



Perspectives on doing business in ASEAN countries

Presented by:

Volker Friedrich

GBP International

www.gbp-international.com



AGENDA

Part 1: General Introduction

Part 2: Some numbers on ASEAN

Part 3: Country specifics and their agenda for development

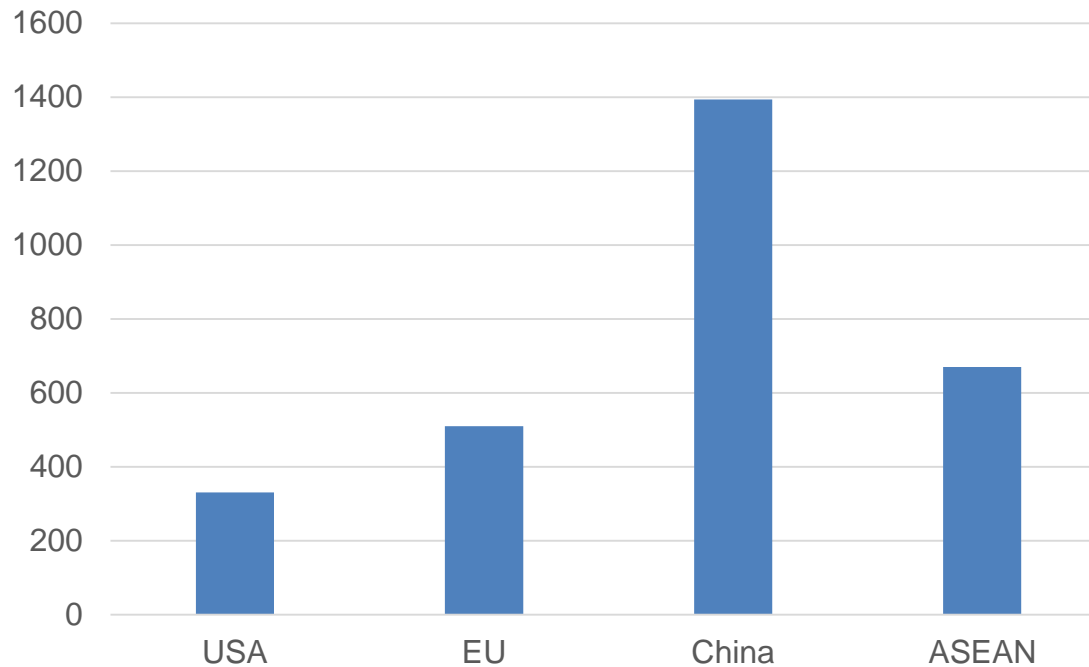
The ASEAN nations are uniquely different –
but they all share a harsh and painful historical development

In order to understand ASEAN today you need study the history



The ASEAN nations comprise around 10% of the total world population

World Population in Mio people (2013)

