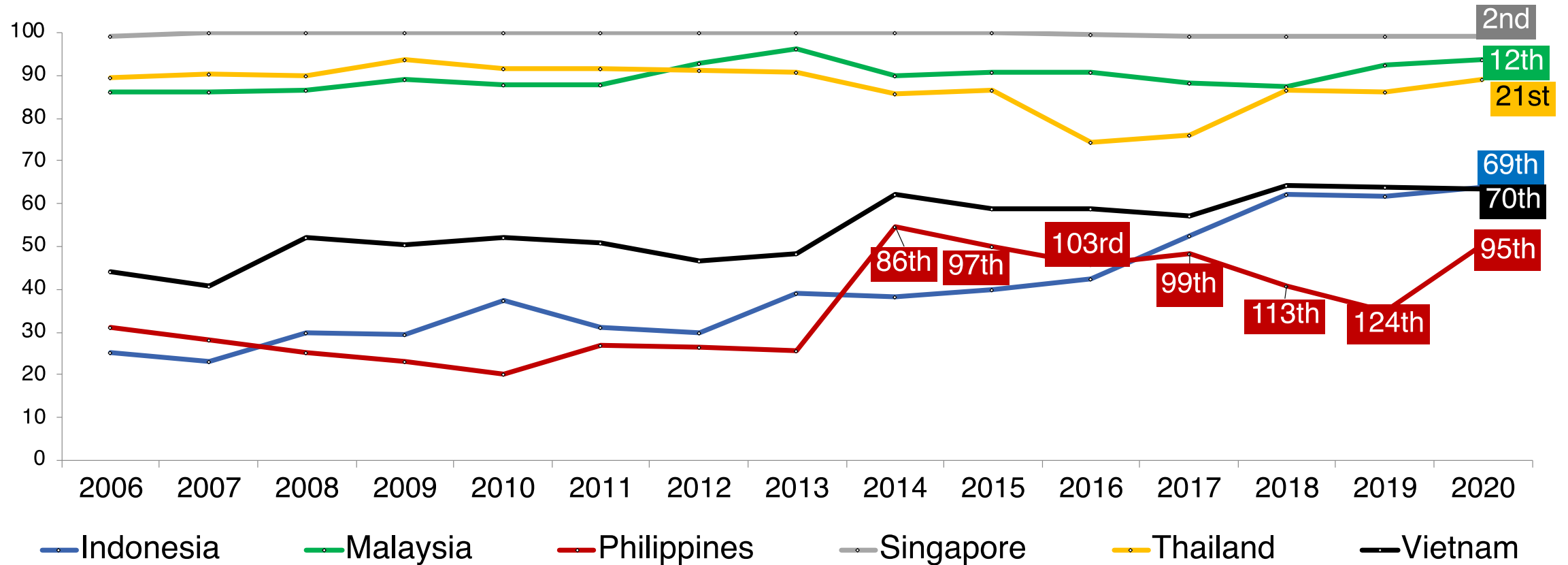


Attachments: Slides 1-14

1. WB EODB Report Rankings, ASEAN-6, 2006-2020 (graph)
2. WB EODB Report Rankings, ASEAN-6, 2006-2020 (table)
3. WEF Top Concerns of Business, Philippines, 2017
4. WEF Inefficient Government Bureaucracy concern, ASEAN-6, 2017
5. WEF, Inefficient Government Bureaucracy concern, countries with #1 ranking, 2017
6. Country shares of FDI for ASEAN-6, 2001-2019
7. FDI China and ASEAN, 2001-2019
8. FDI in ASEAN-5, 2001 to 2019
9. Standard Chartered Bank ASEAN preferred locations for supply chain investments, 2020
10. UNCTAD top 30 developing economies receiving FDI, 2019
11. Matrix comparing Philippines with Vietnam in 143 factors
12. UNCTAD, FDI in Developing Asia, 2020 prediction
13. UNCTAD, reasons for depressed FDI flows in Developing Asia, 2020
14. UNCTAD, reasons to expect recovery of FDI in Developing Asia

1. WB EODB Report Rankings, ASEAN-6, 2006-2020 (graph)



Source: World Bank and authors calculations

Note: N= 175 (2006-2007); 181 (2008); 183 (2009-2011); 185 (2012-2013); 189 (2014-2016); 190 (2017-2020)

