

1977-2017



40 YEARS OF EU-ASEAN

PARTNERSHIP & PROSPERITY

Trading and Investing Together

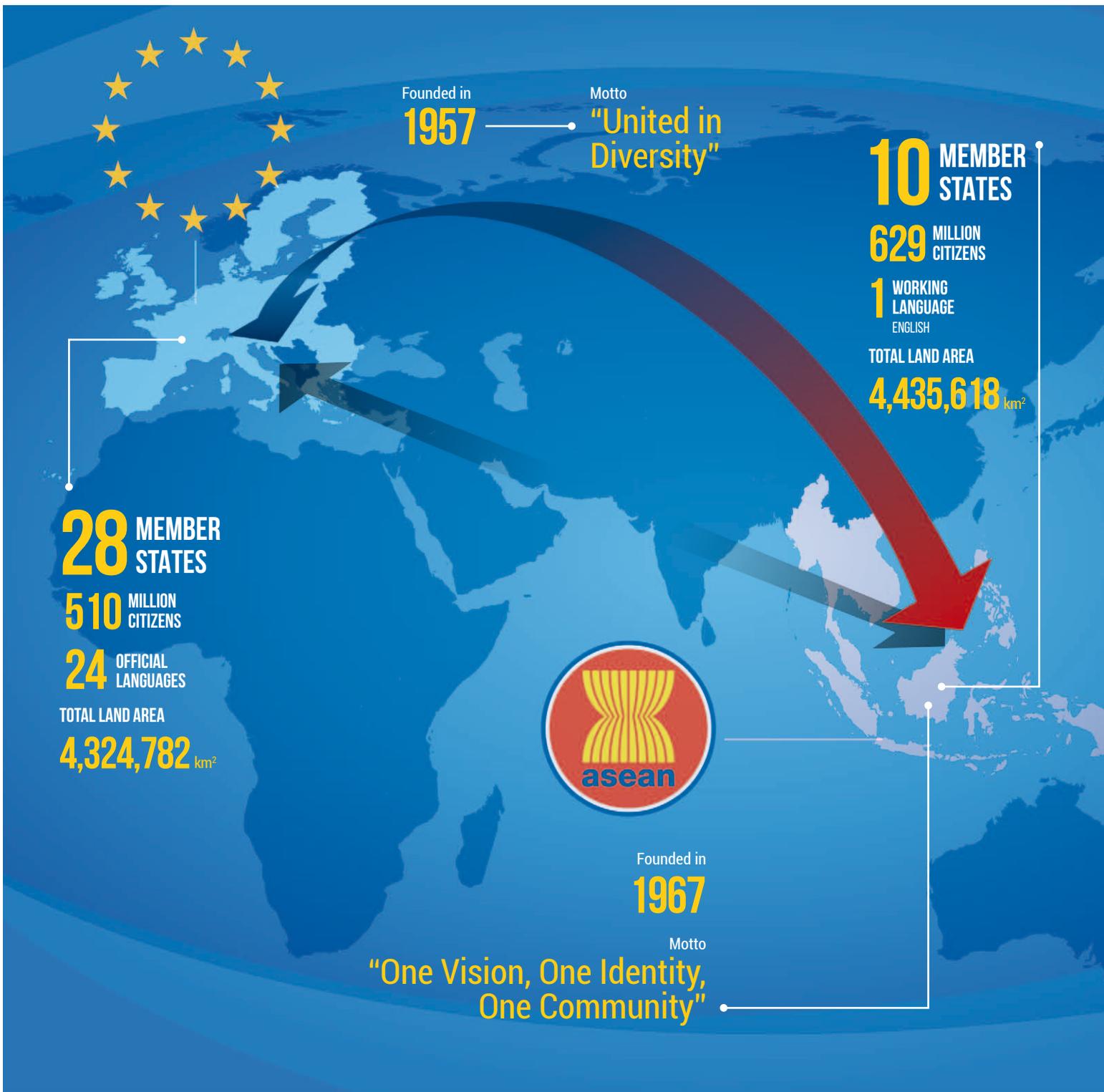


Table of Contents

- 2 **Message from the EU Trade Commissioner**
Mrs. Cecilia Malmström

- 4 **Message from the EU Ambassador to ASEAN**
Mr. Francisco Fontan

- 6 **Message from the Chairman of the EU-ASEAN Business Council**, Mr. Donald Kanak

- 8 **1. EU (The European Union)**
- 10 1.1. The EU as a Global Economic Player
- 13 1.2. The European Single Market
- 14 1.3. Trade for All

- 16 **2. ASEAN (The Association of Southeast Asian Nations)**
- 18 2.1. ASEAN Facts and Figures
- 22 2.2. Key Developments under the AEC

- 26 **3. EU-ASEAN Relations**
- 28 3.1. Enhancing the EU-ASEAN Partnership
- 30 3.2. EU-ASEAN Projects Supporting the AEC

- 32 **4. EU-ASEAN Trade and Investment**
- 34 4.1. Trade in Goods
- 38 4.2. Trade in Services
- 40 4.3. Investment Relations

- 42 **5. EU-ASEAN Business Support**
- 44 5.1. The EU-ASEAN Business Council
- 46 5.2. EU Business Avenues in South East Asia
- 47 5.3. South-East Asia IPR SME Helpdesk

- 48 List of Useful Contacts

- 49 The EU Export Helpdesk

Message from the EU Trade Commissioner

Mrs. Cecilia Malmström

The European Union (EU) is the world's largest trading bloc, the biggest importer and exporter, and the biggest investor and recipient of foreign direct investments. The commercial and political ties between the EU and our partners in Southeast Asia have existed for centuries and have grown into what is today one of the most important exchanges of goods, services and investment in the world. As we celebrate 40 years of close partnership, we are keen to further reinforce this relationship.

Opening new markets makes economies grow on both ends. This is why the EU has even in times of economic turmoil led global efforts to fight protectionism, and promoted open trade and investment at home and abroad.

Today global value chains make borders disappear and help create jobs, with input added at various stages and different geographical locations. To respond to this reality, the European Commission adopted in October 2015 a new trade and investment strategy, 'Trade for All'. It involves trade policy being more effective at delivering new economic opportunities; more

transparent in terms of opening up negotiations to more public scrutiny; and addressing not just interests but also values. The strategy lays out an ambitious programme of trade negotiations, seeking to reenergise the World Trade Organisation (WTO), to conclude ongoing bilateral negotiations, and opening the door to new initiatives, when the conditions are right – in the Asia-Pacific region in particular, but also in Latin America and Africa.

“As we celebrate 40 years of close partnership, we are keen to further reinforce this relationship.”

The EU and the Association of Southeast Asian Nations (ASEAN) entertain a very robust and dynamic trade and investment relationship. The EU is today ASEAN's second largest trading partner, while ASEAN ranks third among the EU's top trading partners outside Europe. Even more impressive, the EU is the top foreign investor in the ASEAN, and is estimated to hold around a quarter of the total Foreign Direct Investment (FDI)

stock in the ASEAN region. However, when one looks at the sheer size of the economies of EU and the ASEAN, comprising a combined market of more than 1 billion consumers, it becomes clear that the potential of our trade relations is not fully exploited.

Southeast Asia is therefore central to the EU trade negotiating agenda. We have completed our Free Trade Agreement (FTA) negotiations with Singapore and Vietnam, and we are keen to open and conclude negotiations with other ASEAN Member States. These bilateral negotiations comprise building blocs for a possible future comprehensive region-to-region FTA with ASEAN, which remains the EU's ultimate objective. At the policy level, I am also delighted to have annual regular consultations with the ten ASEAN Economic Ministers to discuss fruitful ways on further upgrading our trade and investment partnership.

As the EU's Commissioner for Trade, I fully support the shared objective to bring our two economies closer together in order to tap the full potential of this promising partnership. Therefore, I warmly welcome this brochure as a



“I fully support the shared objective to bring our two economies closer together...”

valuable piece of information for EU and ASEAN stakeholders. Over the coming years, I look forward to working closely with ASEAN Governments in order to enhance our trade and business relations.

Message from the EU Ambassador to ASEAN

Mr. Francisco Fontan

The ASEAN and the EU will celebrate the 40th anniversary of their formal relations in 2017, precisely when ASEAN itself will turn 50 years old, and the EU will celebrate the 60th anniversary of the Treaty of Rome.

Both regions can look back at 40 years of friendship characterised by their shared goal of peace and prosperity for its peoples, and look forward to further deepening relations based on trust, mutual respect, common interests and values. Today, the ASEAN and the EU, with their own dynamics, objectives and contexts, are probably the two most ambitious regional integration organisations in the world.

Even during difficult economic times, trade and investment flows between the EU and ASEAN have grown substantially – showing how robust and positive our commercial relations are. Growth in both EU exports to the ASEAN and EU investment in ASEAN have far outpaced growth in the EU's GDP.

The EU has become ASEAN's second largest trade partner (after China) with a share of 13.1%, while ASEAN, as a whole, is the EU's third largest trade partner

outside Europe (after the US and China), with trade totalling EUR 201.6 billion in 2015. In fact, bilateral merchandise trade has almost doubled in the last 10 years. Furthermore, if we add trade in services, which is growing rapidly, the number becomes even more impressive, with a value of EUR 67.4 billion of trade in services in 2014.

“...bilateral merchandise trade has almost doubled in the last 10 years.”

More impressive still, the EU is the largest investor in ASEAN economies, with FDI inflows from the EU accounting for around EUR 20 billion or 16.7% of the total investments inflows into ASEAN in 2015, and for about a quarter of the total FDI stock in the ASEAN. EU companies have been investing an average of EUR 14 billion annually in the region since 2004. In fact, in 2015, the EU investments in the ASEAN region topped the FDI inflows of Japan, the United States (US) and China.

ASEAN has averaged an impressive annual GDP growth of around 5.5%

“...the EU is the largest investor in ASEAN economies, ...”

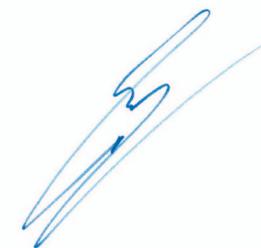
from 2010 to 2015, making it not only one of the most dynamic regions in the world but also an attractive trade partner for the EU. The ASEAN market today represents a population of almost 629 million people, and with a rapidly growing middle-class. As a bloc, ASEAN represents the 5th largest economy today, and it is projected to become the 4th largest economy by 2050.

It is with this market potential in mind that the EU has launched a series of FTA-negotiations with selected ASEAN countries in order to fully realise the market opportunities for EU companies. I am very pleased to report that we have successfully concluded negotiations with Singapore and Vietnam. We have launched negotiations with Indonesia, Malaysia, Thailand and the Philippines. The ambition is to conclude these negotiations in the medium-term. In the longer-term, we hope that these bilateral FTAs could constitute the building blocs for a more comprehensive region-to-region FTA, which would represent a



major achievement in the development of our economic partnership.

