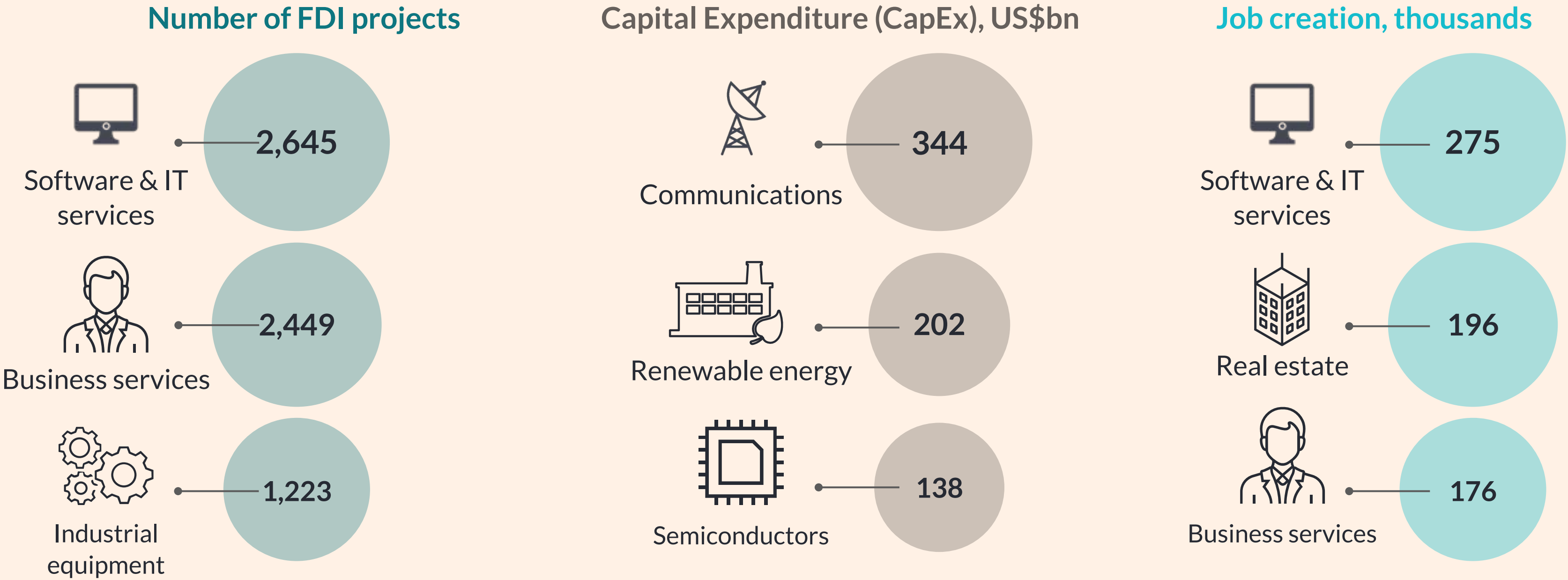
Notes
Data includes announced and opened projects and does not capture all FDI projects.
Data excludes retail FDI

Strategically sensitive sectors are among the most resilient and fastest-growing in FDI



Source
FT Locations, *fDi Markets*, 2026

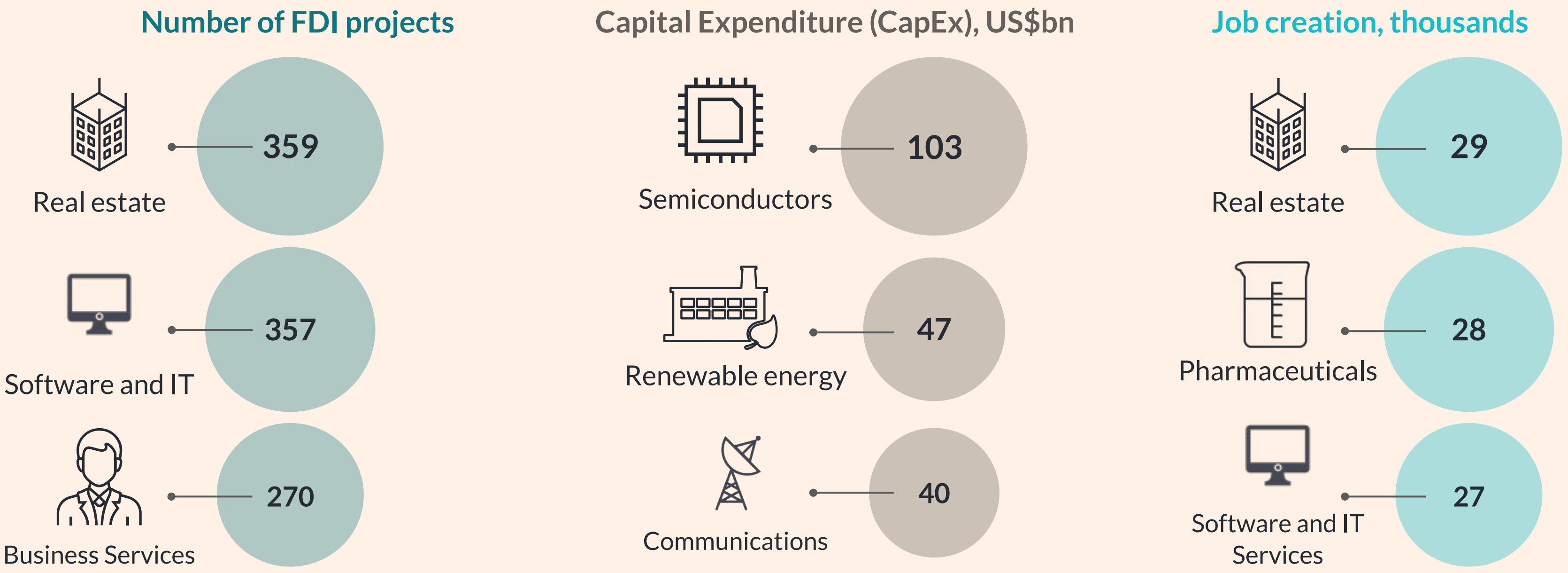
Global Greenfield FDI 2025 was led by software & IT projects and jobs, while communications (data centers) attracted the most capital



Source
FT Locations, *fDi Markets*, 2026.
Available at ftlocations.com/fdimarkets

Notes
Data includes announced and opened projects and does not capture all FDI projects.
Data includes estimates for capital expenditure and job creation. Excludes retail FDI

Greenfield FDI into North America in 2025 was led by real estate for projects and jobs, while semiconductors attracted the most capital

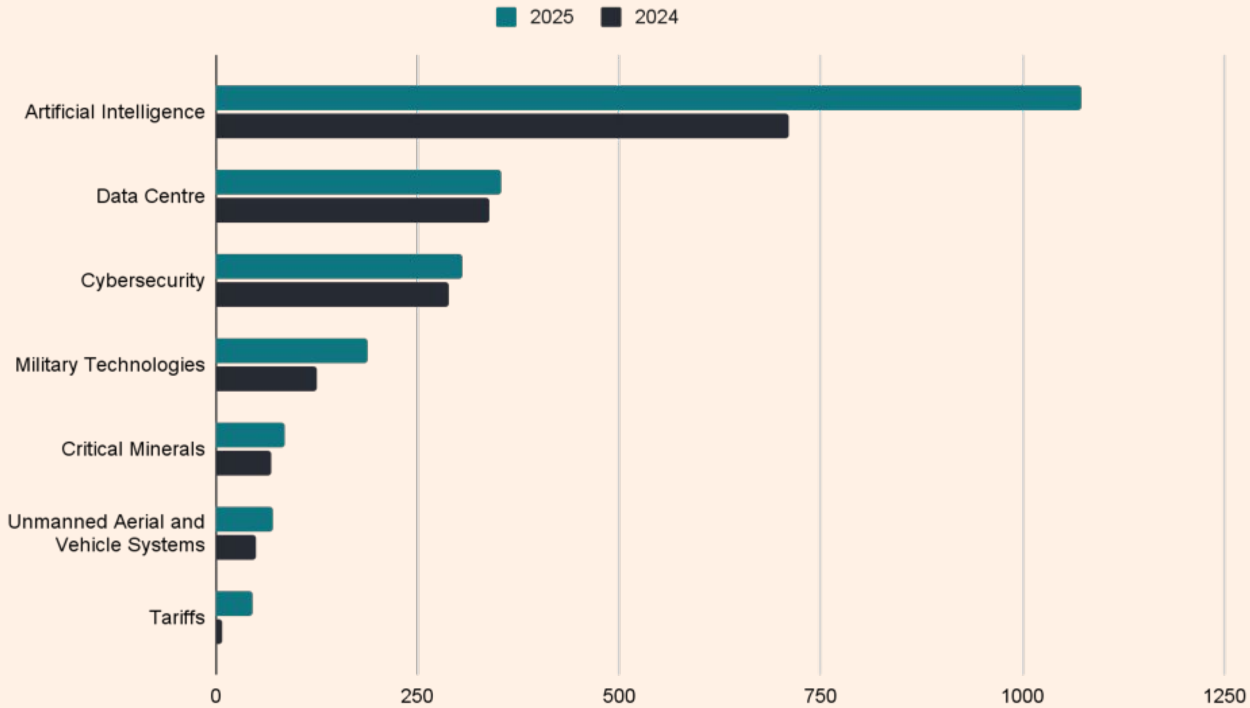


Source
FT Locations, *fDi Markets*, 2026.
Available at ftlocations.com/fdimarkets

Notes
Data includes announced and opened projects and does not capture all FDI projects.
Data includes estimates for capital expenditure and job creation. Excludes retail FDI

Key themes: tech and tariffs

Number of FDI projects by FDI theme, 2024-2025



Source
FT Locations, *fDi Markets*, 2026

AI has become the dominant FDI theme

- 51% YoY growth in 2025
- Increasing scope across sectors

Military technologies

- YoY increases since 2022

Unmanned aerial and vehicle systems (e.g. drones)

