

イラン： グローバル企業に向けたビジネス機会と投資分析







フロスト&サリバン

**An Outlook on Opportunities in Iran for Global Clients and
Frost & Sullivan Offerings**

February 2016

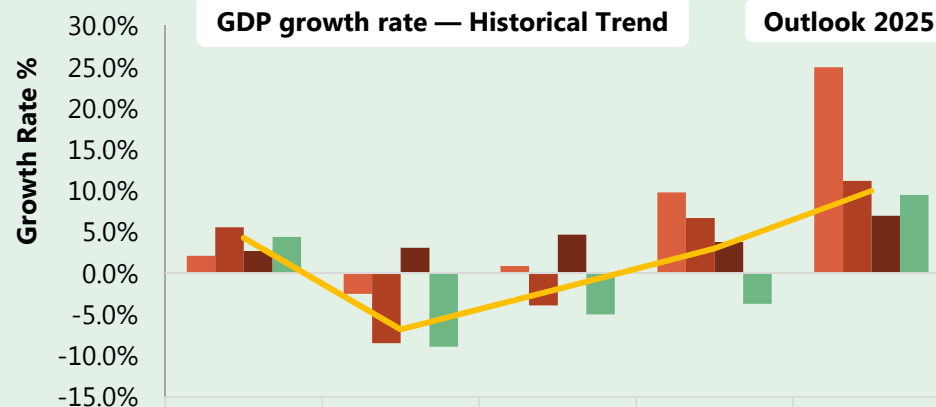
F R O S T  S U L L I V A N

イラン：2025年に向けた政府の経済成長目標

	Economy Growth Targeted	GDP to double from the current USD 415 Billion in a decade
	For Economy to grow	Annual investments to the tune of USD 120-150 Billion required; USD 1.5 Trillion investment required by 2025.
	Increasing investments in manufacturing	The Government is planning on increasing the net investment in manufacturing to USD 25.5 Billion by early 2018, USD 35 Billion by 2020, and USD 62 Billion by 2025.
	Diversification as key to Growth	The Government has announced a new roadmap for 12 manufacturing sectors, which are pivotal to the Iranian economy, in order to reduce dependence on O&G. The Government plans to increase the capacity of these industries in the next 10 years, which shall impact GDP growth, as well.
	Focus Sectors	Petrochemical Products, Mining and Minerals, Foods and Beverages, Chemicals and Pharmaceuticals, Essential and Crude Metals, Industrial Machinery, Non-metallic Mineral Products, Home Appliances, Textile and Apparel, Ground Vehicles, Rail and Maritime, Rubber and Plastic Products, and Power Generation and Transmission.
	Privatisation and PPP engagements encouraged	The Government prefers to boost investment through BOT, BOOT, BOO and PPP modes of business engagement.

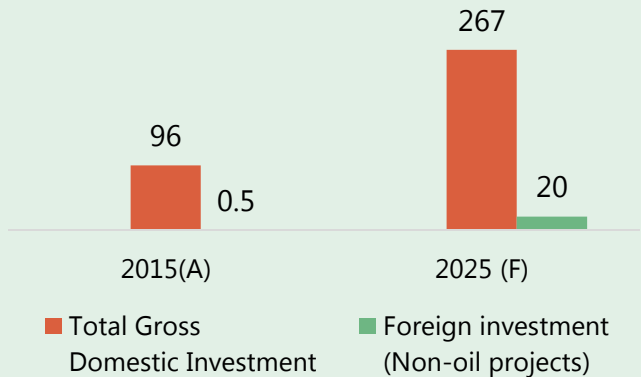
経済情勢の回復で、投資の需要拡大

Historical GDP annual growth rate vs. Outlook



- According to the 6th Development Plan (2016-2020), it is expected that the GDP growth rate shall stabilise at 8% or more during the plan period.
- To achieve these growth trends and decrease unemployment rates, Iran requires approximately **USD 150 Billion investments year-on-year (YoY)** going forward.

