



THAILAND
BOARD OF
INVESTMENT

BOI's Investment Promotion Policies

BOI 投资促进政策



Dr. Bonggot Anuroj
Senior Investment Advisor
12 July 2017

邦郭·阿努洛 博士
泰国投资促进委员会资深投资顾问
2017年7月12日

Contents 内容

- 1 Introduction of BOI 投资委简介**
- 2 Why Thailand 为何选择泰国**
- 3 Current Investment Promotion Policy 目前投资促进政策**
- 4 Chinese Investment Trend 中国来泰投资趋势**
- 5 BOI Services 投资委的服务**

Introduction of BOI

投资委简介



BOI Introduction

投资委简介

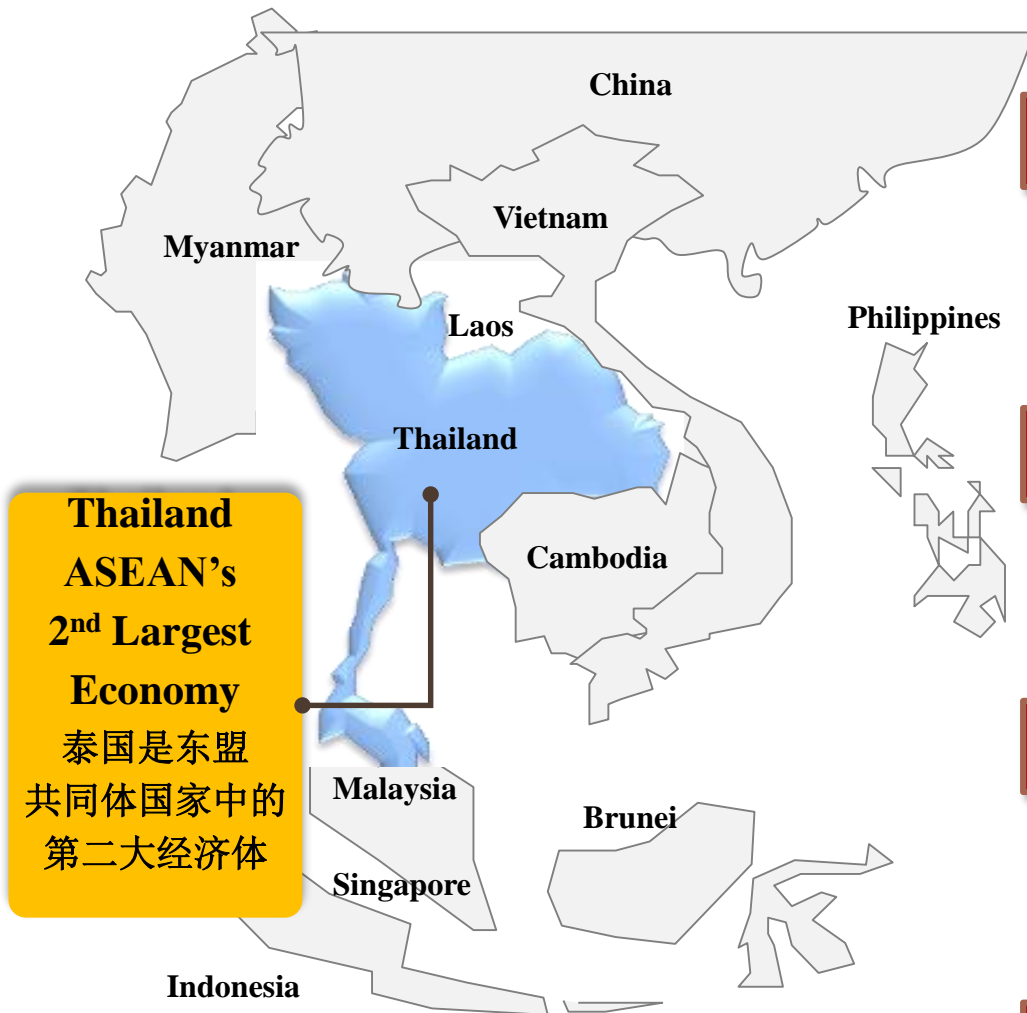
- The Office of the Board of Investment is a government agency under the Office of the Prime Minister.
泰国投资促进委员会是直属总理府的政府机构。
- Chairman : Prime Minister
委员会主席：泰国总理
- The main roles and responsibilities are in promoting investment for foreign and local investors by “Tax - based incentives” and “Non - Tax incentives”.
主要职责与义务是以税收和非税收激励措施，鼓励国内外投资者来泰投资。

