

Asia Overview

Presented by Rita Hadden

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Asia Overview

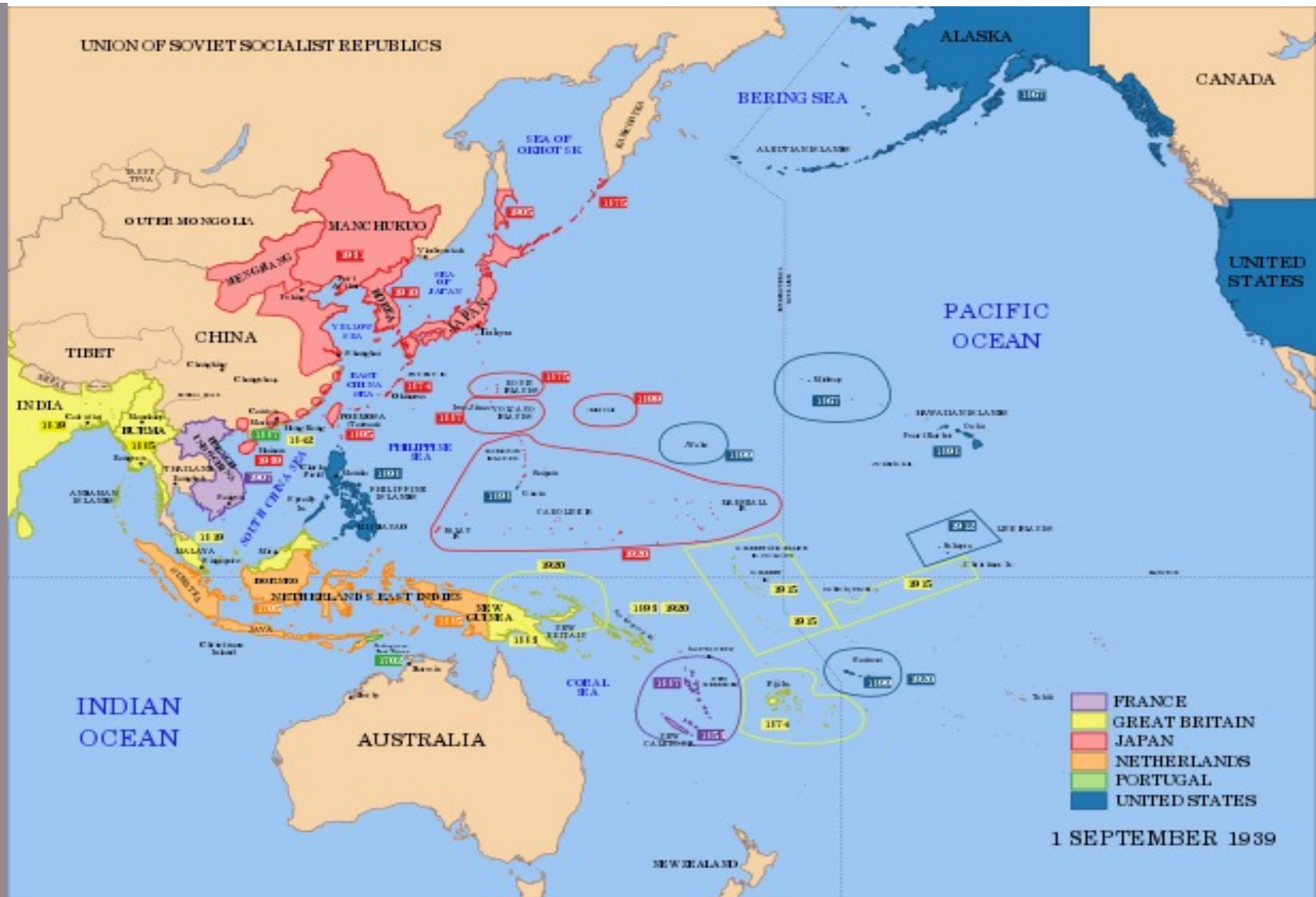
- Brief Look at Colonization in Asia
- World Foreign Direct Investments (FDI)
- China FDI
- Trade*
- Allies, Threats
- Asia Challenges*

* = Q&A follows

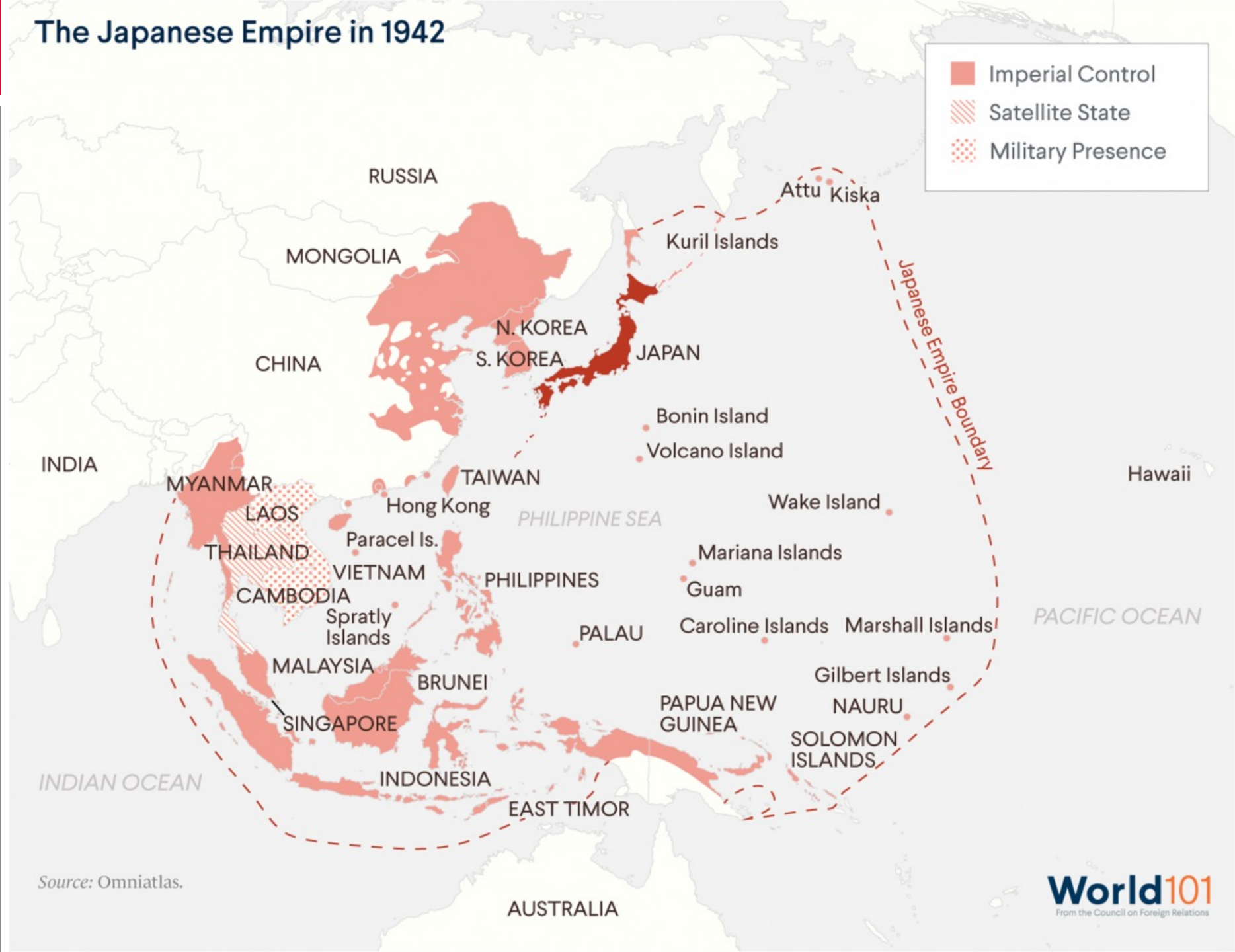
Brief Look at Colonization in Asia

Colonies in Southeast Asia 1895



[illegible]

The Japanese Empire in 1942



Source: Omniatlas.

Decolonization

- 
- A map of Southeast Asia with different colors indicating the period of decolonization. The colors are: light blue for 1945-1948, magenta for 1949-1955, medium blue for 1956-1965, dark blue for after 1965, and yellow for never under colonial rule. The map shows that most of Southeast Asia gained independence between 1945 and 1965, with some regions gaining independence later.
-  Independence gained 1945-1948
Philippines 1946, India 1947,
Pakistan 1947, Burma 1948
 -  Independence gained 1949-1955
Indonesia 1949, Cambodia 1953,
Laos 1954, North, South Vietnam 1954
 -  Independence gained 1956-1965
West New Guinea, occupied by
Indonesia 1963; Malaysia 1963.
Singapore 1965
 -  Independence gained after 1965
Papua New Guinea 1975;
East Timor occupied by Indonesia
1975, independent 2002; Brunei 1984
 -  never been under colonial rule



World

Foreign Direct Investments (FDI)

Investment that involves controlling ownership in a business in one country by an entity based in another country. Decline by 40%+ due to 2020 pandemic.