Domestic Investment and Foreign Direct Investment (in Manufacturing) Plans



- The Government plans to boost mining activities (both upstream and downstream) to contribute more in GDP in order to decrease the contribution of oil in the economy.
- The Government has increased the share of tax revenues in its annual budget to decrease dependence on O&G in the next year. Currently, tax revenue accounts for 6% of the total GDP; it is forecast to reach more than 16-18% by 2025
- The Government is planning in increasing the net investment in manufacturing to USD 25.5 Billion in early 2018, USD 35 Billion in 2020, and USD 62 Billion in 2025.

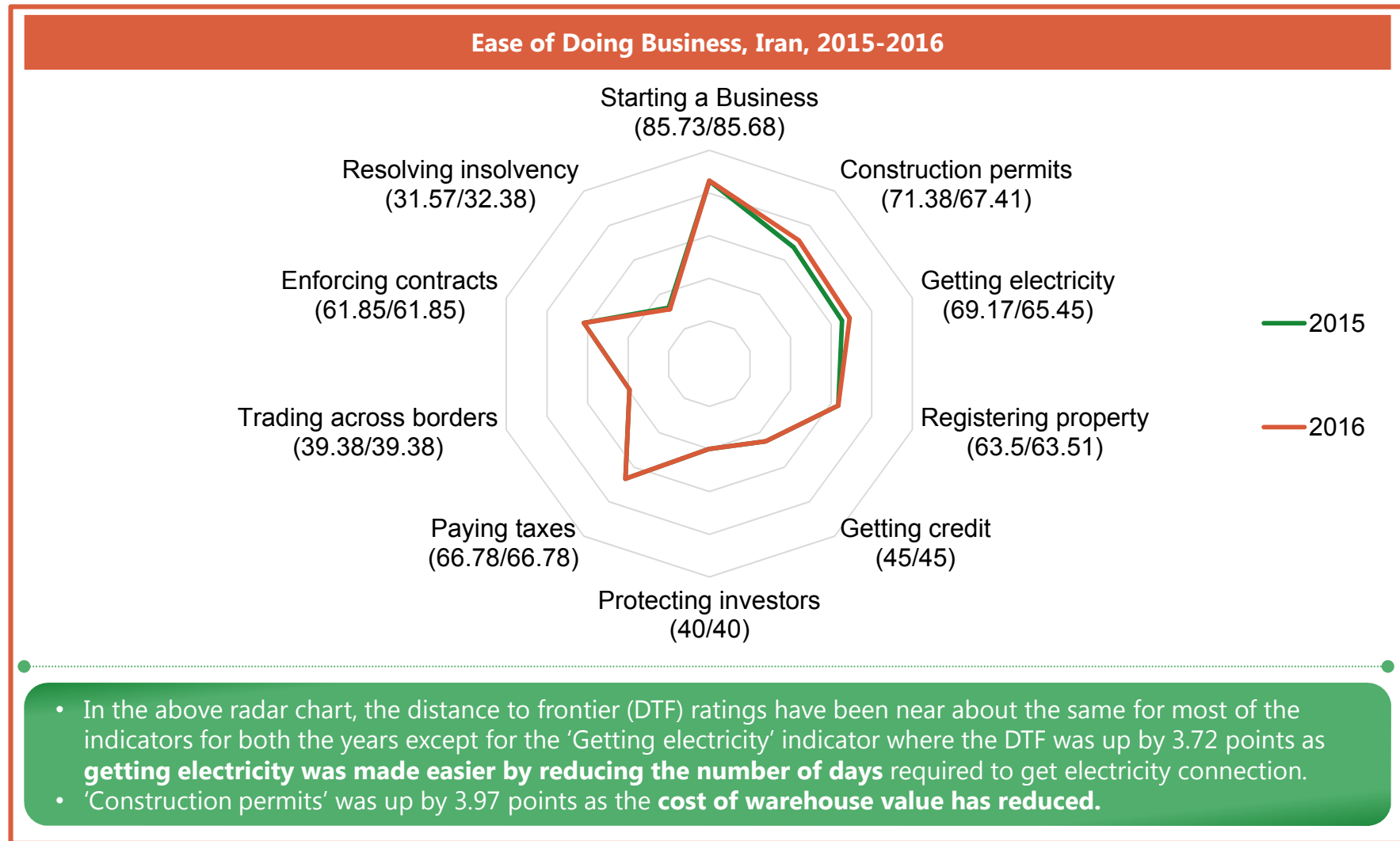
Source : Central bank of Iran based on Constant prices & 2015 reviewed report on Iran economy outlook 2025