Why Thailand

为何选择泰国



Thailand's Economic Overview 泰国经济情况



Source: NESDB, Ministry of Commerce of Thailand, World Bank, IMD
Note: Exchange rate (BOT, Jan 4 2017): 1 USD = 35.89 THB

1

国内生产总值 421.0 亿美元
GDP USD 421 billion
增长率 3.2%
GDP growth: 3.2%
人均 6,056 美元
GDP per capita USD 6,056
人口 : 6800万
Population : 68 million

GDP

2

出口额 221.5 亿美元
Export Value USD 221.5 billion
出口增长率 4.45%
Export Growth Rate 4.45%
进口额 1845 亿美元
Import Value EUR 184.5 billion



3

World Bank ranks
Thailand 5th for its ease of doing business
among East Asia & Pacific countries for
2017
世界银行将泰国列为东亚国家中第5大最
易启动商贸活动国



4

IMD World Competitiveness
ranks Thailand 27th out of
63 economies in its global competitiveness
index for 2017
2017年IMD世界竞争力排行榜中泰国在全
球63个参加评选的经济体中位列第27名


Thailand: the Crossroads of ASEAN 泰国：东盟的十字路口

Strategic Location Gateway to ASEAN
“We are surrounded by the world’s economic powerhouses”
战略位置所带来的优势
“我们被世界经济强国包围着”





ASEAN Economic Community
 亚洲经济共同体



633 million population
 (9% of world population)
 6.33亿人口（占世界人口的9%）



GDP: USD 2.4 trillion
 (2% of world’s GDP)
 国内生产总值：2.4万亿美元（占世界GDP的2%）



Regional Comprehensive Economic Partnership *(RCEP)
 区域全面经济伙伴关系



3.3 billion population
 (50% of world population)
 33亿人口（占世界人口的50%）

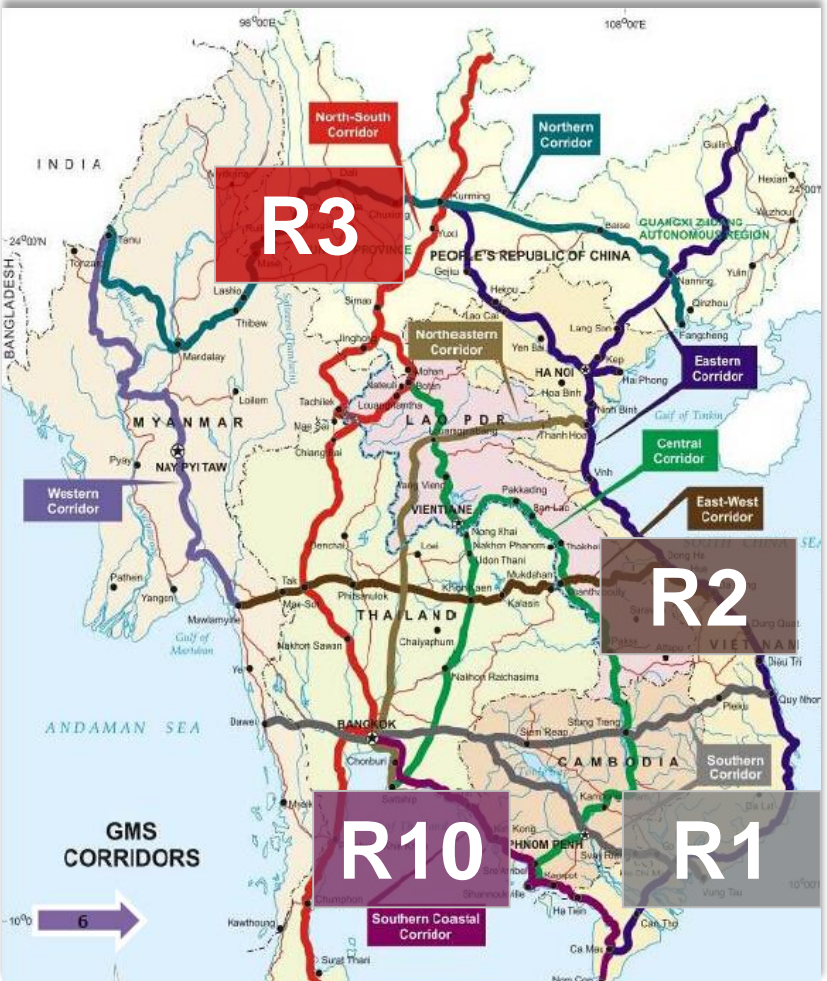


GDP: USD 21 trillion
 (28% of world’s GDP)
 国内生产总值：
 21万亿美元（占世界GDP的28%）

GMS Economic Corridors

GMS 经济走廊

There are 4 Major Economic Corridors in Thailand 泰国四大经济走廊



- R1** Southern Economic Corridor
Thailand - Cambodia - Vietnam
南部经济走廊：泰 - 柬 - 越
- R2** East-West Economic Corridor
Myanmar - Thailand - Laos - Vietnam
东西经济走廊： 緬-泰-老-越
- R3** North-South Economic Corridor
Chiang Rai- Kunming- Myanmar- Laos
南北经济走廊： 清莱-昆明-緬甸-老挝
- R10** Southern Coastal Corridor
Thailand - Cambodia - Vietnam
南部海岸经济走廊： 泰-柬-越