Total Wealth by Country (2021)

Top 10 Countries by Total Wealth in Tn, 2021

United States \$126,340Tn (30.2%)

China \$74,884Tn (17.9%)

Japan \$26,931 (6.4%)

Germany \$18,274 (4.4%)

France \$14,958 (3.7%)

United Kingdom \$15,284 (3.7%)

India \$12,833 (3.1%)

Italy \$11,901 (2.9%)

Canada \$9,948 (2.4%)

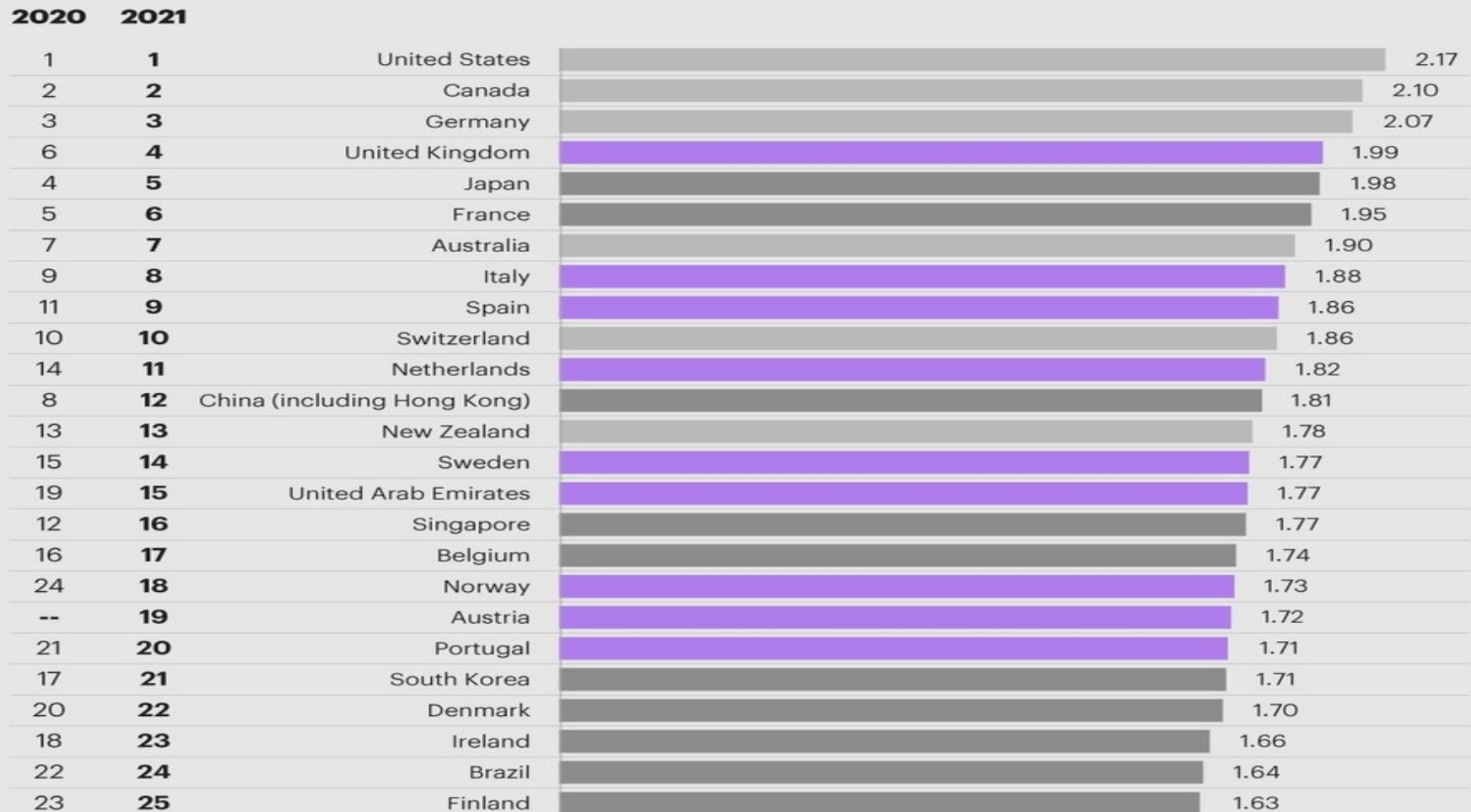
Australia \$9,268 (2.2%)

Rest (23.4%)

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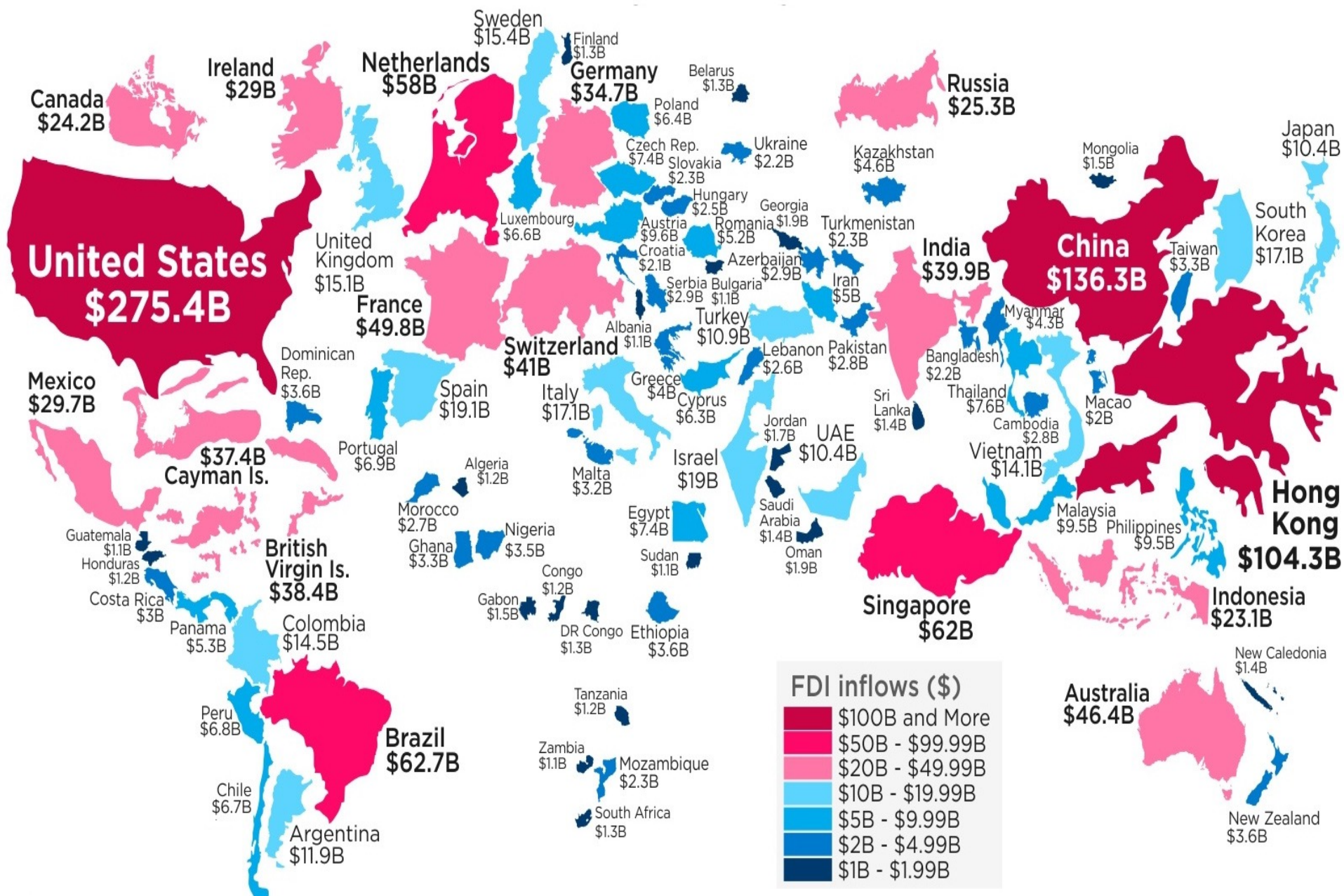
Kearney FDI Confidence Index (2021) (annual survey of global business execs that ranks markets that are likely to attract the most investment in the next 3 years)

The 2021 Kearney FDI Confidence Index®

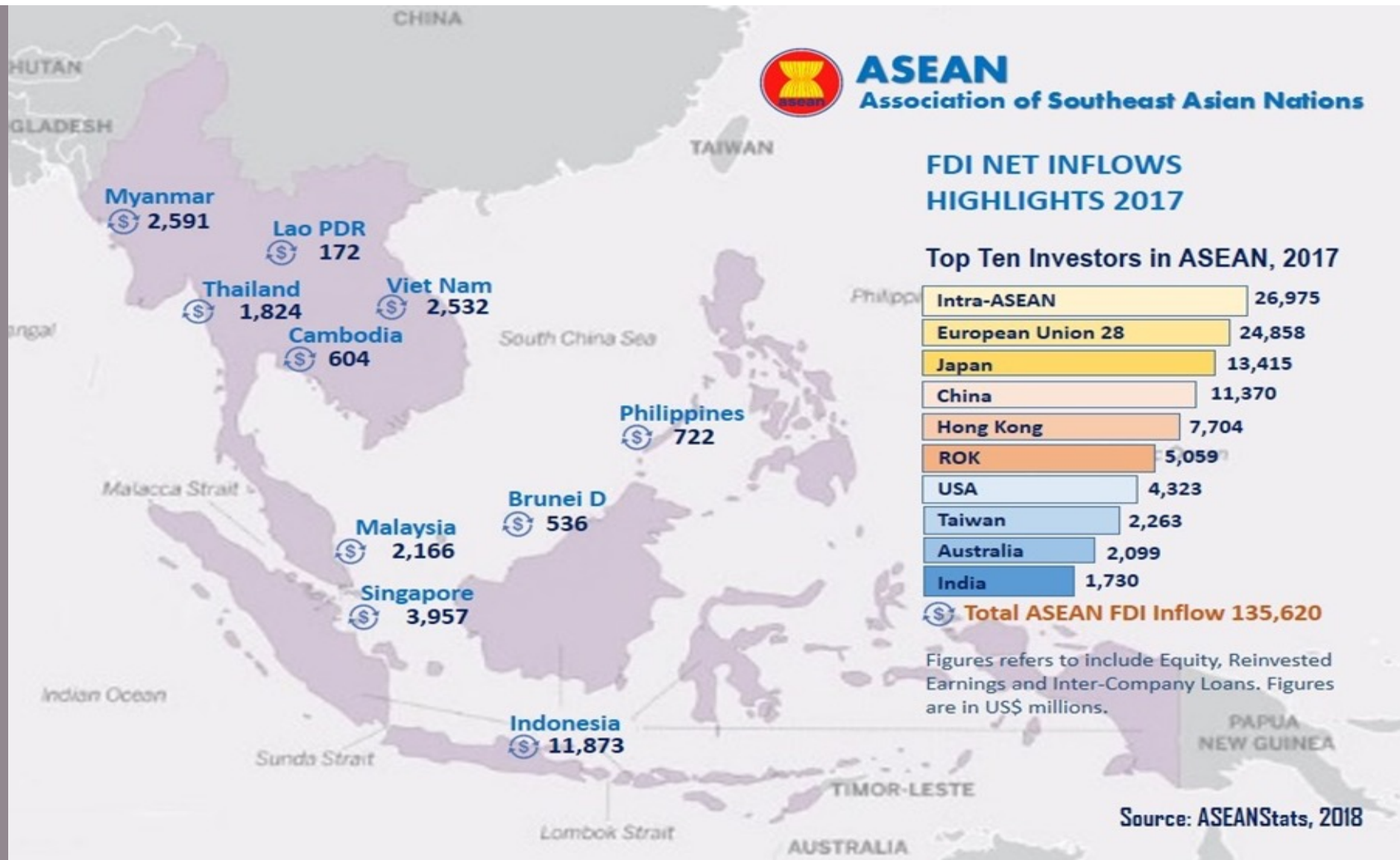


● Moved up
 ● Moved down
 ● Maintained ranking

FDI Inflows from the World (2019). FDI into China was \$181B in 2021



FDI Flows into ASEAN, top investors (2017-2018)