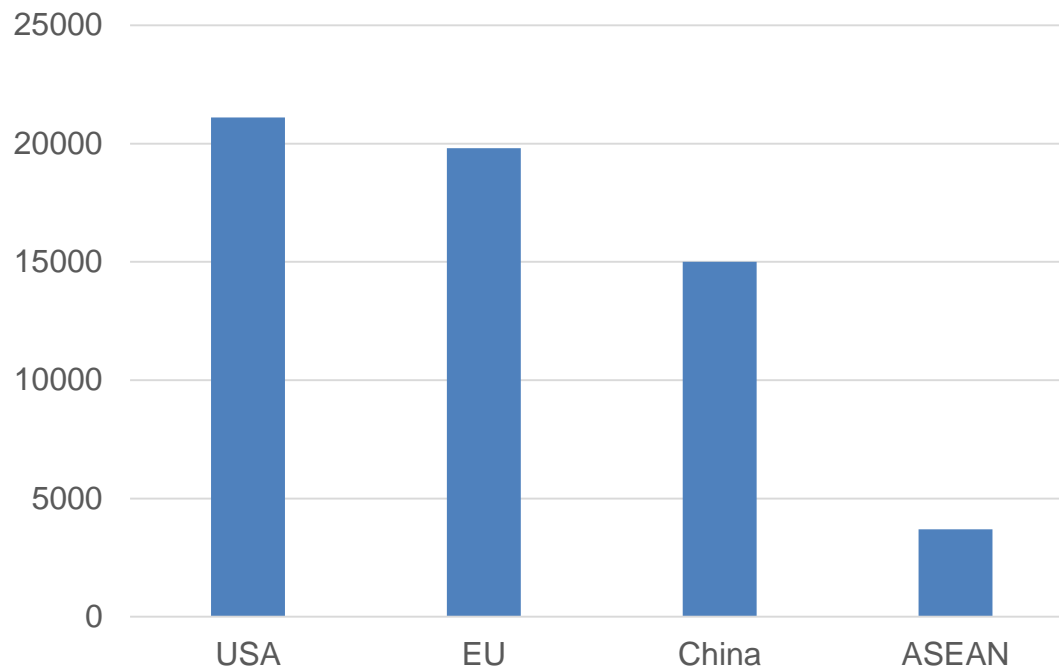


Source. OECD Data 2013



...but only represents 3-4% of the global GDP

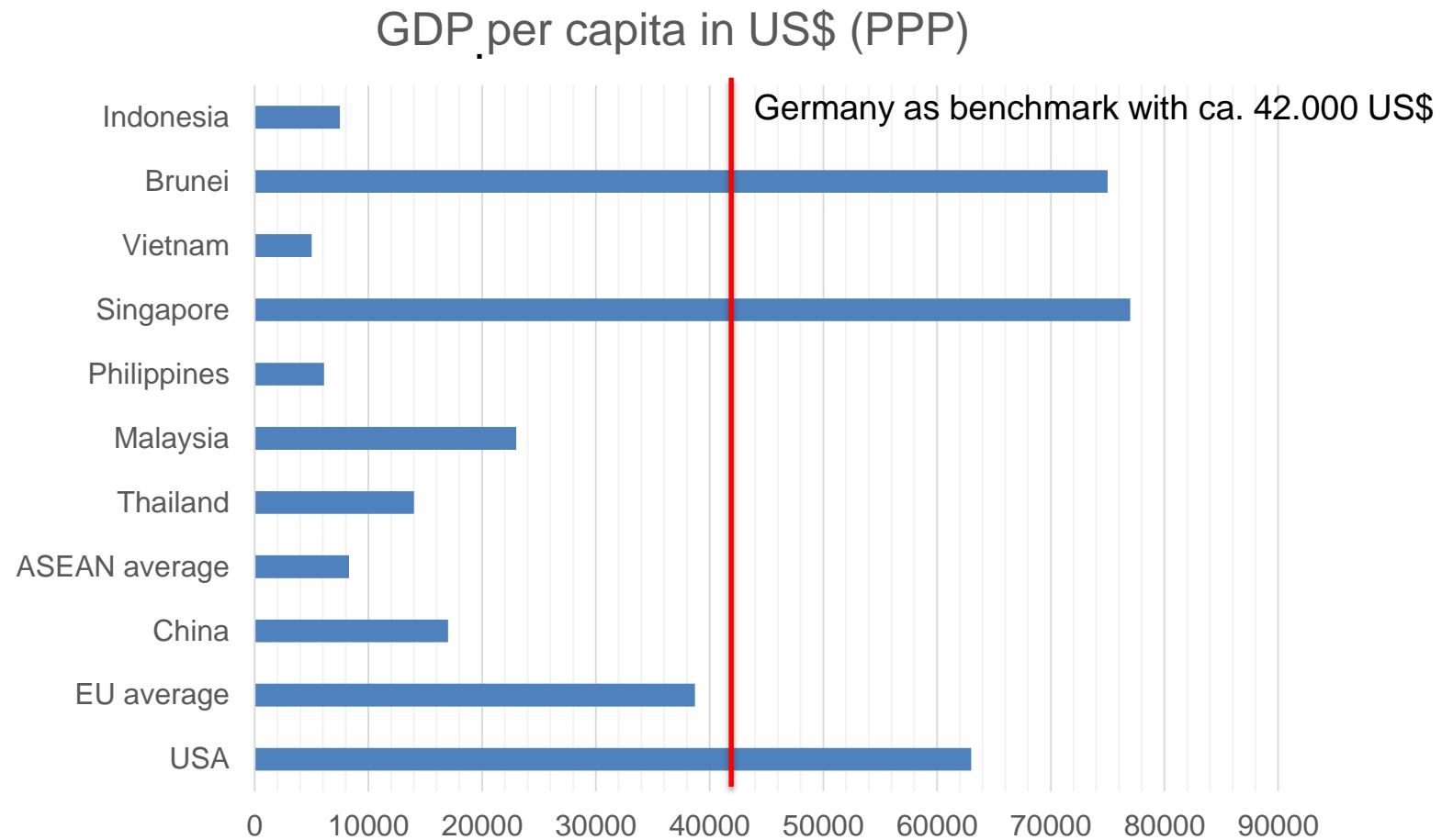
GDP by country in billion US\$ (2013)