- Key Objectives 主要目标**
- Connect centers of economic activity 经济活动的连接枢纽
 - Facilitate trade, investment and tourism 促进贸易、投资与旅游的发展
 - Reduce transport costs, and facilitate mobility across borders 降低运输成本，促进跨境的贸易交流。

Source: NESDB

Competitive Corporate Income Tax

企业所得税竞争力

[Unit 单位: %]

新加坡



Singapore

17.0%

文莱



Brunei

18.5%

泰国



Thailand

20.0%

柬埔寨



Cambodia

20.0%

越南



Vietnam

20.0%

老挝



Laos

24.0%

马来西亚



Malaysia

24.0%

缅甸



Myanmar

25.0%

印尼



Indonesia

25.0%

菲律宾



Phillippines

30.0%

Source: KPMG Taxation of AEC, as of 2016,

Affordable Office Spaces 实惠的办公空间成本

[Unit: USD/squarefoot/annum] 单位：美元/平方英尺/年

Total Occupancy Cost of Prime Office 办公室租用总成本



The Most Affordable Grade A Office Space in Asia-Pacific (Bangkok)
亚太地区最实惠甲级办公空间 (曼谷)

1st

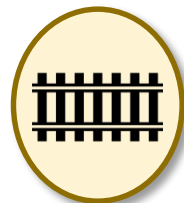
Thailand's Infrastructure Development Strategy (2015-2022)

泰国 7 年基础设施发展战略计划

5 Key Programs: to reduce logistics and transportation costs and Improve the competitiveness of the economy

5 大主要项目：降低物流与运输成本并提高经济竞争力

<p>1. Expansion of the inter-city rail network 扩大城际铁路网 (USA 14.3 billion) (143亿美元)</p>	<p>2. Highway capacity enhancement 提升高速路通行能力 (USA 15.2 billion) (152亿美元)</p>	<p>3. Development of mass transit systems in Bangkok Metropolitan 发展曼谷公共交通系统 (USA 21.7 billion) (217 亿美元)</p>	<p>4. Air transport capacity enhancement 提升航空运输能力 (USA 1.5 billion) (15 亿美元)</p>	<p>5. Development of the maritime transport network 发展海上运输网 (USA 3 billion) (3 千万美元)</p>
---	---	--	---	---



Railway 铁路

- Upgrade railway networks 提升铁路网
- Increase double-track railways 增加双轨铁路
- Build 1,435-meter standard gauge 建设1,435 米标准轨道



Mass Transit 公共交通

- Extend mass transit railway system 扩建公共交通铁路系统
- Acquire 3,183 NGV buses 增加3,183 辆NGV 公车



Road 公路

- Expand highways to 4 or more traffic lanes 扩展高速路为 4 条车道或多车道
- Develop facilities along the main roads such as container yards 发展主干道设施



Water & Air 水运 & 空运

- Enhance sea ports capacity 提升海港吞吐量
- Enhance airport capacity 提升空港吞吐量
- Establish aviation industrial estates 建立航空工业区

Source: Office of Transport and Traffic Policy and Planning, Ministry of Transport, as of 21 December 2015 交通运输政策与规划办公室，交通部，2015年12月21日

Current Investment Promotion Policy

目前投资促进政策



New Chapter of Investment Promotion 投资促进新篇章

Thailand 4.0 泰国 4.0

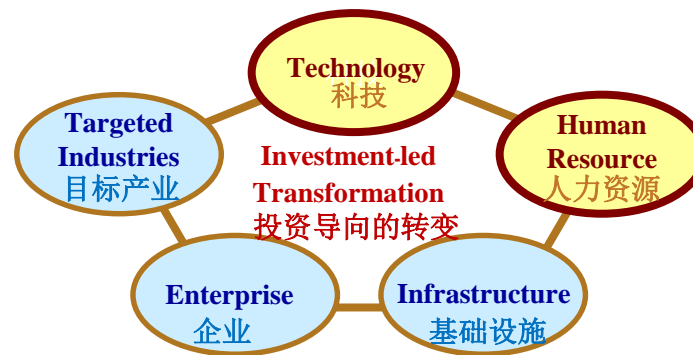
Investment 4.0 投资 4.0

Core Technology 核心技术	Industrial Cluster 产业集群
Bio-tech 生物技术	Food & Nutrient 农业& 食品
Bio-Med 生物医药	Health & Wellness 医疗服务
Mechatronics 机械电子	Smart Devices & Robotics 智能设备& 机器人技术
Embedded Technology 嵌入式技术	Digital & IOT 数字产业& 物联网
Service Design & Technology 服务设计& 技术	Creative, Culture and High Value Services 创新、文化和高价值服务