イラン国内産業を取り巻く情勢変化： グローバル企業の進出を誘致

	Lifting of Sanctions	<ul style="list-style-type: none"> The lifting of sanctions is the single-most positive development that is expected to boost the domestic industry. It has already brought an ever-increasing influx of the world's corporations to Tehran to make contacts and express their interest in investing in the country.
	Iranian Privatisation Organisation	<ul style="list-style-type: none"> The Privatisation Organisation is a governmental company affiliated to the Ministry of Economic Affairs and Finance with financial independence. Since 2006, over USD 12 billion has been received by the Iranian Government through its programme of privatisation, representing over 60% shares in large companies. Plans are underway for further divestment. This programme promotes privatization to increase efficiency, competitiveness, and expansion of private ownership.
	Development of Downstream Sectors	<ul style="list-style-type: none"> Development of Metal and Minerals along the industry value chain as well as consumer goods from plastics and rubber (Petrochemical downstream consumer goods) are Government's focus to create many jobs. The government has over USD 9 billion investment in metals and minerals under implementation that are expected to create 100,000 new jobs. On the other hand supporting SMEs is also a plan by the Government and it is expected that at least 20,000-30,000 small factories shall be commissioned that can generate at least 600,000-700,000 new jobs.
	Economic Diversification	<ul style="list-style-type: none"> To drive its diversification momentum, Iran seeks annual investment to the tune of USD 150 Billion to significantly develop Petrochemical and Mining downstream projects along with other important sectors like Infrastructure, Automotive, Tourism and Healthcare. To meet this investment target, the government plans to utilise 20% of the Iranian private sector liquidity every year (equal USD 50 billion), attract between USD 30-50 billion FDI and USD 20-40 from oil revenue, taxes and duties, international finances and other resources.

Sources: Iranian Privatization Organisation, British Iranian Chamber of Commerce, Financial Tribune, Iran Daily News, The Guardian, Press TV

イラン国内でのビジネス展開における制限の改善



Note: The above radar diagram is based on the distance to frontier (DTF) measure, where it depicts how much the regulatory environment for local entrepreneurs in the country has changed over time in absolute terms. And DTF numbers in the bracket indicate 2015 as against 2014 (2015/2014)

Source: World Bank

イラン政府は2025年に向けて製造業の成長促進を計画： 今後注力すべき12の業種を特定

In 2015, the Government announced a new roadmap for the following manufacturing sectors, which are pivotal to the Iranian economy, in order to reduce dependence on O&G. The Government plans to increase the capacity of these industries within the next 10 years, which shall impact the GDP in this sector.