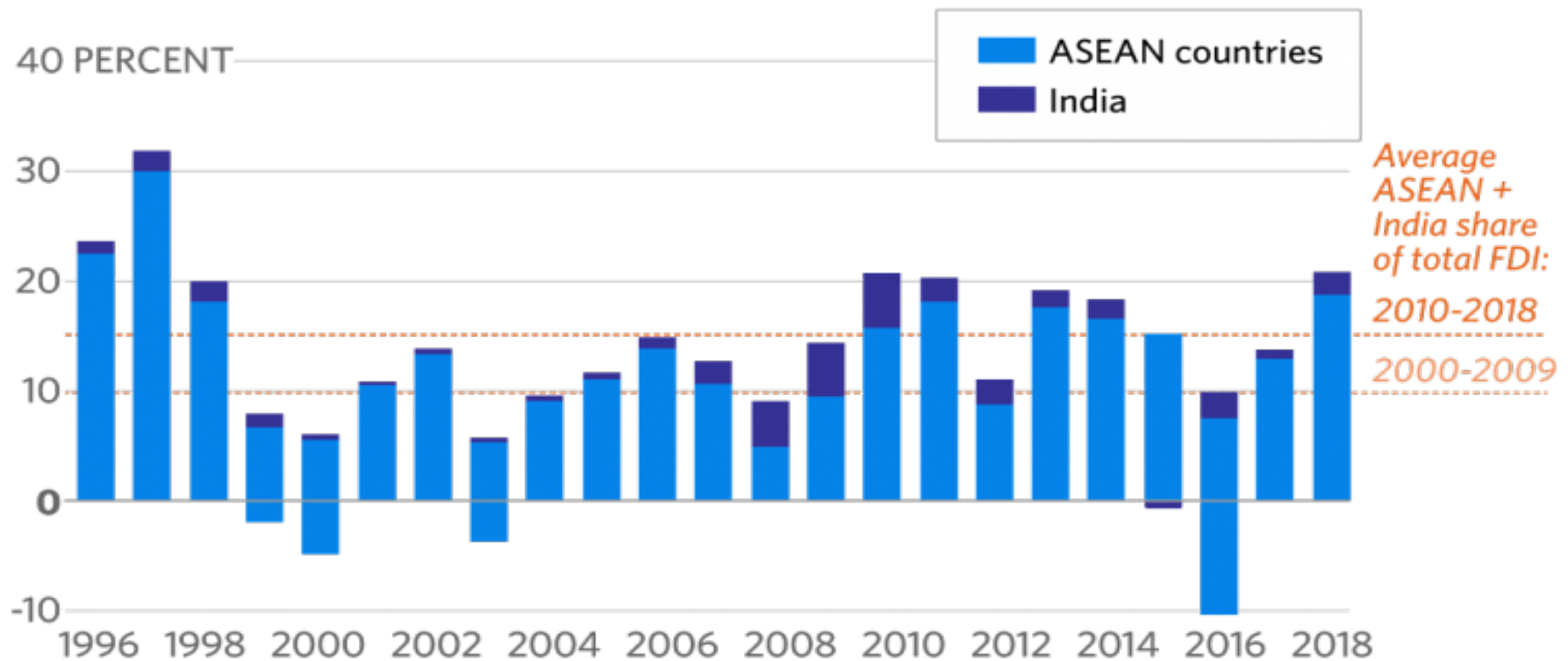


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Japan FDI to ASEAN, India (1996 - 2018)

Japan's Regional Foreign Direct Investment

The upswing in the share of Japan's total foreign direct investment into India and members of the Association of Southeast Asian Nations (ASEAN) highlights renewed Japanese interests in the region.



The ASEAN countries are Indonesia, Vietnam, Philippines, Malaysia, Thailand, Singapore, Cambodia, Myanmar, Brunei and Laos

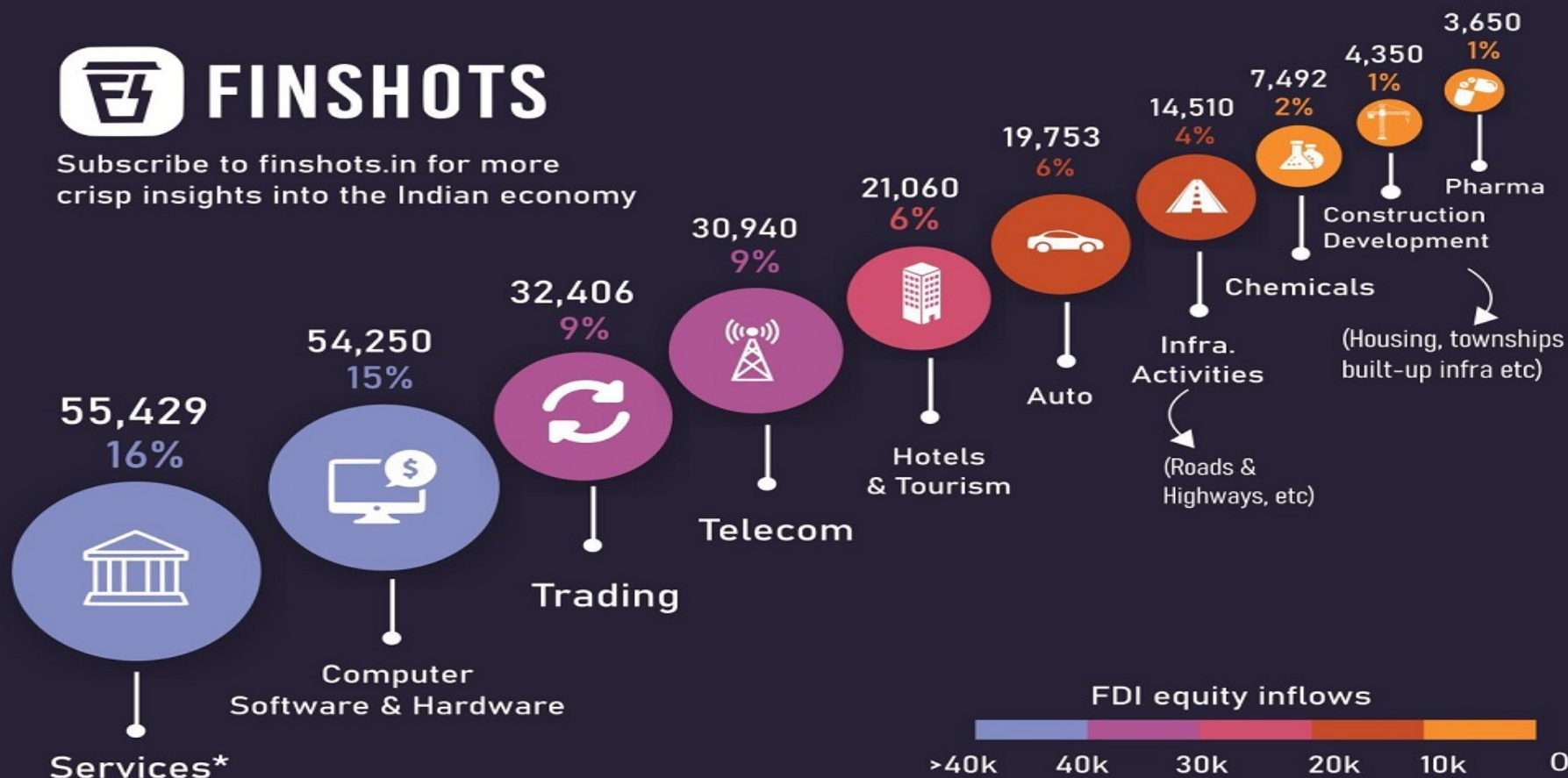
FDI to India by Sector (2020)

Which Indian sector gets most amount of FDI inflows?
Sector-wise highest FDI equity inflows (₹ Cr.) and % share [FY20]



FINSHOTS

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*Services sector includes Financial, Banking, Insurance, Non-Financial / Business, Outsourcing, R&D, Courier, Tech. Testing and Analysis

Source: dipp.gov.in

China

Foreign Direct Investments

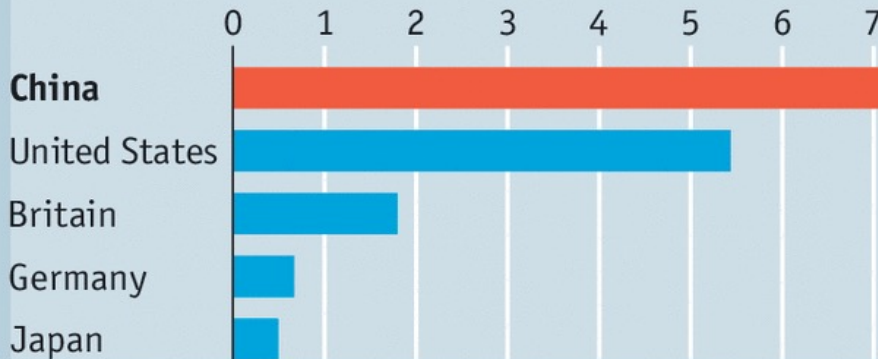
(FDI)

Chinese Investm by Technology (2016, in \$Bn, Fintech, AI, VirR, Ed Tech, Robotics, Autonomous Driving)