- High overlap with military tech (~75% increase)

Increased demand for critical mineral FDI

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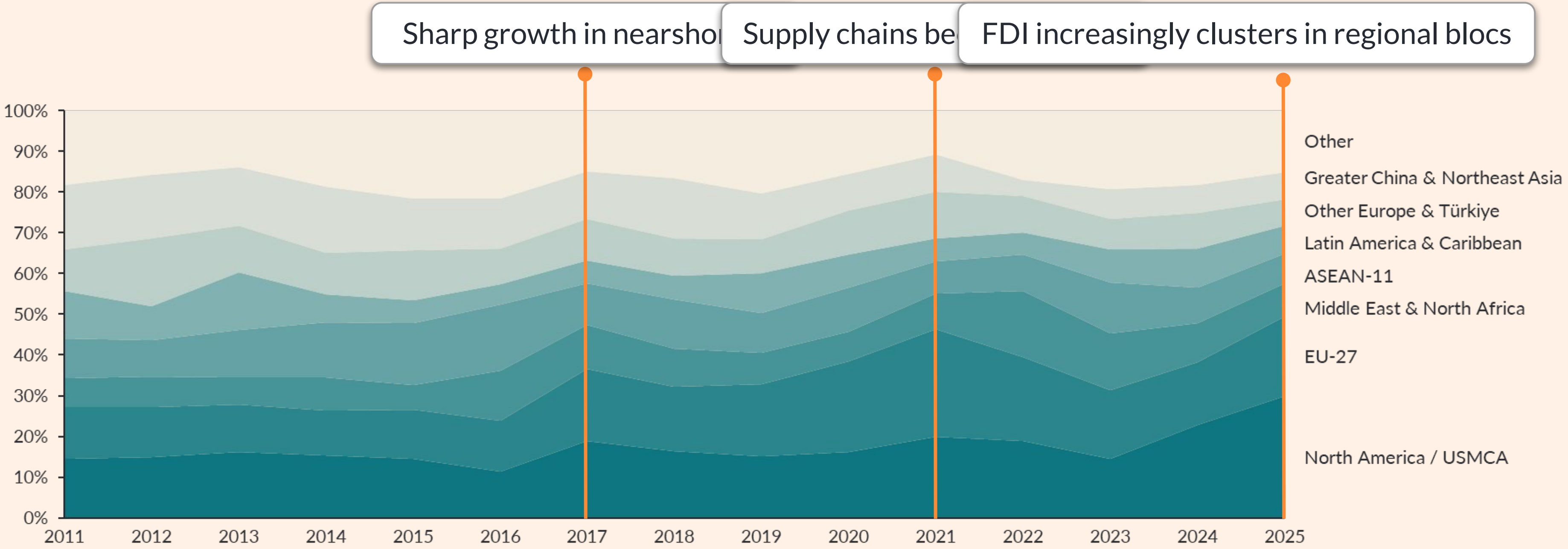
Investors favour North America and the EU as FDI increasingly flows into regional blocs to support supply chain resilience

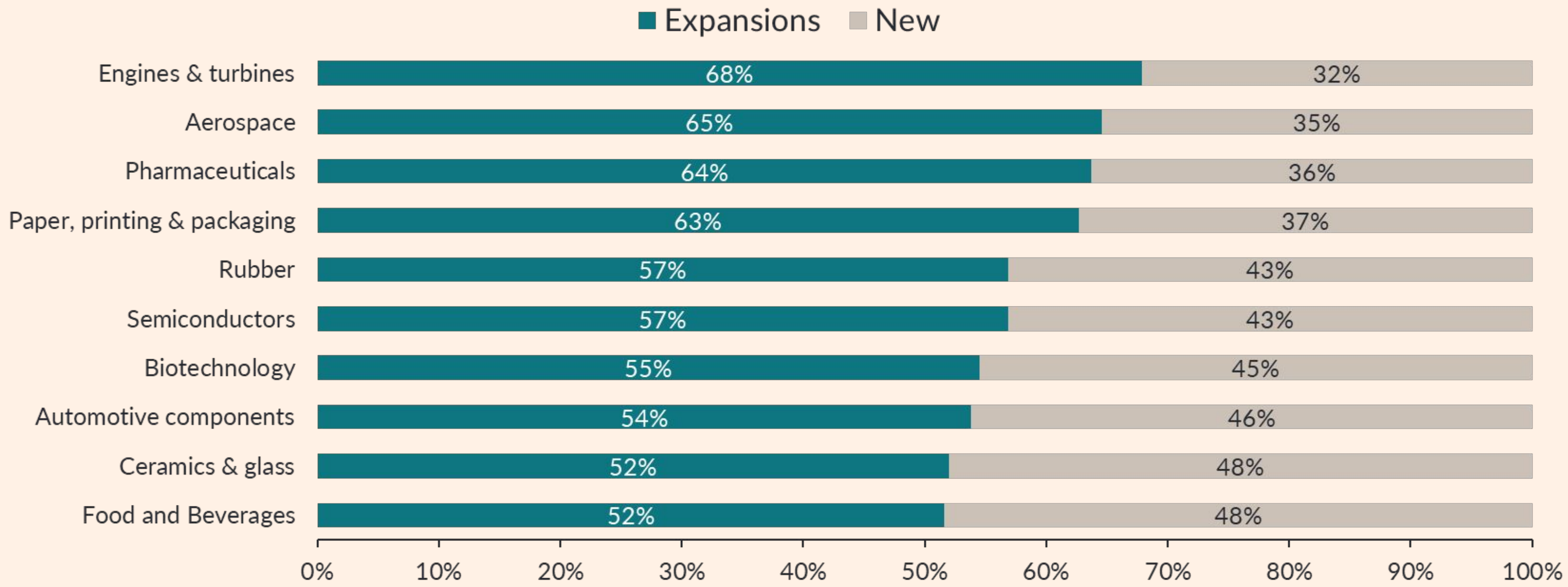
Proportion of global greenfield FDI capex (USD billion) by destination market, 2011-2025



Source
FT Locations, *fDi Markets*, 2026

Expansion-led sectors reveal where EDO can build resilience through BRE

Top manufacturing sectors by share of FDI projects classified as expansions, 2022–2025



Source
FT Locations, *fDi Markets*, 2026

Top global foreign investor motives

Market access is increasingly driving FDI decisions while regulatory environment is one of the top 5 reasons why investors choose locations

Location determinant	2016-2019		2020-2022		2023-2026* YTD	
	Rank	% of FDI projects	Rank	% of FDI projects	Rank	% of FDI projects
Proximity to markets or customers	**1**	**35%**	**1**	**46%**	**1**	**52%**
Domestic market growth	2	34%	3	29%	2	42%
Skilled workforce availability	3	23%	2	29%	3	22%
Regulatory environment	**4**	**17%**	**4**	**13%**	**5**	**15%**
Transport infrastructure	5	9%	7	8%	6	9%
Technology & innovation	6	9%	5	12%	4	16%
Industry cluster	7	8%	6	11%	7	8%
Government support	8	5%	8	7%	8	5%

Source
FT Locations, fDi Markets, 2016-March 2026

Note
A total of 50,149 motives have been recorded for 29,071 projects between 2016 and *March 2026. An FDI project can be assigned multiple motives.

External shocks are changing the expansion playbook

FINANCIAL TIMES

Geopolitical upheaval spurs family offices to open global branches

US tariffs and Iran war cited among motivations for the rich to spread risk

One person who until recently ran a Dubai family office said the wealthy
Alshaer/Bloomberg

Josh Spero in London

Published APR 14 2026

Geopolitical upheaval is driving the rich to open n
around the world to manage risks created by wars,
sanctions.

Supply chains + Add to myFT

Supply chain shocks fuel push for more resilience

Disruptions such as tariffs, wars and energy crises have forced companies to rethink the 'just in time' model

Opinion US economy

Data centres are a crucial test of US industrial resolve

America must not repeat the mistakes that handed China rare-earth dominance

JOSH ZOFFER + Add to myFT

A data centre under construction in California. Although local people often despise them like they did the industrial facilities of old, they bring economic benefits © Mario Tama/Getty Images

Opinion Free Lunch

Rich nations must unleash land, labour, energy and capital

As policymakers shift towards industrial interventionism, they risk neglecting the simplest drivers of growth

TEJ PARIKH + Add to myFT

Chinese employees work on an electricity pylon. Electricity prices explain almost 60% of the levelised cost gap of building a data centre in China compared with the UK © CFOTO/Reuters

Electrification jumps up corporate agenda after energy crisis, survey finds

Security and cost concerns elevate business push for overhaul of power systems

A survey of almost 2,000 executives across 18 countries found that 91% believed the switch from fossil fuel-powered equipment to electric would improve their energy security © Bloomberg

Attracta Mooney

Published JUN 14 2026 39

Geopolitical instability has made electrification more urgent for four in five business executives responding to one of the biggest corporate polls since the Middle East energy crisis.

