

Recent FDI Trends Russia

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The better the question. The better the answer.
The better the world works.

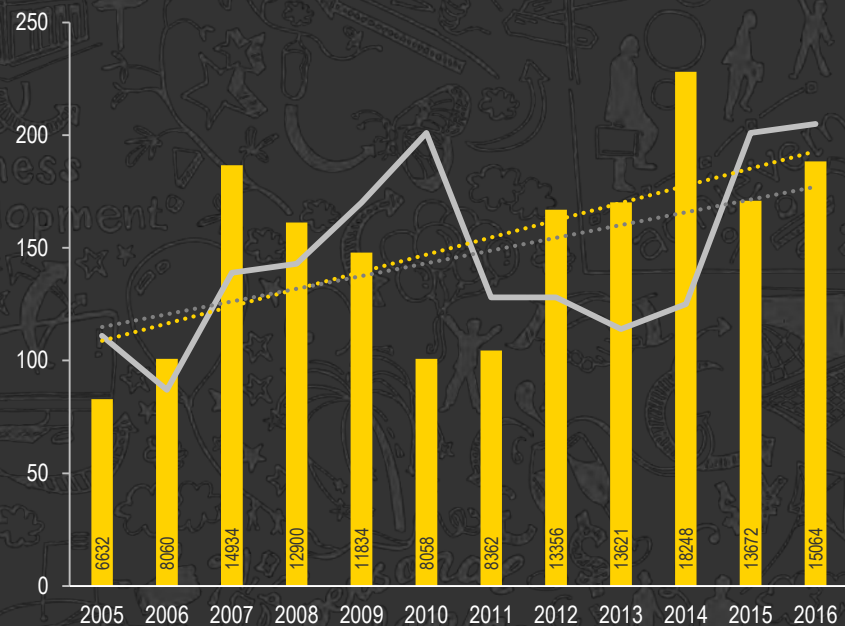


Building a better
working world

Recent FDI Trends Russia

Trends | Record number of projects in 2016

Fig. 2.1: FDI Trends, 2005-2016



Source: EY European Attractiveness Survey 2017

Number of jobs created

Fig. 2.2: FDI projects by project-type

Type of FDI Project	2013	2014	2015
Contact Centre	1		
Education & Training	4	2	1
Headquarters		1	
IDC			3
Logistics	9	13	10
Manufacturing	55	69	153
R&D	4	4	10
Sales & Marketing	40	34	20
Shared Services Centre			1
Testing & Servicing	1	2	3
Total	114	125	201

Source: EY European Attractiveness Survey 2016

Recent FDI Trends Russia

Trends | Enhanced manufacturing base

Fig. 3.1: FDI Projects by industries

Sector	2013	2014	2015	2016
Agriculture			2	9
Construction	3	1	4	3
Energy		1		2
Finance	12	15	15	5
Manufacturing	84	95	171	171
Recreation				
Retail & Hospitality	5	4	1	2
Transport	10	9	8	13
Total	114	125	201	205

Source: EY European Attractiveness Survey 2017

Fig. 3.2: Number of FDI projects by sector

Sector	2015	2016
Food	35	32
Machinery and equipment	28	27
Chemical products	19	23
Electrical	10	15
Automotive assembly	16	13
Non-metallic mineral products	15	13
Fabricated metals	5	10
Pharmaceuticals	6	10
Plastic and rubber	8	10
Other	29	18
Total	171	171

Source: EY European Attractiveness Survey 2017

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Trends | Geographical patterns

Fig. 4.1: Number of FDI projects by country of origin, 2010-2016

Country	2010	2011	2012	2013	2014	2015	2016
Germany	26	13	28	12	11	36	43
US	24	24	29	24	14	29	38
France	10	9	14	7	14	20	20
Japan	11	6	9	14	8	10	12
Austria	7	1			2	6	9
China	3	3		4	7	12	9
Italy	6	6	5	2	4	12	7
Finland	8	6	5	5	6	9	7
Switzerland	11	4	3	4	8	8	7
Netherlands	2	7	4	1	1	3	5