*2014-2020 rankings based on new methodology

2. WB EODB Report Rankings, ASEAN-6, 2006-2020 (table)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Indonesia	131	135	127	129	115	126	130	116	117	114	109	91	72	73	69
Malaysia	25	25	25	21	23	23	14	8	20	18	18	23	24	15	12
Philippines	121	126	136	141	146	134	136	133	86	97	103	99	113	124	95
Singapore	2	1	1	1	1	1	1	1	1	1	1	2	2	2	2
Thailand	19	18	19	12	16	16	17	18	28	26	49	46	26	27	21
Vietnam	98	104	87	91	88	90	99	98	72	78	78	82	68	69	70

Source: World Bank and authors calculations

Note: N= 175 (2006-2007); 181 (2008); 183 (2009-2011); 185 (2012-2013); 189 (2014-2016); 190 (2017-2020)

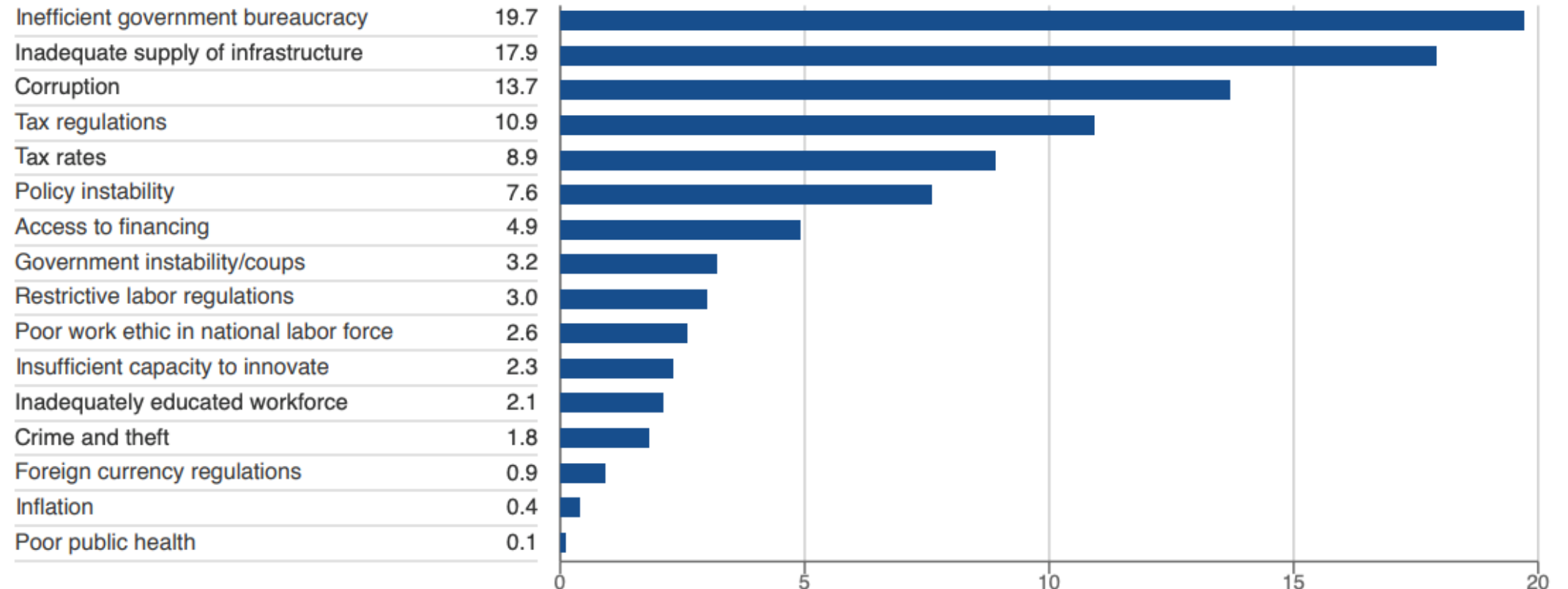
*2014-2020 rankings based on new methodology

3. WEF Top Concerns of Business, Philippines, 2017

Source: World Economic Forum

Most problematic factors for doing business

Source: World Economic Forum, Executive Opinion Survey 2017



4. WEF Inefficient Government Bureaucracy concern, ASEAN-6, 2017

Source: World Economic Forum

	Rank	Score*
Philippines	1st	18.8
Indonesia	2nd	9.3
Malaysia	3rd	8.4
Singapore	8th	2.7
Thailand	2nd	11.9
Vietnam	8th	7.9

*Respondents asked to select 5 most problematic factors for doing business in the country and to rank them between 1 (most problematic) and 5. Score corresponds to responses weighted according to ranking.