Source
FT.com, 2026

The top trends impacting FDI in 2026

Facilitating FDI

Mixed effect on FDI

Hindering FDI

AI investment

AI is the dominant global investment theme, driving unprecedented capital expenditure into data centres, semiconductors, cloud, and digital infrastructure, despite fears of an industry bubble

Geopolitical divisions

Geopolitical fragmentation is reshaping rather than reducing FDI. Companies are regionalising supply chains, adopting friendshoring and nearshoring strategies, and duplicating production across geopolitical blocs

Slower growth and capital constraints

Slower economic growth, higher energy costs and tighter financing conditions in major outward FDI markets are reducing firm's capacity to pursue overseas expansion

Industrial policy proliferation

Governments are deploying increasingly interventionist industrial strategies through subsidies, tax incentives, tariffs, and localisation requirements which both promote and hinder investment

Strategic sectors & national security

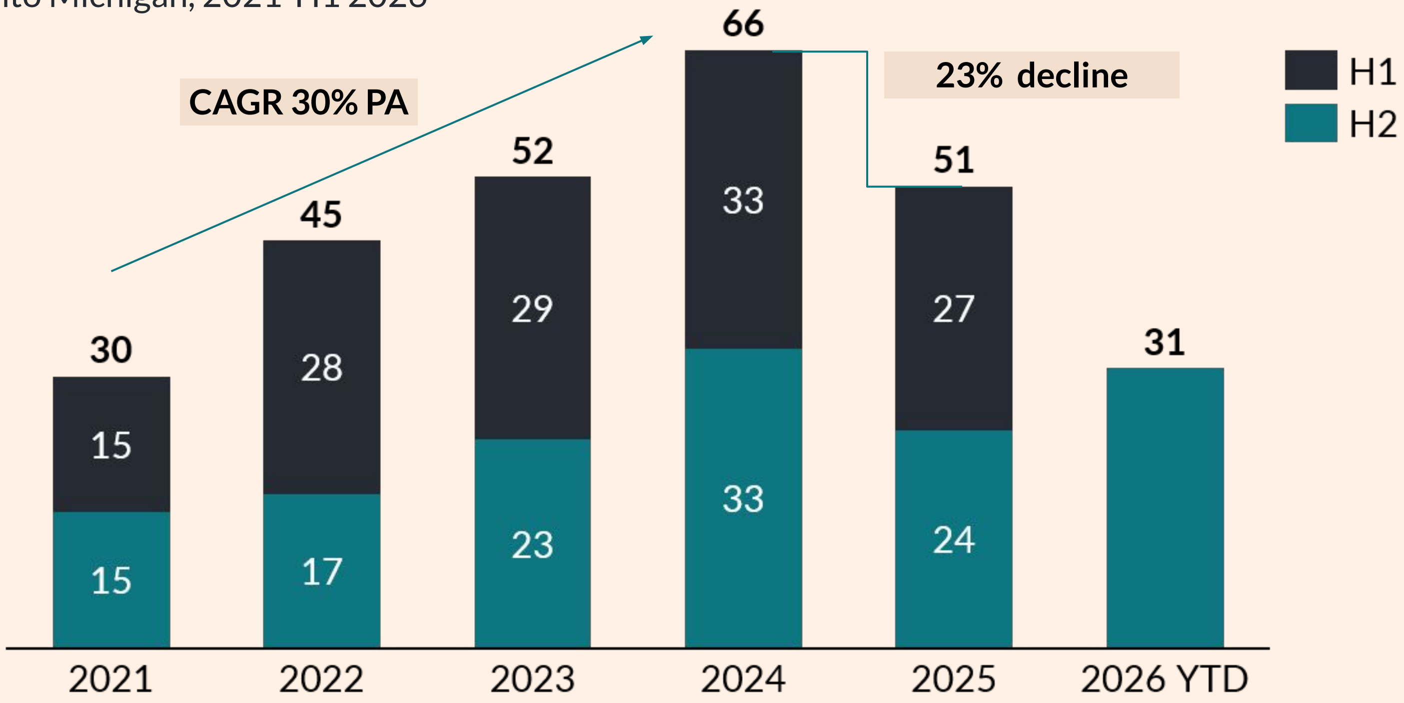
Governments and investors are prioritising sectors linked to national resilience including semiconductors, defence, cybersecurity, and critical minerals. At the same time, tighter foreign investment screening, export controls and national security reviews make investment approvals more complex

Source
FT Locations, *fDi Markets*, 2026

04 FDI landscape in Michigan

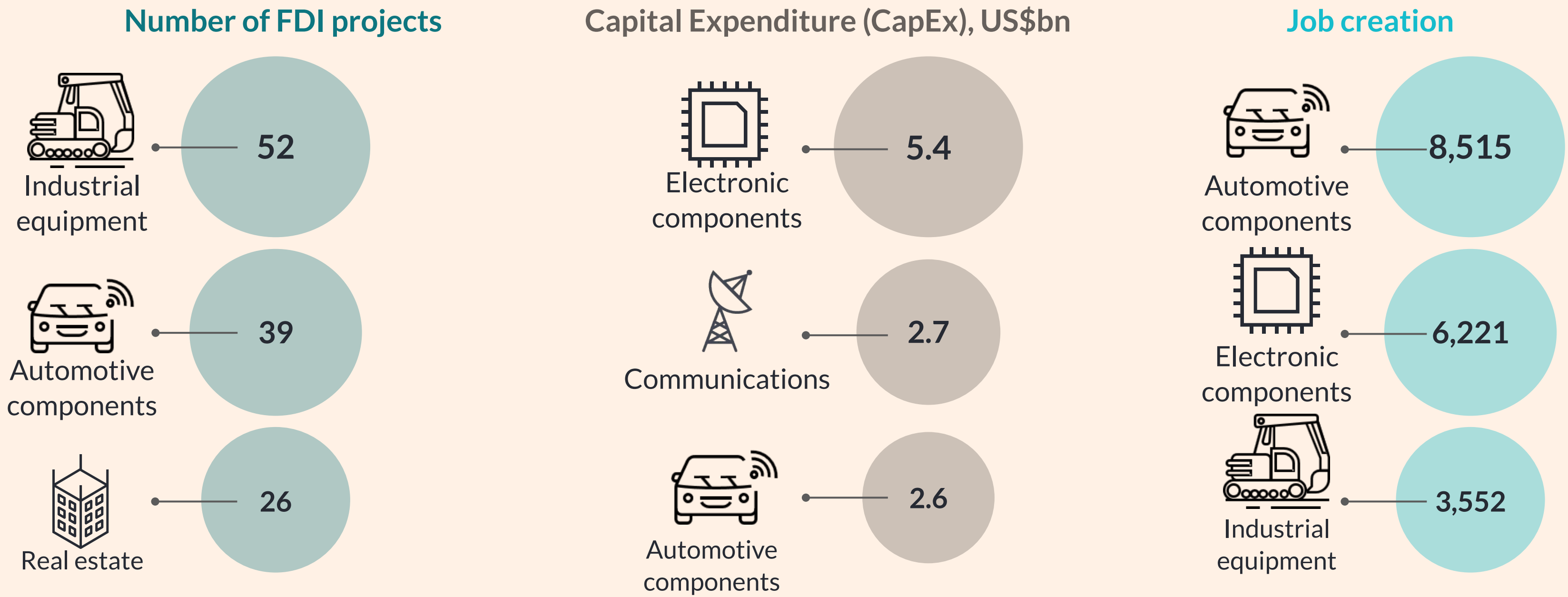
Michigan greenfield FDI surged in 2024 but declined in 2025

FDI projects into Michigan, 2021-H1 2026



Source
FT Locations, *fDi Markets*, 2021 - 2026 H1
Excluding interstate projects

Industrial equipment and electronic and automotive components have been driving FDI into Michigan since 2021

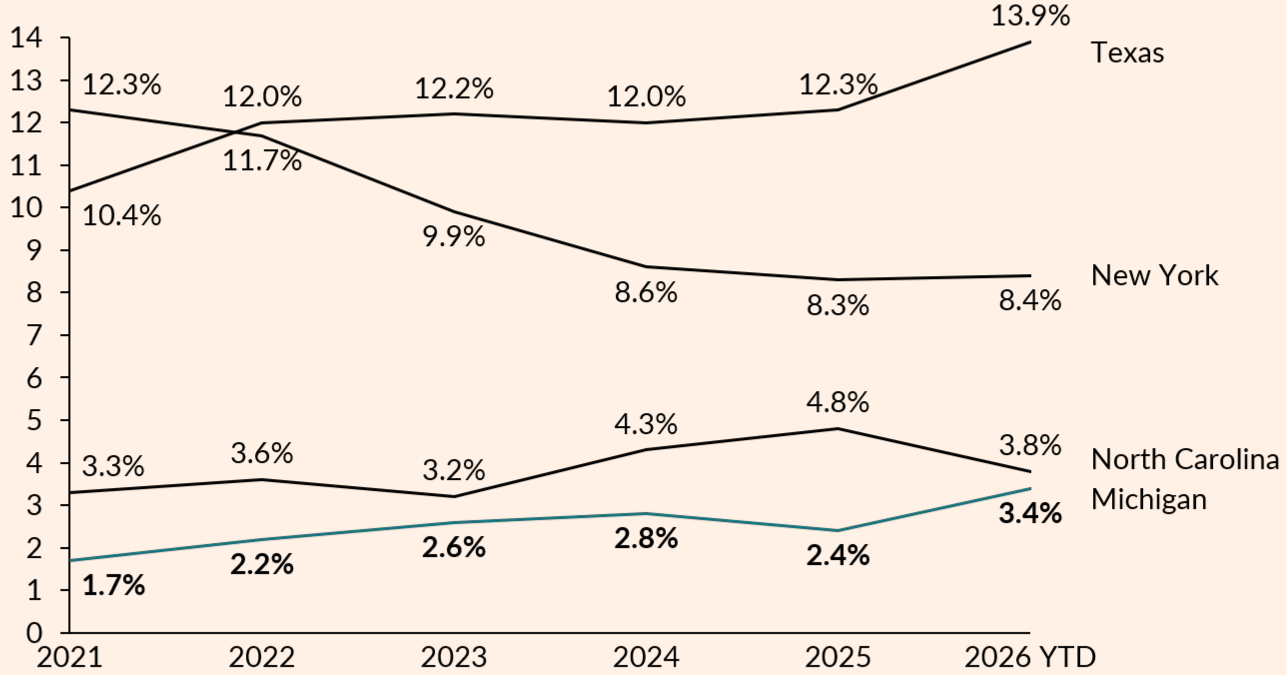


Source
FT Locations, *fDi Markets*, 2021- June 2026
Excluding interstate projects