Source: EY European Attractiveness Survey 2017

Fig. 4.2: Number of FDI projects by region

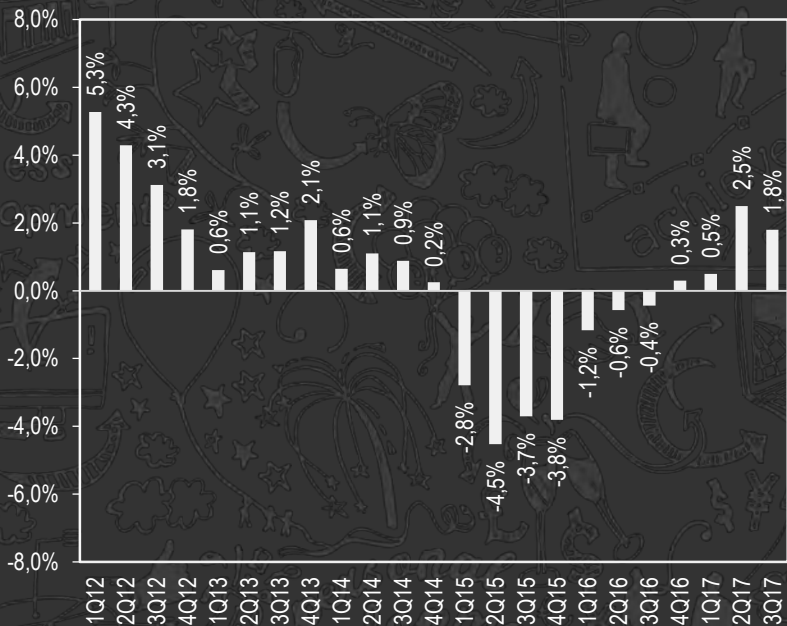
Region	2015	2016
Moscow, Moscow Region	45	49
Kaluga	8	15
St. Petersburg, Leningrad Region	22	15
Ulyanovsk	9	8
Primorsky	1	7
Tatarstan	15	7
Nizhny Novgorod	7	7
Vladimir	3	6
Krasnodar	6	6
Sverdlovsk	3	6

EY European Attractiveness Survey 2017

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Drivers | GDP recovery

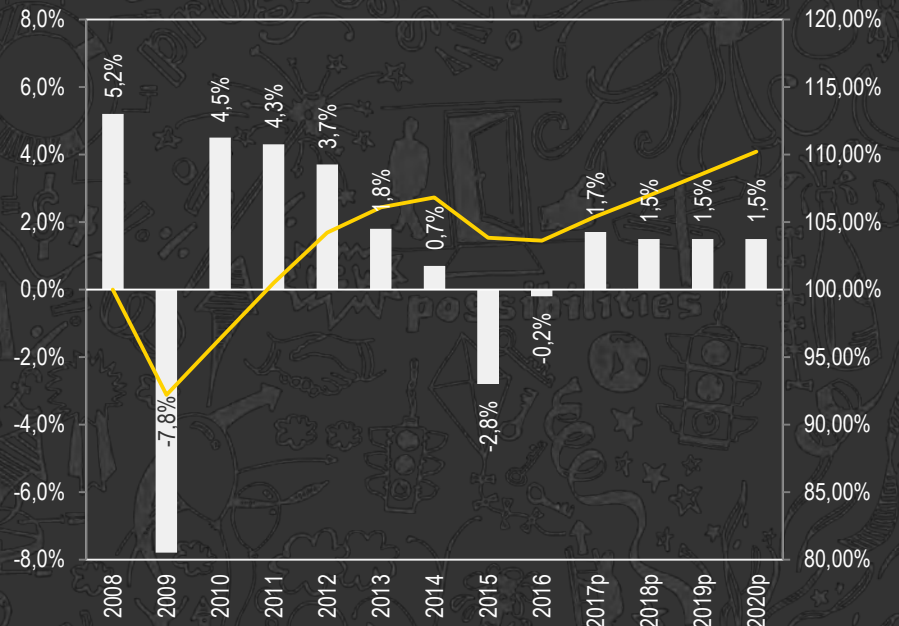
Fig. 5.1: Quarterly GDP growth, 2012-2017