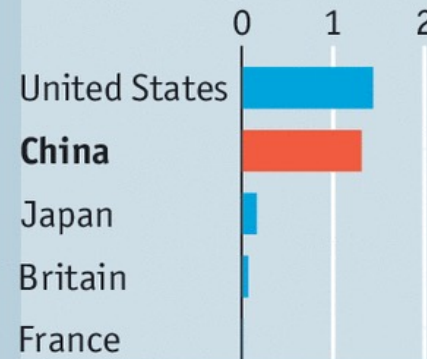
A good place to startup

Chinese venture-capital investment by technology, 2016, \$bn

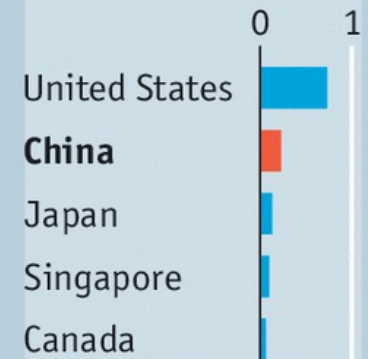
Fintech



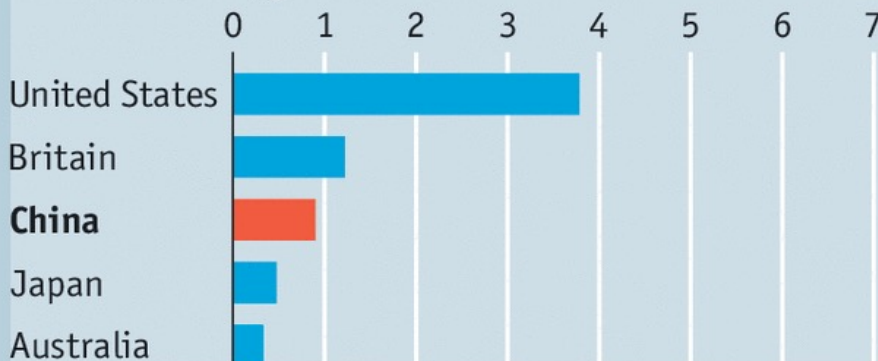
Virtual reality



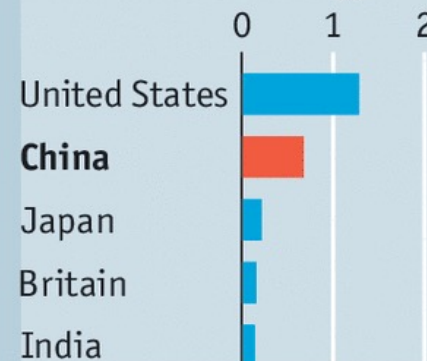
Robotics and drones



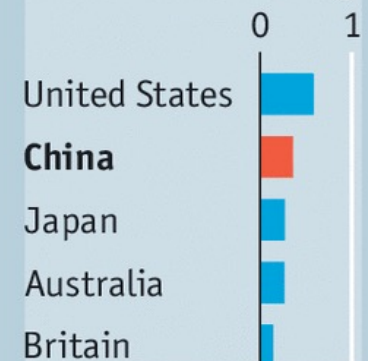
Artificial intelligence



Education technology



Autonomous driving

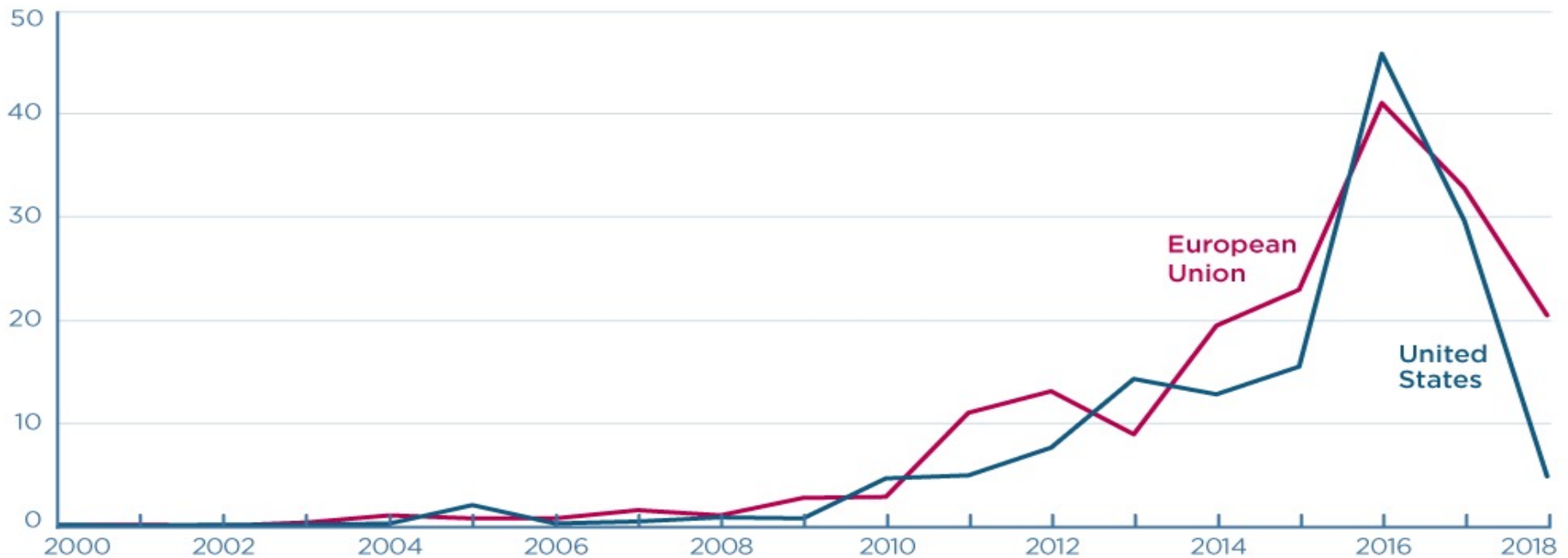


Source: McKinsey Global Institute

China FDI in USA in 2018 plummeted by 88% (comp to 2017) to \$5.4B

Chinese Investment into the US and EU Has Plummeted since 2016

Annual Chinese outward foreign direct investment (FDI), billions of dollars



#PIIECharts

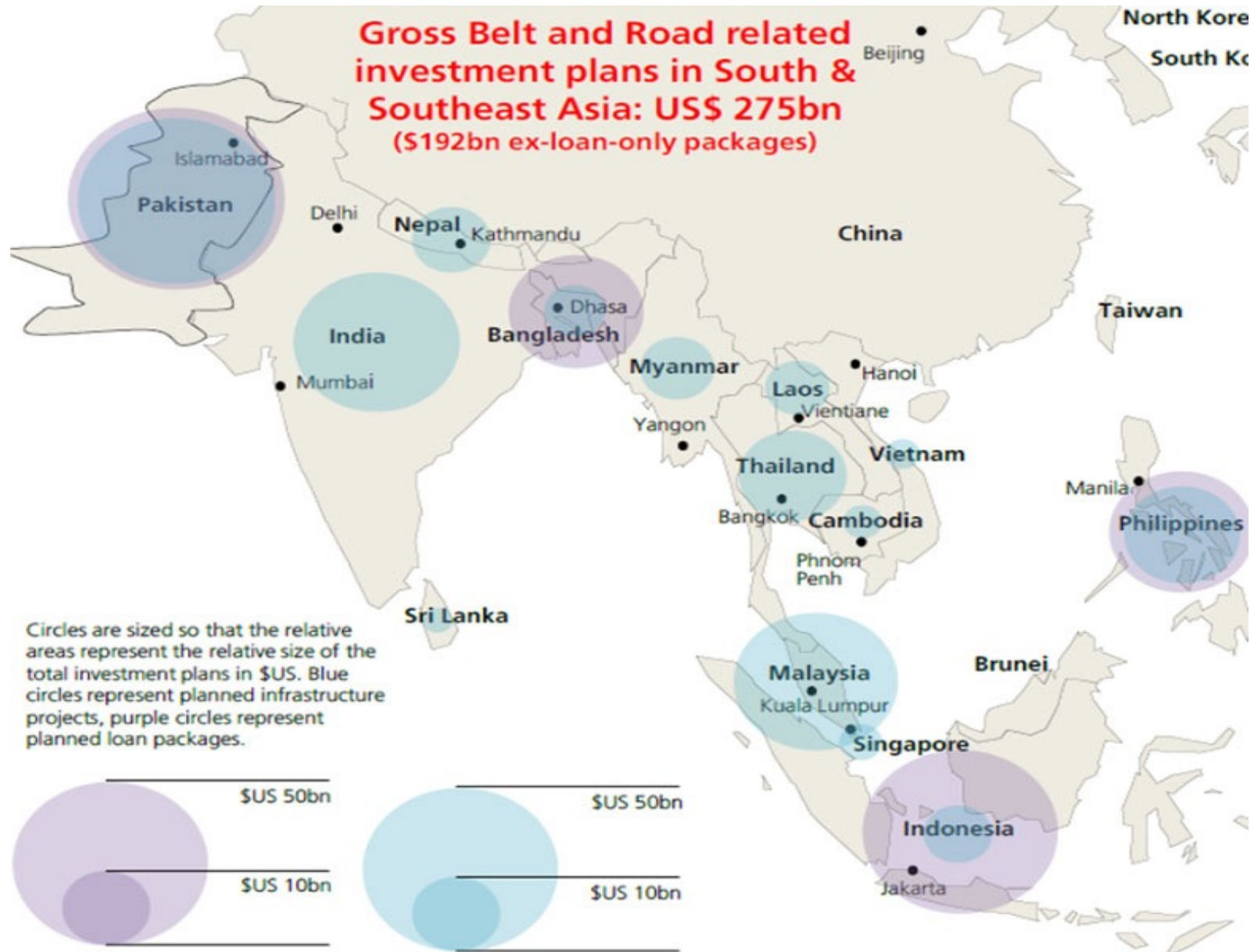
Learn more at [pii.com/research/piie-charts](https://www.pii.com/research/piie-charts)



Note: Shows the combined value of direct investment transactions by mainland Chinese companies, including greenfield projects and acquisitions that result in significant ownership control (>10 percent of equity).

Source: Rhodium Group.