Notes
Data includes announced and opened projects and does not capture all FDI projects.
Data includes estimates for capital expenditure and job creation. Excludes retail FDI

Michigan is steadily increasing its share of national FDI projects

Michigan share of total U.S. FDI projects, 2021-H1 2026

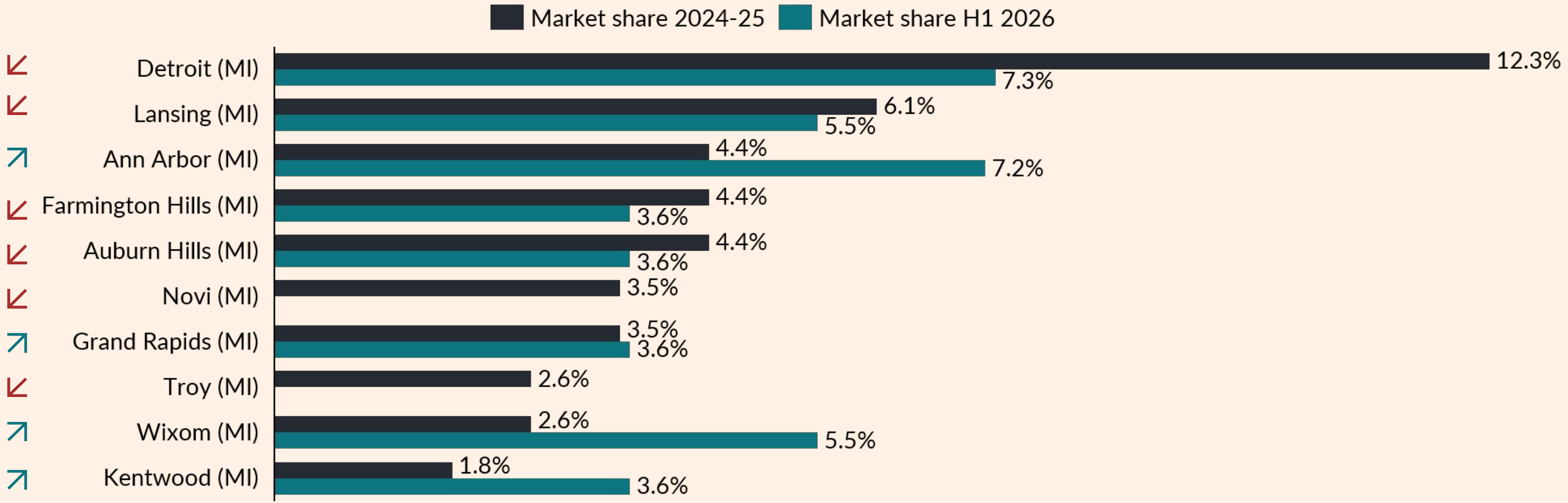


- Whilst the gap in total annual share of FDI projects is widening with US market leaders Texas and New York, **Michigan, is slowly increasing its annual share of FDI projects.**
- **Michigan is currently the 10th ranked state** for total share of FDI projects attracted between 2021 and H1 2026.

Source
FT Locations, *fDi Markets*, 2021 - 2026 H1
Excluding interstate projects

Ann Arbor, Grand Rapids, Wixom and Kentwood Are showing a higher market share in H1 of 2026, compared to their shares from 2024-25

FDI projects into Michigan at city level



Source
FT Locations, *fDi Markets*, 2024 - June 2026
Excluding interstate projects

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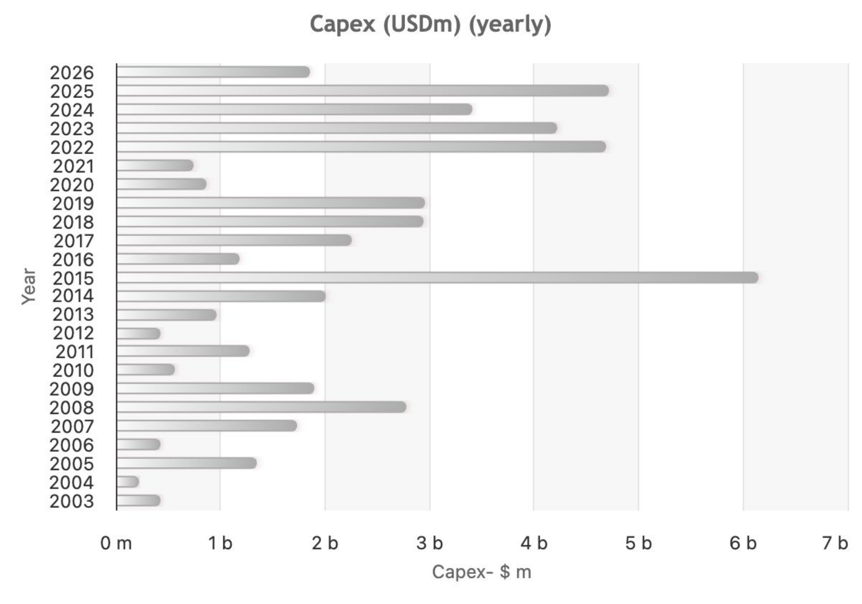
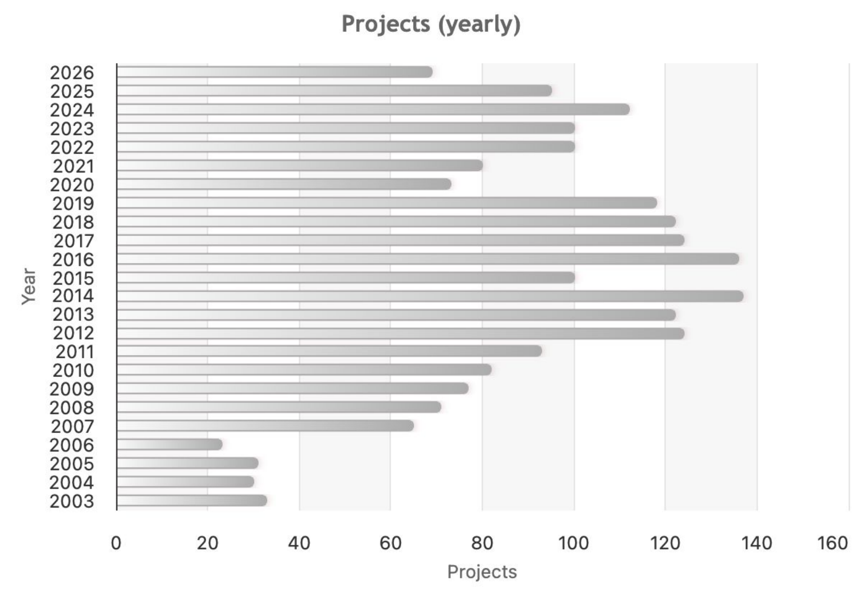
Michigan is attracting fewer but significantly larger FDI projects.

Investment value has rebounded sharply



Project volumes remain resilient, but below historic highs



05 Opportunities and growth drivers for Michigan

Leveraging investor priorities to drive FDI growth in Michigan

Nearshoring and supply chain resilience
Global firms are shortening supply chains to enhance resilience. Michigan's manufacturing depth, logistics connectivity, and proximity to major markets including Canada, make it ideally positioned to capture investment in automotive, electronics, advanced manufacturing, and materials processing.

R&D and innovation commercialisation
Investor demand for digital and engineering focused R&D and innovation capacity continues to grow. Michigan is well equipped to support global investors with research and development activity, and technology commercialization supported through its extensive university ecosystem.

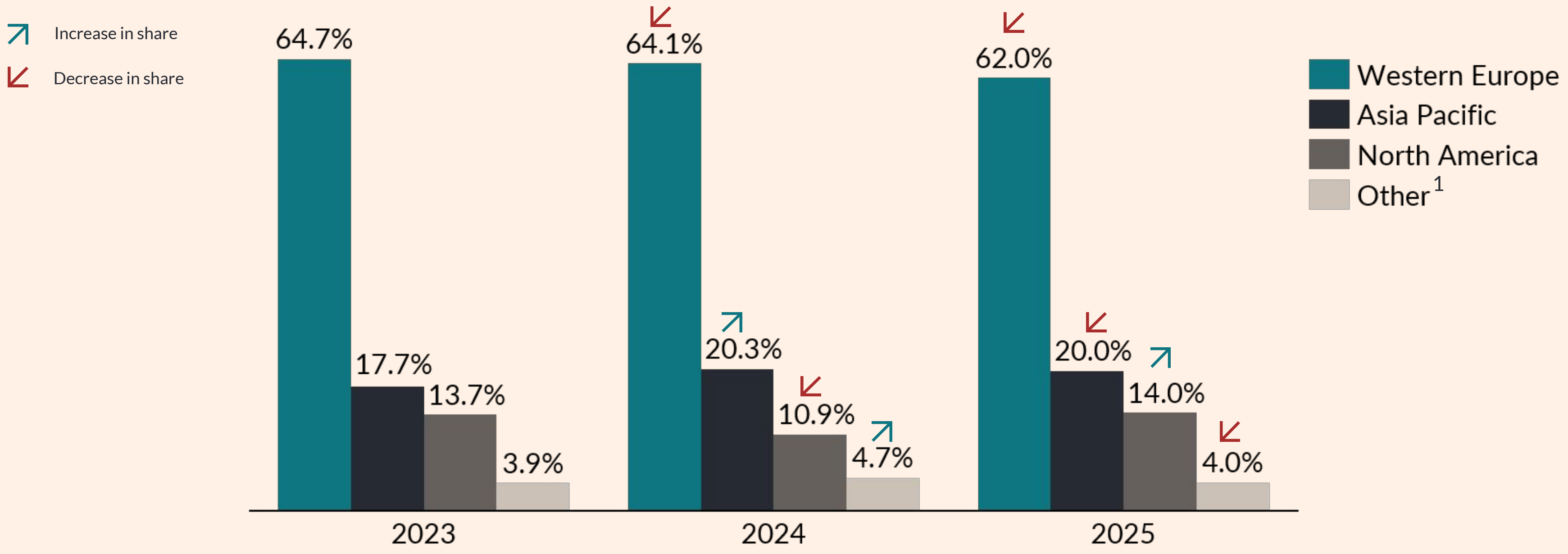
Talent & workforce availability
Michigan’s strong workforce and development programmes particularly in engineering and manufacturing can offer a competitive advantage for investors looking to enter an existing cluster with operational requirements.