From 从	To 到
Volume-based 数量	Value-based 价值
Capital-driven 资本驱动	Innovation-driven 创新驱动
Physical capital 物质资本	Human capital 人力资本
Manufacturing 制造业	High value services 高附加值服务
Sector-based & Standard Tax Incentive 基于行业& 标准的税收激励	Whole "tailored" packages & Negotiations 整个“量身定制”包装& 协商

Prioritizing human resources and technology

首先注重 “人才和科技”



BOI's Liberal Investment Regime & Attractive Investment Incentives

投资委的自由投资政策和吸引投资鼓励措施

Policy 政策

100% foreign ownership
外商拥有100%所有权

No local content requirements
没有本地化要求

No export requirements
没有出口要求

No restriction on foreign currency
无外汇限制

Tax Incentives 税务优惠权益

Import duty exemptions/ reductions
免机器进口税

Corporate income tax exemption for up to 13 years
最高可免13年企业所得税

50% reduction of corporate income tax for up to 5 years
再加5年税收减半

Double deduction on utility costs
公共设施建设费按照双倍为成本

Deductions for qualifying infrastructure costs
免除基建成本限制项

Facilitation 非税务优惠权益

Land ownership rights
持有土地所有权

Work permit & visa facilitation
简化工作证、签证
办理过程

List of Activities Eligible for Investment Promotion

投资促进行业类别

Section 1. Agriculture and Agricultural Products

农业及农产品加工业

Section 2. Mineral ,Ceramics and Basic Metals

矿业、陶瓷业及基础金属

Section 3. Light Industry

轻工业

Section 4. Metal Products, Machinery and Transport Equipment

金属制品、机械及交通设备

Section 5. Electronics and Electrical Appliances Industry

电子电器业

Section 6. Chemicals ,Paper and Plastics

化工产品、塑料及造纸

Section 7. Service and Public Utilities

服务业和公用事业

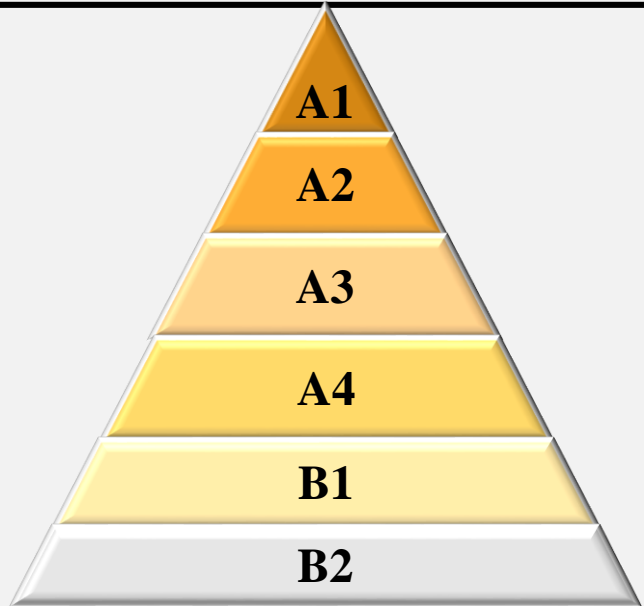
Section 8. Technology and Innovation Development

发展科技创新行业

How Investment Incentives are Granted

投资优惠政策给予办法

Activity-based Incentives 按行业类别给予优惠权益



- **Exemption of import duties on machinery**
免机器进口税
- **Up to 8 years of corporate income tax exemption**
免企业所得税最高达 8 年



