



GLOBAL ADVANTAGE: TURNING LOCAL STRENGTH INTO GLOBAL OPPORTUNITY

Greater Fayetteville Business Journal Power Breakfast

MARCH 4, 2026

WHY IS FDI IMPORTANT?

8.7 M

Workers

8.7 million U.S. workers are employed by international companies across America

3 M

Manufacturing Workers

3 million U.S. workers at international companies earn their living in the manufacturing sector, 22 percent of all manufacturing jobs in the country

\$ 92 K

Annual Compensation

U.S workers at international companies make \$92K annually, 7 percent higher than the economy-wide average

WHY IS FDI IMPORTANT?

HIGH-QUALITY JOBS

347,100 workers in North Carolina are employed as a result of international investment.

MANUFACTURING

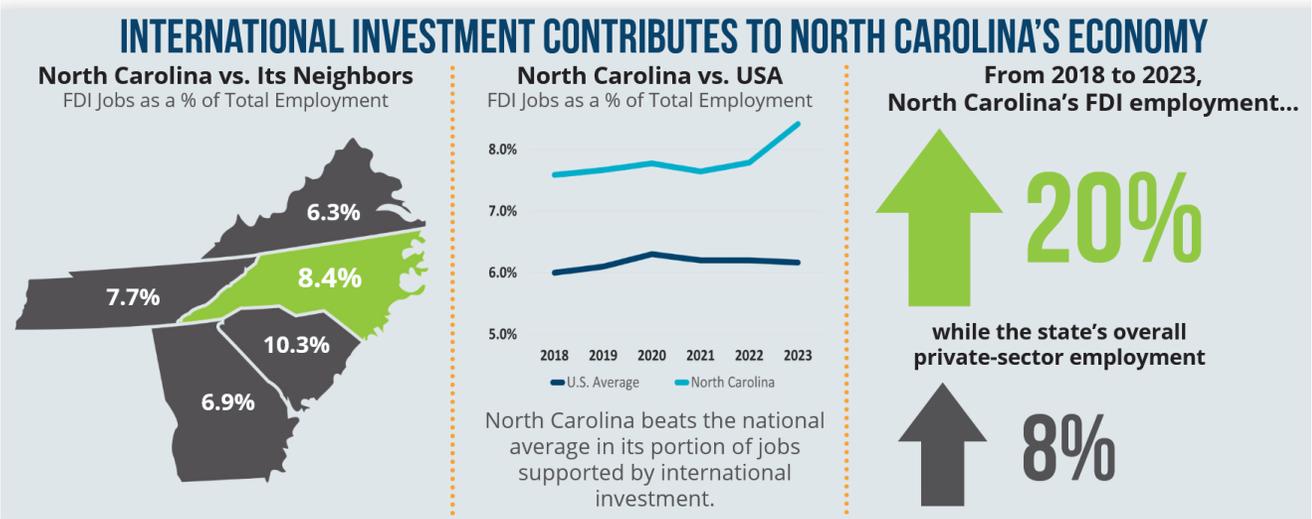
141,200 workers in North Carolina - **41 percent** of all FDI jobs in the state - are in the **manufacturing sector**.

GLOBALLY CONNECTED

Among all international employers, those from the **United Kingdom**, the **Netherlands** and **Germany** support the largest number of jobs in North Carolina.

MANY EMPLOYERS

1,432 international employers have operations in North Carolina.