The publication of this booklet on EU-ASEAN trade and investment relations comes at an opportune time as trade and investment is becoming ever more important for the EU and ASEAN as drivers of growth for development and the creation of jobs. The booklet serves as a first reference to businesses on both sides with regard to the opportunities that the ASEAN and European markets promise.



Message from the Chairman of the EU-ASEAN Business Council

Mr. Donald Kanak

The year 2017 marks a number of important anniversaries for both ASEAN and the EU. Round numbers predominate – 40, 50, and 60. 40 years of formal EU-ASEAN dialogue; 50 years since the creation of ASEAN; and 60 years since the Treaty of Rome established the forerunner of the present day European Union. All are important milestones and ones that the EU-ASEAN Business Council hopes can be marked by further and enhanced diplomatic, trade and investment relations with ASEAN.

Optimism about ASEAN's future remains as strong as ever. That is probably, in one sentence, the key headline that emerged from the EU-ASEAN Business Council's Business Sentiment Survey in 2016. The survey of European businesses operating in Southeast Asia clearly reaffirmed the ASEAN region as a bright spot in the global economy and a focus for European investment going forward.

At a time when similar surveys of businesses in other Asian markets are showing a more cautious approach and dampening investment expectations, European businesses in ASEAN overwhelmingly expect their profits to

grow and their operations to expand over the medium term. More than two-thirds of respondents said that they are planning to expand operations and increase employment in ASEAN over the next five years – good news for jobs and investment.

This confidence is driven by the growth potential of ASEAN markets which is

“Optimism about ASEAN’s future remains as strong as ever.”

powered by large, youthful populations, strong consumer sentiment, high rates of urbanisation and deep pools of skilled workforces. Additionally, ASEAN member states are embracing external trade as a driver for growth and are demonstrating their commitment to enhancing economic ties among themselves and with the rest of the world.

Bilateral FTA discussions between the EU and the Philippines and Indonesia are now underway which, when coupled with the concluded deals with Singapore and Vietnam, will form the foundations for

“...a comprehensive region-to-region FTA between ASEAN and the EU...would be a significant game changer for both regions...”

what we hope will be a comprehensive region-to-region FTA between ASEAN and the EU – an agreement that would be a significant game changer for both regions and that European businesses want to see. ASEAN itself continues to make progress with its own ASEAN Economic Community (AEC) objectives, albeit at a slow and steady pace, but progress nonetheless.

Europe and ASEAN have a growing and mutually beneficial trading and diplomatic relationship with much to gain from its further development. At this time, however, growth is slowing in some of the world's largest economies, and the global political debate is challenging the benefits of open trade and investment. Challenging times call for leaders in governments and businesses to work together and take action to achieve sustainable and inclusive growth and prosperity. With those goals in mind,



the EU-ASEAN Business Council will continuously strive to build Europe's relationship with ASEAN, and to support ASEAN and its Member States in both their development and the full implementation of the AEC.

1

EU (THE EUROPEAN UNION)



The EU represents the world's second largest economy. With a population of more than 510 million inhabitants, it accounts for roughly a quarter of the world's total GDP. The EU is the world's largest exporter and importer of goods and services. In its nearly six decades of history, the EU has laid the foundation for a unique model of regional integration based on a common market with the free movement of goods, services, people and capital, comprising a harmonised set of rules.



14.7% SHARE OF GLOBAL TRADE IN GOODS

22.2% SHARE OF GLOBAL TRADE IN SERVICES

32.8% SHARE OF GLOBAL FDI OUTWARD STOCKS



EUR 14.635
BILLION

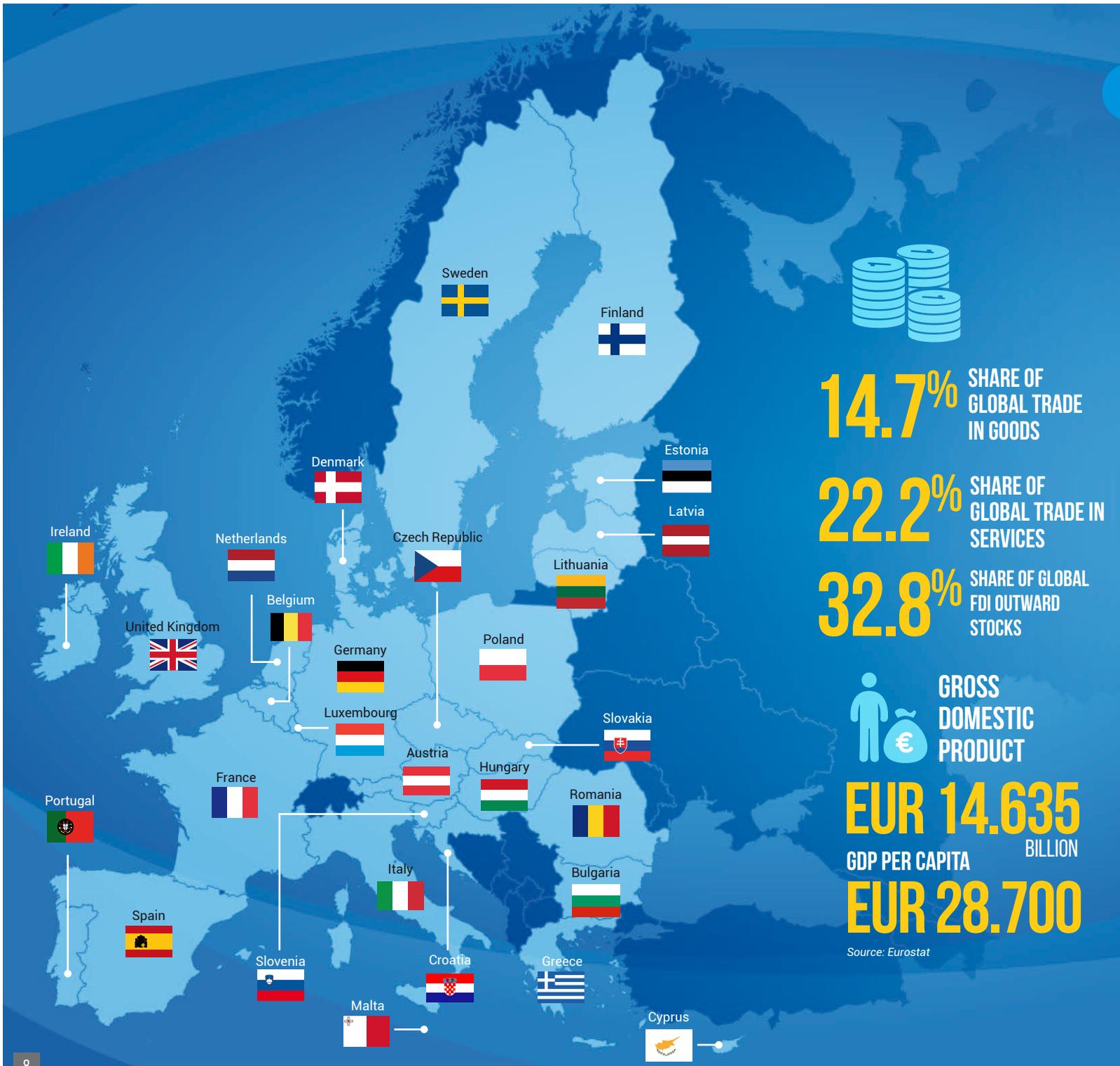
EUR 28.700
GDP PER CAPITA

Source: Eurostat

60
YEARS

1957 - 2017

ANNIVERSARY
OF THE TREATY
OF ROME

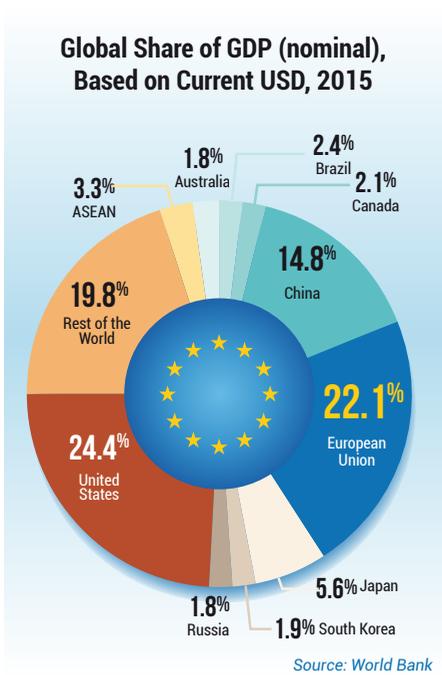




1.1 The EU as a Global Economic Player

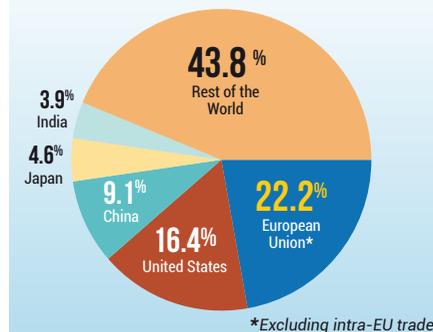
The EU is the only such grouping of sovereign states that has managed to create such an extensive customs union with common commercial policies. Throughout its 60 years of evolution, the EU has successfully developed a strong internal market as well as strengthened its global trading position. As of today, it stands amongst the largest global trading powers, such as the US, China and Japan. In terms of trade in goods, in 2015 the EU accounted for 14.7% of global trade, whilst in terms of services it covered 22.2% of the global trade.

Thanks to its extensive global economic clout, the EU holds important roles within international multilateral organizations such as the WTO. In the WTO, it is represented and speaks on behalf of the entire bloc. As one of the most vocal

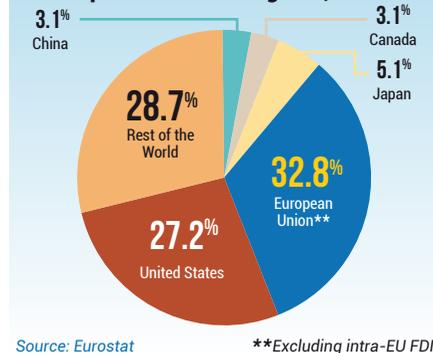


importer of services. In 2015 it managed to generate a flow of transactions of EUR 1,472 billion which followed the growing trend over the last few years. Overall, the EU economy registered a trade surplus of EUR 64.4 billion in trade in goods, and a surplus of EUR 150.7 billion in trade in services. In terms of FDI, the EU is the world's leading investor (EUR 5,748.6 billion of outward stocks, excluding intra-EU FDI), as well as the largest holder of FDI stocks (EUR 4,582.5 billion of inward stocks, excluding intra-EU FDI).

Global Share of Trade in Services, Top 5 Countries/Regions, 2015



Global Share of FDI Outward Stocks, Top 5 Countries/Regions, 2014



trading powers, it frequently takes the lead on various initiatives and multilateral agreements. Thus, the EU's role proved instrumental during the Bali WTO and Nairobi WTO conferences, which brought about major international trade-related agreements.