Chinese FDI in SE Asia, S.Asia (2017)



Source: UBS Sep 2017

China&Japan's Infrastructure Investm in SE Asia (2019)

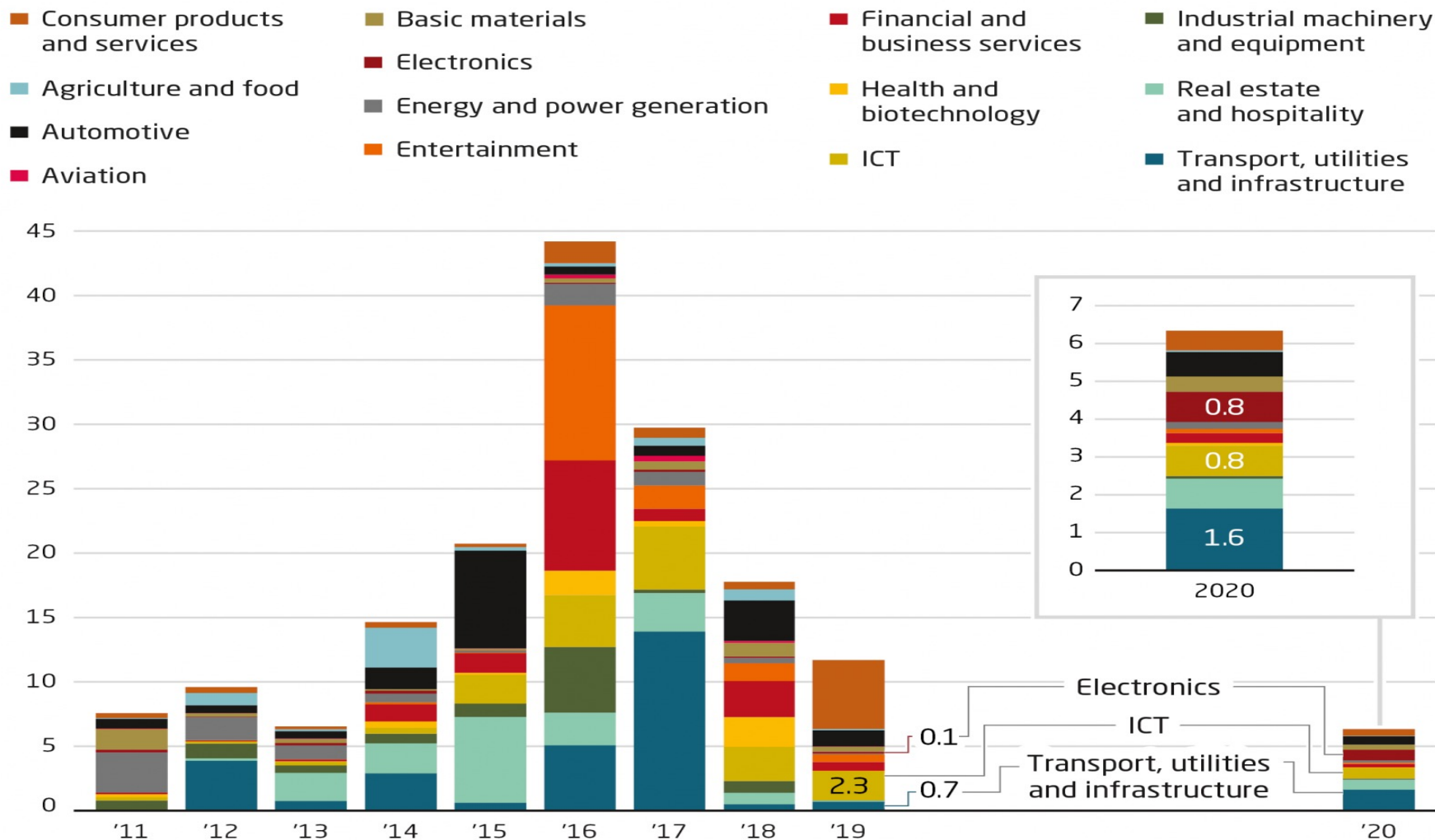
SE ASIAN COUNTRY	JAPAN	CHINA
Vietnam	\$208B USD	\$69B USD
Indonesia	74	92
Philippines	43	
Singapore	19	28
Thailand	15	
Malaysia		34

NOTE: ADB estim. SE Asia economies need \$210B/yr in infrastructure investment from 2016 - 2030 to maintain current level of economic growth. Data from ADB/Bloomberg

Chinese FDI in EU & UK by industry (2000-2020)

in EUR B (declined since 2016)

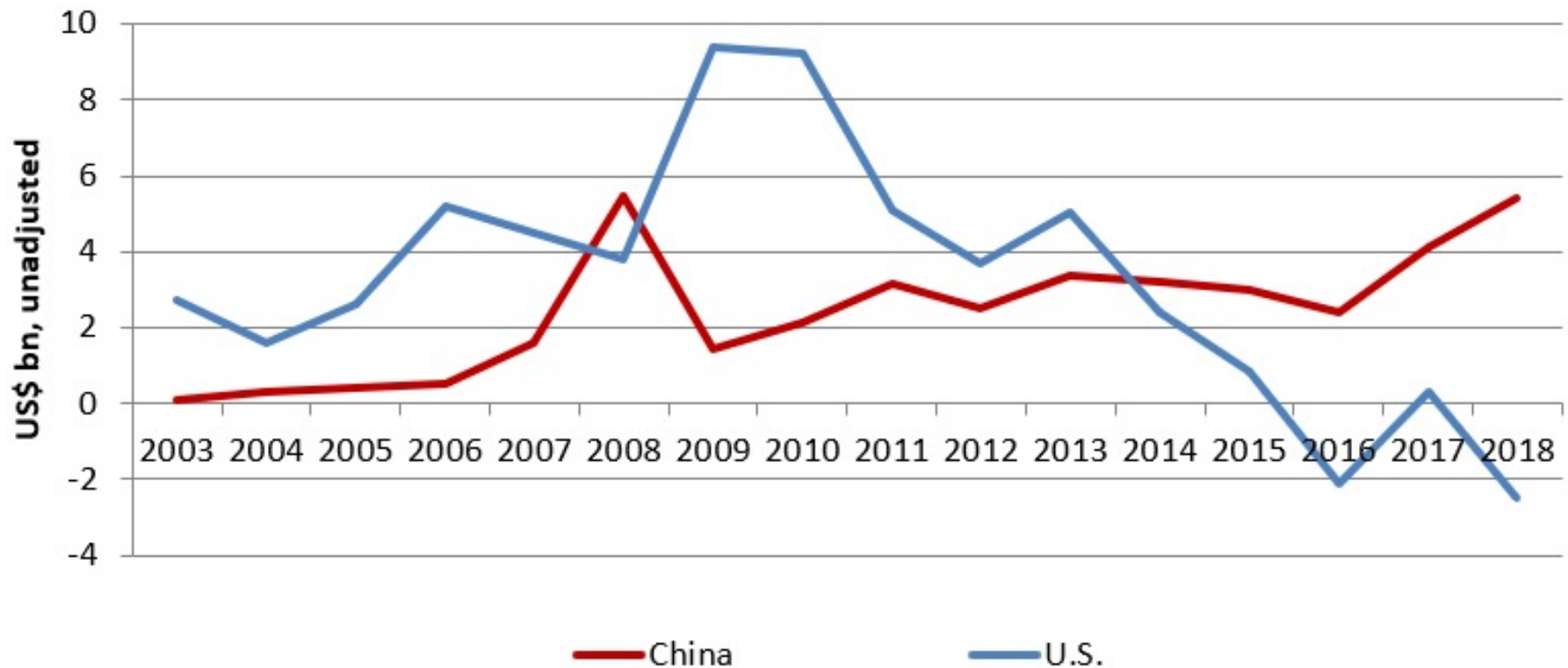
Completed Chinese FDI in the EU-27 and the UK by industry, 2000-2020
EUR billion



Source: Rhodium Group

China's FDI in Africa (2018)

Chinese FDI vs. US FDI to Africa, Flow



Feb 2019

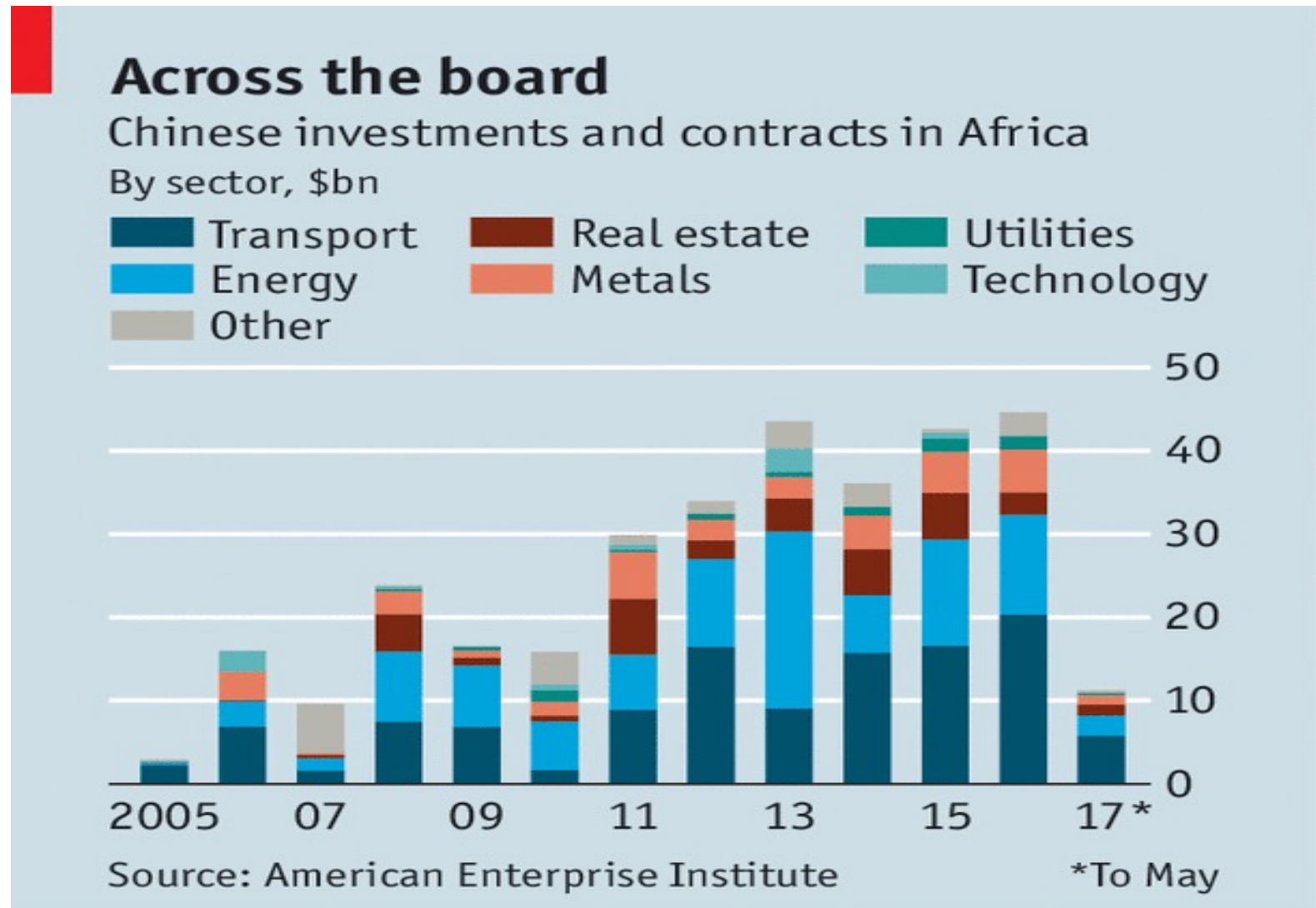
Source: The Statistical Bulletin of China's
Outward Foreign Direct Investment, UNCTAD
Bilateral Debt Statistics