Petrochemical Products



Chemicals and Pharmaceuticals



Non-metallic Mineral Products



Ground Vehicles, Rail, and Maritime



Mining and Minerals



Essential and Crude Metals



Home Appliances



Rubber and Plastic Products



Foods and Beverages



Industrial Machinery



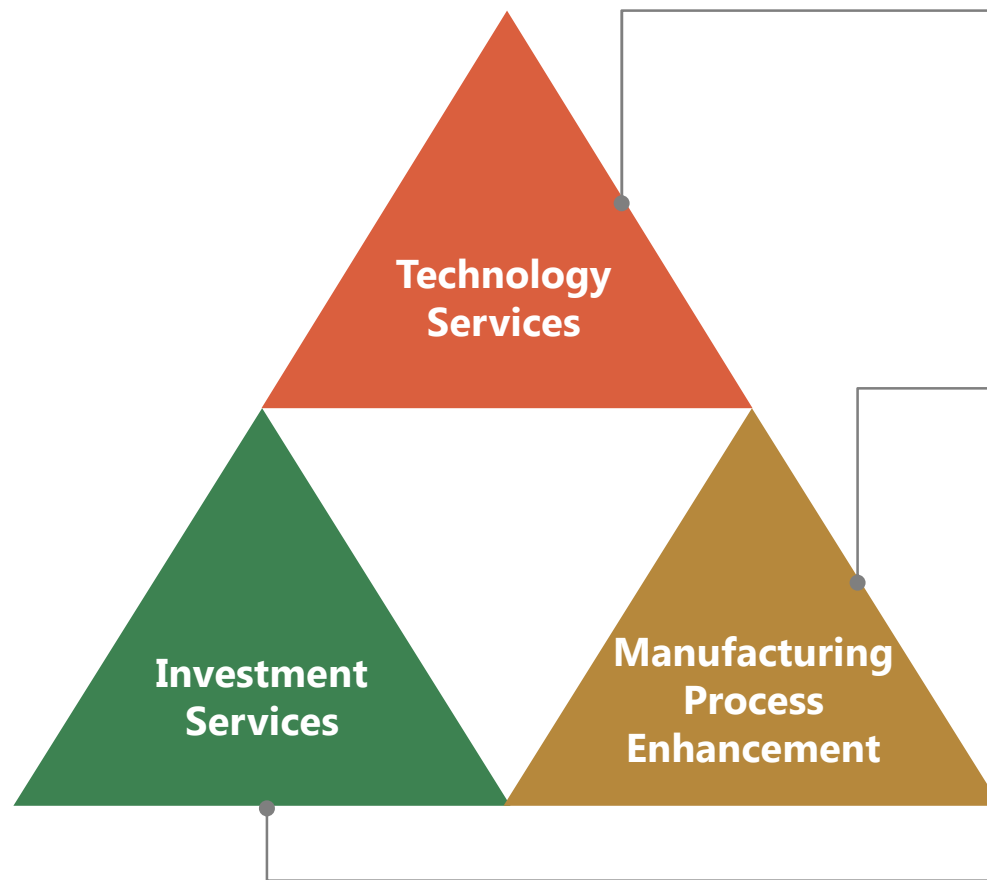
Textile and Apparel



Power Generation and Transmission



イランで海外企業が参入すべき3つの分野： テクノロジー、投資、製造プロセス

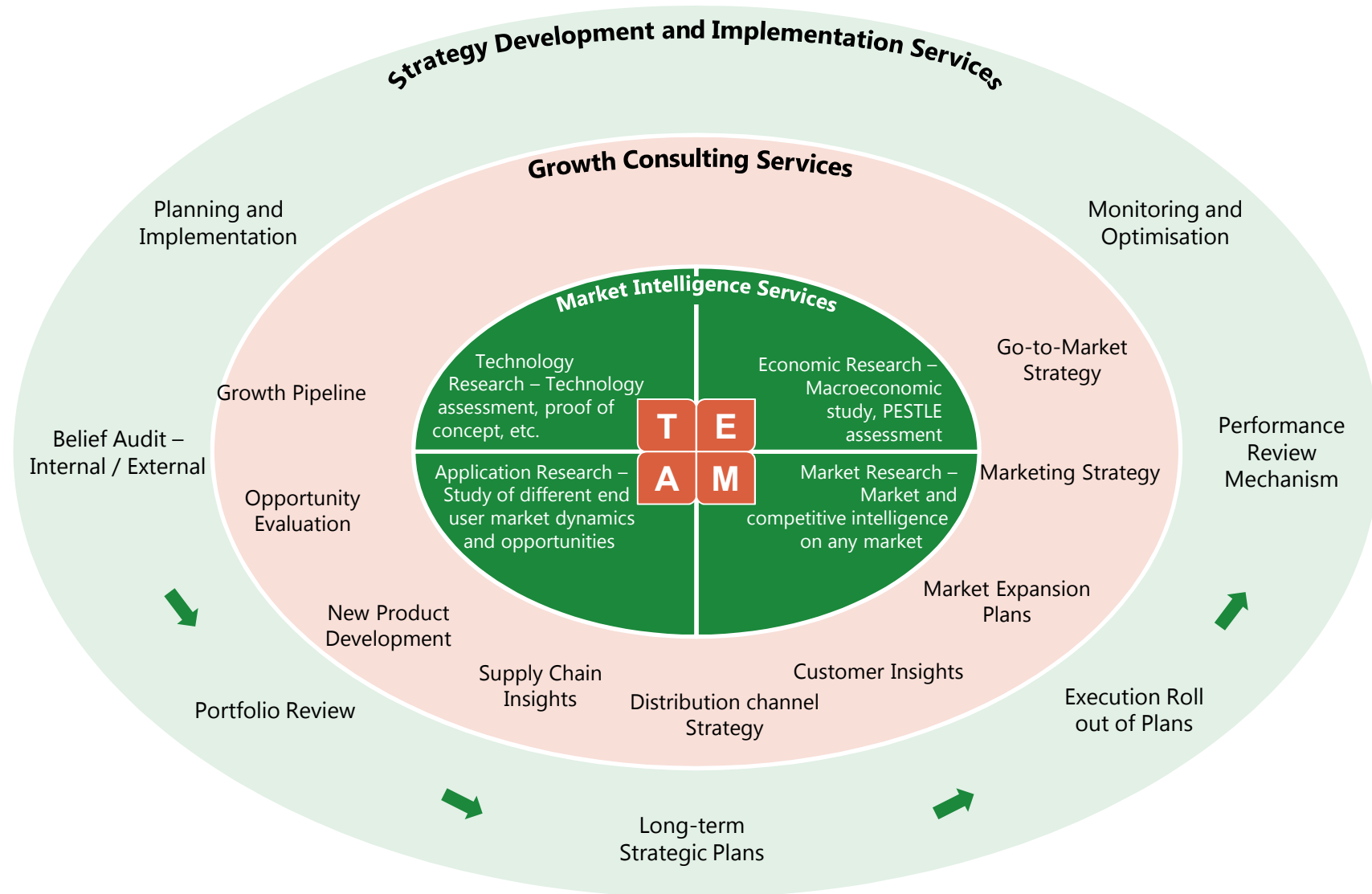


Most of the industries operate on obsolete or old technologies as the sanctions had prevented access to latest technologies. Thus, operational efficiency and productivity are very low. **Companies are looking for technology licensing and technology partners for advancing the existing technologies to more recent and cutting edge.**

Similar to the obsolete technologies, manufacturing assembly lines and processes are also quite dated. **Iranian companies are in dire need for process improvements that shall help in operational efficiency maximisation.** Iran companies seek to tie-up with global companies to benefit from their best practices in manufacturing processes.