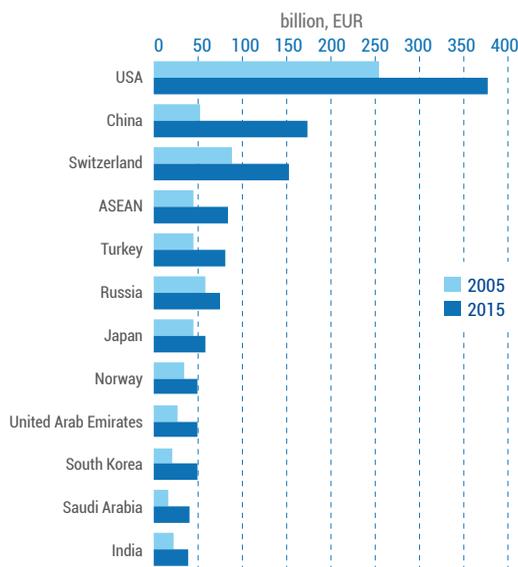
The EU's economic growth is highly reliant on its external markets. In 2015, the EU's international trade in goods with the rest of the world (the sum of extra-EU exports and imports) accounted for EUR 3,519 billion. Both exports and imports recorded an increase in comparison with the 2014 levels. Additionally, the EU stands out as the world's largest exporter and

The main trading partners that engage in trade with the EU are the US, China, Switzerland, the ASEAN and Turkey. While the largest share of EU goods is being exported to the US, China has recently emerged as the largest source of imports to the EU market.

The need of retaining a principal role within the global trade environment drives the EU to improve existing bilateral trade agreements as well as to conclude new agreements. As of today, the EU has concluded major agreements with South Korea, Singapore, Vietnam and Canada. It is estimated that the upcoming decade

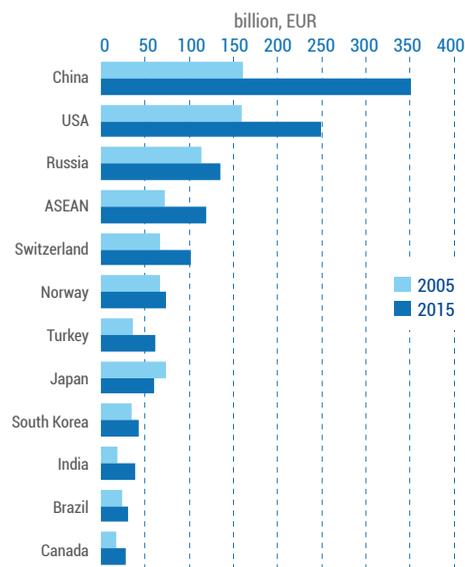
will see up to 90% of global economic growth generated outside Europe. Therefore, it is of key importance that the EU taps into this growth potential by opening up new market opportunities for European businesses abroad. Undoubtedly, a great share of potential could be identified in rapidly-growing regions such as Southeast Asia. A gradual liberalization of markets with ASEAN could improve the EU's trade and investment relations with its ASEAN partners and simultaneously propel economic growth in individual countries within the ASEAN region.

EU Trade in Goods by Main Trading Partners - Exports



Source: Eurostat

EU Trade in Goods by Main Trading Partners - Imports



1.2 The European Single Market

The European Single Market lies at the heart of the European integration project. Starting with the basic idea for the creation of a free trade area, the EU as of today has managed to develop an environment where people, goods, services and capital move freely. EU Member States jointly decided to remove a significant number of technical, legal and bureaucratic barriers in order to enable companies to expand their businesses across the EU market. As a result, European consumers have enjoyed a steady decrease of prices, as well as a wider range of available products. The membership of the European Single Market extends beyond the EU, as Iceland,

Liechtenstein, Norway and Switzerland are also participating in the single market under negotiated frameworks.

On the 28th October 2015, the European Commission issued the most recent Single Market initiative. The Single Market Strategy aims at unlocking the full potential of the internal market by improving mobility for service providers, ensuring that innovative business models may flourish. An improved digital agenda should help retailers conducting businesses across borders, and, concurrently ease the access to goods and services across Member States.

Did you know that...

- The expansion of the Single Market resulted in a rise of consumers from 345 million people in 1992 to more than 510 million in 2016;
- 19 countries within the Single Market use the same currency, the Euro (EUR), which is the world's second most important currency;
- The EU is by far the world's largest host of FDI stock, accounting for more than EUR 9,000 billion in 2014 (including intra-EU FDI). In terms of investments abroad, the EU ranked second in 2014, only behind the US, as it generated more than EUR 280 billion of FDI outflows (including intra-EU FDI);
- Within the last 15 years, trade in goods between EU countries (intra-EU trade) has increased from EUR 800 billion to more than EUR 3,000 billion. As of today, it constitutes a share of 63.2% of the EU's total trade in goods;
- The Single Market represents one of the most significant symbols of European integration, encompassing many policy areas. These include the European Customs Union, the single currency, the Schengen Agreement and many other policies and laws designed to unite the diverse national economies of Europe into a single unit.

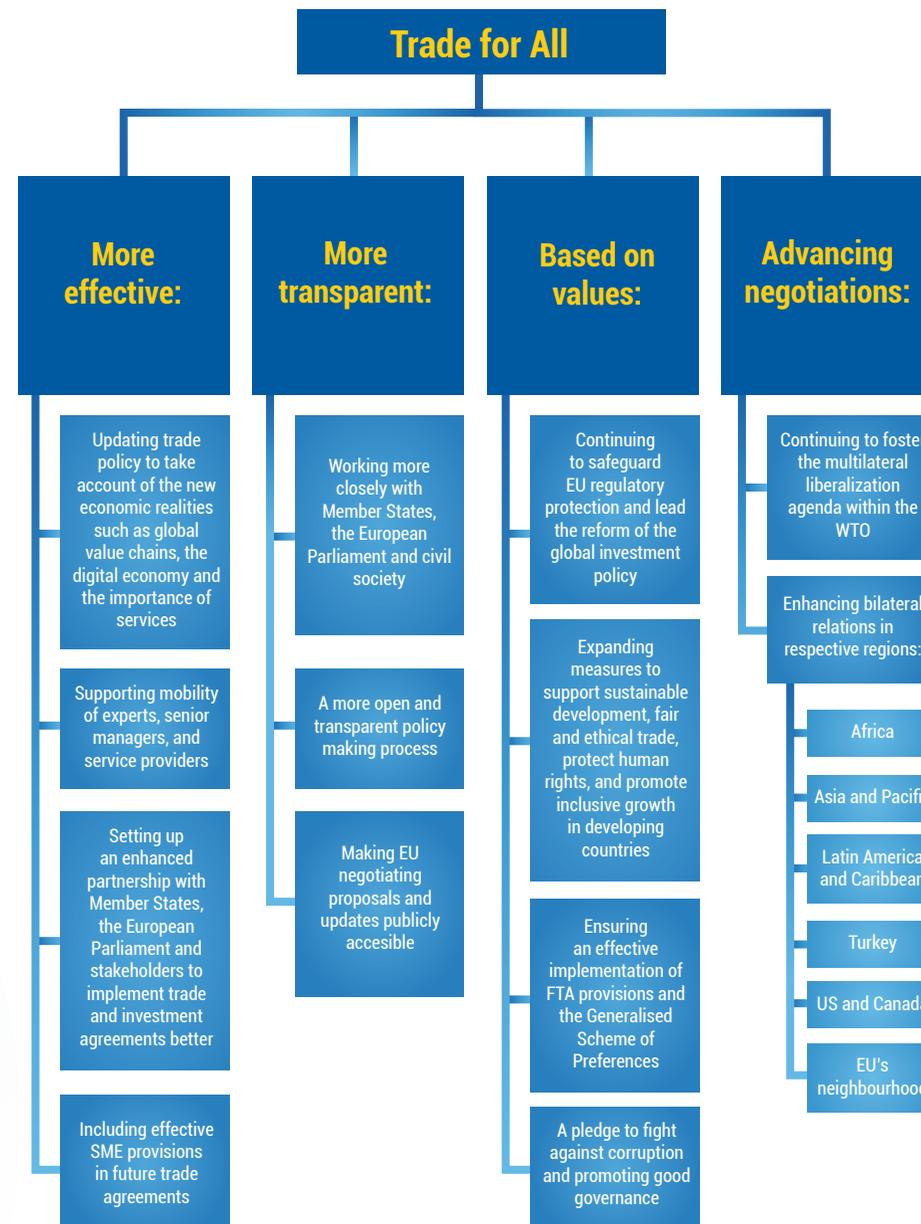
Source: Eurostat & UNCTAD

1.3 Trade for All The EU's New Trade and Investment Strategy

Trade for All is the new trade and investment strategy, presented by the EU Commissioner for Trade, Cecilia Malmström, to tackle the challenges that arise from the current global trade environment. It was launched on the 14th October 2015 and builds upon Europe's international role in trade, and the single market. Today, more than 30 million jobs in the EU depend on exports outside Europe. It is therefore deemed important to follow basic principles that would

not only lead to economic prosperity, but would also protect the values and standards that Europeans have managed to develop over time.

The strategy aims at improving the EU's trade policy and make it more effective, more transparent and more in tune with EU values. Overall, it aims at becoming more responsible and deliver on principal economic goals, such as growth and jobs, without compromising core EU principles.



Source: European Commission

2

ASEAN (THE ASSOCIATION OF SOUTHEAST ASIAN NATIONS)



Since its creation in 1967, the ASEAN exemplifies one of the most successful regional integration initiatives in Asia. It groups together the ten Southeast nations of Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Thailand, Singapore, and Vietnam with a combined population of 629 million. As a bloc, it constitutes the third largest economy in Asia, and is projected to become the 4th largest economy in the world by 2050. With a rapidly growing middle-class population, and favourable demographics, the region is attracting trade and investment on an unprecedented scale.



