

# ASIAN Advantage

Key Strategies for  
Winning in the  
Asia-Pacific Region

GEORGE S. YIP

*Author of Total Global Strategy*

# ASIAN ADVANTAGE

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Key Strategies for Winning  
in the Asia-Pacific Region

GEORGE S. YIP



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Also by George S. Yip

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*Total Global Strategy: Managing for Worldwide Competitive Advantage*

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## Preface

THIS BOOK IS THE culmination of a nearly three-year effort by a team of sixteen coauthors spread across thirteen Asia-Pacific countries plus the United States. We have met as a group in both Hong Kong and Manila, individually in different parts of the world, and electronically frequently.

I have lived what I teach: global strategic alliances. I wish to thank all of my coauthors, first for joining the team and, second, for all the effort they have put in. My coauthors have contributed not just to their respective country chapters but to other chapters in the book and to the overall framework. I also value their friendship.

I wish to thank all of the assistants who have worked with my coauthors. I also wish to thank the many research assistants who have helped me: Lynda Bahaudin, Heather Berry, Bill Fink, Mark Junkunc, Jina Kang, Kate Kimball, Konstantina Kiouis, Avani Sahai, Steve Valerie, Don Wong, and Vitus Wong; all were UCLA Anderson MBA or doctoral students. Mohan Sankaran and Tal Simchoni skillfully produced the exhibits used in this book. Randy O'Toole of the Federal Reserve Bank of San Francisco helped with economic data. I also wish to thank a number of support staff, especially Allen Nepsa, Susan Wu, and Carolyn Tutas.

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*November 1997*

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## CHAPTER 1

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# Evaluating the Asia-Pacific Opportunity

THE ASIA-PACIFIC REGION should provide the most profitable prospects for business activity over the next several decades, although shaken by the financial crises that began in 1997. The third millennium will still begin with the “Pacific Century.” While other regions, such as Latin America, the countries of the former Soviet bloc, the Middle East, or even sub-Saharan Africa, may offer spectacular growth in the future, it is the countries of Asia-Pacific that have already achieved economic takeoff and can be of immediate profit for multinational companies both as markets and as sources of production—and increasingly as sources of innovation. The economies in the triangle bounded by Japan, India, and New Zealand already account for a third of the world’s gross national product (GNP), and have enjoyed most of the fastest growth rates in recent years (Table 1.1).<sup>1</sup> Using purchasing power parity (PPP) measures (i.e., adjusting for differing price levels in each country) of gross domestic product (GDP), the economic strength of most Asia-Pacific countries looks even greater (see columns four and six of Table 1.1). Furthermore, these economies attract a great deal of foreign direct investment, and many of these Asian economies also make significant investments in other countries (Tables 1.2, 1.3, and 1.4).

So managers in multinational companies (MNCs), whether from North America, Western Europe, Asia, or other parts of the world, need to develop effective strategies for the Asia-Pacific region—for individual countries, for the region as a whole, and for how the region fits into an overall global strategy. We have written this book to help managers develop these strategies, and, for those already in the region, to improve their strategies.

To succeed with an Asian (or any regional) strategy, a company needs to work on four levels:

1. overall global strategy
2. regional strategy
3. country strategy
4. country operations