Source: WEF Global Competitiveness Report 2016-2017

5. WEF, Inefficient Government Bureaucracy concern, countries with #1 ranking, 2017

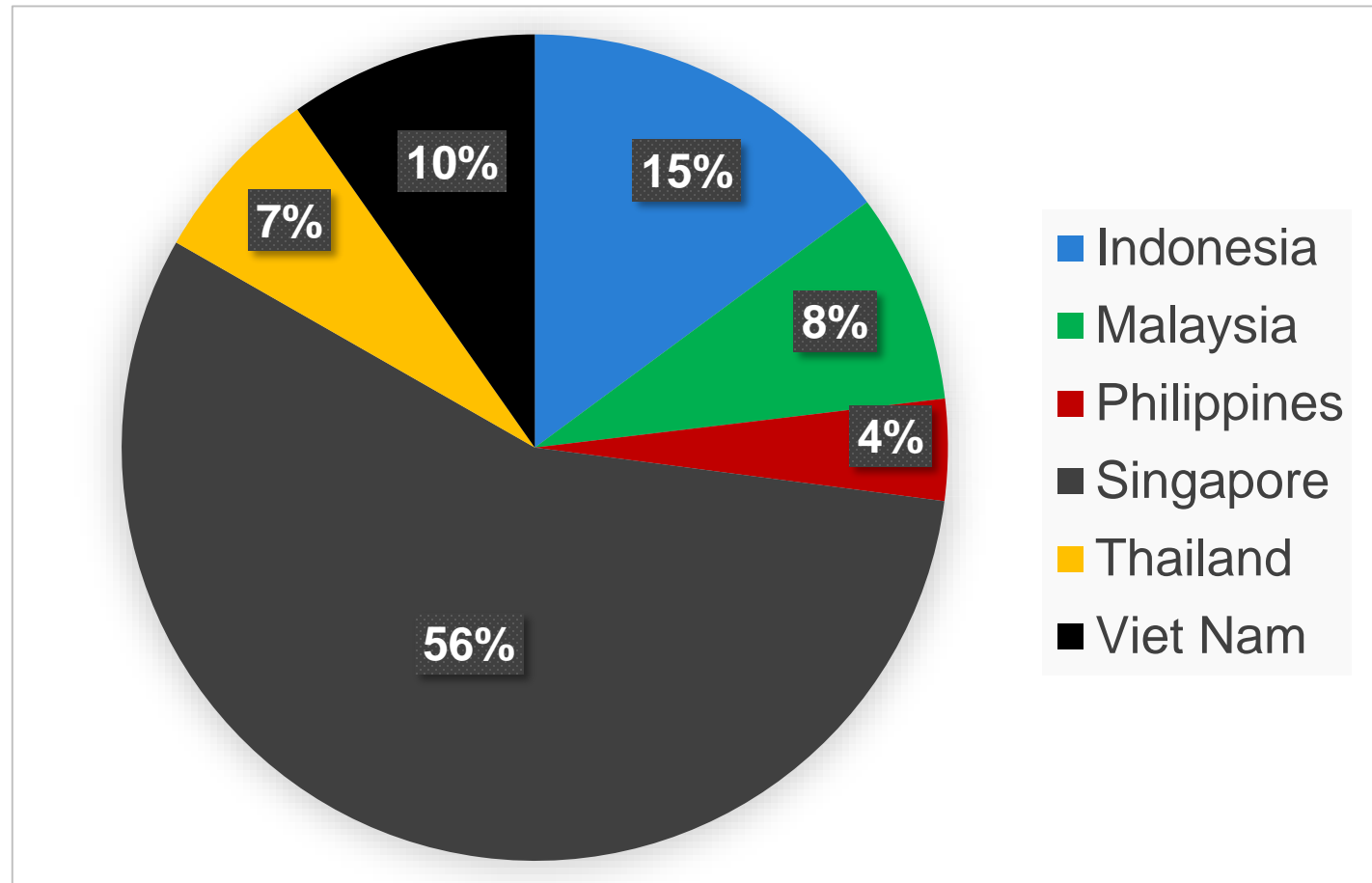
Source: World Economic Forum

Countries	Score
Algeria	17.5
Bahrain	13.1
Bosnia and Herzegovina	13.7
Brunei	17.4
Chile	17.2
Costa Rica	22.9
Croatia	20.8
Czech Republic	19.7
Honduras	15.3
Israel	18.6
Kuwait	21.2
Mauritius	16.9