Source: Global Business Alliance

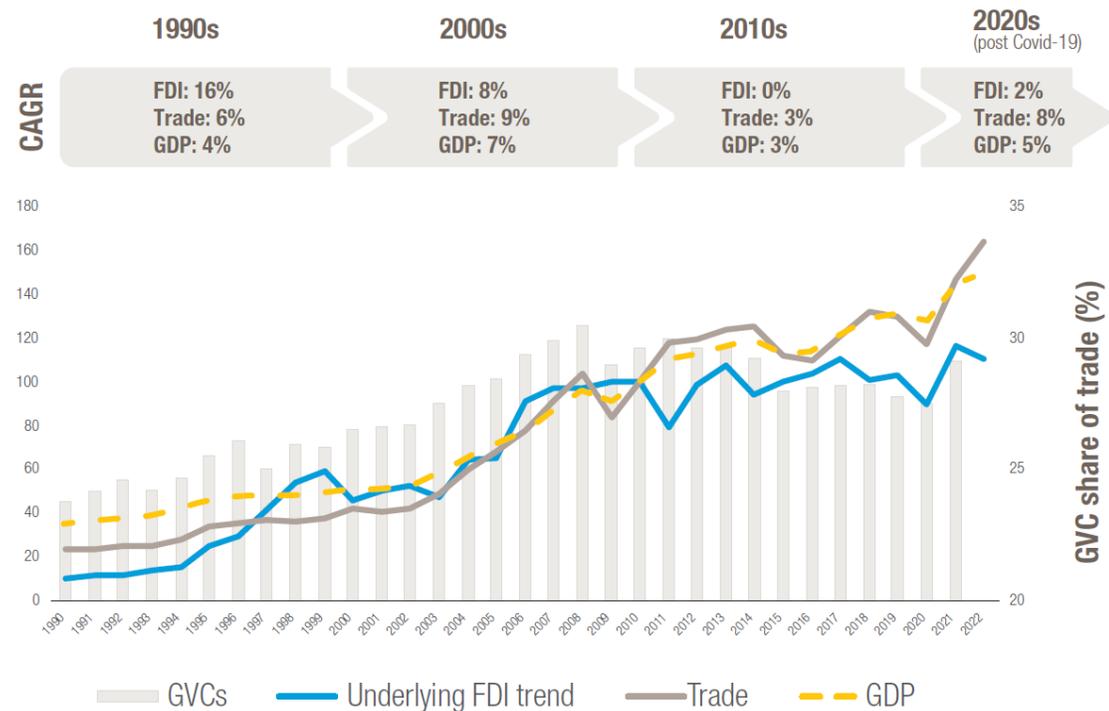
WHY IS FDI IMPORTANT?

- Job creation
 - Talent attraction
 - Higher salaries
 - Workforce training
 - Career opportunities
 - Capital inflows
 - Local spending
 - Exports
 - Tax revenue
 - Greater competition
 - Contribution to economic and social goals
 - Know-how and innovation
 - Economic diversification
 - Integration with global value chains
 - Regulatory reform
 - Improved business environment
 - Political stability
 - Image and “brand”
-
- Not all FDI is equally beneficial
 - Locations should clearly define why they want to attract FDI

FDI GLOBALLY HAS SLOWED SIGNIFICANTLY

FDI and GVCs lost pace with trade and GDP growth around 2010

FDI, trade and GDP trends, indexed 2010 = 100



- FDI has barely increased over the past 10 years
- Competition for FDI has intensified