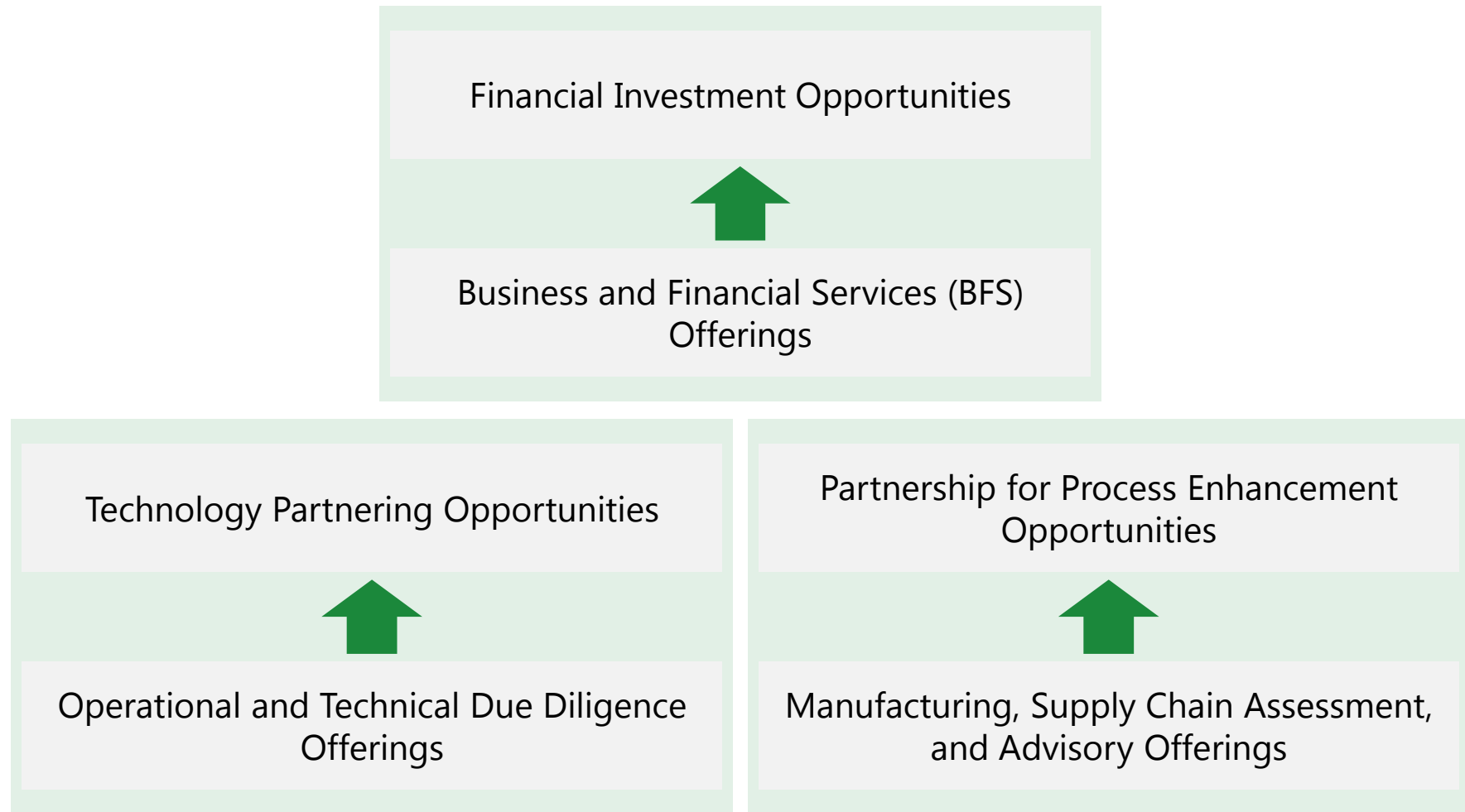
Access to finance is a major handicap to companies in Iran. Despite announcements, several projects are stalled due to access to finance. Lifting the ban has encouraged the Government and the local industries to extend hand to global majors and financial institutions for finance access. Disinvestment / privatisation projects, M&A targets are some of the opportunities for financial investors.