CHINA★AFRICA
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Chinese Investm. In Africa (2017)



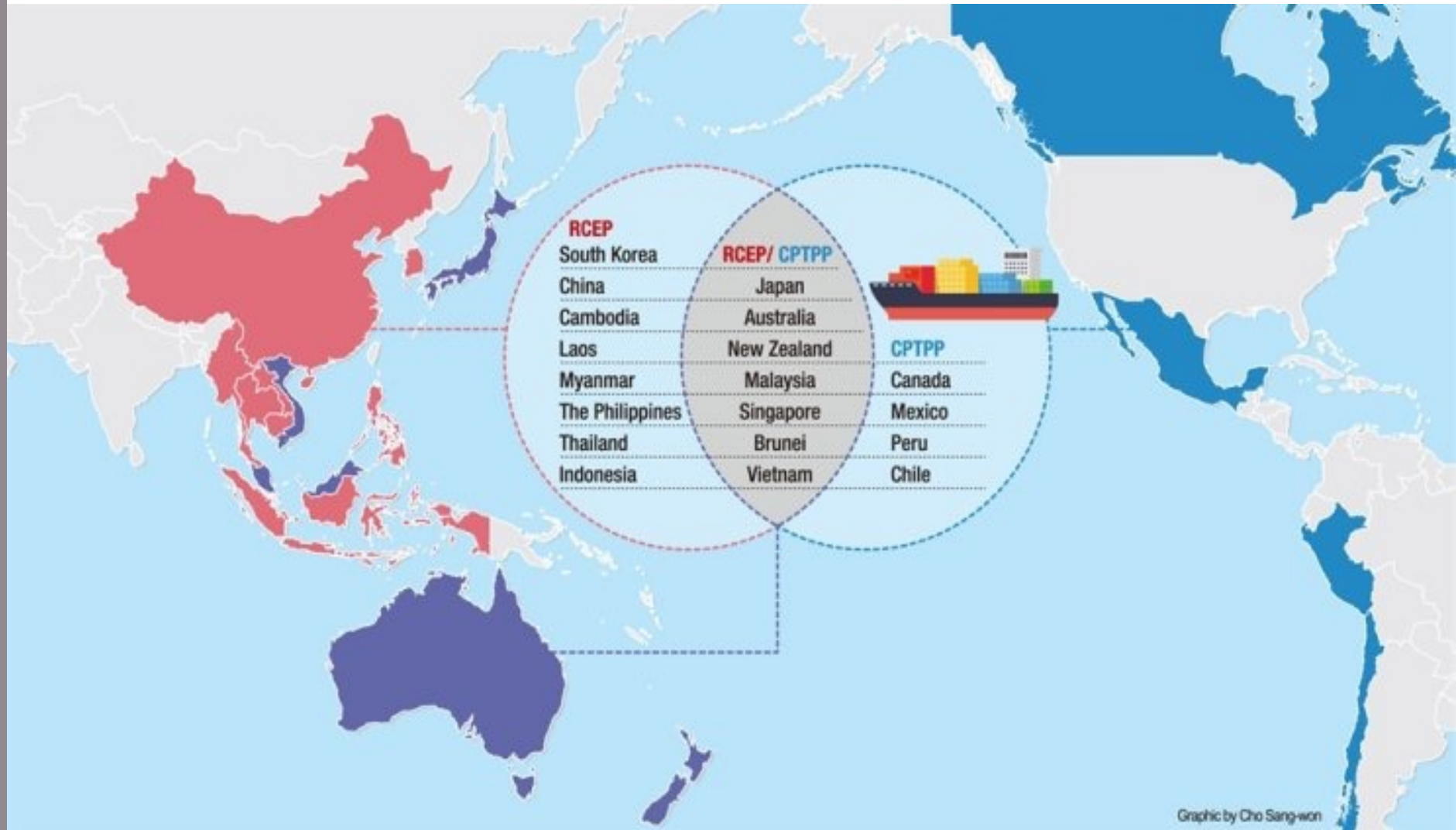
Economist.com

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Trade

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Asia's Key Trade Agreements (RCEP, CPTPP)



Graphic by Cho Sang-won

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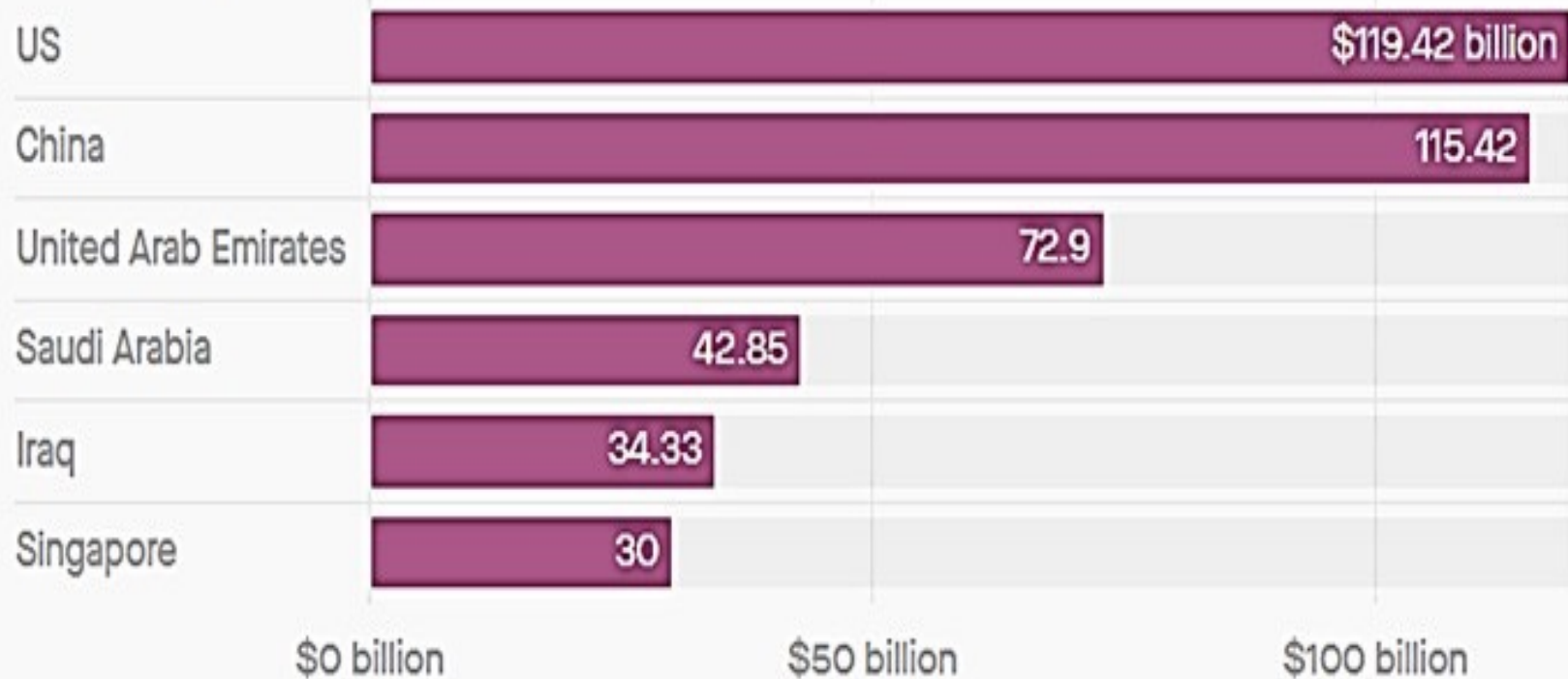