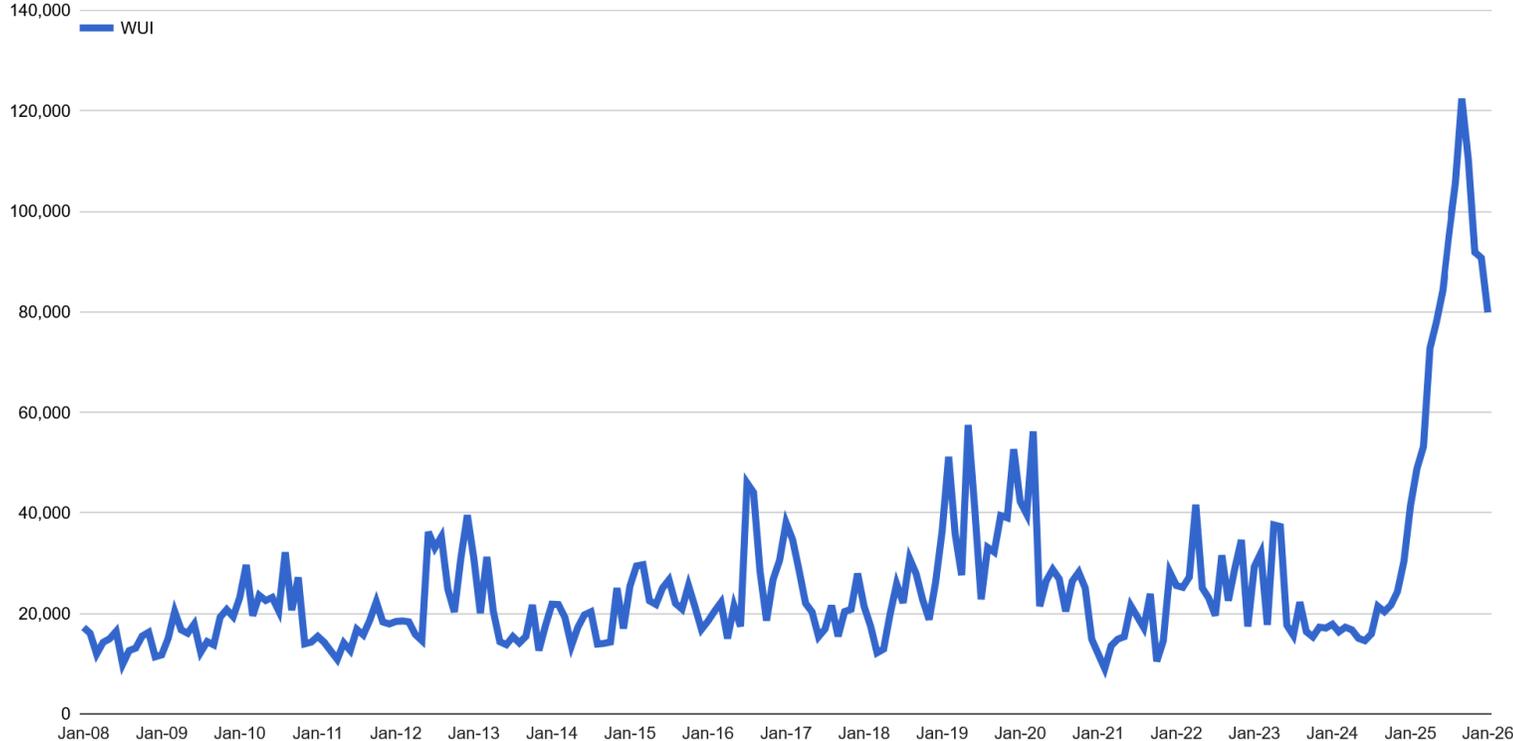
Source: UNCTAD

UNCERTAINTY IS HOLDING INVESTMENT BACK

World Uncertainty Index (WUI): Global