**Table 1.1**  
**Key Statistics of Asia-Pacific and Other Economies**

	Population 1995 (millions)	Population 2020 (millions)	GNP 1995 (U.S.\$ billions)	GNP (PPP <sup>a</sup> ) 1995 (U.S.\$ billions)	Per Capita GNP 1995 (U.S.\$)	PPP <sup>a</sup> Per Capita GNP 1995 (U.S.\$)	Avg. GDP Growth 1995-1997 (%) <sup>b</sup>
<i>Asia-Pacific</i>							
Japan	125.5	130.9	4,975	2,775	39,640	22,110	2.8
South Korea	44.9	57.5	436	514	9,700	11,450	7.7
China	1,200.2	1,489.0	744	3,505	620	2,920	10.5
Taiwan	22.0	27.5	246	279	12,265	14,295 <sup>c</sup>	6.0
Hong Kong	6.2	7.0	144	142	23,200	22,950	4.9
Singapore	3.0	3.2	80	68	26,730	22,770	7.2
Malaysia	20.1	26.3	78	181	3,890	9,020	8.3
Thailand	58.2	81.0	159	439	2,740	7,540	7.2
Indonesia	193.3	269.6	189	735	980	3,800	7.5
Philippines	66.6	99.9	72	196	1,050	2,850	5.5
India	929.4	1,252.8	316	1,301	340	1,400	5.9
Vietnam	73.5	119.1	18	96 <sup>c</sup>	240	1,310 <sup>c</sup>	9.0
Australia	16.1	19.9	339	343	18,720	18,940	3.3
New Zealand	3.6	3.9	52	59	14,340	16,360	3.5
<i>Other</i>							
United States	263.1	282.3	7,098	7,098	26,980	26,980	3.2
Germany	81.9	70.7	2,253	1,644	27,510	20,070	2.9
Mexico	91.8	145.6	305	588	3,320	6,400	2.0
Poland	61.1	44.4	170	330	2,790	5,400 <sup>d</sup>	6.4

Sources: International Economics Department, The World Bank; *Asiaweek*, March 28, 1997, p. 72.

<sup>a</sup>Purchasing Power Parity

<sup>b</sup>Includes estimates for 1997.

<sup>c</sup>GDP

<sup>d</sup>For 1994

**Table 1.2**  
**Foreign Direct Investment Inflows, 1990–1996**

	(U.S.\$ millions)						
	1990	1991	1992	1993	1994	1995	1996
<i>Asia-Pacific</i>							
Japan	1,753	1,730	3,490	234	908	39	220
South Korea	788	1,180	727	588	809	1,500	2,308
China	3,487	4,366	11,156	27,515	33,787	37,500	42,300
Taiwan	1,330	1,271	879	917	1,375	1,470	1,402
Hong Kong	1,728	538	2,051	1,667	2,000	2,100	2,500
Singapore	5,575	4,879	2,351	5,016	5,588	5,302	9,400
Malaysia	2,333	3,998	5,183	5,006	4,348	5,800	5,300
Thailand	2,444	2,014	2,116	1,726	640	2,300	2,426
Indonesia	1,093	1,482	1,777	2,004	2,109	4,500	7,960
Philippines	530	544	228	1,025	1,457	1,500	1,408
India	162	141	151	273	620	1,750	2,587
Vietnam	16	32	24	25	100	150	156
Australia	7,077	4,903	4,912	2,687	4,423	13,094	6,043
New Zealand	1,686	1,698	1,090	2,200	2,796	2,483	2,528
<i>Other</i>							
United States	47,918	22,020	17,580	41,128	49,760	60,236	84,629
Germany	2,689	4,071	2,370	277	-2,993	8,996	20,809
Mexico	2,549	4,742	4,393	4,389	7,978	6,984	7,535
Poland	89	291	678	1,715	1,875	2,510	5,196

Source: United Nations Conference on Trade and Development, *World Investment Report 1997: Investment, Trade and International Policy Arrangements*, Annex Table 1, 227–232

*Overall global strategy.* Before deciding whether and how to do business in Asia, or any other region of the world, a company needs to have a clear global strategy. Key elements of this strategy include the core business strategy, the competitive objectives for the business, and the extent to which the business will be operated as a single integrated business or as a looser collection of geographically independent units.

*Regional strategy.* Next, a company needs to decide on the overall role of Asia within the global strategy. Should Asia be a source of growth, or profit, or both? Should Asia be primarily a source of supply or a locus of markets? Or should different countries play differing roles? In which countries in Asia should the company do business?

*Country strategy.* Having selected the countries in which to be involved, the company should develop a country strategy that includes the mode of entry, partner selection, the usual elements of a business strategy, (including what activities to conduct and what parts of the value chain to locate in the country), and how activities in the country will relate to those in the rest of the region and the world.