COVID-19 Economic Recovery Scorecard

Country Scorecard		Asian nations expected to recover faster than Western peers										
(35 countries)	Weighting	15%	15%	10%	10%	10%	10%	10%	10%	5%	5%	100%
Company	Nominal GDP (\$bn) 2019	2-year GDP growth rate (%) 2020-2021	COVID-19 cases per million population	Inflation rate (%) forecast 2021	Unemployment rate (%) forecast 2021	Stimulus as a % of GDP	Equity index YoY change (%)	Household consumption expenditure growth (%) forecast 2021	Industrial production YoY change (%)	Manufacturing PMI	Merchandise export YoY change (%)	Country ranking
China	14,792	5.3	65	1.4	4.3	5.6	4.3	9.1	7.3	51.9	18.1	1
South Korea	1,580	1.2	1,653	1.2	4.3	24.3	6.5	3.5	2.1	52.9	12.6	2
Singapore	330	-0.2	11,962	0.8	2.5	22.3	2.3	6.2	14.3	50.5	4.5	3
Malaysia	337	1.0	8,411	1.9	4.3	21.5	-0.3	9.1	-0.5	49.1	5.5	4
Japan	4,945	-1.3	3,321	-0.1	2.8	58.2	11.1	2.3	-2.4	49.7	-0.1	5
Ireland	366	0.7	52,778	0.6	6.0	7.9	-2.1	10.7	41.6	57.2	19.5	6
Israel	380	0.4	91,822	0.6	5.3	14.2	8.1	5.5	0.1	57.1	-13.4	7
India	2,920	0.5	8,081	4.4	8.4	11.4	8.1	10.2	-1.9	56.4	0.1	8
Indonesia	1,017	1.9	4,622	2.3	5.8	4.9	2.0	5.2	-0.8	51.3	9.4	9
Australia	1,191	-0.2	1,204	1.6	7.0	21.1	3.0	4.0	-2.0	57.2	2.2	10
Norway	332	0.9	13,403	2.5	4.5	5.0	3.5	4.1	-0.7	51.9	-7.8	11
Poland	544	0.3	43,153	2.3	5.6	14.7	2.5	3.8	3.4	51.5	16.8	12
Sweden	491	-0.5	61,787	1.4	7.8	23.7	7.5	2.5	-0.8	64.9	8.6	13
Italy	1,812	-2.4	45,660	0.7	11.0	56.6	5.0	5.4	-2.5	52.8	8.3	14
Netherlands	854	-0.8	61,712	1.5	4.3	14.6	8.9	3.2	-2.0	58.2	5.7	15
Austria	421	-1.4	54,517	1.6	5.8	13.4	8.3	4.7	-0.5	53.5	9.9	16
Germany	3,640	-1.2	28,692	1.7	4.8	38.5	2.5	3.5	-3.5	57.0	5.8	17
Czech Republic	222	-1.3	1,09,965	2.2	3.0	21.6	4.0	4.6	0.1	54.4	13.1	18
Canada	1,557	-0.5	22,610	1.8	7.9	17.3	5.6	4.9	-8.1	57.9	-1.6	19
Denmark	334	0.0	41,174	1.0	5.7	13.9	1.6	4.5	2.0	41.9	-3.4	20
Switzerland	682	-0.4	68,035	0.3	4.8	11.4	1.6	3.8	-1.6	58.0	12.9	21
Belgium	496	-1.7	67,226	1.2	6.1	16.5	5.2	4.7	-0.4		3.7	22
Turkey	722	0.5	31,732	12.6	14.2	10.2	3.2	4.5	10.2	50.8	15.5	23
USA	20,649	0.3	84,857	2.3	7.9	28.5	6.3	4.8	-5.5	57.1	-7.3	24
Philippines	369	0.4	5,210	3.2	10.3	16.2	-3.2	7.8	-11.3	49.2	3.0	25
UAE	403	-1.7	39,459	1.1	2.8	19.6	1.3	1.8		51.2		26
France	2,524	-1.4	53,764	1.2	9.2	27.4	3.5	6.0	-4.6	51.5	-0.6	27
UK	2,532	-3.1	61,672	1.6	5.5	27.5	2.7	4.8	-5.6	52.9	0.5	28
Saudi Arabia	769	-1.3	11,314	2.6	6.2	7.5	5.0	4.4	-13.4	57.0	-14.9	29
South Africa	272	-2.3	26,213	3.9	33.3	12.0	11.4	4.1	-2.6	52.6	12.9	30
Brazil	1,470	-1.2	47,474	4.4	13.4	16.1	0.5	3.9	4.0	61.5	-0.7	31
Spain	1,283	-2.9	67,312	1.0	16.7	24.1	0.7	5.2	-3.8	51.0	6.2	32
Russia	1,388	-0.5	27,955	3.8	5.7	4.2	4.3	3.4	-2.8	49.7	-16.9	33
Portugal	220	-2.0	78,856	0.9	7.6	14.3	-3.3	4.7	-3.6		6.7	34
Mexico	1,007	-2.3	15,840	3.5	5.2	3.9	0.0	4.7	-3.3	42.4	2.3	35
Median		-0.5	39,459	1.6	5.8	16.1	3.5	4.7	-1.6	52.6	4.5	

India's Major Trading Partners (2021-2022)

India's major trading partners in 2021-22

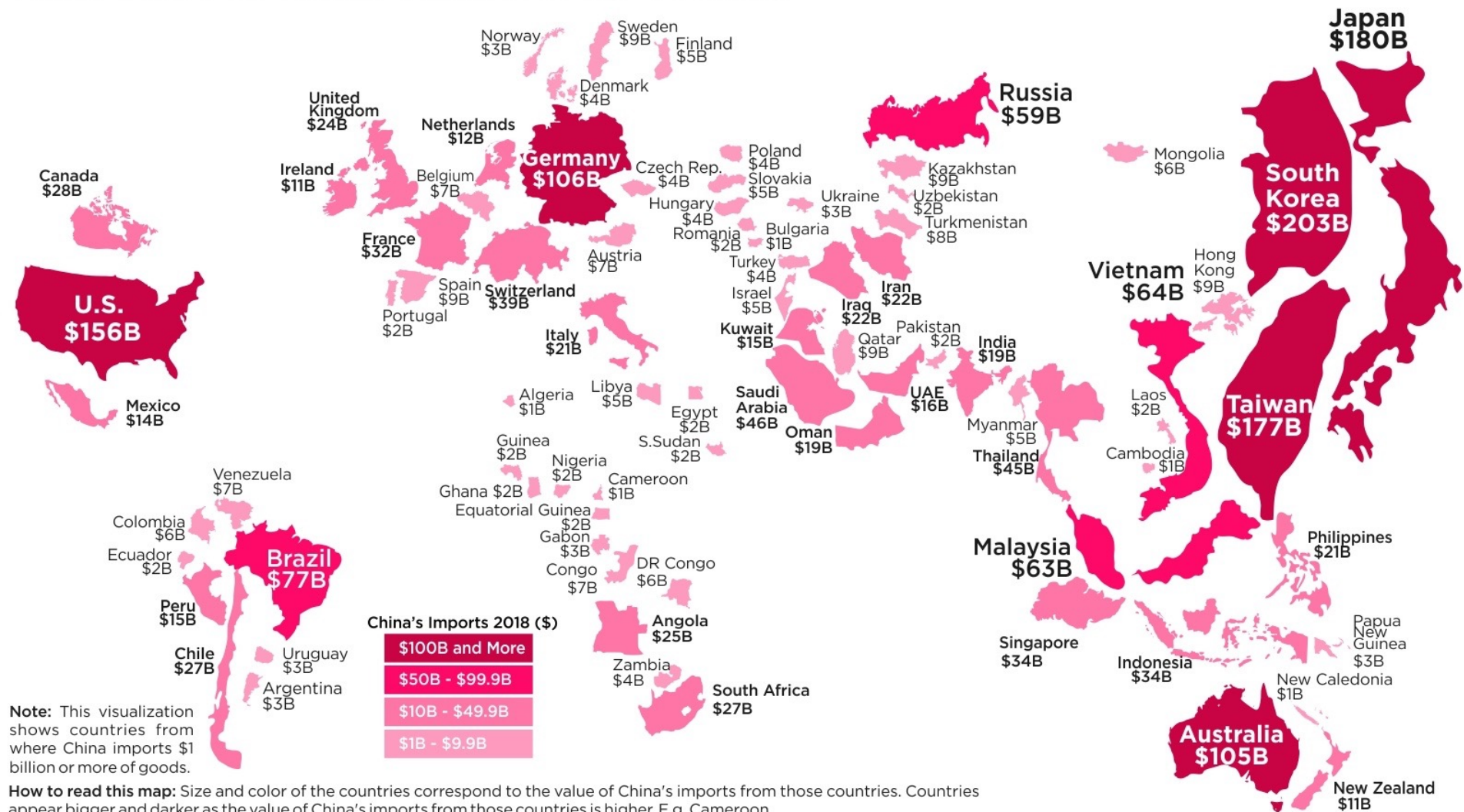


Quartz | qz.com | Data: Ministry of Commerce

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China's Top Import Partners (2018)

China's Biggest Imports Total Value of China's Imports by Country



Projected Imports by China (2020 - 2024)

Based on Current Trends – Projected Exports to China							
Country/region	Current growth rate (%)	2019 Volume (US\$ billion)	2020 Volume (US\$ billion)	2021 Volume (US\$ billion)	2022 Volume (US\$ billion)	2023 Volume (US\$ billion)	2024 Volume (US\$ billion)
US	-9	179	163	148	135	123	112
EU*	4	215	224	233	243	253	263
ASEAN**	13.8	250	285	324	369	420	478
India	-1.62	8	8	8	8	7	7
Africa	31	100	131	172	225	295	386
Russia	20	56	67	83	99	120	144
Emerging Belt and Road***	3	150	155	160	165	170	175