Cross-border industrial integration
Despite short-term trade frictions, U.S.–Canada supply chain integration remains a core strength. Coordinated investment promotion can attract projects that span both markets in automotive, advanced manufacturing and electronics.

Source
FT Locations, *fDi Strategies*, 2025

FDI source regions into Michigan show recent decline from Western Europe and Asia but increase share of inter North America flow

FDI projects into Michigan by source region % share

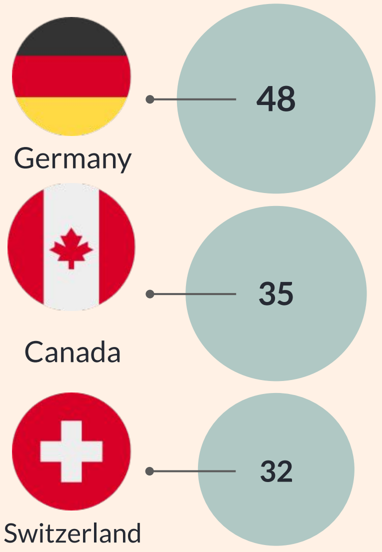


Source
FT Locations, *fDi Markets*, 2023-2025
Excluding interstate projects

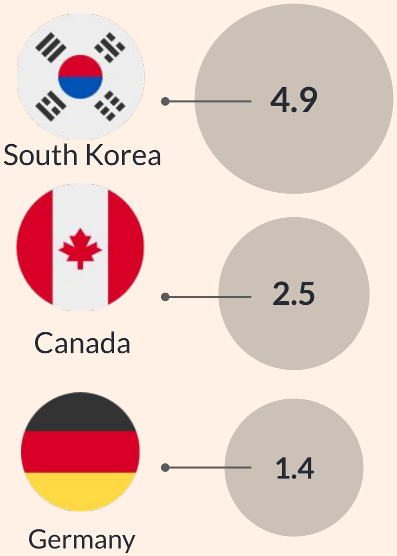
Note
1 Emerging Europe, Latin America, Middle-East, Africa

Germany, South Korea and Canada have been driving FDI into Michigan since 2021

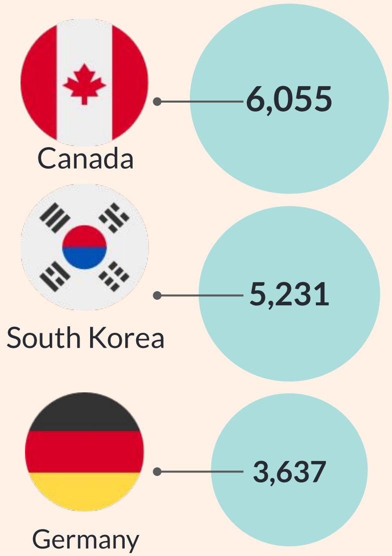
Number of FDI projects



Capital Expenditure (CapEx), US$bn



Job creation



Source
FT Locations, *fDi Markets*, 2021-June 2026
Excluding interstate projects

Notes
Data includes announced and opened projects and does not capture all FDI projects.
Data includes estimates for capital expenditure and job creation. Excludes retail FDI

Where Michigan FDI comes from: Key source markets by sector

Top sources of FDI projects in Michigan 2022-25	Industrial equipment	Real estate	Electronic components	Automotive components	Communications
Countries sourcing at least 10% of projects	Japan Germany China Canada	Switzerland	Germany South Korea	Canada Germany Spain South Korea	Canada
Level of source market concentration	●	●	●	●	●

Source
FT Locations, *fDi Markets*, 2023- June 2026
Excluding interstate projects

Note
● Higher concentration: Few countries dominate sector investment
● Somewhat concentrated: Limited but diverse investor mix
● Less concentrated: Broader global participation

Where Michigan FDI comes from: Key source markets by sector

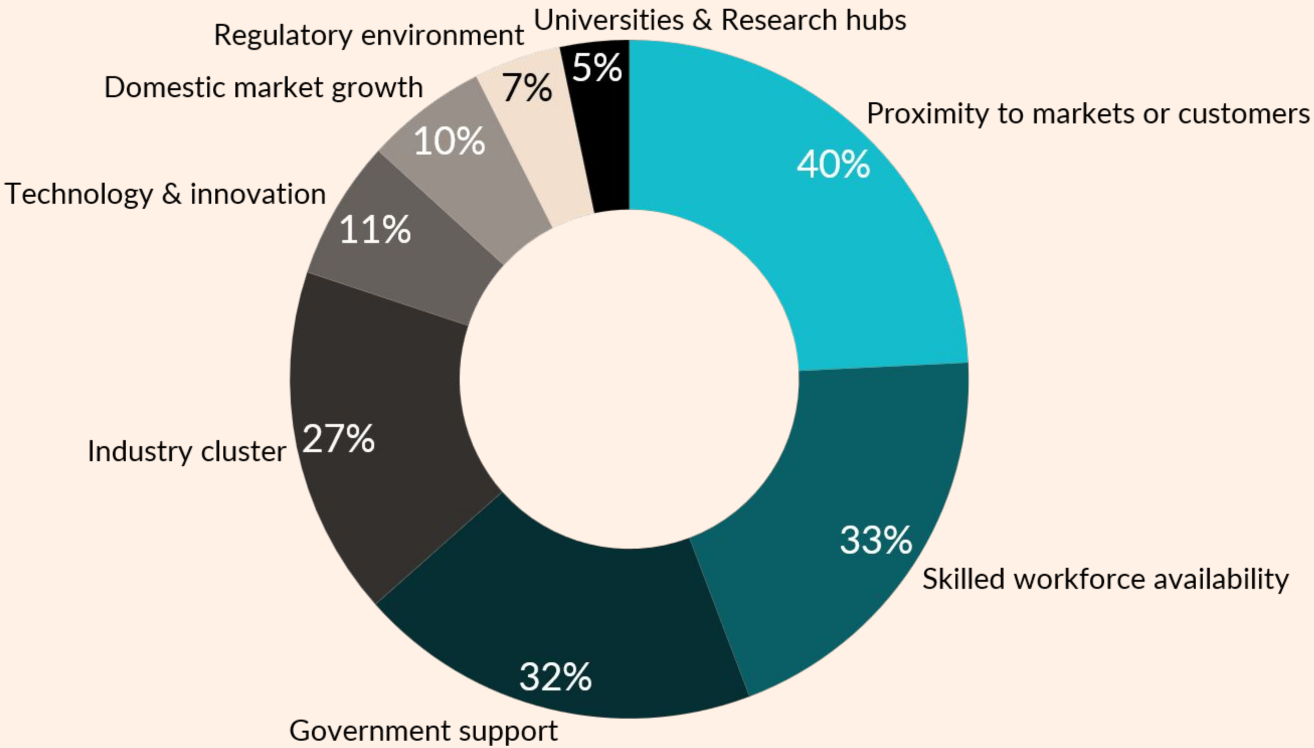
Top sources of FDI projects in Michigan 2022-25	Space and defence	Plastics	Metals	Chemicals	Business services
Countries sourcing at least 10% of projects	Germany	Germany Japan Canada	Canada Netherlands	Germany France Switzerland	Germany France
Level of source market concentration					

Source
FT Locations, *fDi Markets*, 2023- June 2026
Excluding interstate projects

Note
- Higher concentration: Few countries dominate sector investment
- Somewhat concentrated: Limited but diverse investor mix
- Less concentrated: Broader global participation

Proximity and people power: What investors value most Michigan

Ranking of investment motives cited by investors Into Michigan, 2021–2026 (YTD)[1]



Source
FT Locations, *fDi Markets*, 2021 - June 2026

Note
1 Based on 131 cited motives recorded for 73 projects since January 2021.

Investors underscore the region's strength in automotive and precision engineering

April 2026: South Korea-based BRILS, a provider of **advanced robot solutions for industrial automation**, has **established a new US subsidiary in Kentwood, Michigan, US**. BRILS USA LLC is located at 4350 40th Street South-east and will span 6435 sq m. It forms part of the company's plan to expand its reach into the automotive supply chain and advanced manufacturing sectors in North America.

"The location is considered an optimal strategic point to ***rapidly expand not only within the automotive industry****, an existing strength of BRILS, but also into* ***high-tech sectors requiring ultra-precision processes."***

BRILS

March 2026: Canada-based Ottawa Infotainment, a developer of **automotive cockpit platform** and software-defined vehicles, has opened a **new office at Newlab in Detroit, Michigan, US.**

"Detroit is the centre of the automotive universe."

Sean Hazaray, Chief Executive Officer, Infotainment

March 2026: MHP Americas, an an IT management and consultancy firm that offer **mobility and manufacturing solutions**, and an ultimate subsidiary of Germany-based Porsche SE, **has opened a new office in Royal Oak, Michigan, US.**

"Why Detroit? Because it's where the future of automotive and manufacturing industries are being built."