1967 - 2017
ANNIVERSARY OF
THE ESTABLISHMENT
OF ASEAN

MYANMAR

Population	52,476,000
Area	676,577 km ²
GDP per capita	USD 1,246
Membership	1997

VIETNAM

Population	91,713,300
Area	330,951 km ²
GDP per capita	USD 2,109
Membership	1995

PHILIPPINES

Population	101,562,300
Area	300,000 km ²
GDP per capita	USD 2,850
Membership	1967

LAO PDR

Population	6,902,400
Area	236,800 km ²
GDP per capita	USD 1,831
Membership	1997

CAMBODIA

Population	15,405,200
Area	181,035 km ²
GDP per capita	USD 1,198
Membership	1999

THAILAND

Population	68,979,000
Area	513,120 km ²
GDP per capita	USD 5,737
Membership	1967

BRUNEI DARUSSALAM

Population	417,200
Area	5,769 km ²
GDP per capita	USD 30,942
Membership	1984

MALAYSIA

Population	30,485,300
Area	330,290 km ²
GDP per capita	USD 9,657
Membership	1967

SINGAPORE

Population	5,535,000
Area	719 km ²
GDP per capita	USD 52,744
Membership	1967

INDONESIA

Population	255,461,700
Area	1,913,579 km ²
GDP per capita	USD 3,357
Membership	1967



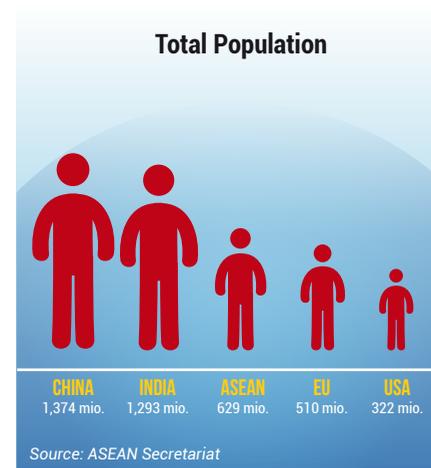
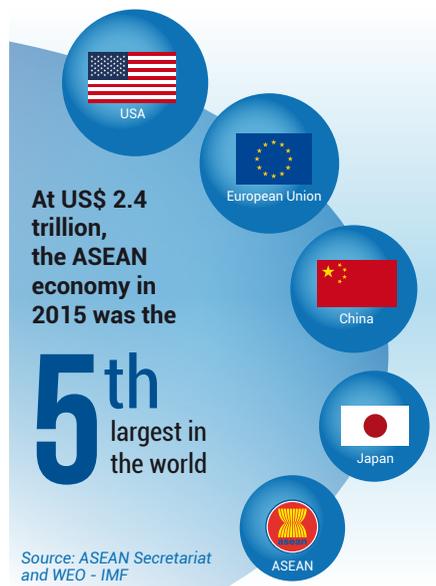
Source: ASEANstats



2.1 ASEAN - Facts and Figures

ASEAN was established on the 8th August 1967 in Bangkok, Thailand. The five Southeast Asian countries of Indonesia, Malaysia, Philippines, Singapore and Thailand signed the ASEAN declaration (also known as the Bangkok declaration), giving birth to the first regional economic organization in Asia.

This document set the principal aims and purposes that would be the core of the cooperation between the member countries. ASEAN Member States agreed on strengthening the relations in the economic, social, cultural, technical and educational fields. Additionally, they committed to promote regional peace

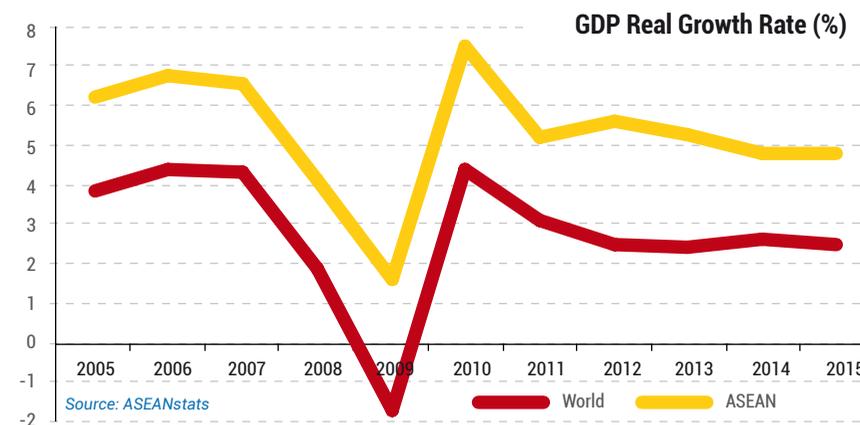


Cambodia, Laos, Myanmar and Vietnam, expanding its membership to cover 10 nations in Southeast Asia. East Timor submitted its application to join the ASEAN grouping in 2011.

Within the last decade, ASEAN has successfully positioned itself as one of the world's leading economic powers. With a combined GDP of nearly EUR 2 trillion in 2015, it forms the third largest economy in Asia and the fifth largest economy in the world. The most recent projections point to ASEAN becoming the 4th largest economy in the world by the year 2050.

and stability, respecting the rule of law and adhering to the obligations that arise from international agreements. The gradual evolution of a political and economic community has meant that ASEAN has developed complex and advanced mechanisms of cooperation. With its gradual expansion, ASEAN has managed to integrate the neighbouring countries of Brunei Darussalam,

In terms of population, ASEAN ranks as the world's third largest market, preceded only by China and India. The rapidly expanding middle-class consumers represent a strong purchasing potential for ASEAN's future trade relations. Moreover, with more than half of its population aged below 30 years, ASEAN possesses a large base of productive labour force.





ASEAN growth has been outperforming global GDP growth during the past decade. With an average GDP growth rate of 5.3% it stood as the world's third fastest growing economy, only behind China and India.

During the last ten years, the total amount of ASEAN trade in goods increased by more than EUR 1 trillion, recording a 107% change. ASEAN is becoming more reliant on its external trading partners, as the share of extra-ASEAN trade has seen a steady increase in the aftermath of the global economic crisis reaching 76.1% in 2015, while intra-ASEAN trade accounted for 23.9% in 2015.

ASEAN's positive economic performance has successfully attracted a big

proportion of foreign investors. As of today, ASEAN stands out as one of the major destinations of FDI flows amongst the developing countries. With the introduction of the AEC on 31st December 2015, a further rise of interest by investors in the region could be expected. In 2015, ASEAN managed to attract more than EUR 100 billion of FDI, which represents an impressive increase compared to less than EUR 40 billion recorded in 2005. Despite the most recent decline in FDI inflows, national policy measures favourable to investment, point to the willingness of ASEAN member states to further open their markets to foreign investors.

The ASEAN Free Trade Area



The ASEAN Free Trade Area (AFTA) is an agreement, signed in 1992 by the ASEAN-6 (Brunei Darussalam, Indonesia, Malaysia, the Philippines, Singapore and Thailand), which established the Common Effective Preferential Tariff (CEPT) Scheme. The primary goals of this agreement were twofold; firstly, increasing the competitive edge of ASEAN as a whole on global markets through the elimination of internal tariffs and other internal barriers to trade and secondly, attracting more FDI to the region. In accordance with the AFTA Framework Agreement, the ASEAN 6 members had to commit to establish a free trade area by 2008. The so-called CLMV countries (Cambodia, Laos, Myanmar, Vietnam) which joined ASEAN later were given extended timeframes to reduce their tariff and non-tariff barriers to trade.

Following the implementation of the AFTA and the entry into force of the ASEAN Trade in Goods Agreement (ATIGA) on 17th May 2010, common effective preferential tariff rates between the ASEAN-6 (Brunei Darussalam, Indonesia, Malaysia, the Philippines, Singapore, and Thailand) fell to virtually zero.



2.2 Key Developments under the AEC

The AEC is the realisation of the region's goal of economic integration. Its institutional base was formed with the establishment of the ASEAN Economic Community Blueprint in 2007. The AEC was officially launched on the 31st of December 2015 at the Kuala Lumpur Summit. On that occasion, ASEAN leaders affirmed that the AEC should be viewed as a milestone and not the end of the process of creating the ASEAN internal market. In order to ensure further development of the AEC, a new Blueprint with an extended deadline of 2025 was issued. It is structured around five elements, each of them addressing individual economic areas of focus.

The first element aims at developing a highly integrated and cohesive economy.

The second element – competitive, innovative, and dynamic ASEAN – emphasizes the importance of fair competition and the creation of an efficient and integrated transport network. With the third element, ASEAN Member States pledge to enhance cooperation through a sectorial approach. The fourth element promotes the equitable and inclusive economic development, with a focus on the private sector. Finally, the fifth element envisages ASEAN's full integration into the global economy through a coherent approach towards external economic relations, with the formation of free trade agreements and comprehensive economic partnerships.

AEC Blueprint 2025

Highly Integrated and Cohesive Economy

- ▶ Trade in Goods
- ▶ Trade in Services
- ▶ Investment Environment
- ▶ Financial Integration,
- ▶ Financial Inclusion, and Financial Stability
- ▶ Movement of Skilled Labour and Business Visitors
- ▶ Participation in Global Value Chains

Competitive, Innovative, and Dynamic ASEAN

- ▶ Competition Policy
- ▶ Consumer Protection
- ▶ IPR Cooperation
- ▶ Productivity-Driven Growth, Innovation, R&D, and Tech Commercialisation
- ▶ Taxation Cooperation
- ▶ Good Governance
- ▶ Regulations and Good Regulatory Practice
- ▶ Sustainable Economic Development
- ▶ Global Megatrends and Emerging Trade-related Issues

Enhanced Connectivity and Sectoral Cooperation

- ▶ Transport
- ▶ Information and Communications Technology
- ▶ E-commerce
- ▶ Energy
- ▶ Food, Agriculture, and Forestry
- ▶ Tourism
- ▶ Healthcare
- ▶ Minerals
- ▶ Science and Technology



Resilient, Inclusive and People-Oriented, People-Centred ASEAN

- ▶ Micro, Small, and Medium Enterprises
- ▶ Strengthening the Role of the Private Sector
- ▶ Public-Private Partnership
- ▶ Narrowing the Development Gap
- ▶ Contribution of Stakeholders on Regional Integration Efforts

Global ASEAN

- ▶ Strategic and coherent approach towards external economic relations
- ▶ Review existing FTAs
- ▶ Enhance economic partnerships with non-FTA Dialogue Partners
- ▶ Engage with regional and global partners
- ▶ Supporting the multilateral trading system and actively participating in regional fora
- ▶ Engagement with global and regional institutions.



Mutual Recognition Agreements (MRAs)

Mutual Recognition Agreements (MRAs) in goods should prevent product-related standards and regulations from becoming technical barriers to trade. In order to address these issues, ASEAN is striving to create MRAs sector by sector and harmonization of standards is underway. After agreeing on specific priority sectors, ASEAN states have so far concluded three sectoral MRAs, namely in electrical and electronic equipment, cosmetics and in medicinal products.

Customs Procedures /ASEAN Single Window

National Single Windows – a 'one-stop shop' to speed up customs clearance—have gone live in the ASEAN-6, and ASEAN-6 plus Vietnam have tested the preliminary exchange of trade data and information through the ASEAN Single Windows (ASW). The first step is to implement a region-wide ASW design and develop the necessary legal framework.

Services Liberalization

ASEAN's goal for services integration was first institutionalised with the signing of the ASEAN Framework Agreement on Services (AFAS) in 1995. The stated objectives have been to remove substantially all restrictions on trade in services for all services sectors. To this date, Member States have concluded nine packages of commitments under the AFAS covering a broad range of sectors. These sectors include among others Business Services, Financial Services, Construction, Distribution, Education, Environmental Services, Healthcare, Air and Maritime Transport, Telecommunication and Tourism.

Elimination of Non-Tariff Measures

While tariff liberalisation has largely been completed, the free flow of goods remains hampered by many non-tariff measures or barriers (NTMs, NTBs) – or “behind-the-border” issues. ASEAN States are committed to review non-tariff measures (NTM) and eliminate those that act as barriers by 2018. In this regard, the ASEAN Non-Tariff Measures database is being realigned with the new United Nations Conference on Trade and Development (UNCTAD) classification while developing NTM information portals at the country and ASEAN levels, and each Member State has established an interagency body at the national level to complement regional initiatives on NTMs.