Source: Rosstat

■ GDP (v-o-v. in %)

Fig. 5.2: Real GDP Growth, 2008-2020



Source: Rosstat

■ growth (yoy) — 2008=100%

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Drivers | Macro-economic stabilization

Fig. 6.1: Exchange Rate and Oil Price, 2014-2017

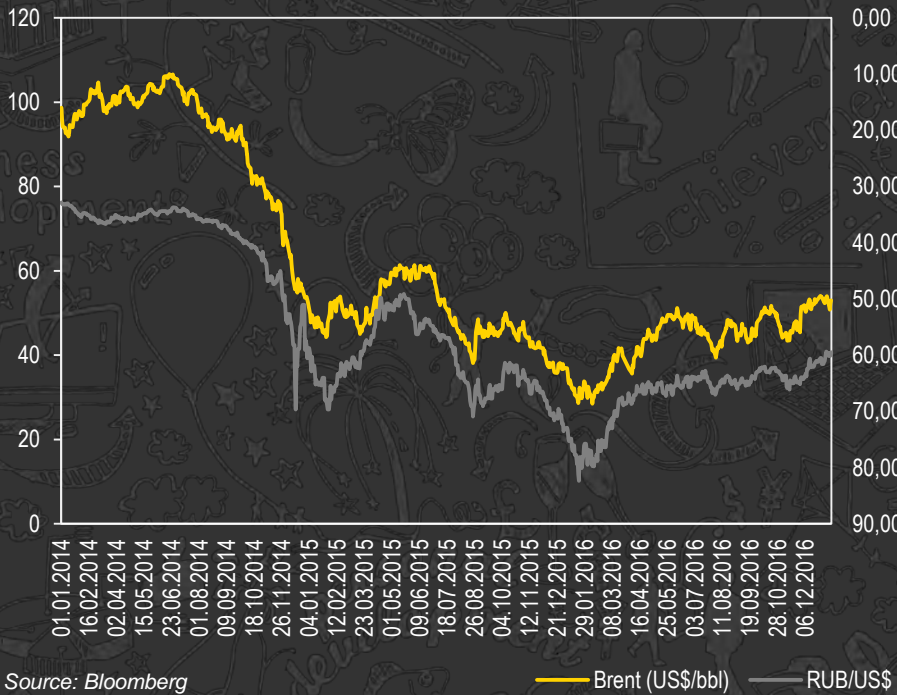
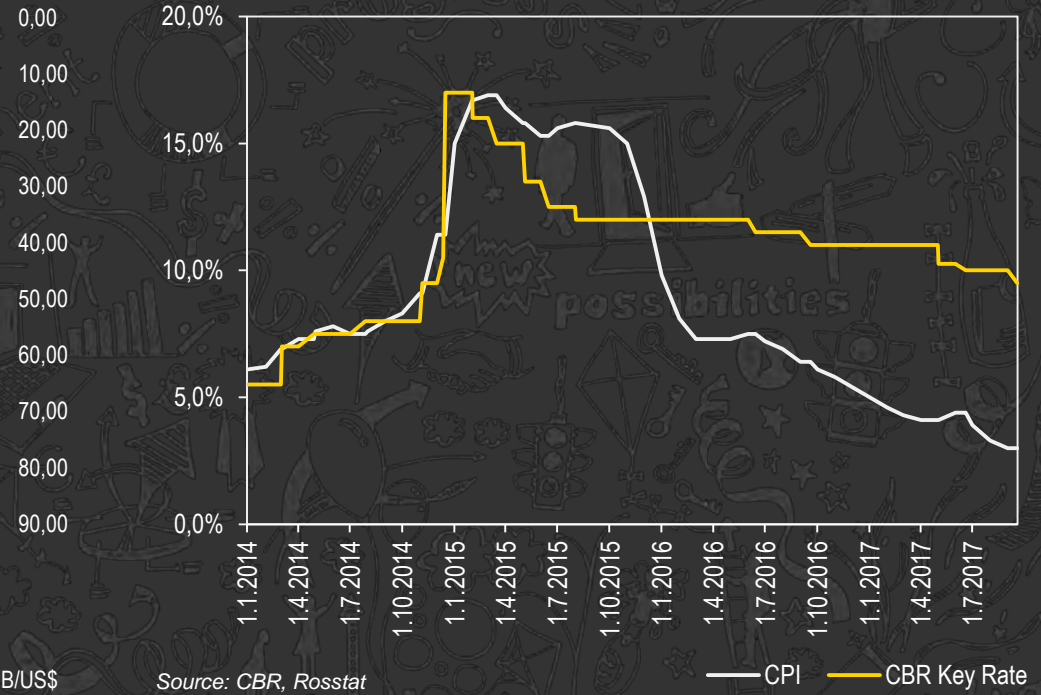