MHP Americas

Source
FT Locations, *fDi Markets*, 2025- June 2026

Access to talent, and market demand driving decision making in high growth sectors such as communications and space and defence

October 2025: Geotab USA, a vehicle and asset management solutions company and subsidiary of Canada-based Geotab, will open a **new office in Oakland County, Michigan, US**. It will create **40 new engineering jobs and serve as a strategic hub for innovation, collaboration, and talent acquisition.**

"Metro Detroit's legacy in the automotive industry and its reputation as a ***hub for transportation transformation*** *make it the perfect location for us…We're investing in Michigan to* ***be closer to our partners and customers and to tap into the region's highly skilled workforce.***"

Neil Cawse, chief executive officer, Geotab USA

September 2025: American Rheinmetall Vehicles, has announced plans to expand its manufacturing facility in Lansing, Michigan. The facility will serve the US Department of Defence. It forms part of a **$31.7m investment and the creation of 450 jobs across its facilities across Michigan including Auburn Hills, Plymouth, Lapeer, and Lansing.**

"Michigan's deep engineering talent and strong heritage in defence and heavy equipment manufacturing *made it the ideal location to deepen the company's roots."*

American Rheinmettal

Source
FT Locations, *fDi Markets*, 2025- June 2026

06 Best practices for attracting and retaining FDI

Be Globally Connected By Design

What leading EDOs are doing to attract in investment in uncertain times

Top-performing EDOs are **intentionally plugged into global investment patterns**, risk signals, and sector shifts. They use real-time intelligence—from tariff movements and regulatory updates to market sentiment and geopolitical alignment—to refine their strategies and stay ahead of the curve.

They monitor investor motivations, not just announcements. They **track where the money is moving, why it's moving, and who it trusts**. And they use that insight to sharpen their pitch, refine their targeting, and position their region as globally relevant.

You can't attract what you can't see and don't understand. Global investment starts with global awareness.

Source
fDi Strategies

Notes
https://greater-seattle.com/innovate-state/

Strengthening FDI attraction through targeted market outreach

Case study

Sector prioritization results

Performance of target sectors across pillars and final score

Sector prioritization standardized score by pillar heatmap[1] and final score [1-5]; 5 = max — Lower Score → Higher Score

	SUPPLY SIDE	DEMAND SIDE	IMPACT	Final weighted score[2]	
Analysis	Based on data analysis and literature review	Based on data analysis	Based on data analysis		
Weightings	50%	30%	20%		
Energy	5.0	5.0	4.3	4.9	Primary
Steel	4.3	3.9	4.3	4.2	Primary
Pharmaceuticals	1.3	4.2	3.6	2.7	Secondary
Light manufacturing	2.3	2.9	2.1	2.5	Secondary
Aerospace	2.3	2.8	2.1	2.4	Secondary
Military & defence	1.0	2.7	5.0	2.3	Tertiary
Aviation	2.0	2.1	2.9	2.2	Tertiary
Shipping & logistics	1.0	2.1	1.4	1.4	Tertiary

Overview of dataset segmentation used for CCREDC target sector analysis

About project

fDi Strategies was commissioned by the Corpus Christi Regional Economic Development Corporation (CCREDC) to develop an FDI target sector and market research study.

Activities & results

- Defined and segmented eight of CCREDC's target sectors using supply and demand-side analysis.
- Prioritised sub-sectors that are most promising for CCREDC to attract FDI.
- Developed sector profiles highlighting the Corpus Christ Region's strengths for investment attraction.
- Shortlisted high-potential source markets for investment attraction and lead generation based on the identified priority sectors.
- Provided strategic recommendations for market profiles and go-to-market strategies and optimising resources in key source markets.
- Developed a comprehensive strategic plan for CCREDC's investment promotion activities, including sector profiles, source market shortlisting, and go-to-market strategy recommendations for the five priority source markets.

Source

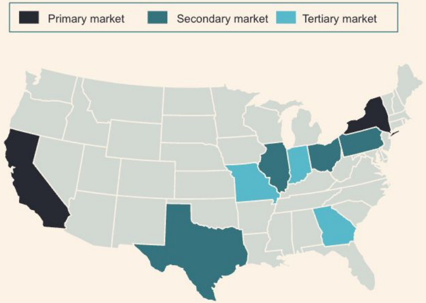
FT Locations, *fDi Strategies*

Corpus Christi REGIONAL ECONOMIC DEVELOPMENT CORPORATION

Prioritize Sectors and Markets with Precision

What leading EDOs are doing to attract in investment in uncertain times

Top-performing EDOs don't spread their bets. They prioritize sectors with strategic fit and markets with real capacity to invest. They align their energy, incentives, and outreach toward where their region's capabilities intersect with global investor demand. This isn't just about targeting—it's about being targetable.



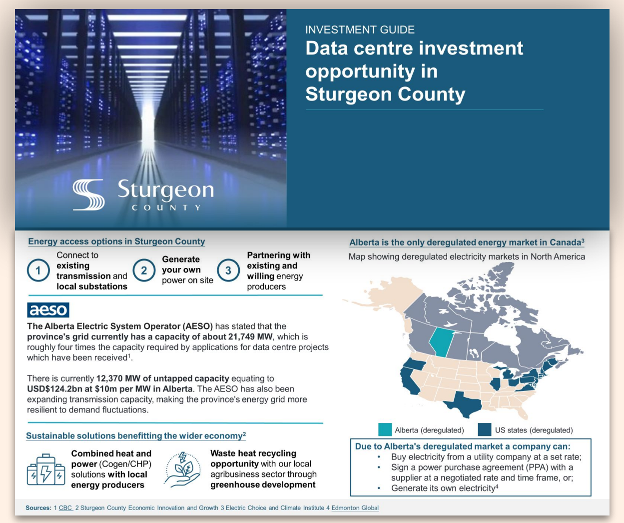
In a world of noise, precision wins. The smartest regions don't chase, they choose.

Source
fDi Strategies

Notes
Example of EDO heat map targets by primary secondary and tertiary market

Building a competitive value proposition to attract data centre investment

Case study



About project

fDi Strategies were contracted by Sturgeon County to deliver a project exploring the market trends and drivers for data centre's globally and within North America and **develop the value proposition and go-to-market strategy for Sturgeon County to use in engagements with prospective investors.**

Activities & results

A powerpoint report was delivered exploring the global and regional trends in data centre FDI and key determinants/ motives as to why investors decide on certain locations for data centre projects.

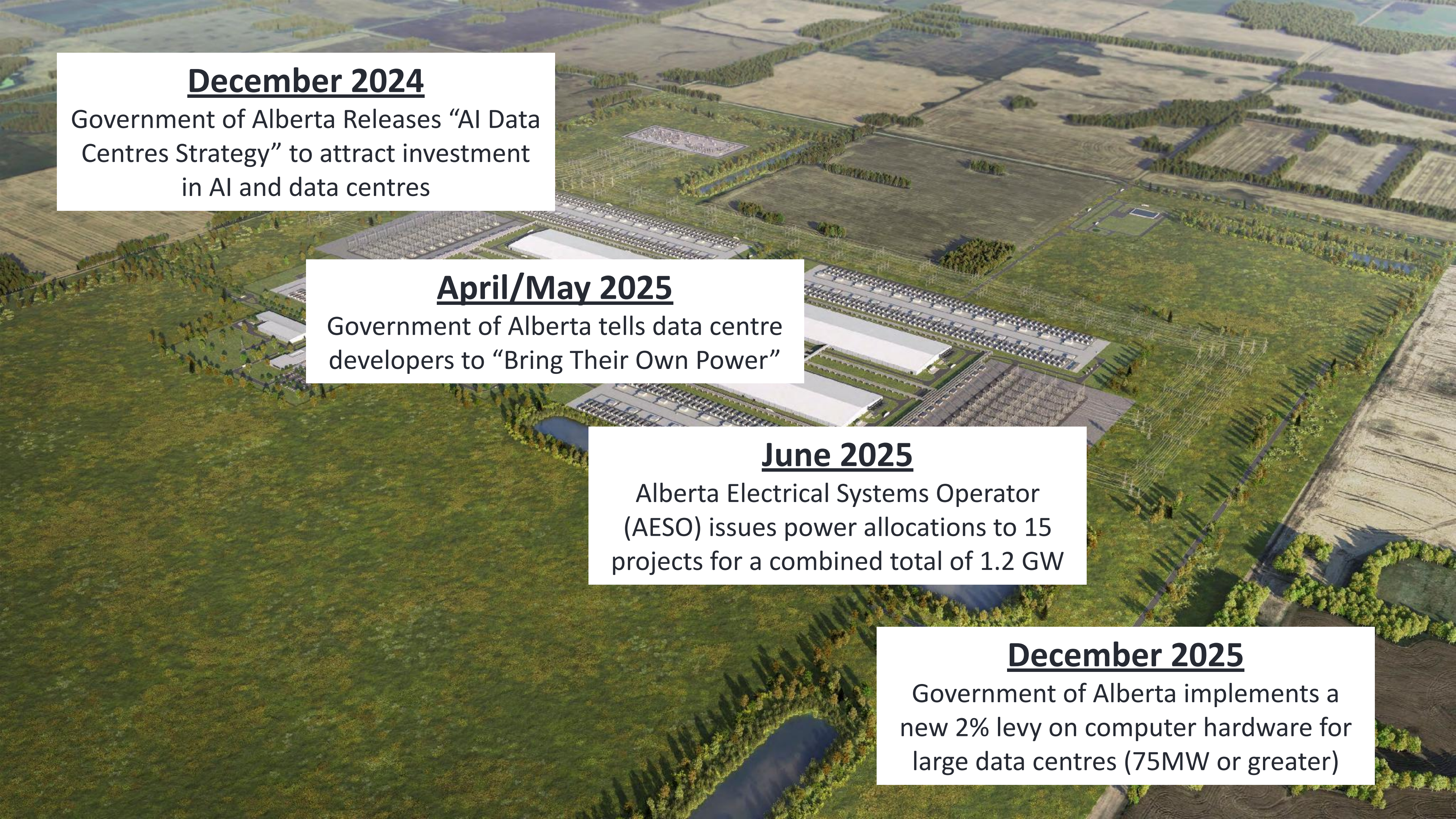
- fDi Strategies conducted a provincial and municipal benchmark to identify competitive advantages of Sturgeon County for attracting data centres. This phase was also informed by stakeholder consultations from both the public and private sector.
- A go-to-market strategy was developed using findings from previous phases. Specific primary and secondary target markets for proactive lead generation and marketing activity were identified.