Free Flow of Investment

Investment flows are consolidated under the ASEAN Comprehensive Investment Agreement (ACIA) – covering investment liberalisation, Most Favoured Nation principle and national treatment, protection, facilitation, and promotion. ACIA provides for the progressive liberalisation of investment in five main sectors: manufacturing, agriculture, fisheries, forestry, mining and quarrying, and related services.

Liberalisation in the AEC Priority Sectors

The ASEAN Framework Agreement for the Priority Integration Sectors (PIS) was signed in 2004 with the objective of identifying measures to be implemented by ASEAN Member States, following clear timelines. There were originally 11 identified sectors under the PIS, namely electrical equipment and electronics, e-ASEAN, healthcare, wood-based products, automotive, rubber-based products, textiles and apparel, agro-based products, fisheries, air travel and tourism.

ASEAN and Regional Integration

The Regional Comprehensive Economic Partnership (RCEP) is one of a series of mega-regional trade agreements currently under negotiation by the ASEAN with its six FTA partner countries (Australia, China, India, Japan, Korea, and New Zealand). The idea of the RCEP framework is to bring a structured, and harmonised approach to the current plethora of ASEAN+ agreements, and to create a wider umbrella agreement which includes all partners. If implemented, the RCEP, which includes the biggest trading partners in Asia, and accounts for around 30% of the global GDP, could create the world's largest trading bloc with potentially significant economic gains for the countries involved.

The Trans-Pacific Partnership (TPP), is also a mega-regional agreement aiming to create a new more ambitious 21st century trade agreement with more advanced rules and higher standards applied to the conduct of trade and investment. It covers 12 countries in Asia and the Pacific, including the US, and Japan, and accounts for around 40% of global GDP. The TPP agreement was finally concluded and signed in February 2016, but has yet to be ratified and implemented. Four ASEAN Members, Brunei Darussalam, Singapore, Malaysia and Vietnam, are signatory to the TPP.



3

EU-ASEAN RELATIONS



ASEAN and the EU, with their own dynamics, objectives and contexts, are probably the two most ambitious regional organisations in the world. This makes us natural partners with a lot to share and learn from each other's experiences and approaches. Indeed, the EU wants to deepen our relations with ASEAN because it believes that ASEAN will play an important role in bringing to fruition a larger integrated market, enhancing its connectivity within the ASEAN Economic Community (AEC) and with the rest of the world, and contributing to prosperity and stability in Asia – the fastest growing region in the world. In view of this, the EU has emerged as a major development partner of the ASEAN in a wide range of cooperation sectors including trade and economic related assistance.



1977 - 2017

ANNIVERSARY OF THE
ESTABLISHMENT OF
FORMAL RELATIONS
BETWEEN THE EU AND ASEAN



3.1 Enhancing the EU-ASEAN Partnership

The last decades have seen the two blocs enhancing their partnership and amplifying the resources devoted to cooperation. For the period of 2014-2020, the EU has almost tripled the previous amount of funds for development cooperation projects implemented by the ASEAN Secretariat (EUR 196 million) to support ASEAN's post-2015 integration agenda. This support comes on top of the EUR 2 billion the EU is devoting in bilateral assistance over the same period of time to poverty reduction and connectivity within and between ASEAN countries.

The EU has also increased the frequency of exchanges of leaders from both

regions to achieve a higher level of joint political dialogue on global challenges. In October 2016, the two partners kicked off the first round of negotiations for a region-to-region Comprehensive Air Transport Agreement (CATA), which aims at creating new business opportunities, improve market access and ensure fair competition on two of the world's largest and most vibrant aviation markets.

The EU recently established a new dedicated Mission to ASEAN, based in Jakarta, which will help intensify the Partnership Dialogue towards a more strategic nature.

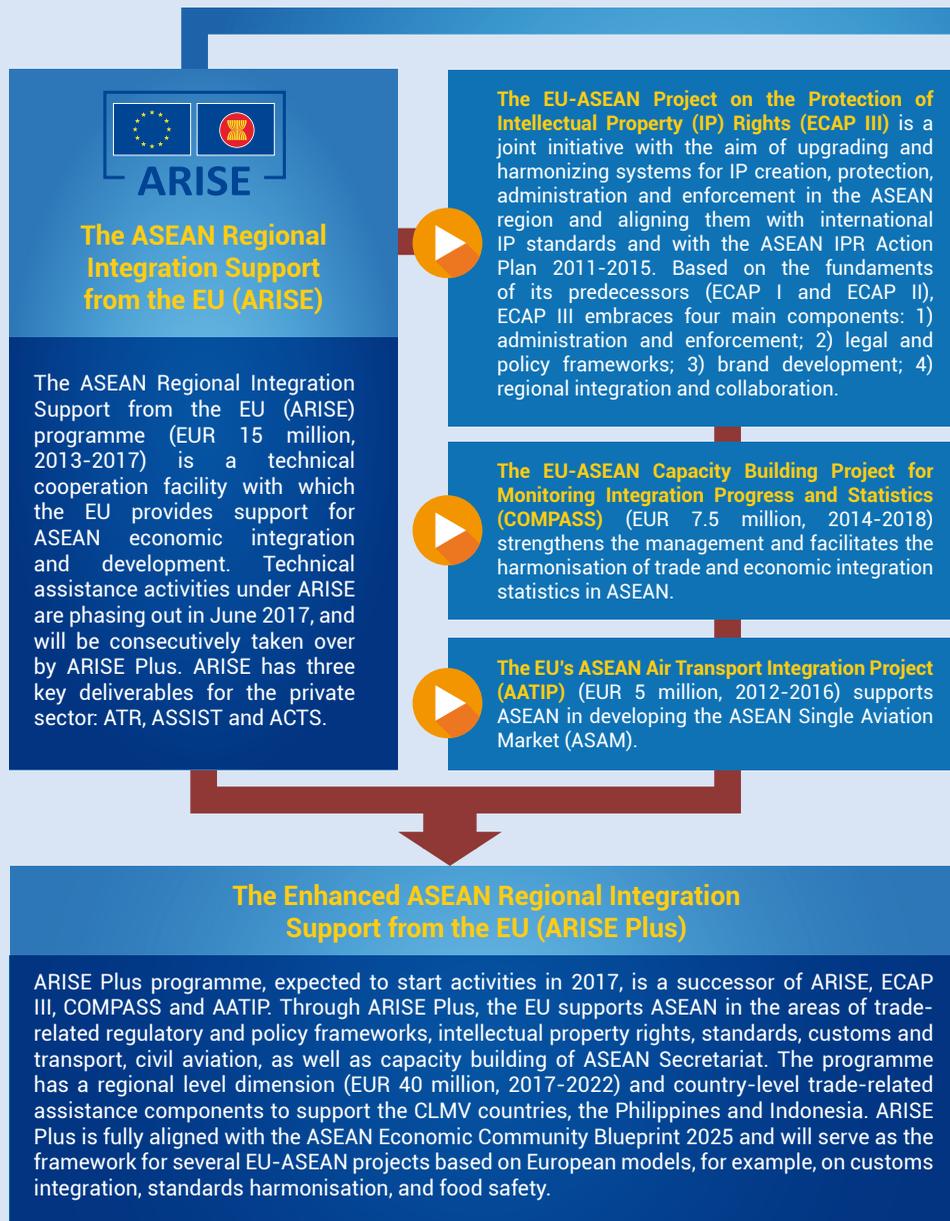
40 Years of Friendship & Partnership



Mr. Francisco Fontan, the first EU Ambassador to ASEAN, presenting his credentials to the Secretary-General of ASEAN, Mr. Le Luong Minh, on 17th September 2015.

The partnership between the EU and the ASEAN seems quite natural since they both share a vision of regional integration as a means of fostering regional stability, building prosperity and addressing global issues. In 1972, the EU's predecessor, the European Economic Community (EEC), was the first international organisation to establish contacts with ASEAN. Five years later, in July 1977, these contacts were formalised at Ministerial level, and later institutionalised with the signature of the 1980 ASEAN-EEC Cooperation Agreement. The relationship has grown rapidly since then and expanded to cover a range of areas including political and security matters, economic and trade, social and cultural, and development cooperation. Today, EU-ASEAN relations are guided by the Nuremberg Declaration on an EU-ASEAN Enhanced Partnership, adopted in 2007. In 2017, the EU and ASEAN can look back on 40 years of friendship and partnership. Through establishing cooperation in many areas, enhanced dialogue with numerous technical level meetings and bi-annual Ministerial meetings, the EU and ASEAN have strengthened their mutual commitment and created ever-closer working ties.

3.2 EU-ASEAN Projects Supporting the AEC



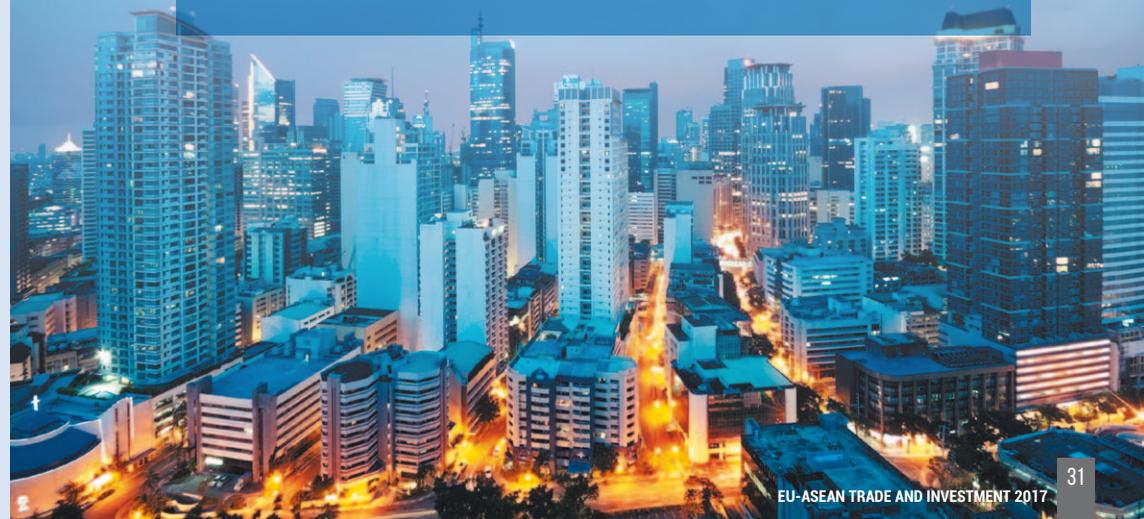
The **ASEAN Trade Repository (ATR)** tool was launched in November 2015 to provide transparency on the trade and customs laws and procedures of all ten ASEAN Member States. The actual information is web-linked to the ATR from a network of National Trade Repositories (NTRs), which are the domestic portals maintained by each ASEAN Member State. When fully functional, the repository is expected to contribute to lower business costs, extend regulatory transparency and provide with greater certainty in business dealings.

