

# ASEAN Investment Report 2020–2021

## Investing in Industry 4.0



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# **ASEAN Investment Report 2020–2021**

## **Investing in Industry 4.0**

**The ASEAN Secretariat**

**United Nations Conference on  
Trade and Development**

The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

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Catalogue-in-Publication Data

ASEAN Investment Report 2020–2021 – Investing in Industry 4.0  
Jakarta: ASEAN Secretariat, September 2021

332.67395

1. ASEAN – Investment – Foreign Direct Investment
2. Infrastructure – Digital Economy – Industry 4.0

ISBN 978-623-6945-50-6



ASEAN: A Community of Opportunities for All

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General information on ASEAN appears online at the ASEAN Website: [www.asean.org](http://www.asean.org)

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This publication was prepared by the ASEAN Secretariat and the United Nations Conference on Trade and Development (UNCTAD), and supported by the Government of Australia through the ASEAN-Australia Development Cooperation Program Phase II (AADCP II).

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The ASEAN Investment Report is produced to facilitate a better understanding of FDI developments in ASEAN. The findings, interpretations, and analysis in the Report should be treated with care, as work on harmonising and improving FDI quality across the region is on-going.

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## FOREWORD

Foreign Direct Investment (FDI) inflows into ASEAN reached its highest ever level in 2019 at US\$ 182 billion, making ASEAN the largest recipient of FDI in the developing world. Due to the unprecedented impact of the COVID-19 pandemic, FDI declined to US\$ 137 billion in 2020, which is quite significant, but compared to the decline of global FDI level, ASEAN still performed slightly better as its share of global FDI actually rose from 11.9 per cent in 2019 to 13.7 per cent in 2020. FDI in the digital economy sectors and infrastructure-related industries helped to cushion the fall of FDI in other sectors in the wake of the pandemic. Investment within the region remained resilient, increasing by 5 per cent to \$23 billion in 2020, pushing up the intra-ASEAN share of FDI in the region from 12 to 17 per cent.

During this period, ASEAN and its five Free Trade Agreement (FTA) partners concluded negotiations and signed the Regional Comprehensive Economic Partnership (RCEP) Agreement in November 2020. This mega regional trading agreement, which constitutes about 15 per cent of global FDI stock and more than 33 per cent of global FDI flows in 2020, is expected to provide an opportunity for ASEAN and its partners to further boost investment and enhance the development of the global value chain in the region.

This year's *ASEAN Investment Report* features the role of FDI and Multi-National Enterprises (MNEs) in Industry 4.0 transformation in the region, and how ASEAN Member States promote the adoption of Industry 4.0 technologies to support their industrialisation and enhance overall economic competitiveness. The Report also provides recommendations going forward to address the challenges in attracting FDIs to support this transformation process, noting that the prospects for FDI in Industry 4.0 relevant industries and activities are positive.

In the wake of the pandemic, accelerating digitalisation and Industry 4.0 transformation can go hand-in-hand with attracting FDIs in rebuilding the ASEAN economy. We hope that policy makers and stakeholders in the industry will find the Report useful in this endeavour.



**Dato Lim Jock Hoi**  
Secretary-General of ASEAN

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