Index. GDP weighted average. January 2008 to January 2026

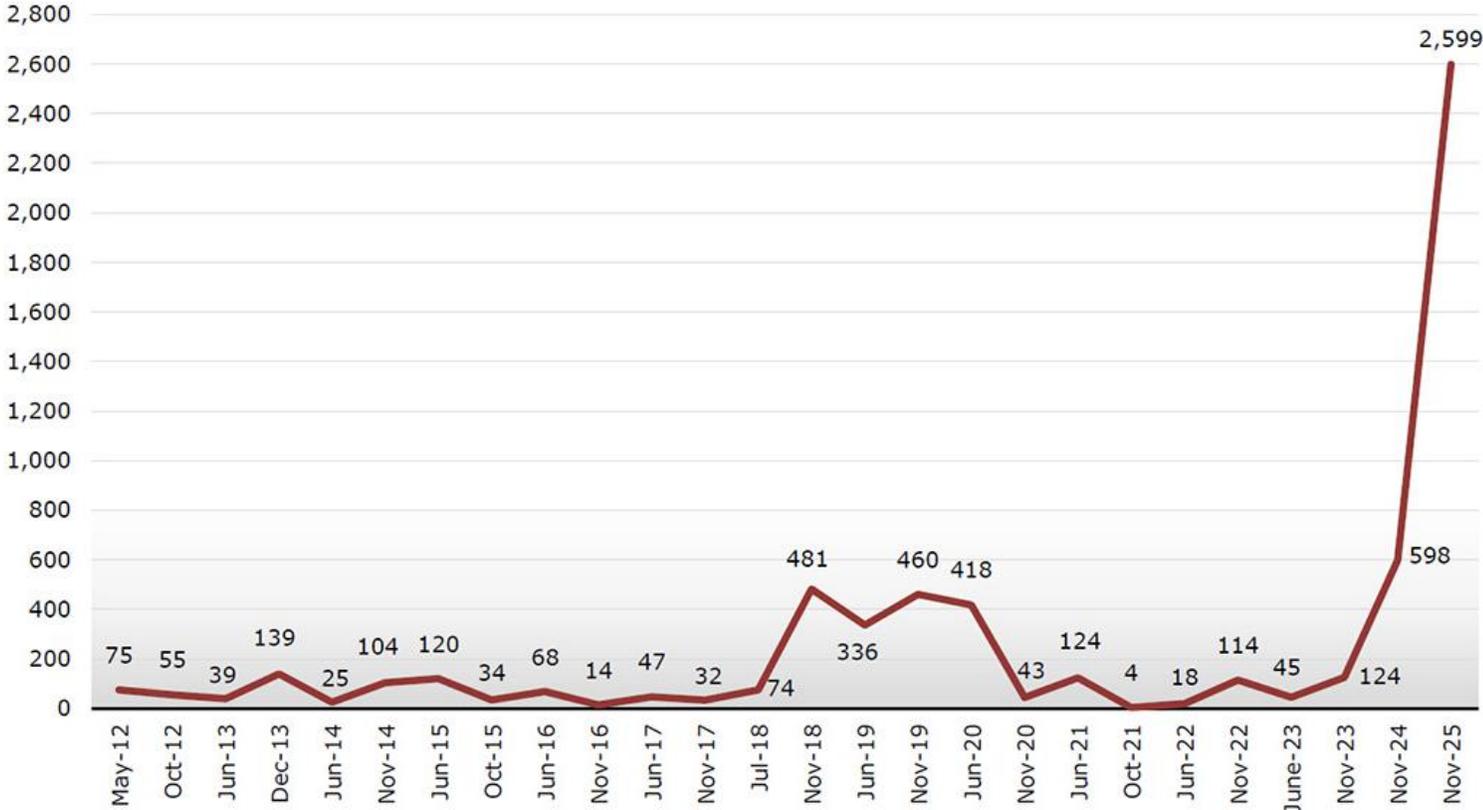
[Print](#) [Excel](#) [Copy](#)