Merit-based Incentives 按照项目价值给予优惠权益

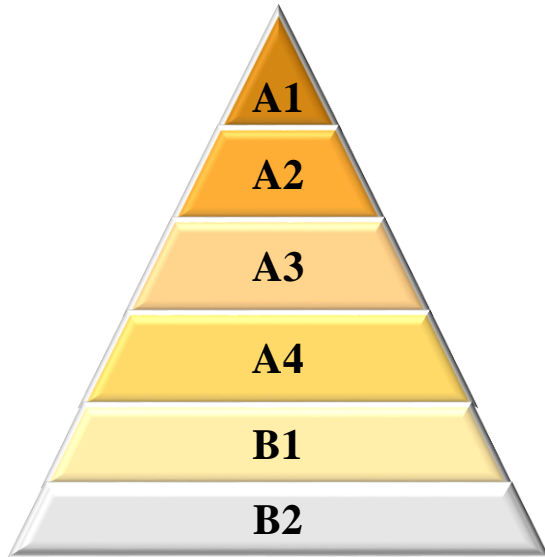
- 1. Competitiveness Enhancement**
提高竞争力
- 2. Decentralization**
带动地区的繁荣
- 3. Industrial Area Development**
发展工业区

Grant additional incentives to encourage more investment/expenditures that benefit the country or overall industry
按照行业项目价值鼓励和促进投资，使国家或是整个工业行业受益

Activity-based incentives

(1/2)

按行业类别给予
投资优惠权益 (1/2)



A1: 知识型产业，以增强国家竞争力的设计和研发行业为主

A2: 发展国家基础设施的行业，具有高附加值的高科技行业，且在泰国投资较少或尚未投资的行业

A3: 对国家发展具有重要意义，且在国内相关领域投资极少的高科技行业

A4: A4行业不如 A1-A3 行业先进，但能增加国内原材料价值以及加强产业链发展的行业

B1/B2: 没有使用高科技但对产业链发展具有重要意义的配套产业

A1

Knowledge-based activities, focusing on **R&D and design** to enhance the

A2

Activities in **infrastructure** for the country's development, activities using **advanced technology** to create value-added investments, with none or very few existing investments in

A3

High technology activities which are important to the country's development, with a few investments already existing in Thailand

A4

Activities with **lower technology than A1-A3** but add value to domestic resources and strengthen

B1

Supporting industries that **do not use high**

B2

technology but are still important to the value chain

Technology-based Incentives

按照技术给予优惠权益

CIT exemption for **10 years** plus **duty exemptions** on materials imported for R&D purposes and related testing

免除为研发目的和相关测试所需要的材料进口税并获免企业所得税 **10年**

Targeted Core Technologies

目标核心技术

- 1 Biotechnology 生物技术
- 2 Nanotechnology 纳米技术
- 3 Advanced Materials Technology
先进材料技术
- 4 Digital Technology 数字技术

Enabling Services 促成服务

1. Research and Development 研究开发
2. Vocational Training Centers (only in S&T) 职业培训中心（仅限科技部）
3. Electronics Design 电子设计
4. Engineering Design 工程设计
5. Scientific Laboratories 科学实验室
6. Calibration Services 校准服务

•For 2-6, only projects that utilize advanced technology, as approved by the Board

•2-6 项只涉及投资委批准的高科技项目

Investment Promotion Policy in 2017

在2017 年投资促进法基础下的投资促进政策

Activity-based 以产业为主

- Bio Industries 生物工业
- Creative & Digital Industries 创意和数字工业
- High Value Businesses & Services 高价值商务和服务
- Advanced Manufacturing 先进生产
- Basic & Supporting Industries 基础和支持工业

Technology-based 以技术为主

- Biotechnology 生物技术
- Nanotechnology 纳米技术
- Advanced Materials Technology 先进材料技术
- Digital Technology 数字技术

+

Merit-based 以价值为主

- R&D 研究开发
- Support academic/research institutes, or technology and human resource development funds 提供教育机构, 培训中心或技术和人才发展基金支持
- IP licensing fee 知识产权费
- Advanced technology training 高等科技培训
- Development of Local suppliers 发展本土供货商
- Product and packaging design 产品和包装的设计