*Table 1.3*  
**Foreign Direct Investment Outflows, 1990–1996**

	(U.S.\$ millions)						
	1990	1991	1992	1993	1994	1995	1996
<i>Asia-Pacific</i>							
Japan	48,024	42,619	21,916	15,471	18,521	21,286	23,440
South Korea	1,056	1,500	1,208	1,361	2,524	3,000	4,188
China	830	913	4,000	4,400	2,000	3,467	2,200
Taiwan	5,243	1,854	1,869	2,451	2,460	3,822	3,096
Hong Kong	2,448	2,825	8,254	17,713	21,437	25,000	27,000
Singapore	2,034	1,024	1,317	1,784	2,177	2,799	4,800
Malaysia	532	389	514	1,325	1,817	2,575	1,906
Thailand	140	167	147	221	493	904	1,740
Indonesia	-11	13	52	-31	15	12	512
Philippines	-5	-26	5	-7	28	9	182
India	6	-11	24	41	49	38	43
Vietnam	0	0	0	0	0	0	0
Australia	186	3,126	113	1,611	5,842	5,372	1,343
New Zealand	2,365	1,475	392	-1,370	2,041	1,310	-157
<i>Other</i>							
United States	27,175	33,456	38,978	68,978	45,640	95,509	84,902
Germany	24,214	23,723	19,698	13,176	14,653	35,302	28,652
Mexico	224	167	730	16	1,045	597	553
Poland	0	-7	13	18	29	20	30

Source: United Nations Conference on Trade and Development, *World Investment Report 1996: Investment, Trade and International Policy Arrangements*, Annex Table 1, 233–37.

*Country operations.* Lastly, the company has to be concerned with implementation at the operational level. Here the company has to deal with detailed matters such as how to adapt to local culture and business practices, how to develop the right kinds of contacts, how to find customers, and how to cope with the country's written and unwritten regulations.

As illustrated in Figure 1.1, this book focuses on the issues in levels 2 and 3. My previous book, *Total Global Strategy*, deals with level 1. Books of the genre, "How to do business in Country X," and more general social commentaries, help with level 4.<sup>2</sup>

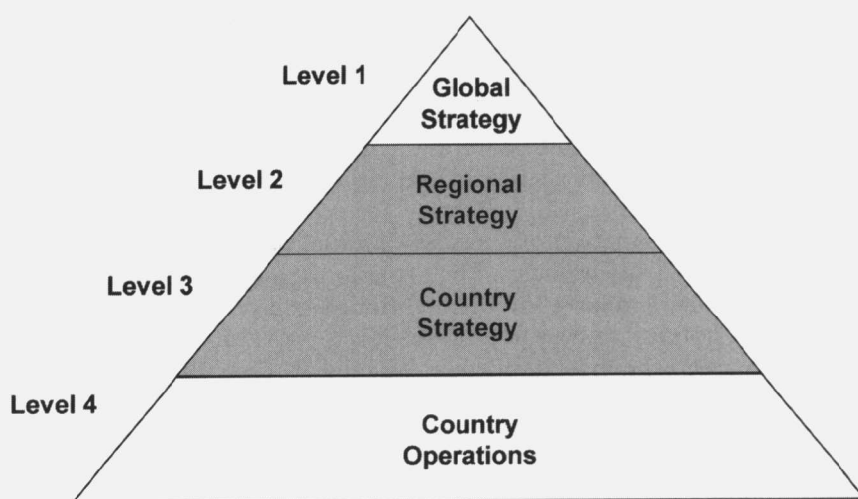
### Asia-Pacific as a Region

Regions can be defined in many ways, depending on the purpose of the definition. For multinational companies, geographic proximity is usually the default basis of definition, if only because of the extensive travel involved in running a global business. A region defined for strategic reasons is also easier to administer if it has geographic coherence or even just spans the same band of time zones. But, in addition, a region defined for