Source: <https://worlduncertaintyindex.com/>

TARIFFS ARE CONTRIBUTING TO UNCERTAINTY

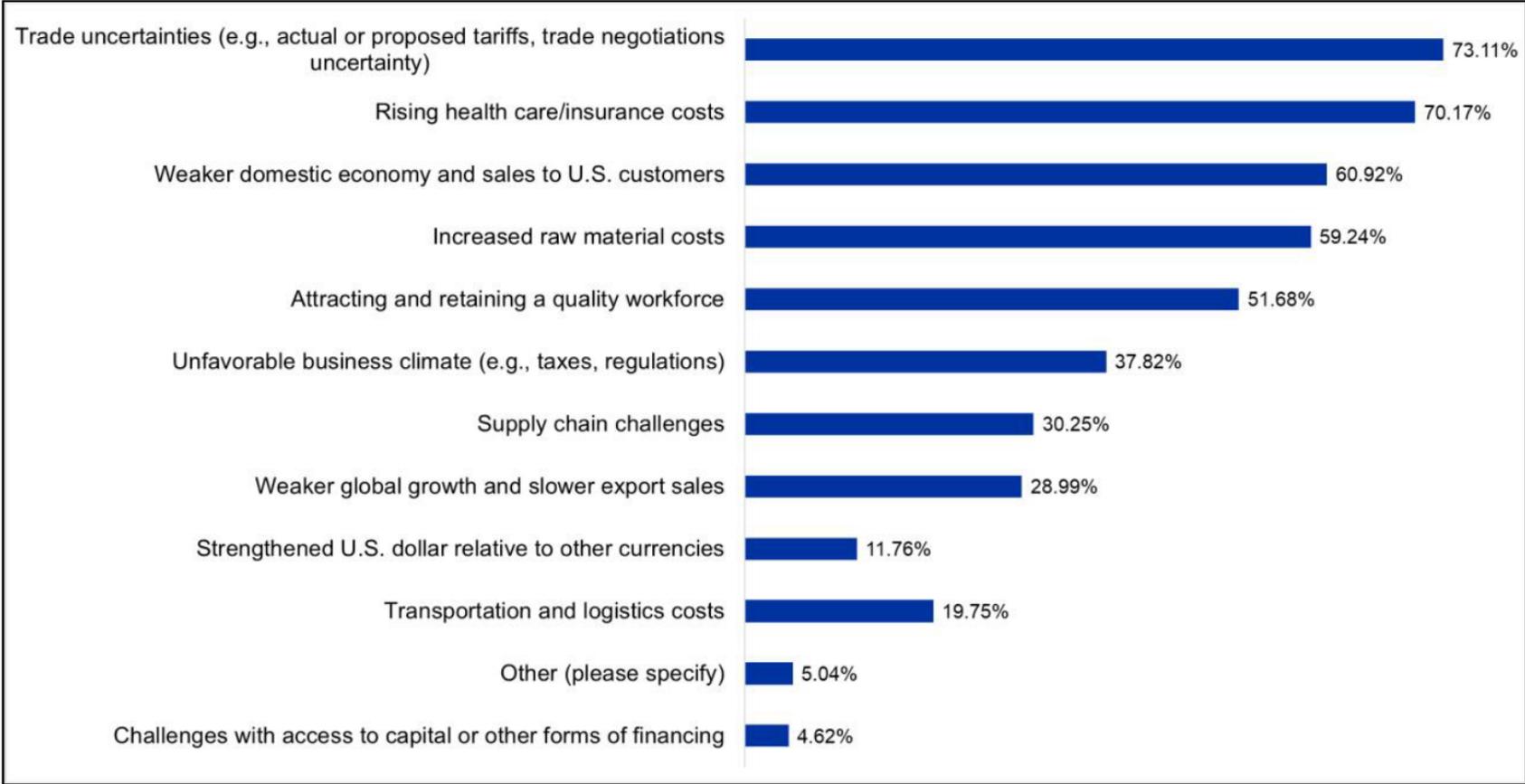
Chart 3.5 Trade coverage of new other trade and trade-related measures affecting imports identified in each period (not cumulative) in USD billion, May 2012 to November 2025