  The final go-to-market strategy included key target markets, methods for engaging with investors, top investing companies with headquarters in each target market, best practice methods for engagements with these markets and an overview of events with good potential for meeting company decision makers.

Source

FT Locations, *fDi Markets*, *fDi Benchmark*,


Meta
$13 Billion CAD/$9.2 Billion USD
€8.1 Billion/£6.9 Billion
1.8 GW (Full Build-out)
300 Full Time Positions
3,000 Construction Jobs



December 2024

Government of Alberta Releases “AI Data Centres Strategy” to attract investment in AI and data centres

April/May 2025

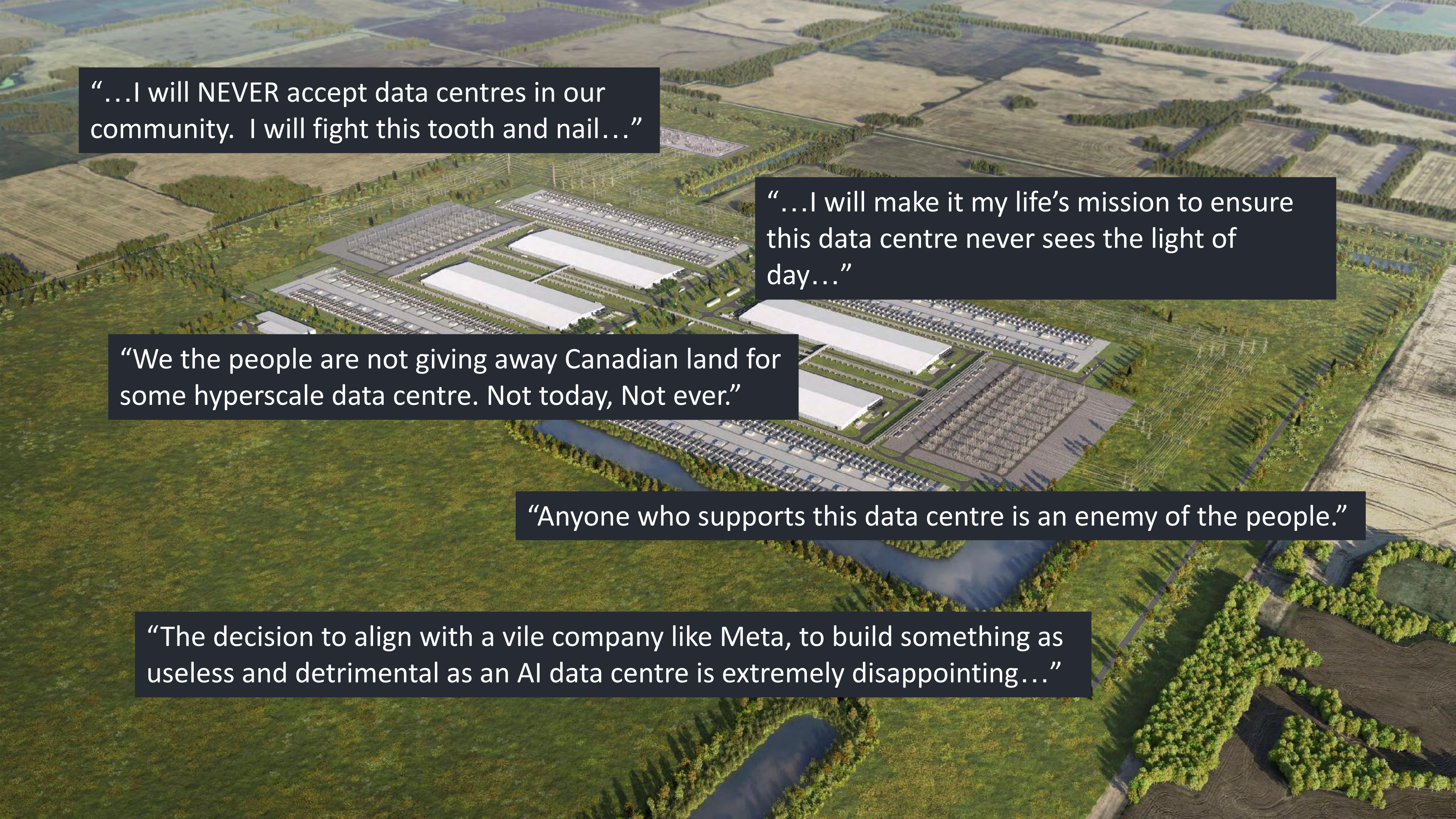
Government of Alberta tells data centre developers to “Bring Their Own Power”

June 2025

Alberta Electrical Systems Operator (AESO) issues power allocations to 15 projects for a combined total of 1.2 GW

December 2025

Government of Alberta implements a new 2% levy on computer hardware for large data centres (75MW or greater)


"…I will NEVER accept data centres in our community. I will fight this tooth and nail…"
"…I will make it my life's mission to ensure this data centre never sees the light of day…"
"We the people are not giving away Canadian land for some hyperscale data centre. Not today, Not ever."
"Anyone who supports this data centre is an enemy of the people."
"The decision to align with a vile company like Meta, to build something as useless and detrimental as an AI data centre is extremely disappointing…"

Treat Existing Investors Like Strategic Assets

What leading EDOs are doing to attract in investment in uncertain times

Retention and reinvestment is the new attraction

Smart EDOs know that existing investors are more than tenants—they're growth partners, brand ambassadors, and strategic storytellers. They build proactive aftercare and BRE programs that surface expansion potential, mitigate risks, and create new advocates.

Winning regions treat existing investors like growth-stage partners, not just legacy assets. They listen deeply, solve problems quickly, and look for ways to help them expand—before competitors do. Aftercare and BRE is not afterthought. It's acceleration.

Your greatest investment attraction tool is investor satisfaction. Reinvestments account for over 65% of total job creation from FDI in the U.S.

Source
FT Locations, *fDi Strategies*, OEDC 2025

Business retention & expansion strategy for Invest Ottawa

Case study

About project

fDi Strategies was selected to deliver a project commissioned by Invest Ottawa to conduct an extensive review of their existing processes and business retention sector strategies for its predefined strategic sectors.

Reference

Jens-Michael Schaal
President, global expansion
E: jschall@investottawa.ca

Activities & results

- Produced a diagnostic report on Invest Ottawa's BRE program, identifying gaps and conducting a needs assessment to enhance business retention and expansion strategies.
- **In the past 5 years the organization has help generate 1.45 Billion in investment**.
- Assessed international best practices to address identified gaps and made preliminary recommendations.
- Led a workshop to discuss best practice findings and finalise recommendations for Invest Ottawa's BRE strategy.
- Provided operational templates to support effective implementation of the updated BRE strategy.
- Developed and delivered four comprehensive BRE sector strategies for Aerospace & Defence, Software & IT, Life Sciences, and Start-ups, including operational templates and diagnostics of BRE pipelines with improvement recommendations.
- Conducted strategy workshops with Invest Ottawa's BRE team.
- Prioritised Invest Ottawa's existing BRE accounts.

Source

FT Locations, *fDi Strategies*, 2021

Market Engagement Model

Coverage is based upon strategic importance, growth potential, complexity and sophistication, and Invest Ottawa's ability to have market impact.

IO Strategy - Tiered markets selected with the objective of driving job and Investment growth through differentiated coverage models and corresponding program investment levels.

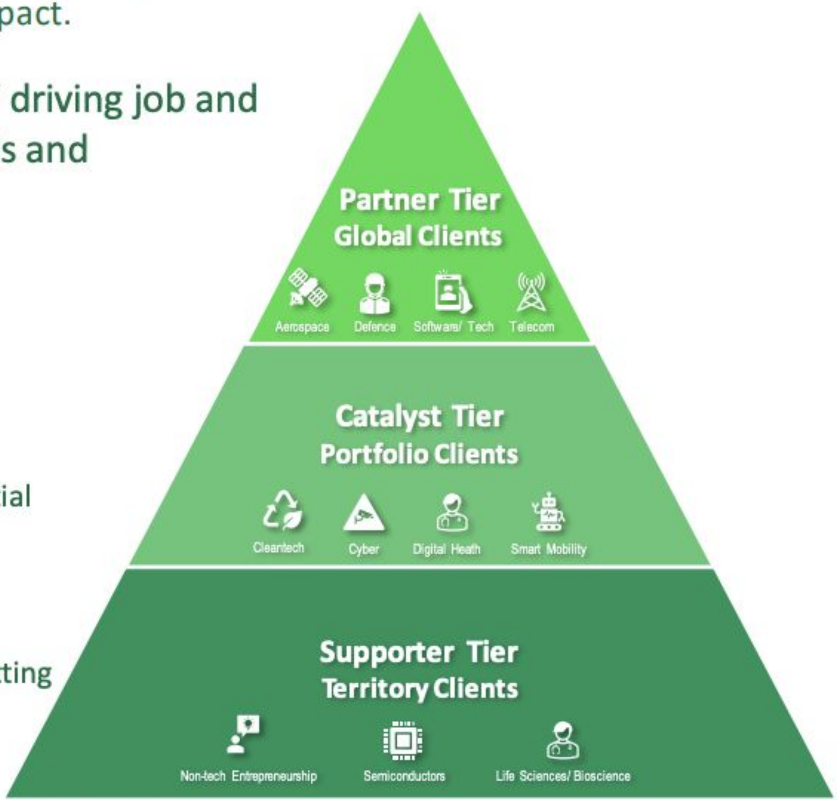
Targeted

Partner Tier
SEGMENT - Large, established growth markets
IO APPROACH - Collaborative coverage for steady growth