フロスト&サリバンは企業のイラン進出をサポート

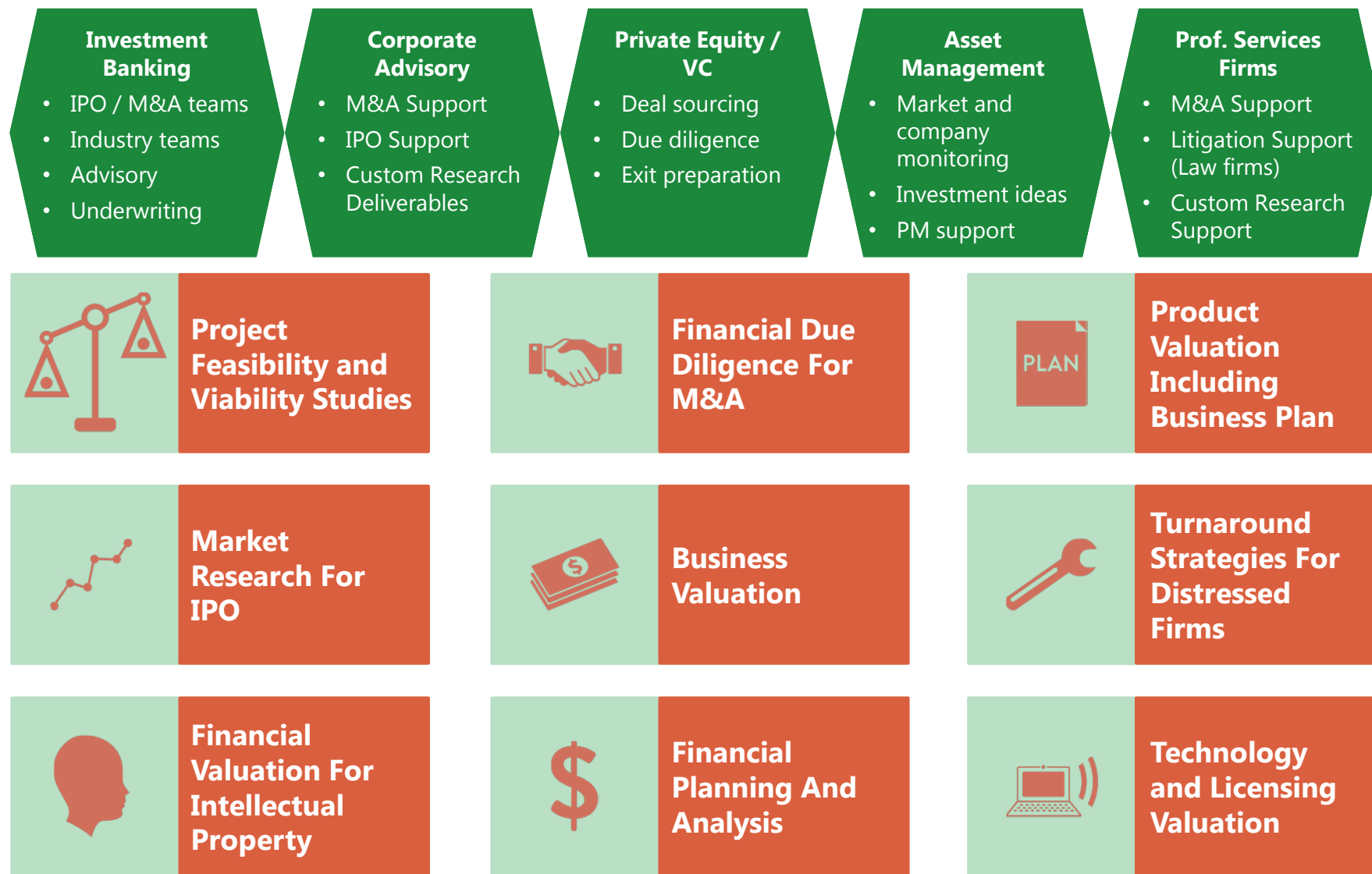


フロスト & サリバンが提供するイラン進出におけるサービス

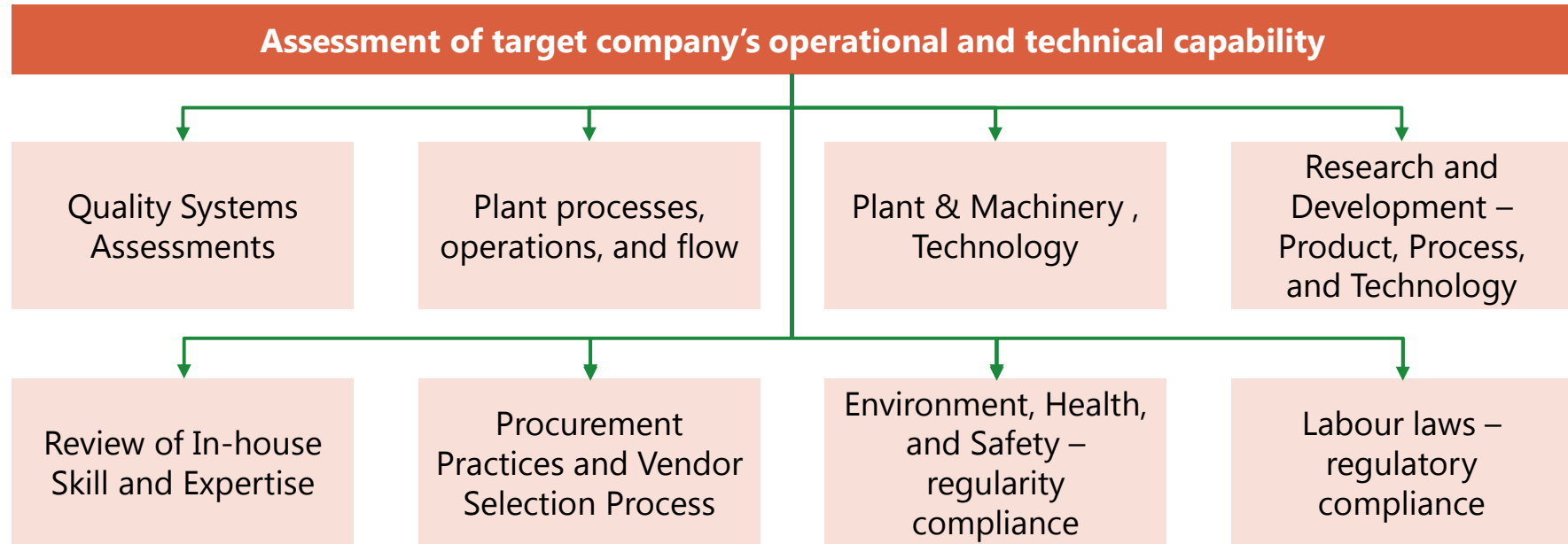
Services to Foreign Companies on Addressing Opportunities in Iran



ビジネス・ファイナンシャルサービス



オペレーション&デュー・デリジェンス



Outcome of Operational and Technical Due Diligence

- A report will be submitted covering all the elements defined as per the scope of the work. Sample report templates are shared in consecutive slides.
- Opportunities for improving the capacity utilisation, technology upgrades, productivity, and efficiency will be shared.
- Best Practices from the industry to improve the overall manufacturing capability of the organisation will be included in the report.

製造業、サプライチェーンの評価・コンサルティング

Achieving manufacturing excellence

Business growth and manufacturing



Addressing stakeholder needs

- Returns
- Margins
- YOY growth

Building a Competent Supply Chain

- Meeting customer expectations
- Identifying competitive differentiators
- Achieving customer preference
- Gaining competitive advantage

Building a capable supply chain

- Standardised operations
- Capable processes
- Learning organisation
- Efficient plant

- **Consolidated report:** Highlighting major observations across all manufacturing sites and opportunities for improvements that would **require immediate intervention**.
- **Scores and assessment report for each manufacturing site** based on Frost & Sullivan's Global Manufacturing Excellence Model.
- **Inter-site benchmarking** and inputs on internal best practices for horizontal deployment.
- **Inputs on best practices** in similar sector.

Manufacturing Excellence Assessment

A programme designed to evaluate effectiveness of manufacturing through on site incisive assessment

Frost & Sullivan's Global Manufacturing Excellence Model judges a manufacturing facility on 12 factors associated with Manufacturing Excellence and is scored on a maximum of 1,200 points.



フロスト&サリバンのイラン進出に向けたコンサルティングサービス概要



Market Intelligence for Decision Making – market demand assessments, competitive assessments, regional market opportunities, etc.



Partner Identification Services – identification of partner for technology and/or investment; technical and financial due diligence



Best practices research – Identification of global best practices for emulation across industries and across functions



Training and Development – L&D programmes in sales, marketing excellence, leadership, and project management

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