Source. OECD Data 2013

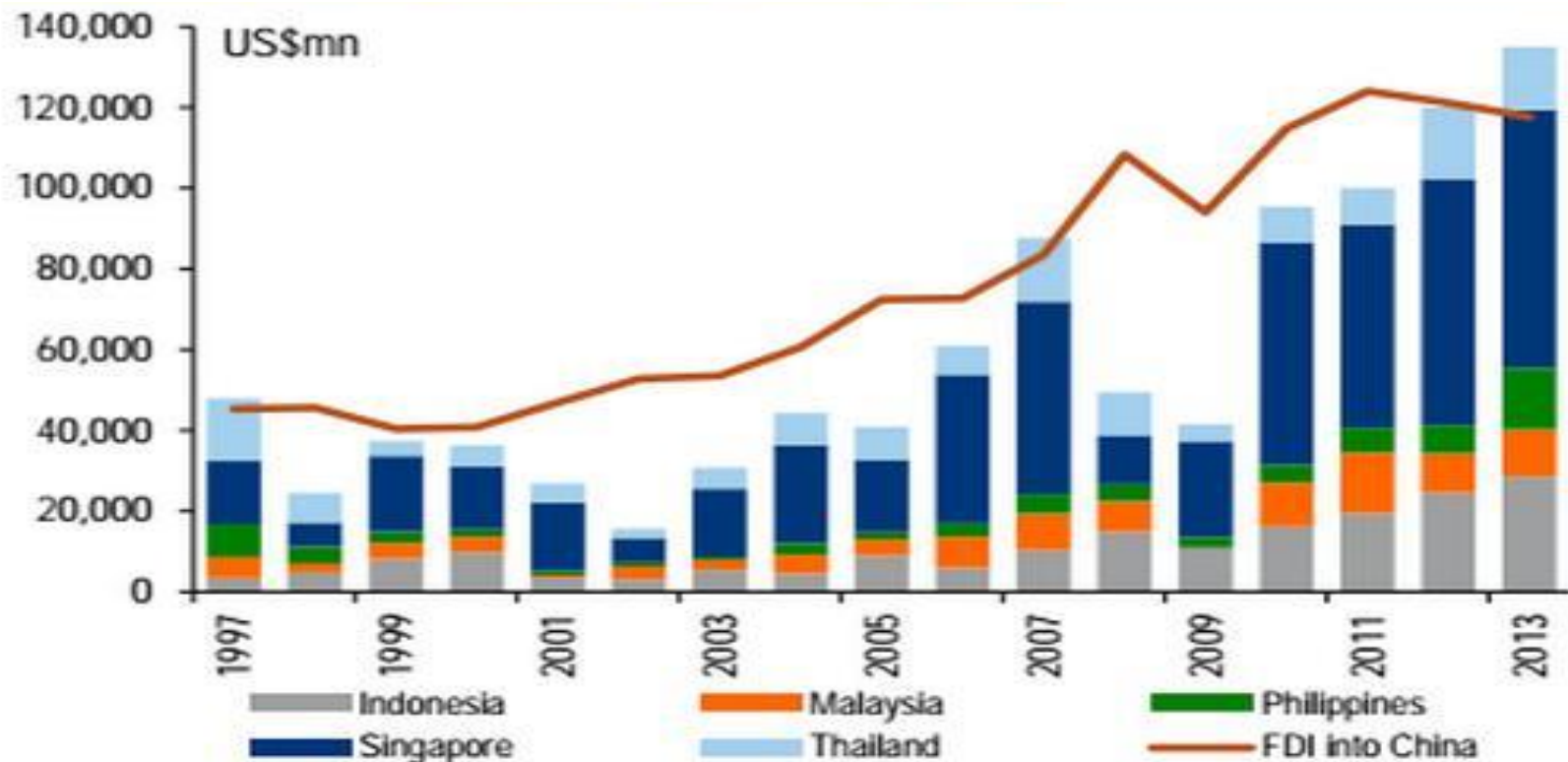


The ASEAN nations have huge structural, economic and social differences



Source. OECD Data 2013, Myanmar, Laos, Cambodia are having around 5,000 US\$ per capita or less