Source: WTO

TARIFFS ARE CONTRIBUTING TO UNCERTAINTY

Figure 3: Primary Current Business Challenges, Q4 2025



Note: Respondents were able to check more than one response; therefore, responses exceed 100%.

Source: National Association of Manufacturers Outlook Survey Q425

MENU

THE WHITE HOUSE
WASHINGTON

SEARCH Q

NEWS GALLERY LIVESTREAM INVESTMENTS SAVE AMERICA WH WIRE CONTACT



THE TRUMP EFFECT

Since President Donald J. Trump returned to office, his America First economic policies have sparked trillions of dollars in new investment in U.S. manufacturing, technology, and infrastructure.



Source: The White House

THE WHITE HOUSE WASHINGTON

[NEWS](#)[GALLERY](#)[LIVESTREAM](#)[INVESTMENTS](#)[SAVE AMERICA](#)[WH WIRE](#)[CONTACT](#)

▾ PRESIDENTIAL ACTIONS

America First Investment Policy

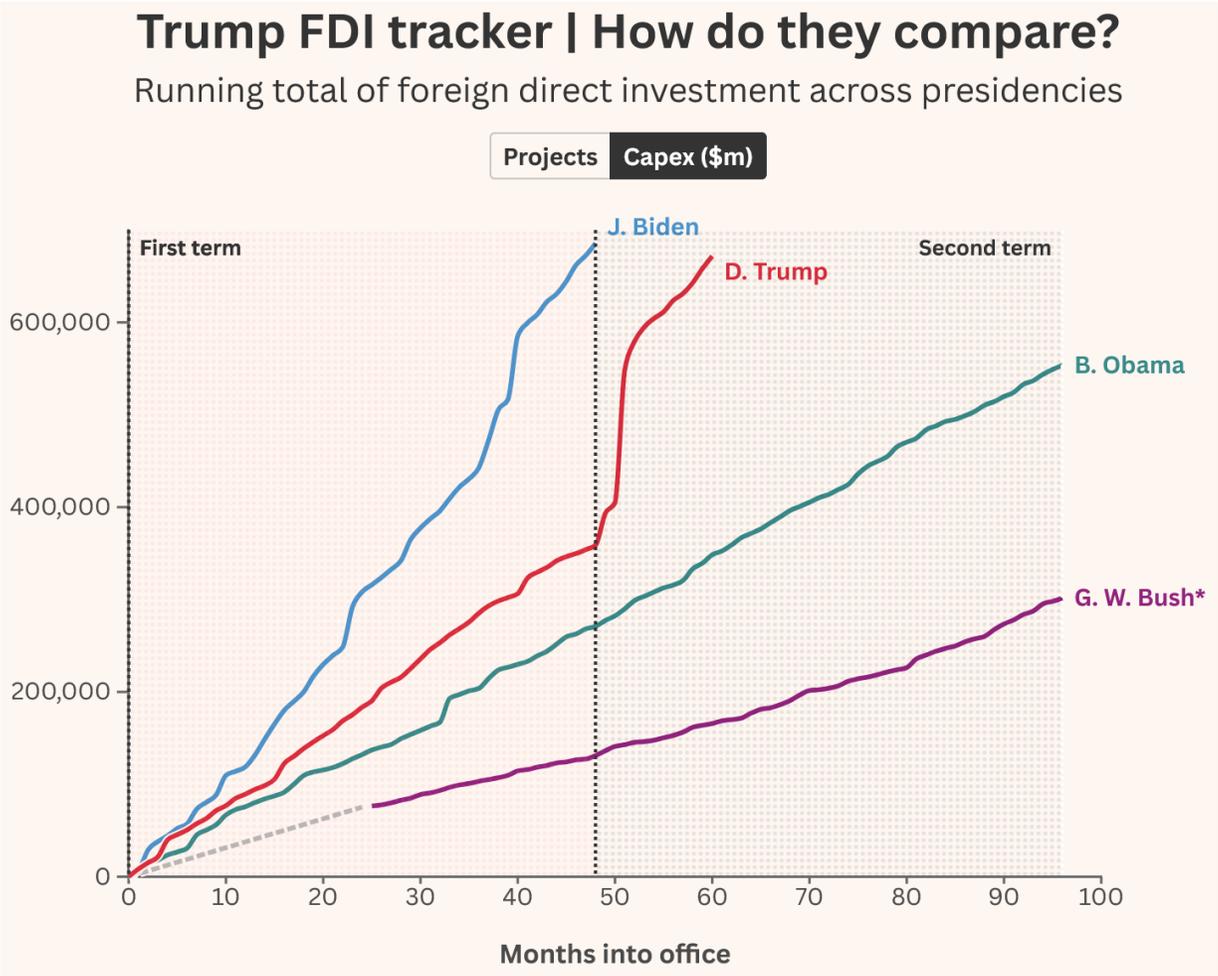
The White House

February 21, 2025

“Welcoming foreign investment...will be a key part of America’s Golden Age... Investment by United States allies and partners can create hundreds of thousands of jobs and significant wealth for the United States. Our Nation is committed to maintaining the strong, open investment environment that benefits our economy and our people”.