Fig. 6.2: Inflation (CPI) and CBR Key Rate, 2014-17



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Drivers | Increased competitiveness, demand recovering...

Fig. 7.1: Real wage and labor productivity growth, 2005-2025 (in%)

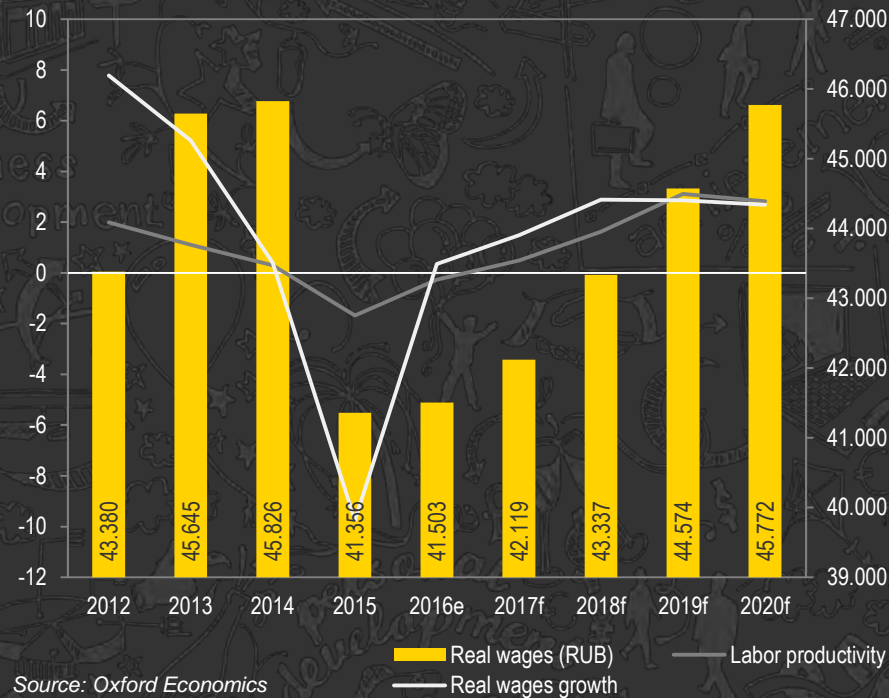
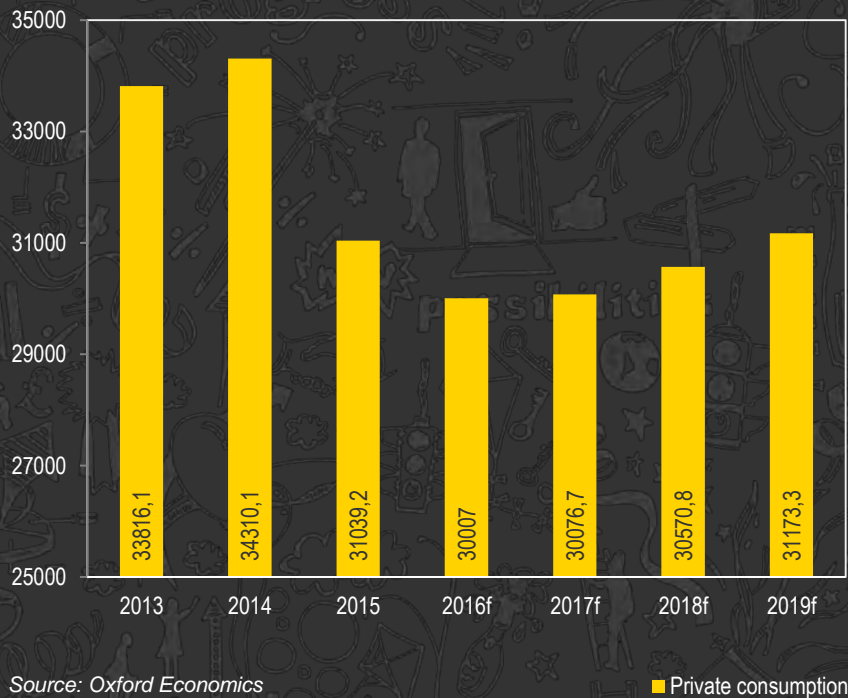