Nicaragua	17.2
Peru	19
South Africa	17.7
Tunisia	18.1

Source: WEF Global Competitiveness Report 2016-2017

6. Country shares of FDI for ASEAN-6, 2001-2019

Source: UNCTAD

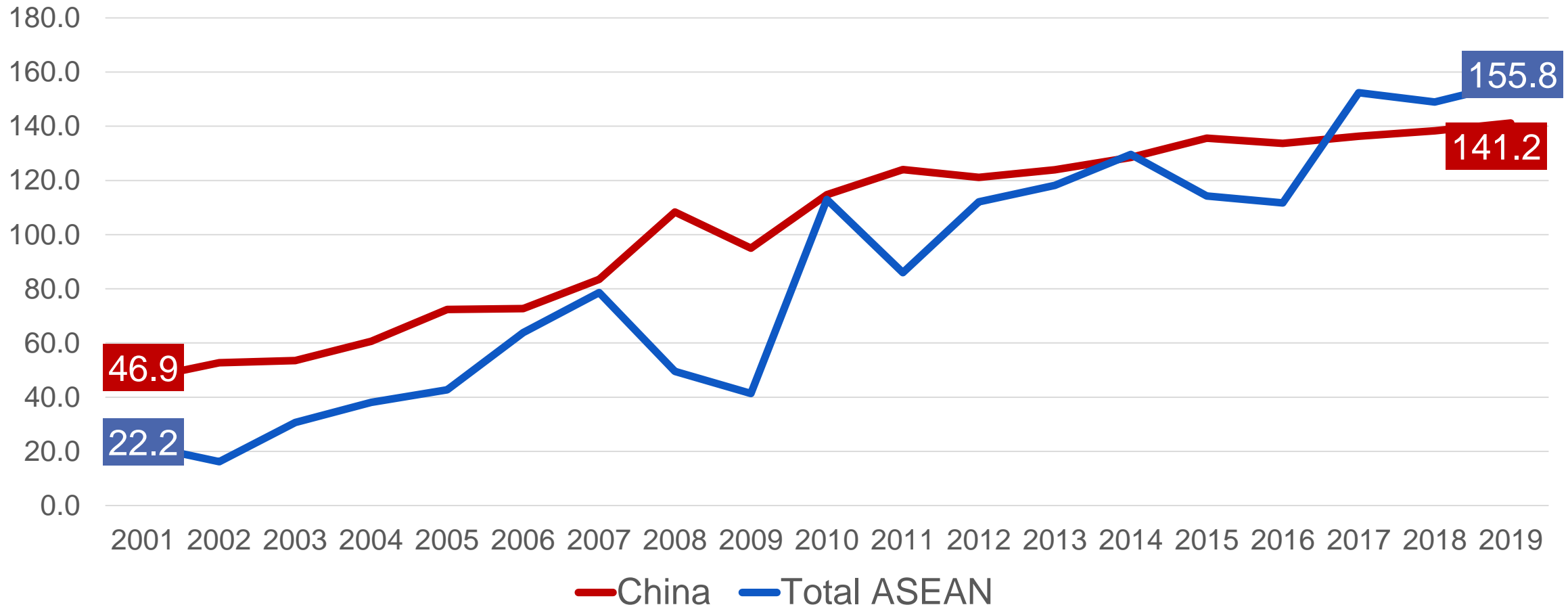


2001-2019: US\$ 1,555.1 billion

ASEAN-6	Total FDI inflow, 2001-2019, in US\$ billions
Indonesia	210.6
Malaysia	137.8
Philippines	60.7
Singapore	861.0
Thailand	138.7
Viet Nam	146.4