Source: The White House

FDI INTO THE US APPEARS STRONG



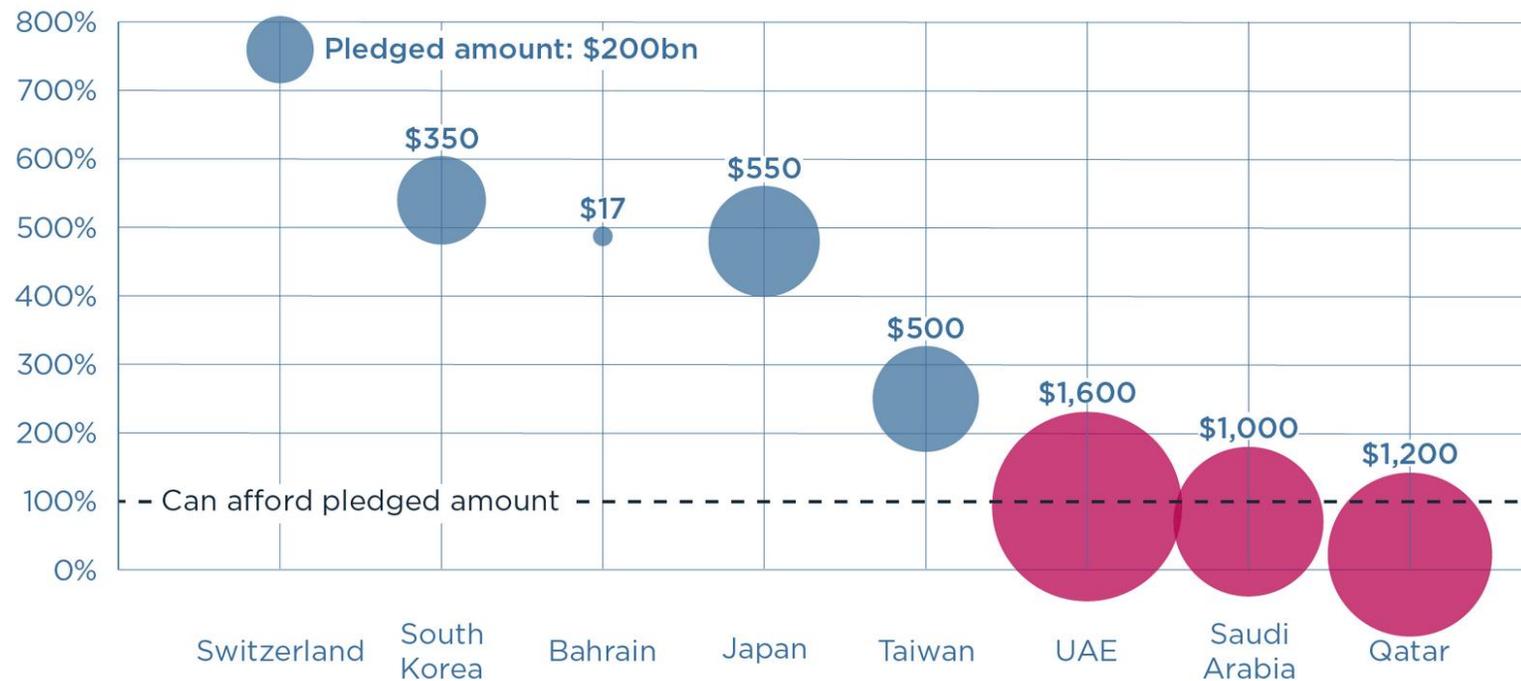
Source: fDi Intelligence

WILL ANNOUNCEMENTS TRANSLATE INTO RESULTS?

Some countries will struggle to fulfill their investment pledges to President Trump

Country investment pledges, in billions of dollars, and ability to pay, by size of pledge and how they could finance it

Percent of pledge country can afford



Source: Peterson Institute for International Economics

Trump's tariffs are already spurring Japanese companies to shift more production to the U.S.



By **Jason Ma**
Weekend Editor

September 29, 2025, 2:35 PM ET

Exclusive: German investments in US nearly halved in Trump's first year back, report shows

By **Rene Wagner** and **Maria Martinez**

January 19, 2026 4:19 PM GMT+1 · Updated January 19, 2026

COMPETITION FOR QUALITY FDI IS GLOBAL

“Pure” IPAs (FDI attraction only)



invest in skåne

International promotion (multiple mandates)



CHOOSE BRISBANE

Privately funded (partly or fully)



LONDON®
& PARTNERS

Other entities



COMPETITION FOR QUALITY FDI IS GLOBAL



NATIONAL

Country level IPAs

≈ 195



REGIONAL

IPAs of states, provinces, regions etc.

> 1000



LOCAL

IPAs of cities, towns, municipalities etc.

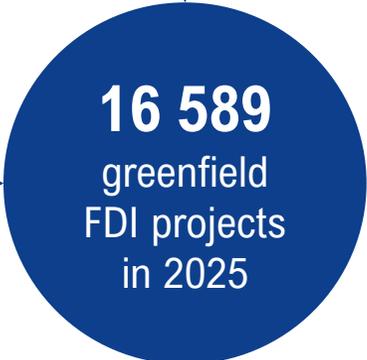
> 2000



SITE

SEZs, free zones, industrial parks, ports etc.

> 2000



Source for number of greenfield projects: fDi Intelligence

Vietnam seeks to draw more FDI inflows into semiconductors, AI

Many major companies from the US and the European Union (EU) are pouring more investment and building supply chains in Vietnam, he stressed, noting that this reflects Vietnam's growing importance in global supply chains.

16/06/2025 05:26

SEMICONDUCTORS AND AI: SAUDI ARABIA AND THE UAE'S BID TO BECOME TECH LEADERS



CHRISTOPHER HAMILL-STEWART

June 12, 2025

WHAT DO INVESTORS WANT?

- Hard factors:
 - Sites
 - Utilities
 - Infrastructure
 - Workforce
 - Incentives
- But also...
 - Clear value added
 - Certainty
 - Feeling welcomed

- Focus
- Distinct value proposition
- Effective support for investors
- Aligned stakeholders and community
- Local partners
- Long term approach

QUESTIONS?

ANDREAS DRESSLER

fdi-center.com

ad@fdi-center.com