Fig. 7.2: Private consumption, 2013-2019 (bn RUB, 2011 prices)



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Drivers | Localization and import substitution policies

Fig. 8.1: Agricultural output (real, 2010 prices)

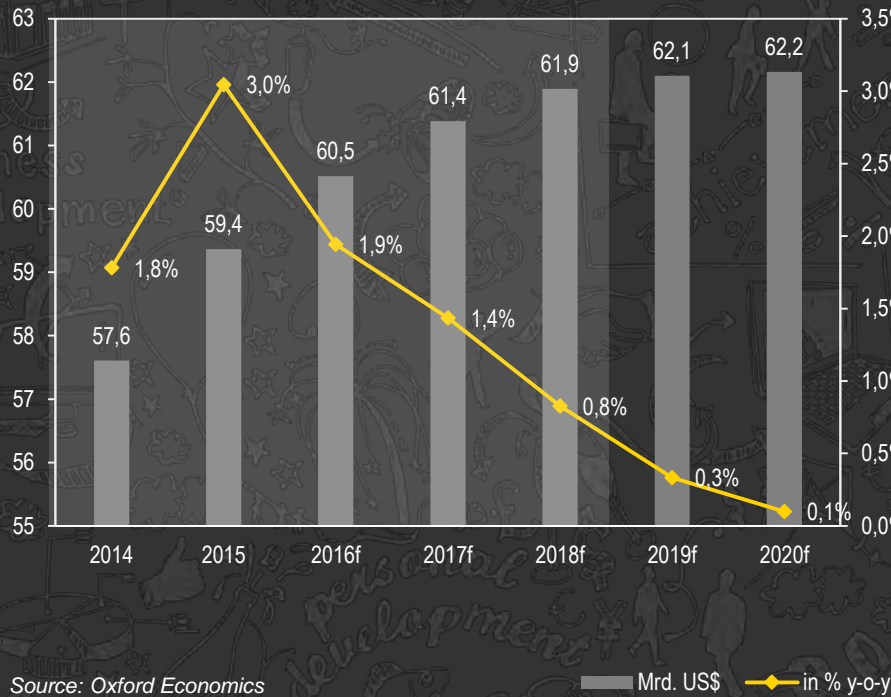
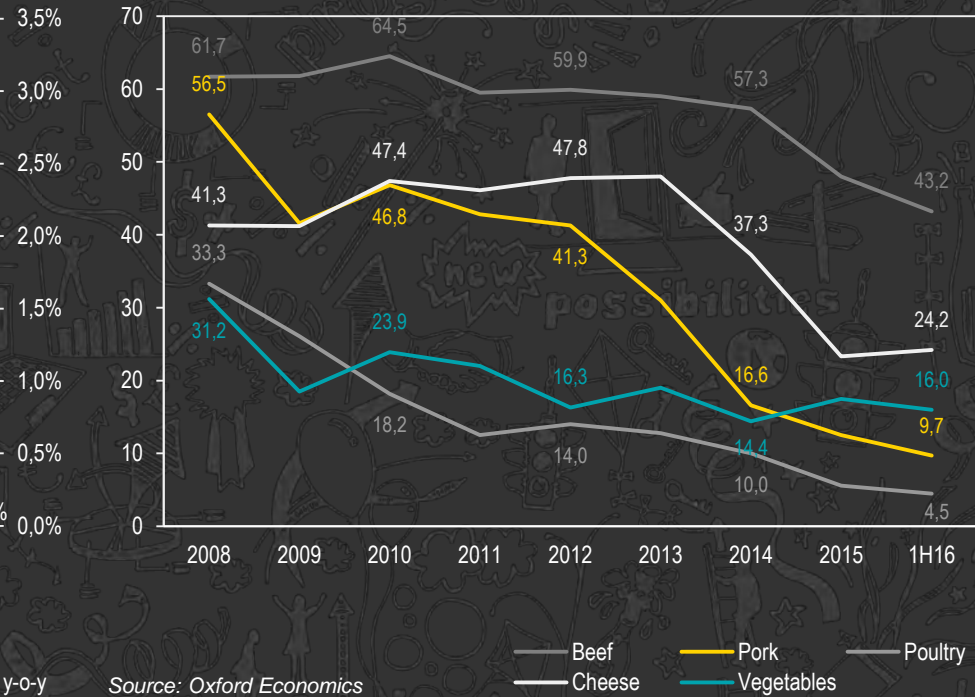