<http://atr.asean.org>

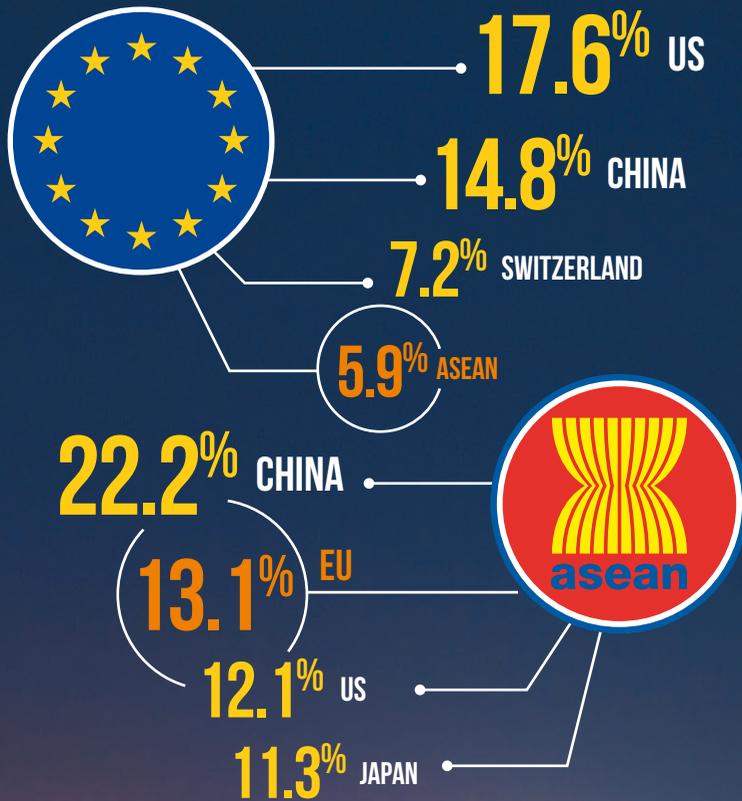
The **ASEAN Solutions for Investments, Services and Trade (ASSIST)** was launched in August 2016 aiming at effectively resolving operational problems encountered by ASEAN enterprises at cross borders. When fully operational, it will provide easy access to information on customs tariffs in ASEAN, as well as rules of origin, identified non-tariff measures; national trade and customs laws and rules; procedures and documentary requirements; and much other relevant trade information. It has been modelled on the EU's SOLVIT system which concentrates on consumers and businesses. ASSIST should also contribute to the realisation of the ASEAN Consultations to Solve Trade and Investment Issues which is mandated under the ASEAN Trade in Goods Agreement (ATIGA).

<http://assist.asean.org>

The **ASEAN Customs Transit System (ACTS)** serves as a computerised Customs transit management system that facilitates the movement of goods by road for the private sector operating in the ASEAN region. It is based on the EU's New Computerised Transit System (NCTS) model, and is, since its establishment in 2015 proceeding with the first testing stage in Malaysia, Singapore and Thailand, expected to go live in 2017. ACTS will be a catalyst for the implementation of ASEAN Framework on the Facilitation of Goods in Transit (AFAFGIT) and provide full end-to-end computerisation of transit operations with a single electronic customs transit declaration. This will allow free movement for trucks across borders with no trans-shipment for transit goods required at border points.



EU'S AND ASEAN'S TOP TRADING PARTNERS
(Share of Trade in Goods, 2015)



4

EU-ASEAN TRADE & INVESTMENT

In the last four decades, EU-ASEAN trade and investment relations have grown impressively. In the last ten years, merchandise trade has almost doubled, and now exceeds EUR 200 billion. This positive trend is today reflected by the fact that the EU is ASEAN's second largest trading partner, only behind China. Similarly, ASEAN now ranks as the EU's third largest trading partner outside Europe (after the US and China). Even more impressive, the EU is the top source of FDI in ASEAN, accounting for a quarter of the total FDI stock in the ASEAN. With key Free-Trade Agreements being concluded in the region between the EU and ASEAN countries, this will further unlock the immense potential that exists.



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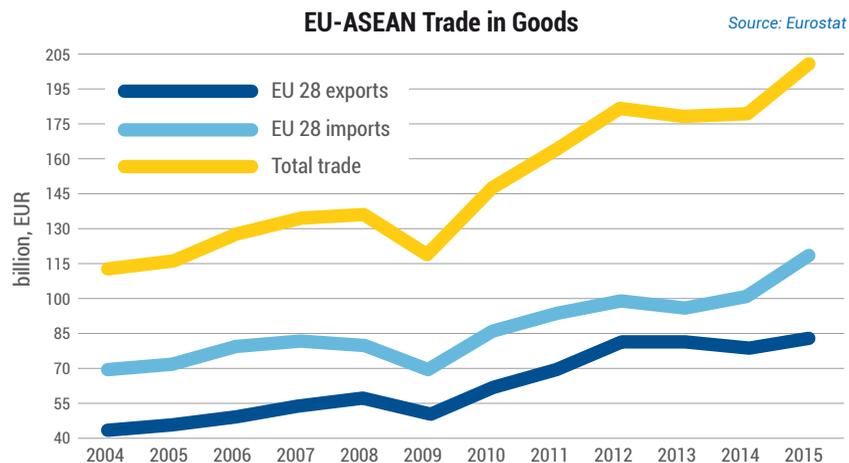
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ESTABLISHMENT OF
FORMAL RELATIONS
BETWEEN THE EU AND ASEAN



ASEAN Economic Ministers (AEM) with the EU Commissioner for Trade, Mrs Cecilia Malmström at the annual AEM-EU Consultation.

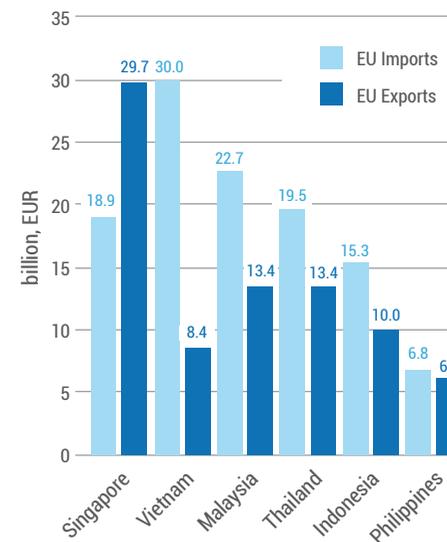
4.1 Trade in Goods

Year 2015 has seen significant increases in EU-ASEAN trade in goods. The total trade between the two blocs amounted to EUR 201.6 billion, which represented almost a double increase compared to the 2004 levels



(EUR 112.7 billion). ASEAN countries collectively exported EUR 118.5 billion of goods to the EU and imported EUR 83.1 billion of goods from the EU in 2015. In recent years, ASEAN exports to the EU grew significantly by 47.6% (from EUR 80.3 billion in 2008 to EUR 118.5 billion

EU Trade Flows of Goods to Selected ASEAN Member States, 2015



Source: Eurostat

in 2015), while EU exports to ASEAN rose by 47.4% (from EUR 56.3 billion in 2008 to EUR 83.1 billion in 2015). This corresponded to a 5.7 annual average increase of total trade between the two blocs during the period 2008-2015. EU imports from ASEAN represented 6.9% of total extra-EU imports and EU exports to ASEAN amounted to 4.7% of total extra-EU exports.

ASEAN MS Trade in Goods with the EU, 2015

Country	Values in Mio EUR		
	Total Trade with EU	EU Share in Total Trade, %	EU Rank in Total Trade
Singapore	48,666	10.3	3
Vietnam	38,432	10.7	3
Malaysia	36,102	10.1	4
Thailand	32,952	9.5	4
Indonesia	25,283	9.0	4
Philippines	13,143	10.7	4
Cambodia	4,552	15.3	3
Myanmar	1,223	3.6	6
Brunei Darussalam	903	9.1	5
Lao PDR	361	3.3	4

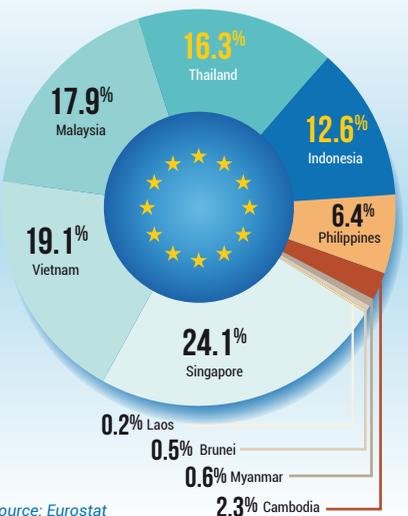
Source: Eurostat/share and rank are extracted from IMF

Singapore accounted for more than 24% of the EU's total merchandise trade with ASEAN in 2015 and is the only ASEAN member state with which the EU recorded a trade surplus (EUR 10.8 billion). Vietnam is the EU's second largest ASEAN trading partner accounting for 19.1% followed by Malaysia (17.9%), Thailand (16.3%) and Indonesia (12.6%). All ASEAN countries, except Singapore, recorded a considerable surplus in their trade with the EU, with Vietnam enjoying the largest surplus of EUR 21.5 billion. In total, EU-ASEAN merchandise trade relations resulted in a substantial EUR 35.3 billion surplus for ASEAN in 2015, an increase by 47% compared to the figure five years before (2010).

Machinery and transport equipment accounted for almost half (49.5%) of the EU exports to the ASEAN countries in 2015. The main products in this group are non-electrical machineries (15%), transport equipment - including automotive products and aircrafts - (15.2%), and power generating machinery (5%). The next most important product group was chemicals (15%), mainly pharmaceutical products at 7%. Various manufactured goods and articles (manufactured goods classified chiefly by material and miscellaneous manufactured articles) constituted 18.7% of the EU's exports to ASEAN, of which scientific and controlling instruments share was the largest at 3.9%.

Similarly, the largest share of ASEAN's exports to the EU in 2015 was also

EU Total Trade in Goods with ASEAN Member States, 2015



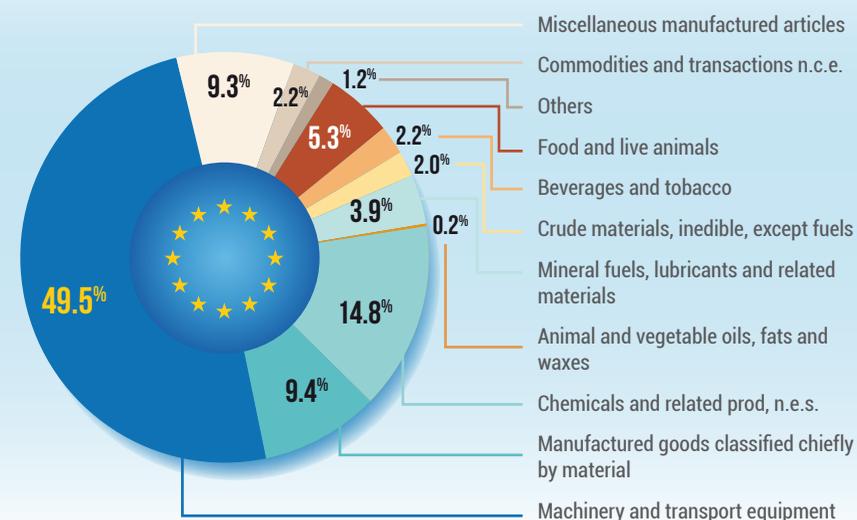
Source: Eurostat

held by the machinery and transport equipment sector (45.1%). Within this category, the subsector of office and telecommunication equipment was ranking the highest with 32.4% of the total share. The main products within this subsector were telecommunication equipment (13.4%), electronic data processing and office equipment (11.8%), and electronic components (7.3%). The sector of miscellaneous manufactured articles was the second largest sector of ASEAN goods being exported to the EU, at 23.7%. Chemical and related products represented 9.7% of ASEAN exports, while food products and live animals constituted 7.2% of ASEAN exports to the EU; covered largely by products such as fish, coffee and fruits.