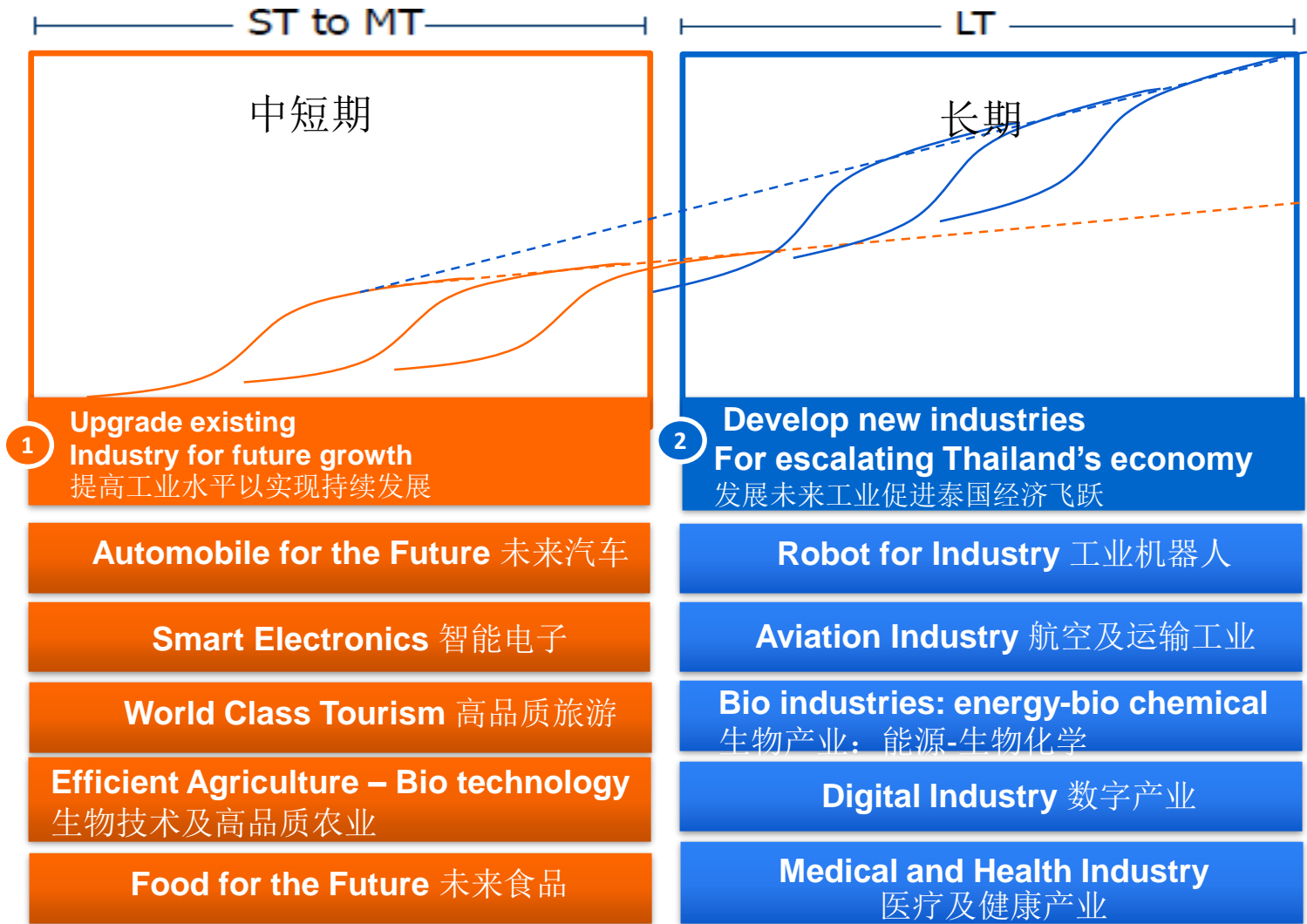
Area-based 以地区为主

- EEC (3 provinces) (东部经济走廊 3 府)
- SEZ (10 provinces) 经济特区 (10 府)
- Southern Border (4 provinces, 4 districts) 南部边境口岸 (4 府4 县)
- 20 Provinces with Lowest per Capita Income 20 个低收入府
- Industrial Estates/Zones 工业园区
- Science and Technology Parks, e.g. Science Parks, Food Innopolis, SKP 食品科技园区

Specific Measures 特别措施

10 Targeted Industries New Engine Of Growth 10个目标产业

5+5 Target industries.. existing 5 industries +new 5 industries
 5+5 目标产业... 5个现有产业 + 5个新产业



Targeted Industries and Activities for Chinese Investors

面向中国的招商引资目标行业

1. High value-added products from natural rubber
高附加值天然橡胶产品
2. Machinery and equipment
机械设备
3. Automobiles and parts
汽车及其零部件
4. Electronics and parts
电子产品及配件
5. Medical devices and parts
医疗器械及零部件
6. Trains or electric trains or equipment or parts
(only rail system)
火车、电车及轨道交通设备
7. Manufacture or repair of aerospace, including equipment
or components
飞机、航空设备及部件的生产及维修
8. Telecommunication products and parts
电信设备及其配件生产
9. Biotechnology
生物技术
10. Software
软件