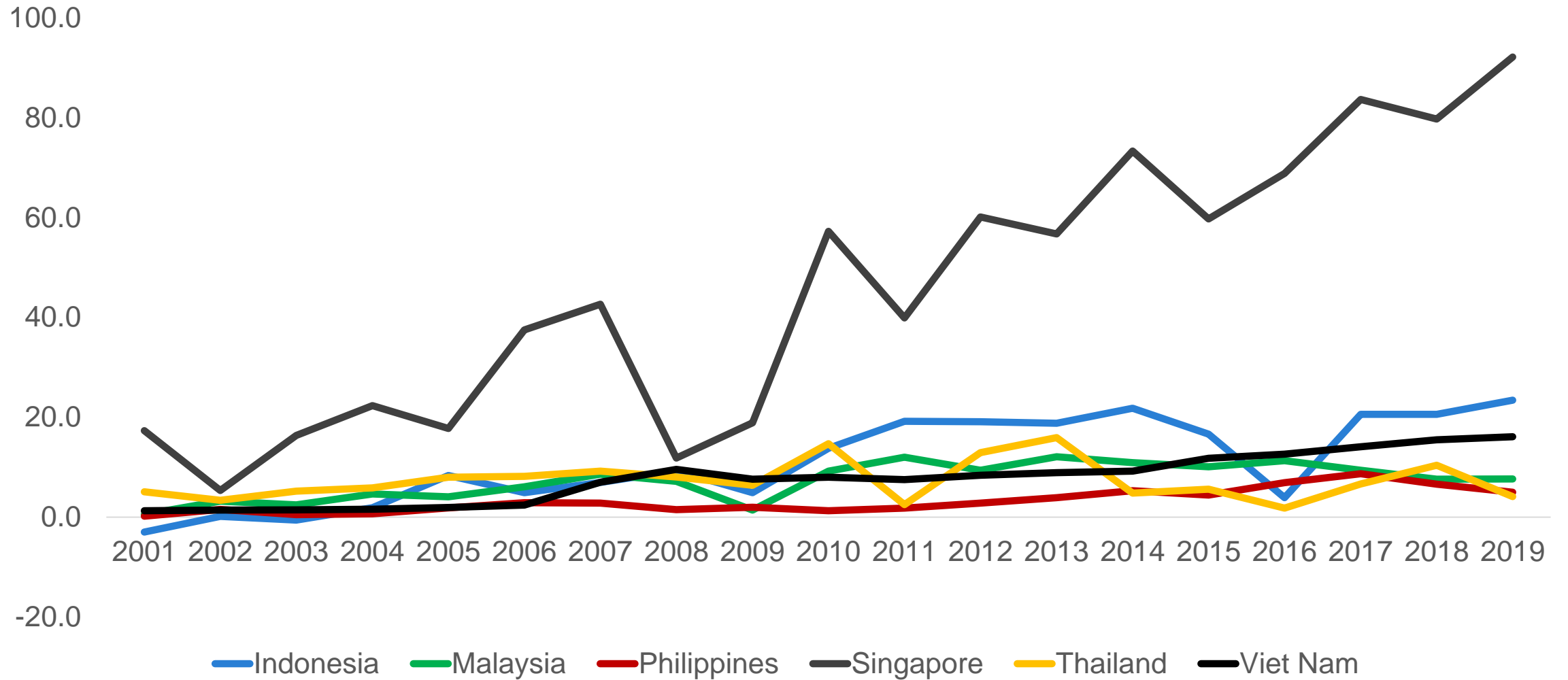
7. FDI China and ASEAN, 2001-2019

Source: UNCTAD



8. FDI in ASEAN-5, 2001 to 2019

Source: UNCTAD



9. Standard Chartered Bank ASEAN preferred locations for supply chain investments, 2020



10. UNCTAD top 30 developing economies receiving FDI, 2019

Source: UNCTAD

Region	Country/Economy	FDI inflow, in US\$ millions	Region	Country/Economy	FDI inflow, in US\$ millions
1 East Asia	China	141,225	16 South America	Peru	8,892
2 Southeast Asia	Singapore	92,081	17 West Asia	Turkey	8,434
3 South America	Brazil	71,989	18 East Asia	Taiwan Province of China	8,213
4 East Asia	Hong Kong, China	68,379	19 Southeast Asia	Malaysia	7,650
5 Caribbean	British Virgin Islands	57,997	20 South America	Argentina	6,244
6 South Asia	India	50,553	21 Southeast Asia	Philippines	4,996
7 Caribbean	Cayman Islands	34,690	22 Central America	Panama	4,835
8 Central America	Mexico	32,921	23 Souther Africa	South Africa	4,624
9 Southeast Asia	Indonesia	23,429	24 West Asia	Saudi Arabia	4,562
10 Southeast Asia	Viet Nam	16,120	25 Southeast Asia	Thailand	4,146
11 South America	Colombia	14,493	26 Southeast Asia	Cambodia	3,706
12 West Asia	United Arab Emirates	13,787	27 North Africa	Morocco	3,559
13 South America	Chile	11,437	28 Central Africa	Congo	3,366
14 East Asia	Korea, Republic of	10,566	29 West Africa	Nigeria	3,299
15 North Africa	Egypt	9,010	30 West Asia	Oman	3,124

11. Matrix comparing Philippines with Vietnam in 143 factors

#	Category	Factor	Vietnam	Philippines	Source	*
1	Business Costs	Industrial estate	Low rent from government-owned land	High rent from privately-owned land		
2	Business Costs	Land Ownership	Government and nationals	Government and nationals 50+25 year lease		
3	Business Costs	Office occupancy cost (US\$/sqm)	US\$ 829 (Ho Chi Minh)	US\$ 581 (Manila)	Jones Lang Lasalle IP, Inc Global Research, Q4 2019	
4	Business Costs	Raw material supply	Extensive sourcing from nearby China	25% local 75% imported by sea and air		
5	Business Costs	Cost to export: border compliance	US\$ 290	US\$ 456	World Bank Doing Business 2020	
