

## Growth prospects

**45% of ASEAN  
CEOs are very  
confident about  
short term  
growth prospects**

**In the longer term,  
96% of ASEAN CEOs  
are somewhat or  
very confident of  
growth over the  
next three years**

**45%**

**39%**

ASEAN

GLOBAL

**96%**

**92%**

ASEAN

GLOBAL

## Growth opportunities

**ASEAN CEOs see opportunities in the  
next 12 months coming from:**

**39%**

**30%**

ASEAN

GLOBAL

Increasing their share in markets

**28%**

**35%**

ASEAN

GLOBAL

Innovation

**13%**

**11%**

ASEAN

GLOBAL

M&A

**Most important  
countries  
named by  
ASEAN CEO's**

China

**41%**

Indonesia

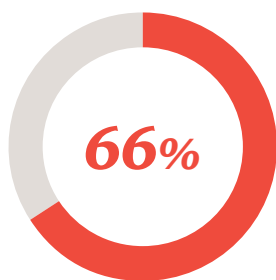
**24%**

India

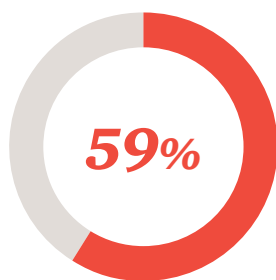
**21%**

# Restructuring

## Cost cutting

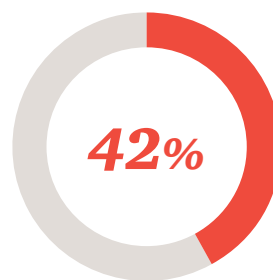


ASEAN CEOs have implemented cost cutting methods in the past 12 months

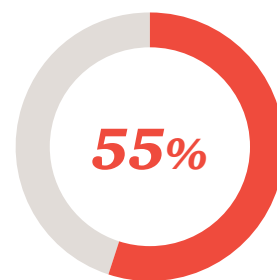


ASEAN CEOs also expect to implement cost-cutting measures in the coming year

## Strategic alliance



ASEAN CEOs have entered into a strategic alliance/joint venture

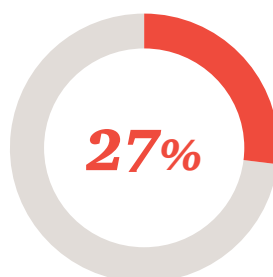


ASEAN CEOs plan to enter into a strategic alliance (joint venture) in the coming year

## Outsourcing



ASEAN CEOs have outsourced a business process or function

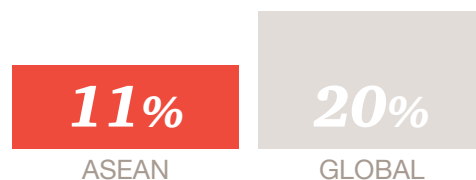
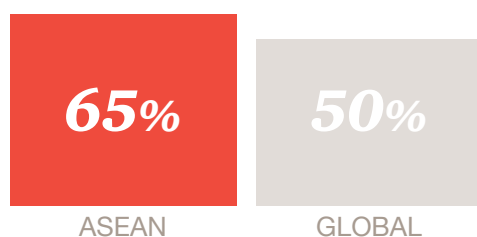


ASEAN CEOs plan to outsource a business process or function

# Headcount

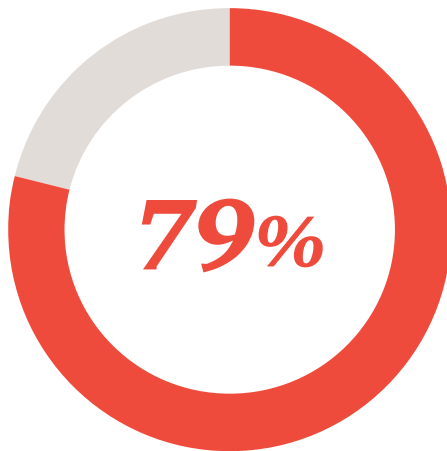
**65% of ASEAN CEOs expect to boost headcount**

**Only 11% of ASEAN CEOs expect to shed jobs**

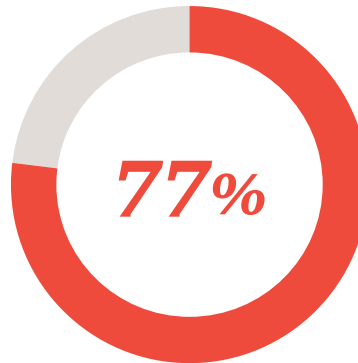


# Threats

## Top economic and policy threats by ASEAN CEOs

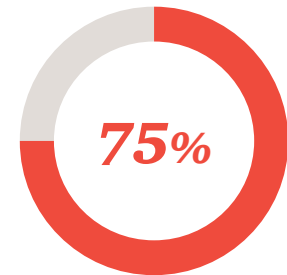


✓ Exchange rate volatility



✓ Continued slow/negative growth in developed economies

✓ Over-regulation



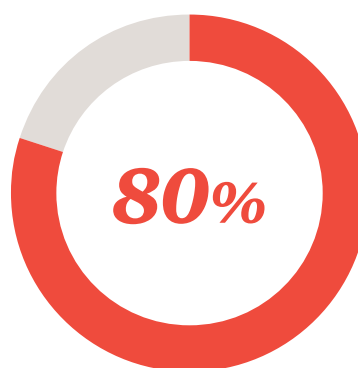
✓ Slowdown in high growth markets

✓ Government response to fiscal debt and debt burden

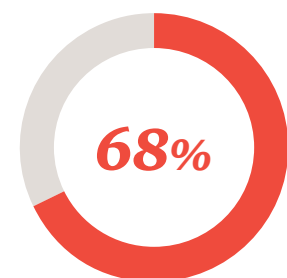
## Top business threats by ASEAN CEOs



✓ Availability of key skills, this percentage is the highest in the world



✓ Rising labor cost in high growth markets



✓ High and volatile raw material prices

✓ Bribery and corruption