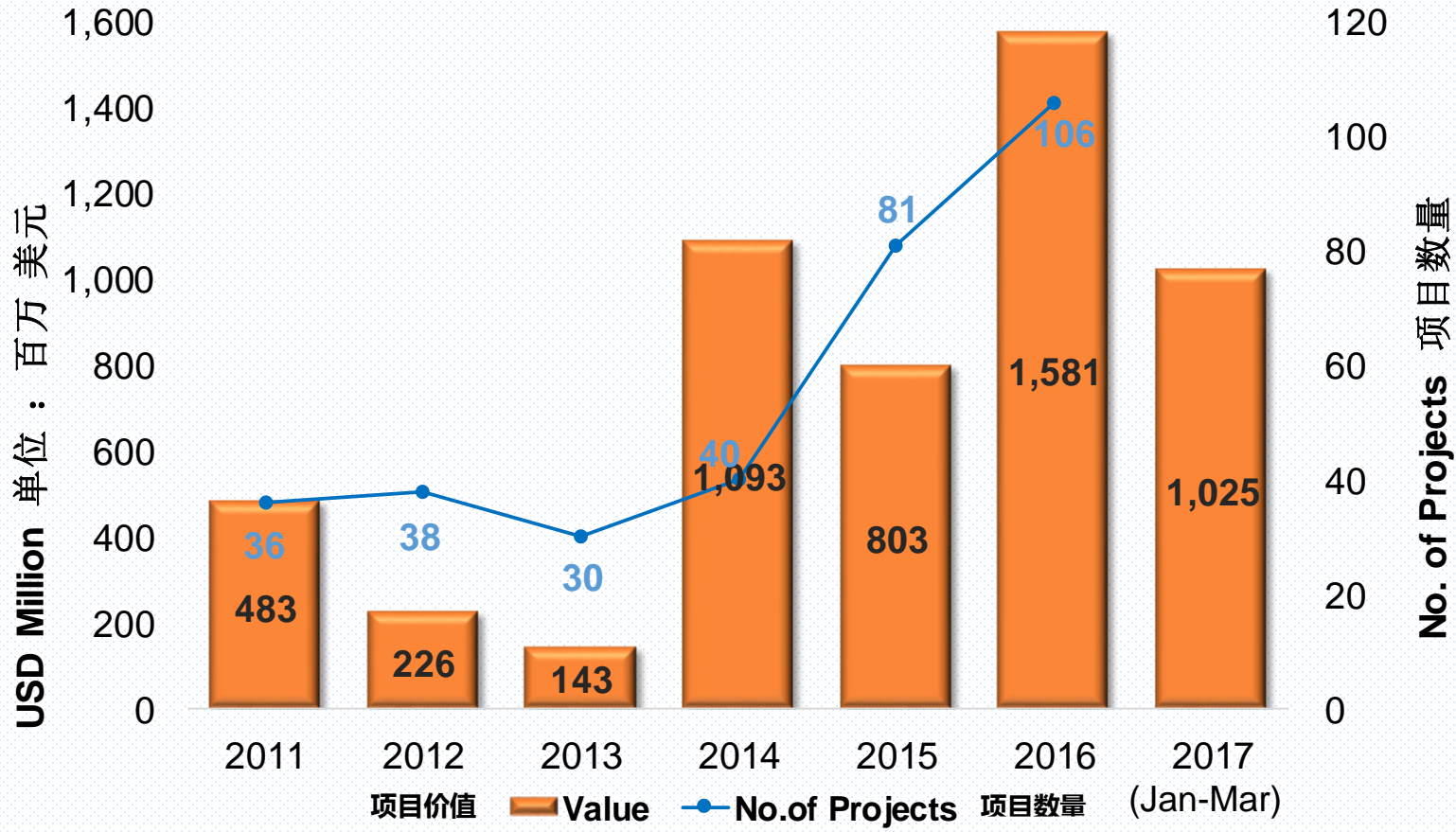
Chinese Investment Trend

中国来泰投资趋势



Trends of Chinese Investment Projects Approved in 2011- 2017 (Jan-Mar)

2011-2017年（1-3月）中国投资促进申请项目趋势



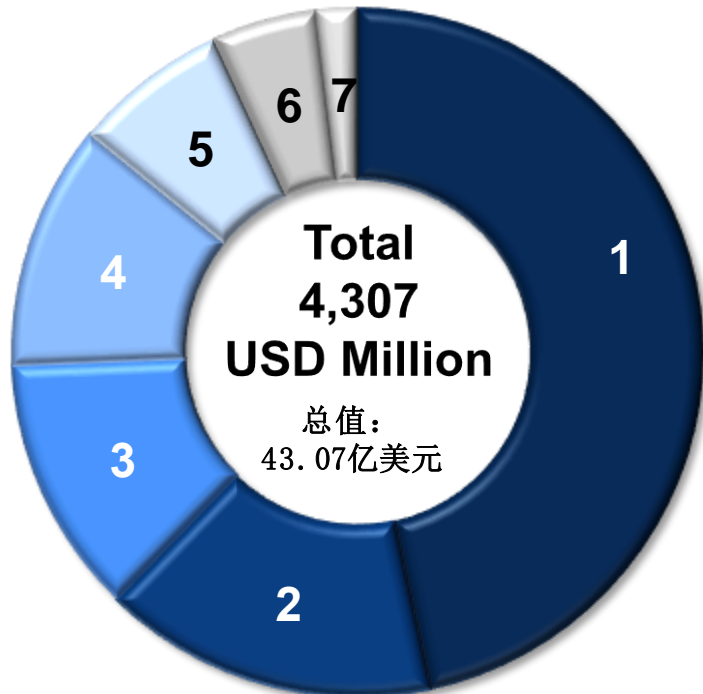
Sources: BOI; Exchange rate: BOT as of Nov 1, 2016 (USD 1 = Bt. 35.00)