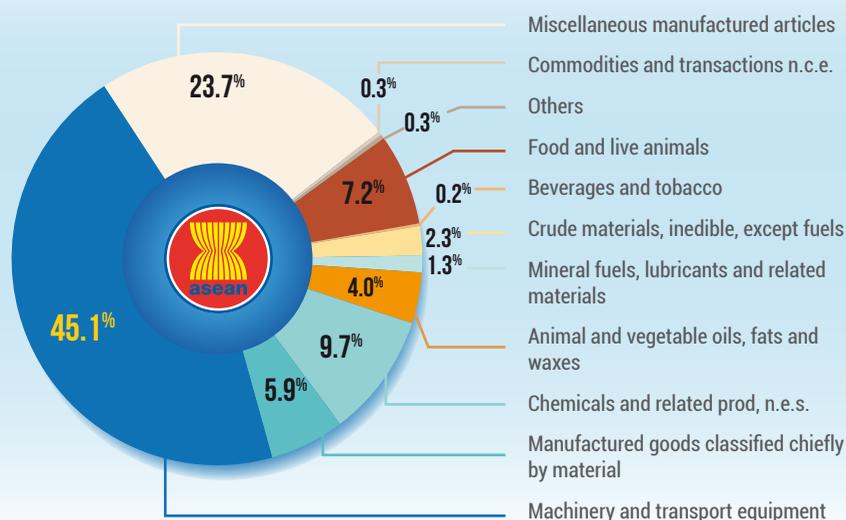
B2B event aimed at bringing the EU and ASEAN businesses together, under the EU Business Avenues program.

EU Exports of Goods to ASEAN by Sector, 2015



Source: Eurostat

EU Import of Goods from ASEAN by Sector, 2015



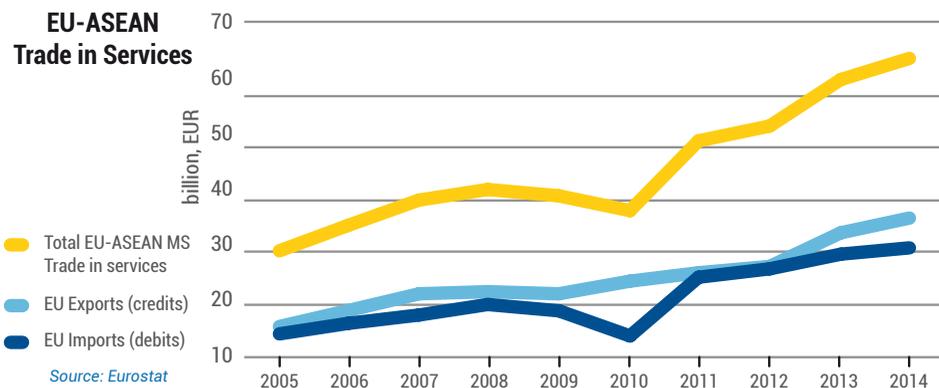
Source: Eurostat



4.2 Trade in Services

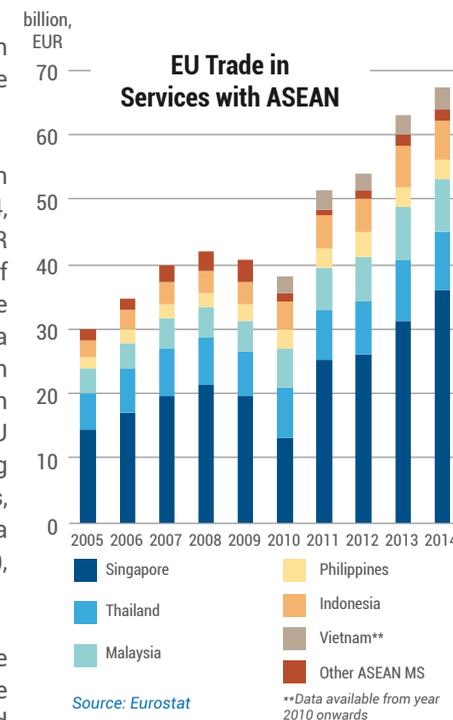
The positive and growing trend in bilateral trade has also been seen in trade in services. The services sector in ASEAN is expanding rapidly and becoming

more important for economic growth and job creation. Total bilateral trade in services between the EU and ASEAN has more than doubled in the last decade.



The figure amounted to EUR 67.4 billion in 2014, which represented a significant rise from EUR 29.9 billion in 2005.

The EU continues to enjoy a surplus in trade in services with ASEAN. In 2014, the total EU surplus amounted to EUR 5.8 billion, with the largest surplus of EUR 4.7 billion recorded in the trade with Singapore. The EU also recorded a considerable surplus of EUR 2.2 billion in its trade with Indonesia and EUR 1.4 billion with Malaysia. Singapore is the major EU trading partner in services, constituting 53.6% of total EU-ASEAN trade in services, followed by Thailand (13.4%), Malaysia (11.7%), Indonesia (8.9%), Vietnam (5.2%), and the Philippines (4.9%).



Both ASEAN and the EU experience different comparative advantages in the services sectors. In 2014, the EU recorded surpluses in commercial services, other business services, financial services, communication services, and

construction services, whilst ASEAN recorded surpluses in transportation services, tourism and travel services.

EU Free Trade Agreements and ASEAN

EU-ASEAN region-to-region FTA negotiations were launched in 2007. In 2009, the negotiations were paused due to differing levels of ambition. Subsequently, the EU decided to start bilateral negotiations with individual ASEAN countries. Until now, the EU has concluded FTAs with Singapore and with Vietnam. The EU is in the process of negotiating FTAs with several other ASEAN countries (Thailand, Malaysia, Indonesia and the Philippines). The ASEAN bilateral FTAs are seen as stepping stones towards a fully-fledged EU-ASEAN region-to-region FTA. In this respect, the EU is engaged with ASEAN on assessing jointly the prospects towards the possible resumption of these region-to-region FTA negotiations. In addition, the EU is negotiating an investment protection agreement with Myanmar (Burma) since 2014. As LDCs, Cambodia, Laos and Myanmar fall under the EU's Everything But Arms (EBA) scheme and are granted special duty-free access to the European market for most products.

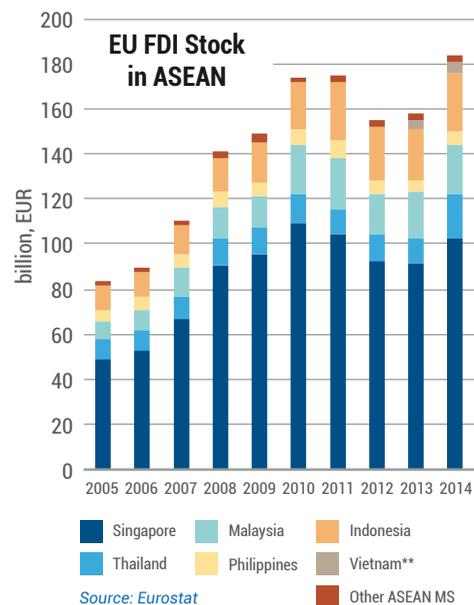


The 4th ASEAN-EU Business Summit on 23rd August 2015, in Kuala Lumpur, Malaysia.

4.3 Investment Relations

The EU has been the largest investor in the ASEAN region during the past decade. ASEAN estimates suggest that during the period from 2004 to 2014, EU companies have invested on average EUR 11.4 billion annually in the region. This has enabled the EU to build a solid investment stock, recording over EUR 184 billion in 2014. The EU has also retained the largest share of total FDI inflows to the ASEAN. In 2015 it totalled EUR 20.1 billion, which represented a share of 16.7% of the total ASEAN FDI inflows.

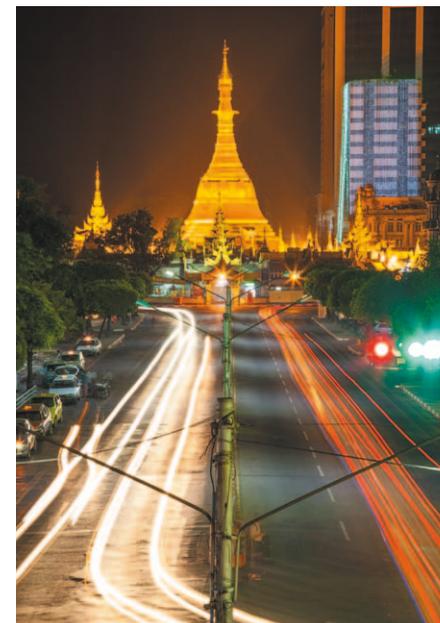
Investment is a major contributor to economic growth in ASEAN Member States. Throughout the last decade, Singapore was the prime destination for FDI from the EU, accounting for EUR 102.9 billion (55.9% of the total EU



**Data available from year 2013 onwards

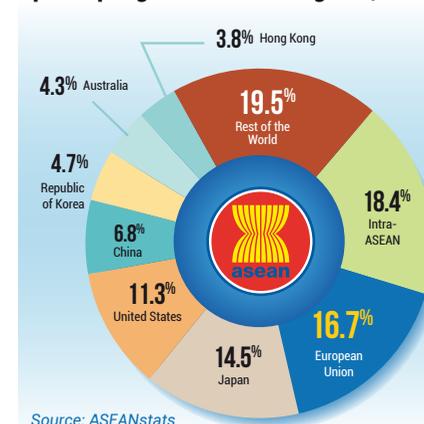
FDI stock in the ASEAN), followed by Indonesia with EUR 25.8 billion (14%) and Malaysia with EUR 21.7 billion (11.8%). ASEAN investment in Europe has also been growing steadily to a total stock of over EUR 54.3 billion in 2014. This ranks ASEAN as the 9th largest source of FDI in the EU. Singapore stands out as ASEAN's largest investor in terms of FDI stock in the EU, recording EUR 43.8 billion in 2014, with Malaysia ranking as second with EUR 11.5 billion.