After the declines in 2001/02 and 2008/09 we see a strong recovery in FDIs



Source. IMF, Worldbank, OECD, Financial Times Data

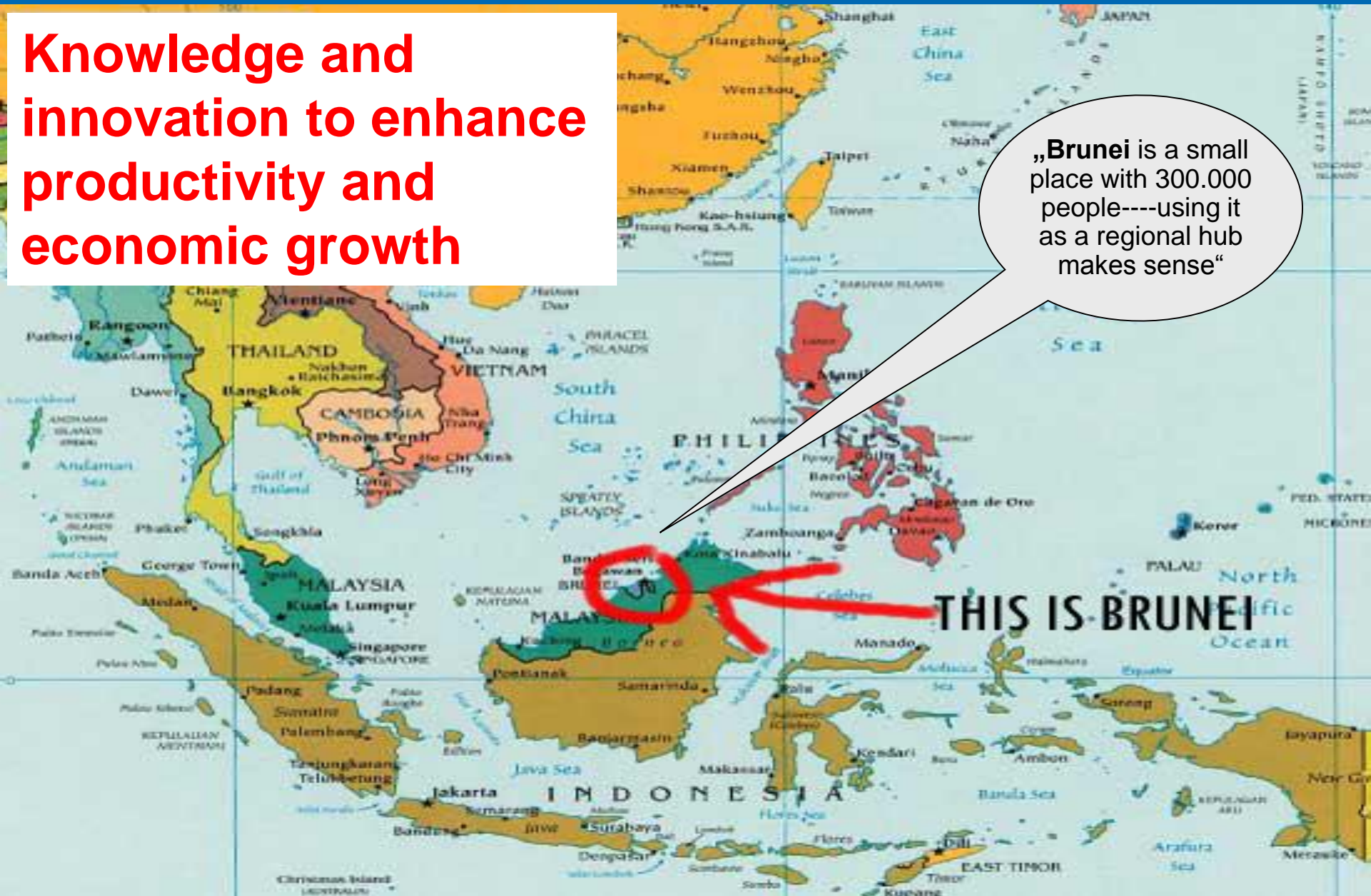
And now: Ten countries in 10 minutes.....