Chinese Investment Projects Approved in 2011-2017 (Jan-Mar)

2011-2017年（1-3月）投资委批准的中国投资项目

[In Millions of USD]

单位：百万 美元



1. Metal Products & Machinery (\$2,006.61m)
金属产品及机械设备 20.06亿美元
2. Electric & Electronic Products (\$674.57m)
电子电气产品 6.74亿美元
3. Minerals & Ceramics (\$522.45m)
矿产及陶瓷产品 5.25亿美元
4. Agricultural Products (\$496.52m)
农产品 4.96亿美元
5. Services (\$312.55m)
服务业 3.13万美金
6. Chemicals & Paper (\$294.85m)
化工产品&造纸业 2.95万美金
7. Light Industries/Textiles (\$81.91m)
轻工及纺织业 0.819亿美元

Sources: BOI; Exchange rate: BOT as of Mar, 2017 (USD 1 = Bt. 35.00)

BOI Services

投资委的服务



One Start One Stop Investment Center (OSOS)

一站式投资服务中心



More convenience 更便利！

Less time 更省时！

More efficiency! 更高效！



One Start One Stop Investment Center (OSOS)

一站式投资服务中心

18th Floor, Chamchuri Square Building, 319 Phayathai Road, Pathumwan, Bangkok Thailand

Tel. 02-209-1100 (domestic), +662-209-1100 (international)

Email. osos@boi.go.th

地址：泰国曼谷八通湾区帕亚泰路319号，占朱利广场大厦第18层

国内线：022091100 国际线：+6622091100

电子邮箱： osos@boi.go.th

BOI Unit for Industrial Linkage Development (BUILD)

Main Activities Aid Investors

投资促进委员会工业联络发展事务组的（ BUILD ）目标投资者



BOI Offices

BOI 总部及中国办事处

Thailand 泰国

Office of the Board of Investment 泰国投资促进委员会
555 Vibhavadi-Rangsit Road, Chatuchak
Bangkok 10900 Thailand
Tel. : (662) 537-8111-55
Fax : (662) 537-8177
E-mail : head@boi.go.th
Website : www.boi.go.th

One Start One Stop Investment Center (OSOS)
一站式投资服务中心
18th Floor Chamchuri Square Building, 319 Phayathai
Road, Pathumwan, Bangkok 10330
Tel. : (662) 209-1100
E-mail: osos@boi.go.th
Website: osos.boi.go.th

China 中国办事处

Shanghai 上海

Royal Thai Consulate-General
2 F., 18 Wanshan Road, Changning
District, Shanghai, 200336
P.R.China
Tel: (86-21) 5260 9876
(86 21) 5260 9877
Fax: (86 21) 5260 9873
E-mail: shanghai@boi.go.th

Guangzhou 广州

Investment Promotion Section,
Royal Thai Consulate - General,
Guangzhou
No.36 Youhe Road, Haizhu District,
Guangzhou, P.R.C 510310
Tel: (86-20) 8385 8988 Ext: 220-225
Fax: (86-20) 8387 2700
E-mail: guangzhou@boi.go.th

Beijing 北京

Royal Thai Embassy
No.21 Guang Hua Road,
Beijing, 100600, P.R.China
Tel: (86-10) 8532-4510
Fax: (86-10) 8532-1620
E-mail: beijing@boi.go.th

BOI on the Internet

泰国投资委网站

www.boi.go.th

THAILAND OF INVESTMENT

The perfect opportunity

泰国：投资的沃土，完美地机遇

www.boi.go.th



THAILAND BOARD OF INVESTMENT

Thank you 谢谢

A Race Half Won

THAILAND

An Asian Hub,
a World of Opportunity

3 BILLION ASIAN CONSUMERS

THAILAND



**THAILAND
BOARD OF
INVESTMENT**

Think Asia, Invest Thailand