**Table 1.4**  
**Cumulative and Net Foreign Direct Investment, 1990–1995**

(U.S.\$ millions)			
	Cumulative Inflow	Cumulative Outflow	Net Cumulative Inflow
<i>Asia-Pacific</i>			
Japan	8,154	167,837	-159,683
South Korea	5,592	10,649	-5,057
China	117,811	15,610	102,201
Taiwan	7,242	17,699	-10,457
Hong Kong	10,084	77,677	-67,593
Singapore	23,142	11,135	12,007
Malaysia	26,668	7,152	19,516
Thailand	11,240	2,072	9,168
Indonesia	12,965	50	12,915
Philippines	5,284	4	5,280
India	3,097	147	2,950
Vietnam	347	0	347
Australia	37,096	16,250	20,846
New Zealand	11,953	6,213	5,740
<i>Other</i>			
United States	238,642	309,736	-71,094
Germany	15,410	130,766	-115,356
Mexico	31,035	2,779	28,256
Poland	7,158	73	7,085

Source: United Nations Conference on Trade and Development, *World Investment Report 1996: Investment, Trade and International Policy Arrangements*, Annex Table 1, 227–37.



**Figure 1.1** Geographic Levels of Strategy

the purposes of business strategy should have a high degree of commonality and mobility in as many as possible of the following characteristics:

- culture
- history
- language
- way of doing business
- form of government
- institutional arrangements
- cross-investment
- intraregional trade
- trade policies and agreements
- economic performance and prospects
- infrastructure, such as airline connections

Using these characteristics, we define Asia-Pacific as that area comprising the countries and economies in the triangle from Japan to India to New Zealand. Within this region we provide in-depth analysis of Japan, South Korea, China, Taiwan, Hong Kong, Malaysia, Singapore, Thailand, Indonesia, the Philippines, India, Australia, New Zealand, and Vietnam (the latter to a lesser extent because it has much less history of MNC involvement) (Figure 1.2). Regardless of their political status, Taiwan and Hong Kong have sufficiently strong and distinctive economies to join our list. So we exclude all the countries from the former Soviet Union, Pakistan, and the Middle East. These excluded countries share few of our defining characteristics and do not have the economic prospects of Asia-Pacific. Perhaps most important, the following two characteristics dominate and distinguish the nature of business in the excluded countries.

First, the countries of the former Soviet Union struggle under both the legacy of the Soviet system and the aftermath of its collapse. While part of it lies in Asia, Russia is not an Asian country. The Central Asian states of the former Soviet Union have perhaps more Asian characteristics, but their recent history and current outlook further differentiate these countries from the rest of Asia. In contrast, China, although still a communist country, is making a very successful and rapid transformation to a market economy. Furthermore, China cannot, for economic purposes, be separated from the nonnation of overseas Chinese, whose money, skills, and connections are playing such a huge role in the transformation of their mother country. Similarly, Vietnam, although still very dominated by its communist political and economic system, is poised for takeoff and has joined (in 1995) the most important Asian institution, the Association of South-East Asian Nations (ASEAN).

Second, for Pakistan and the states of the Middle East or West Asia, Islamic institutions and culture play a far more dominant political, social, and business role than they do in the Muslim countries of Asia-Pacific (Malaysia, Indonesia, and Brunei). Furthermore, the focus of Pakistan and other West Asian states is much more within the Middle East region than on the Pacific region. And again, the prevalence in business of over-





**Figure 1.2** Map of Countries and Economies Studied

seas Chinese in Malaysia and Indonesia helps integrate those countries into the rest of the region. In addition, the economies of the West Asian states still depend primarily on the export of oil and gas, and have not yet become significant production sites for MNCs outside the energy sector.

India, while not bordering the Pacific, has ties both with Asia-Pacific and the Middle East, not least because of ethnic Indians living overseas. Furthermore, MNCs increasingly look to India as a substitute location for activities in Asia. Including Australia and New Zealand is somewhat of a stretch, but they exhibit a number of qualifying characteristics. Both have now deemphasized their British heritage and have committed themselves to becoming part of Asia. Most important, they have opened their borders to immigration from Asia. One of the ASEAN leaders, the prime minister of Singapore, has extended an open invitation to Australia to join ASEAN. So the links northward will continue to strengthen. Many Hong Kong entrepreneurs have emigrated to Australia and New Zealand, bringing these countries into the overseas Chinese network. In addition, a