The predominant sectors that have benefited from EU FDI inflows to ASEAN are manufacturing, financial and insurance activities, logistics, food and beverages, electricity production and the chemical and pharmaceutical industry. ASEAN hopes to encourage further investment by means of the ASEAN Comprehensive Investment Agreement (ACIA) that aims at creating a free and open investment regime in

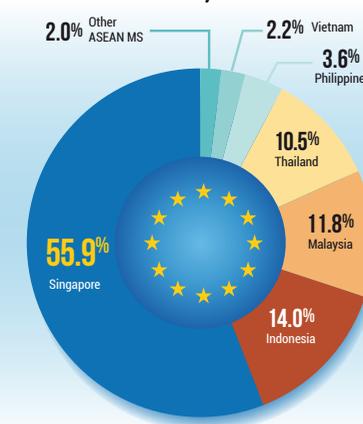


the ASEAN. ACIA promotes the region as an integrated area. The measure is expected to boost investor confidence in the region.

Share of ASEAN FDI Inflows per Top Eight Countries/Regions, 2015



Share of EU FDI Stock in ASEAN Member States, 2014





5

EU-ASEAN BUSINESS SUPPORT

The EU and ASEAN have over the last decades developed an active and regular business dialogue that is supported by leading business organisations on both sides. Most notably, the EU and ASEAN hold regular EU-ASEAN business summits which bring together top CEOs from Europe and the ASEAN in order to discuss ways to enhance further the trade and investment partnership, and to provide policy recommendations to their respective Governments. Furthermore, the EU is funding various platforms in the ASEAN for supporting EU business expansion in the ASEAN region, by for example providing tailored business services and information services to SMEs, bringing business delegations from the EU in selected sectors, and organising fairs and networking events that bring together EU and ASEAN business.



1977 - 2017

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ESTABLISHMENT OF
FORMAL RELATIONS
BETWEEN THE EU AND ASEAN



5.1 The EU-ASEAN Business Council

WHO WE ARE

- The only officially recognised pan-ASEAN European business body
- Official consultation partner of ASEAN and the European Commission
- A membership driven advocacy body – working for the liberalisation of the trade and investment climate in ASEAN and between ASEAN and Europe

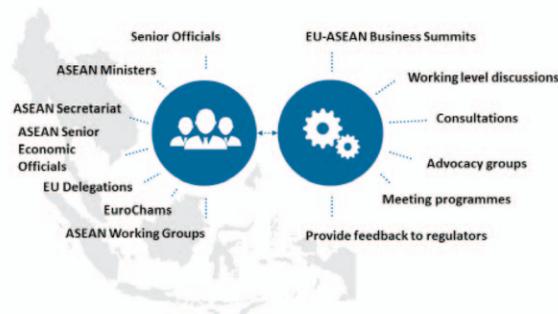
WHAT WE DO

- Advocate for the removal of barriers to trade and business on behalf of European industry across multiple sectors
- Advance the interests of European businesses in ASEAN with both the authorities in Europe and in the ASEAN Member States
- Act on behalf of our Members to assist them in their most pressing business needs in ASEAN
- Act as the lead consultative body for European Business with both ASEAN and the European Commission on business and industry matters in South East Asia

WHO WE ARE

- High level Ministerial meetings in ASEAN (Finance Ministers, Trade Ministers etc.) and Europe (Commissioners)
- Working level discussions with Senior Officials in both regions – at the European Commission, ASEAN Secretariat and ASEAN Member States
- Publication of Position Papers to help focus the debate and discussion, on both sector and cross sector issues
- Regular media engagement to highlight issues of key concern
- Regular delivery of information and updates to our Members

Ongoing Engagement



COMPOSITION OF THE EU-ASEAN BUSINESS COUNCIL

The Executive Board: The EU-ABC is overseen by an elected Executive Board consisting of corporate leaders representing a range of important industry sectors and representatives of the European Chambers of Commerce in South East Asia. The Executive Board is led by its Chairman Mr. Donald Kanak.

Membership: The EU-ABC's membership consists of large European Multi-national Corporations and the eight European Chambers of Commerce from around South East Asia. As such, the EU-ABC represents a diverse range of European industries cutting across almost every commercial sphere from car manufacturing through to financial services and including Fast Moving Consumer Goods and high-end electronics and communications. All of the members have a vested interest in enhancing trade, commerce and investment between Europe and ASEAN.

OUR MEMBERS



EU – ASEAN Business Council
 1 Phillip Street #12-01 Royal One Phillip
 Singapore 048692
 Phone: +65 6836 6681
 Email: info@eu-asean.eu

5.2 EU Business Avenues in South East Asia



The EU Business Avenues in South East Asia is an initiative funded by the European Union (EU) helping European companies to establish long-lasting business collaborations in South East Asia.

Following a successful pilot concluded in 2015, the fully edged programme has expanded the sectoral and geographical coverage in the region. Over the next five years, the EU Business Avenues in South East Asia will bring around 1,000 European companies in seven different sectors to six South East Asian markets.

There will be several week-long business missions, each of which will include expert presentations, networking opportunities, business exhibitions and business matching exercise. The intent is to facilitate business meetings, technology transfers and increased cooperation between European companies and enterprises in the region of South East Asia.

Programme Overview



Upcoming Business Missions 2017

6 – 11 March 2017 Singapore and Indonesia	22 – 27 May 2017 Singapore and Thailand	4 – 8 September 2017 Thailand and Singapore	6 – 10 November 2017 Philippines and Singapore

5.3 South-East Asia IPR SME Helpdesk

Free South-East Asia IPR Advice for European SMEs

- The South-East Asia IPR SME Helpdesk provides free information and services in the form of jargon-free first-line confidential advice on intellectual property and related issues, plus training, materials and online resources.
- The Helpdesk raises awareness about IPR matters in South-East Asia affecting European SMEs, and helps them make informed IPR decisions.

TRAINING MATERIALS

Industry and business-focused guides and training materials address IPR issues in the South-East Asia region by:

- IP specific guides, e.g. patents & trade marks
- Country IP factsheets: IP overviews of each of the 10 South-East Asia countries
- Industry specific guides, e.g. textiles, machinery, creative industries
- Business guides, e.g. technology transfer, manufacturing

The Helpdesk can also supply intermediaries with articles about IPR in the South-East Asia region written by IP experts for partners' newsletter content or other publications.

TRAINING EVENTS AND WEBINARS

- The Helpdesk organises training events and webinars in Europe and South-East Asia on South-East Asia IPR protection and enforcement, tailored to the needs of SMEs:
- General IPR issues, including IP registration and establishing an IP enforcement strategy
- Practical business challenges, e.g. choosing business partners, attending trade fairs, licensing
- Industry specific trainings

- One-to-one sessions: free 20 minute one-on-one consultations with an IP expert are available at most training events
- Webinars: 45 minute online presentations + 30 minute live Q&A, from the convenience of your own office or home. All recordings are available for free download from our website post-session

HELPDESK ENQUIRY SERVICE – CONFIDENTIAL ADVICE

Individual SMEs and SME intermediaries can submit IPR enquiries directly to the Helpdesk via phone, email or in person, getting access to a panel of experts to receive free and confidential first-line advice within 3 working days.

ONLINE SERVICES

- The multi-lingual online portal provides easy access for all EU SMEs to Helpdesk information and services, including Helpdesk guides, event information, and webinar recordings.
- Users can subscribe to our blog Your IP Insider, our project newsletter, and our Twitter, Facebook and LinkedIn feeds, to stay up to date on project activities and South-East Asia IPR news.

List of Useful Contacts



European Chamber of Commerce in Cambodia
 #Sothearos (corner of Street 178) B.P 522 - Khan Daun, Phnom Penh, Cambodia
 Ph: +855 023 964 141
 info@eurocham-cambodia.org
 www.eurocham-cambodia.org



European Business Chamber - EuroCham Indonesia
 Wisma Metropolitan 1, 13th Floor, Jl Jend Sudirman Kav 29, Jakarta 12920 Indonesia
 Ph: +62 21 571 0085
 Fax: +62 21 571 2508
 info@eurocham.or.id
 www.eurocham.or.id



European Chamber of Commerce and Industry in Lao PDR
 Villa Inpeng, No 74, Inpeng Street, Watchan Village, Vientiane capital
 P.O. Box 11781
 Chanthabouly District, 1000
 Ph: +856 21 264330



EU-Malaysia Chamber of Commerce and Industry
 Suite 10.01, Level 10, Menara Atlan, 161B Jalan Ampang, 50450 Kuala Lumpur, Malaysia
 Ph: +603 2162 6298
 Fax: +603 2162 6198
 eumcci@eumcci.com



European Chamber of Commerce in Myanmar
 Parkside One
 271-273 Bagayar Street
 Sanchaung Township
 Yangon, Republic of the Union of Myanmar
 Ph: +95 9 45058 2335
 info@eurocham-myanmar.org
 eurocham-myanmar.org



European Chamber of Commerce in the Philippines
 19/F Philippine AXA Life Centre
 Sen. Gil Puyat Avenue corner Tindalo Street, San Antonio Makati City, Metro Manila, 1200 Philippines
 Ph: +632 845 1324
 +632 759 6680
 Fax: +632 845 1395
 +632 759 6690
 info@eccp.com



European Chamber of Commerce in Vietnam
 GF, Sofitel Plaza Hanoi, 1 Thanh Nien Road, Ba Dinh District, Hanoi, Vietnam
 Ph: +844 3 715 2228
 Fax: +844 3 715 2218
 info-hn@eurochamvn.org



European Association for Business and Commerce (EABC)
 1 Empire Tower, 25th floor
 Sathorn Road, Yannawa, Sathorn Bangkok 10120 Thailand
 Ph: +66 2670 0624
 Fax: +66 2670 0608
 info@eabc-thailand.eu



European Chamber of Commerce (Singapore)
 1 Phillip Street
 #12-01 Royal One Phillip
 Singapore 048692
 Ph: +65 6836 6681
 Fax: +65 6737 3660
 info@eurocham.org.sg

15F, The Landmark, Room 2B, 5B
 Ton Duc Thang, District 1, HCMC
 Ph: +848 3 827 2715
 Fax: +848 3 827 2743
 info-hcm@eurochamvn.org

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Your Gateway to Europe's Market

Want to export your product to the European Union and get access to a market of 500 million consumers in 28 countries?

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<http://exporthelp.europa.eu>

It's specially designed for businesses like yours, based outside the EU or importing into the EU.

You'll find all you need to know about exporting to the EU, including:

- ▶ health, safety and technical standards you'll need to meet
- ▶ customs duties you'll need to pay at the border
- ▶ internal taxes in each of the 28 countries
- ▶ the rules of origin that define where a product is from and whether it profits from preferential duty rates
- ▶ forms to send with your shipments

Sources

ASEANstats, Association of Southeast Asian Nations (ASEAN), European Union (EU), Eurostat, International Monetary Fund (IMF), United Nations Conference on Trade and Development (UNCTAD), World Bank (WB), World Trade Organization (WTO)

Editorial

Miha Mofardin

Layout & Design

EKONID Design Department



Mission of the European Union to ASEAN

Intiland Tower, 16th Floor, Jl Jend Sudirman 32

Jakarta 10220, Indonesia

Phone : + 62 21 2554 6290

Fax : + 62 21 2554 6291

mission-asean@eeas.europa.eu

www.eeas.europa.eu/asean

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