6	Business Costs	Time to export: border compliance (hours)	55	42	World Bank Doing Business 2020	
7	Business Costs	Cost to export: documentary compliance	US\$ 139	US\$ 53	World Bank Doing Business 2020	
8	Business Costs	Time to export: documentary compliance (hours)	50	36	World Bank Doing Business 2020	

12. UNCTAD, FDI in Developing Asia, 2020 prediction

Source: UNCTAD

All regions will see negative FDI growth rates in 2020 with severe impact expected in developing Asia (-30 to -45 per cent)

FDI inflows and projections, by group of economies and region, 2017-2019, and forecast 2020 (Billions of dollars and per cent)

Group of economies/region	2017	2018	2019	Projections
				2020
World	1 700	1 495	1 540	920 to 1 080
Developed economies	950	761	800	480 to 600
Europe	570	364	429	240 to 300
North America	304	297	297	190 to 240
Developing economies	701	699	685	380 to 480
Africa	42	51	45	25 to 35
Asia	502	499	474	260 to 330
Latin America and the Caribbean	156	149	164	70 to 100
Transition economies	50	35	55	30 to 40
<i>Memorandum: annual growth rate (per cent)</i>				
World	-14	-12	3	(-40 to -30)
Developed economies	-25	-20	5	(-40 to -25)
Europe	-16	-36	18	(-45 to -30)
North America	-40	-2	0	(-35 to -20)
Developing economies	7	0	-2	(-45 to -30)
Africa	-10	22	-10	(-40 to -25)
Asia	7	-1	-5	(-45 to -30)
Latin America and the Caribbean	14	-5	10	(-55 to -40)
Transition economies	-25	-31	59	(-45 to -30)

13. UNCTAD, reasons for depressed FDI flows in Developing Asia, 2020

Source: UNCTAD

Why?

Among others:

- Lockdown measures and travel restrictions
- Global uncertainties
- Economic recession and falling demand
- Challenging corporate financial situation
- Declining reinvested earnings
- Declining M&A activities
- Trade tension and supply chain disruption

14. UNCTAD, reasons to expect recovery of FDI in Developing Asia

Source: UNCTAD

But there are plenty of opportunities in ASEAN post pandemic

- AEC 2025, a closer integrated region
- RCEP – US companies can also benefit from it
- Supply chains resilient and network development
- Industry 4.0 adaptation, utilisation and development
- Increasing opportunities in the digital economy