Catalyst Tier
SEGMENT - Targeted markets with above-average business potential
IO APPROACH - Long range investment and incremental growth

Open

Supporter Tier
SEGMENT - Open market, limited or unclear growth
IO APPROACH - General coverage, cost management & talent spotting



***Mission:** Collaboratively support entrepreneurs, ventures and global enterprises to drive innovation, jobs and sustainable, inclusive economic growth*

Building Long Term Strategic Competitive Differentiated Advantage

VISION: *Fulfill Ottawa's Economic Potential for Global Leadership, Advantage and Impact*

Venture Development
Building domestic: competency & capability

Global Expansion
Strategically pursuing: global supply chains

Foster entrepreneurship

Early-stage advancement

Accelerate & scale

Strategic market initiatives

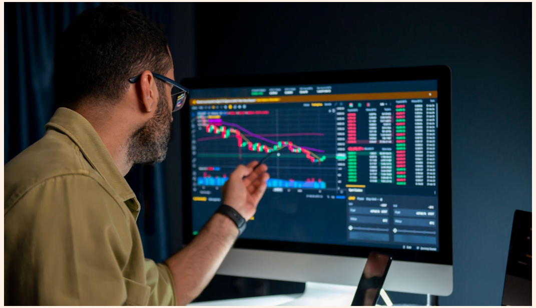
Business retention & expansion

Foreign direct investment

AREA X.O

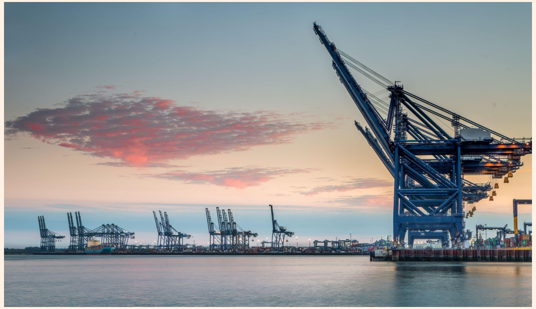
Futureplex for smart mobility: prototyping, training, projects

Key takeaways for Michigan economic developers



Diversify target markets and drill into target segments

Identify and **prioritise sectors that are most promising for FDI attraction, supporting diversification efforts.** Segment international markets into priority tiers and plan lead generation activities within specific clusters and hotspots.



Align your sector targeting with strategic investment themes

Focus resources on sectors with sustained investment momentum. Craft investor messaging that reduces perceived risk and clarifies market access. and **prove you can deliver on cost, power, permits and people in strategic industries.**

Place BRE at the centre of investment attraction

Expansion projects are becoming one of the most reliable sources of FDI. **Build structured business retention and expansion programmes that help surface issues and opportunities** and use existing investors as ambassadors to attract new projects.

Source
FT Locations, *fDi Strategies*, 2026

FT LOCATIONS

Questions?

Please get in touch if you have any questions or would like to learn more about our products and services

Find out more at ftlocations.com

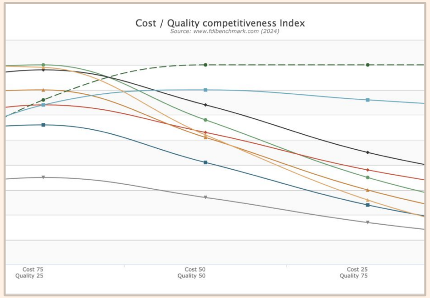
How can we help?

Identify sector opportunities and benchmark your locations to better respond to upcoming changes

fDi Strategies

Obtain expert strategy and consultancy services

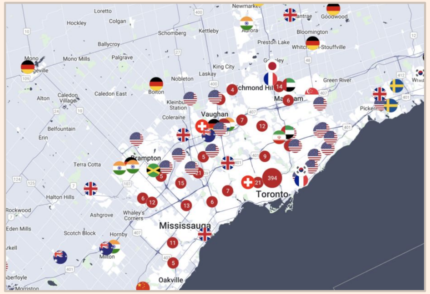
The market-leading strategies unit within fDi Intelligence that provides best-in-class services across the investment promotion life cycle, rooted in data-driven solutions and strategy implementation services.



fDi Benchmark

Research locations worldwide

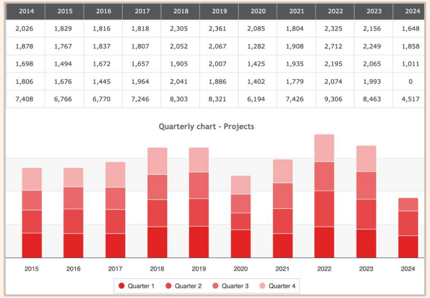
Assess the relative competitiveness of **1,000+ locations** across **153 sectors**. fDi Benchmark's unique patented algorithmic technology is used to assess global footprint strategies.



InvestmentMap

Showcase your location to the world

A highly innovative solution to track all investment in your location, measure organisational performance and the quality and economic impact of investment to market your location to the world.



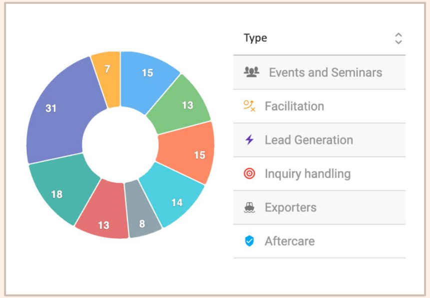
fDi Markets

The crossborder investment monitor

The leading online database tracking FDI in real-time across all markets and sectors globally since 2003, helping make informed decisions.

How can we help to leverage data?

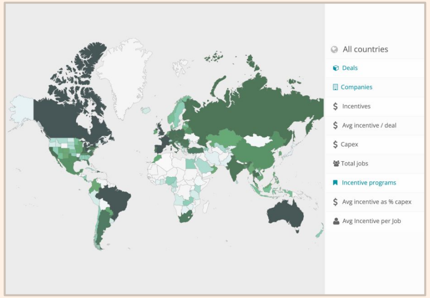
Monitor FDI and incentive trends and better track your performance



Amplify

Manage your investor life-cycle on one platform

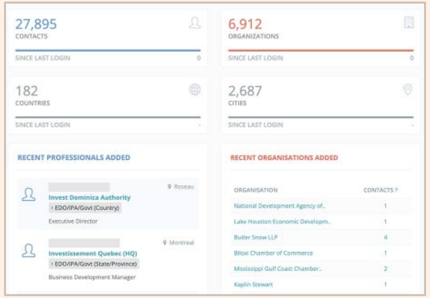
Unlike traditional CRM systems, Amplify enables EDOs to manage their entire investor life-cycle, enabling you to attract new investment by building relationships.



IncentivesFlow

Track incentives deals and policies

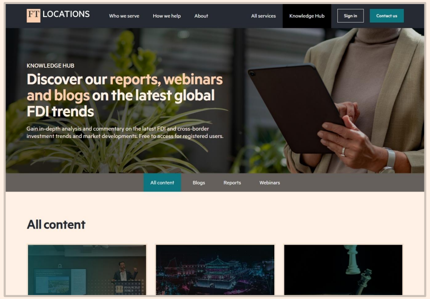
The only global deal database tracking real-time financial incentives awarded to companies for foreign and domestic investment projects.



fDi Influencers

Access the global FDI community

A unique online platform providing a complete solution to develop and implement an intermediary strategy.



Knowledge Hub

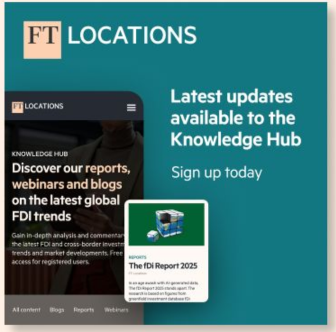
In-depth crossborder greenfield investment data and analysis

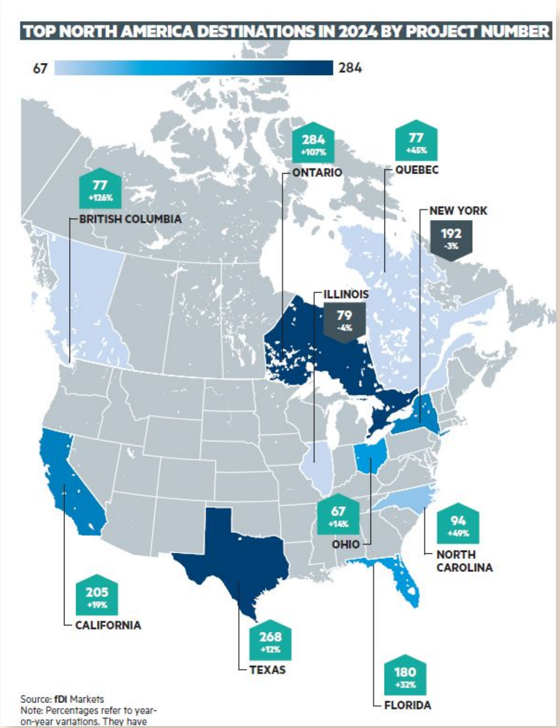
Gain in-depth analysis and commentary on the latest FDI and cross-border investment trends and market developments through reports, blogs and on-demand webinars.

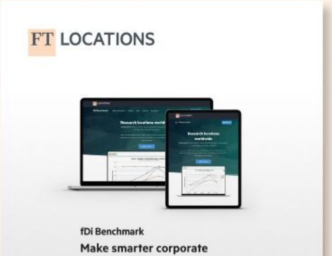
FT LOCATIONS

How can we help to increase your visibility and share your story?

Keep yourself informed on FDI trends and raise your profile in the region

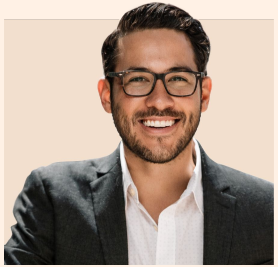






Get in touch

Learn more about our products and solutions to help your organisation attract investment



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