Brunei is a special place for the oil & gas industry

Knowledge and innovation to enhance productivity and economic growth

„Brunei is a small place with 300.000 people----using it as a regional hub makes sense“




Singapore is best in class and has no rival



„Nothing beats **Singapore** – but don't think it is cheap anymore!“

**Highly skilled people,
innovative economy,
distinctive global city**

Malaysia is a clear runner up behind Singapore



“Malaysia is still a hidden jewel and it is not selling itself to well – however, once you know the place you will appreciate the value it has to offer”

**Charting development
towards a high income
nation**


Thailand has developed a strong manufacturing base

A happy society with equity, fairness and resilience under the philosophy of a Sufficiency

„**Thailand** is caught in political trouble these days but daily business is not effected. Of course the instability is not positive for the country and the business“



Indonesia is improving fast and is becoming more and more attractive

A nighttime photograph of a city skyline, likely Jakarta, featuring several illuminated skyscrapers and a complex highway interchange with light trails from traffic. A speech bubble is overlaid on the right side of the image.

„Indonesia is still the country with the highest potential due to its size only...however, it is not easy there and infrastructure is one of the biggest nightmares“

Realisation of an Indonesia that is prosperous, democratic and just

Vietnam is regarded as „easy“ for German companies
- but nothing is easy in Asia...

„**Vietnam** is one of the positive growth stories in ASEAN with a very strong and positive bias to Germany“

A modern industrialised country by 2020

The Philippines has come a long way since the Marcos years

“The Philippines have been doing really well during the last few years....but it is hardly noticed in Europe”

Pursuit of inclusive growth

The Mekong countries have a lot to catch up

**Growth,
industrialisation,
education and health**

**“Myanmar, Laos and
Cambodia** have been
under the radar of Europe
and are now strongly
dominated by China”



Thank you for your attention

GBP International
Moosdorfstr. 7-9
D-12435 Berlin
Germany
Phone: +49-172-2154944



GBP International
UOA Centre 19-9-6
19 Jalan Pinang
50450 Kuala Lumpur
Malaysia
Phone: +60 3 2162 8545



vf@gbp-international.com
www.gbp-international.com