Fig. 8.2: Share of imports by agricultural product, 2008-2016 (in%)



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Drivers | Investment climate steadily improving, but...

Fig. 9.1: Ease of Doing Business Ranking, 2013-2018

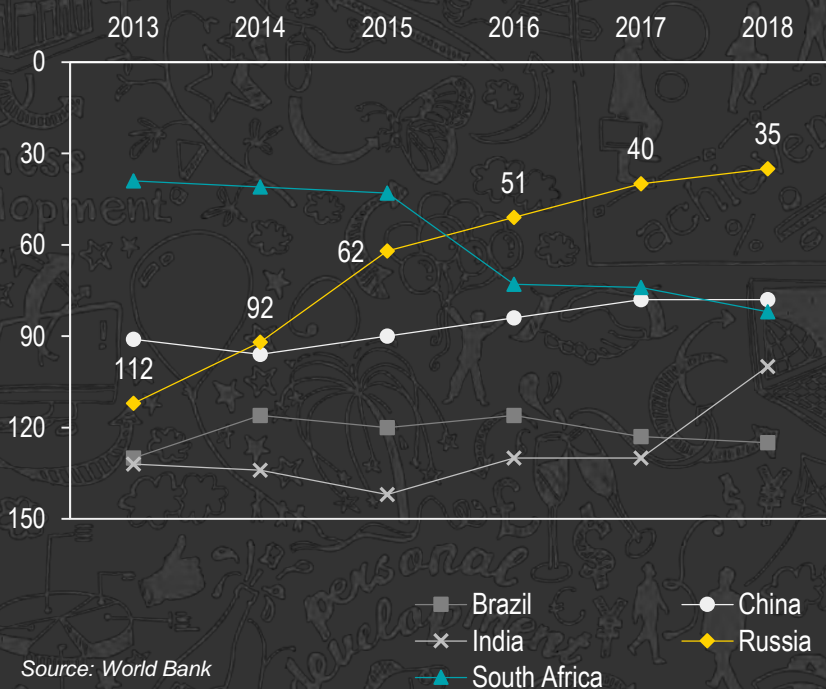


Fig. 9.2: Ease of Doing Business by subindicator

	DB 2017	DB 2018	Difference
Getting Electricity	30	10	20
Registering Property	9	12	-3
Enforcing Contracts	12	18	-6
Starting a Business	26	28	-2
Getting Credit	44	29	15
Overall	40	35	5
Protecting Minority Investors	53	51	2
Paying Taxes	45	52	-7
Resolving Insolvency	51	54	-3
Trading across Borders	140	100	40
Dealing with Construction Permits	115	115	0

