Software development and related services

T-Mark Inc.  
Japan  
1994

T-Mark International Inc.  
United States  
2008

Japan  
China  
Australia  
Singapore  
Philippines  
Malaysia  
India  
Hong Kong  
South Korea  
New Zealand  
United States  
Canada  
United Kingdom  
Netherlands  
Germany  
Sweden, etc  
Italy  
Spain  
France  
Poland

American Chamber of Commerce Japan

Asia Business Committee  →  Globalization and Labor Diversity Committee
Global Digital Workflow Trends- View from Japan

Three Stories

An international accountant
  - The Global workforce is getting larger

Meeting with Holly Vineyard
  Deputy Assistant Secretary of Commerce
  - US Commerce focusing on Asia

Meeting with METI official
  Japan Ministry of Economy, Trade and Industry
  - Japan shifting from China to ASEAN countries
### How do companies think?

Are they global thinkers, local thinkers or a combination?

<table>
<thead>
<tr>
<th>Example companies</th>
<th>Branding / Marketing</th>
<th>Product Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple</td>
<td>Global</td>
<td>Global</td>
</tr>
<tr>
<td>FedEx</td>
<td></td>
<td></td>
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<tr>
<td>MacDonald’s</td>
<td>Global</td>
<td>Local</td>
</tr>
<tr>
<td>Ralph Lauren</td>
<td></td>
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</tr>
<tr>
<td>Toyota</td>
<td>Local</td>
<td>Global</td>
</tr>
<tr>
<td>Kikkoman</td>
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<tr>
<td>Japan Railways</td>
<td>Local</td>
<td>Local</td>
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<tr>
<td>NHK</td>
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</tbody>
</table>

Corporate security

- Largest companies consider security a global issue.

Laws and Regulations

- US: SAS70
- EU/US: Safe Harbor
- Japan: Privacy Mark
- ISO27001

[State owned enterprises]
Selected Players in Asia

Korea
- On-line jousting with North Korea.
- On-line security technology very good.

China
- On-line jousting with United States.
- Jobs to maintain order (240 million).

India
- A lot of innovation, entrepreneurs.
- Education elite.

Philippines
- The new world call center.
- Young population, energetic.

Vietnam
- Young population, energetic.
- A lot of potential, but can it integrate globally?
US Asia Pivot / The Rebalancing

- Began with military shift - troops in Australia
  - Now the economic shift begins - Commerce Secretary Trip
    - APEC / TPP / FTAAP
  - Interesting trend - US state governors coming to Asia.

![Diagram showing relationships between US Military Presence, US Foreign Aid, and US Commerce, with Partnering with Japan ODA and Influencing a shift from Outsourcing to FDI? connections.]
Japan Looking Outward

- Decreasing population
- Industrial hollowing out
- Moving assets abroad

Innovation will be driven by demands of an aging society.
Two Major Events Involving Japan

2011 - Japan Earthquake and Tsunami

- Exposed how important Japan has been to global manufacturing.
- First time Japan directly felt the lack of young Japanese people.
- Japanese companies increasing foreign investments.

2012 - Japan buys Senkaku Islands

- China protests, Japan looks to ASEAN countries.
- US stands by Japan (for the most part).
Conclusions

- Companies with global reach make partnership choices based on security considerations as well as financial considerations.

- Innovation is occurring due to local market demands, rather than growth for growth sake. Governments increasingly accepting this.

- Globalization is the norm for many people in advanced countries, but there are still countries joining the group. Dual economic system?

- The US and Japan will often team up to promote their interests in Asia. Could see increased FDI into ASEAN countries.

- The next 10 years should see Vietnam become an important player in Asia and Japan could be an important friend.