Source: World Bank

Recent FDI Trends Russia Outlook | New patterns of EM FDI

Fig. 10.1: BRICS inbound FDI flows, 2006-2026 (bn US\$)

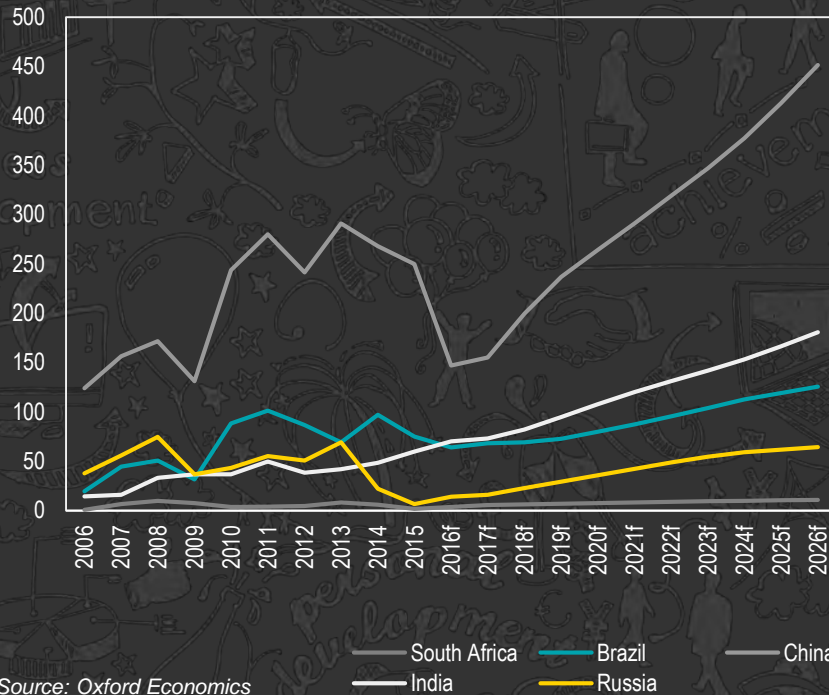
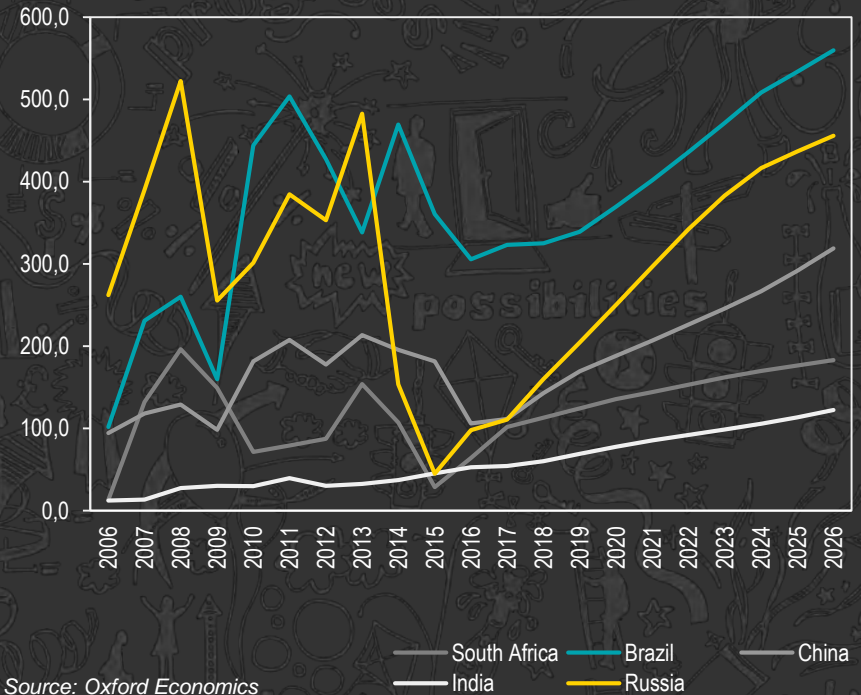


Fig. 10.2: FDI per capita trends, 2006-2026 (US\$)



Do you have questions?



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