* Excluding the UK

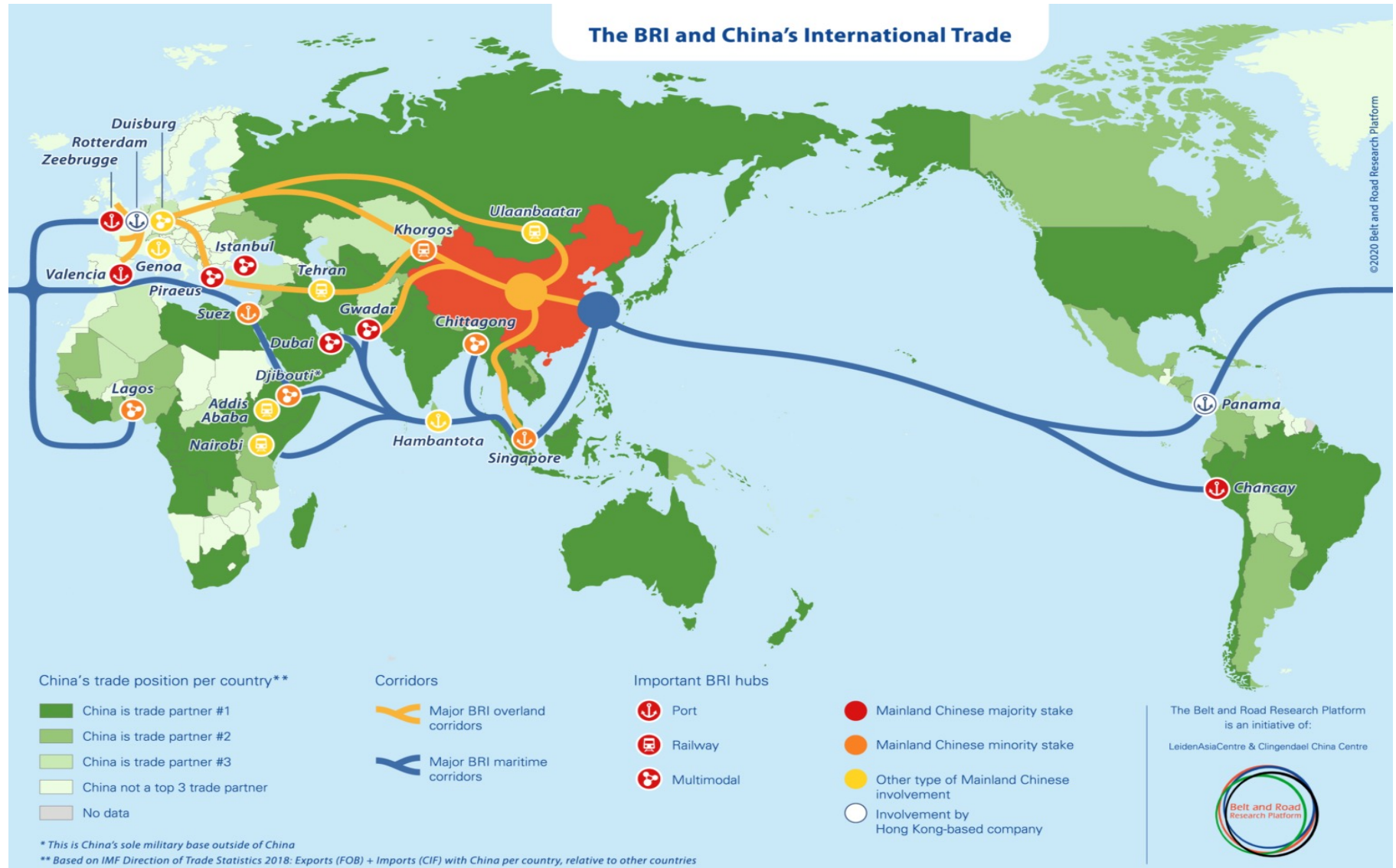
**Excluding Cambodia, Laos, Myanmar, and Vietnam

***Excluding Russia, EU, and the larger ASEAN nations

Statistics are sourced from China's MOFCOM, USTR, EU Commission, ASEAN Secretariat, and Dezan Shira's business intelligence unit.

Figures have been rounded up for convenience.

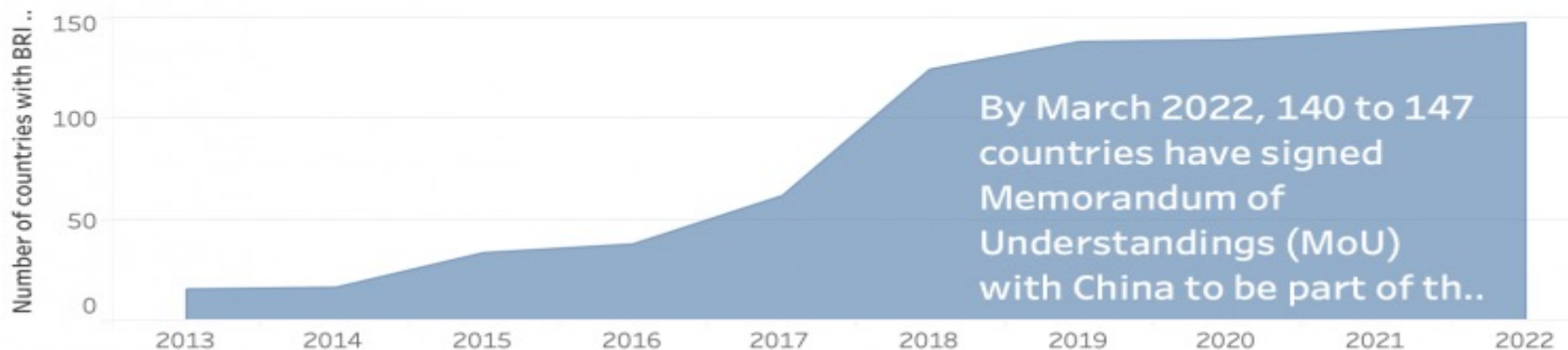
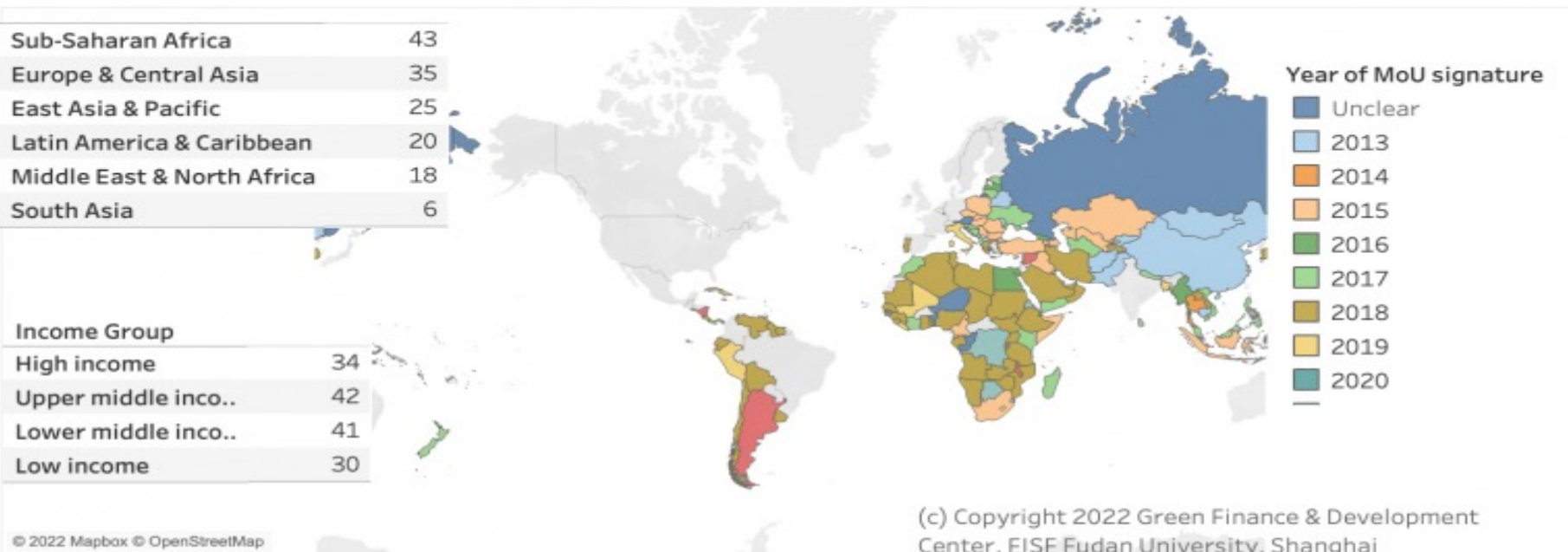
China's BRI Trade Worldwide (top, #2, #3 partner)



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China's BRI Partners Worldwide (2022)

Countries of the Belt and Road Initiative



US Tariffs Targeting 10 Industries Prioritized by China in its “Made in China 2025” Plan

- **IT:** become cyber power; semi-conductors; acquisition of techn. co's.
- **Numerical ctrl tools & robotics:** lots of experts by 2025.
- **Aerospace equipment:** satellite technology; passenger jets.
- **Ocean engineering & high tech ships:** grow strong export sector.
- **Railway equipment:** grow export competitiveness thru BRI projects.
- **Energy saving & new energy vehicles:** combine cleanup air w. winning global recognition for Chinese cars.
- **Power equipment:** energy efficiency; smart grid & smart city technologies.
- **New materials:** leader inventing & commercializing new materials; demo innovation.
- **Medicine & medical devices:** medical device manufacturers start to export; accelerate export.
- **Agricultural machinery:** efficiency enhancement; create platform for exports.

US Export Controls in Confrontation w. China?

Washington eyes export controls in confrontation with China

US list of 14 emerging technologies



Artificial intelligence (AI)
and machine learning
technology

Additive
manufacturing
(3D printing)

Position, Navigation
and Timing (PNT)
technology

Microprocessor
technology

Quantum information
and sensing
technology

Advanced computing
technology

Data analytics
technology

Logistics
technology

Brain-computer
interfaces

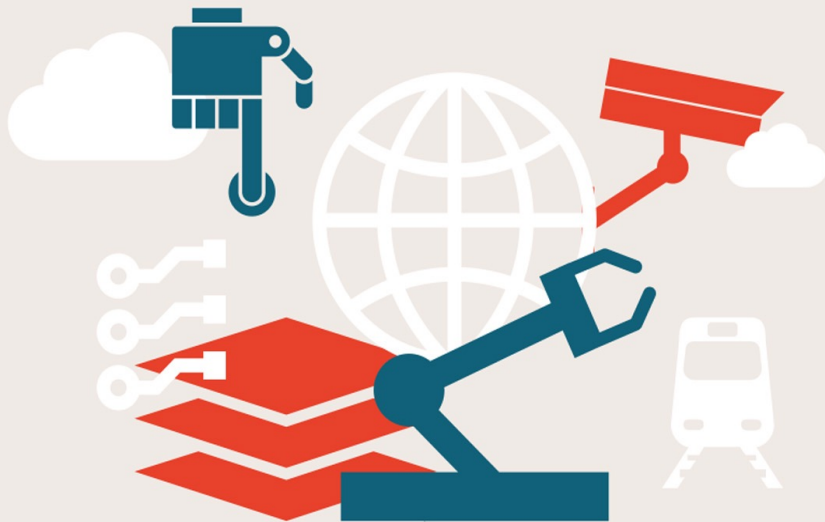
Robotics

Advanced
Materials

Advanced
surveillance
technologies

Biotechnology

Hypersonics



Source: U.S. Federal Register – Review of Controls for Certain Emerging Technologies

China's Biggest Exports

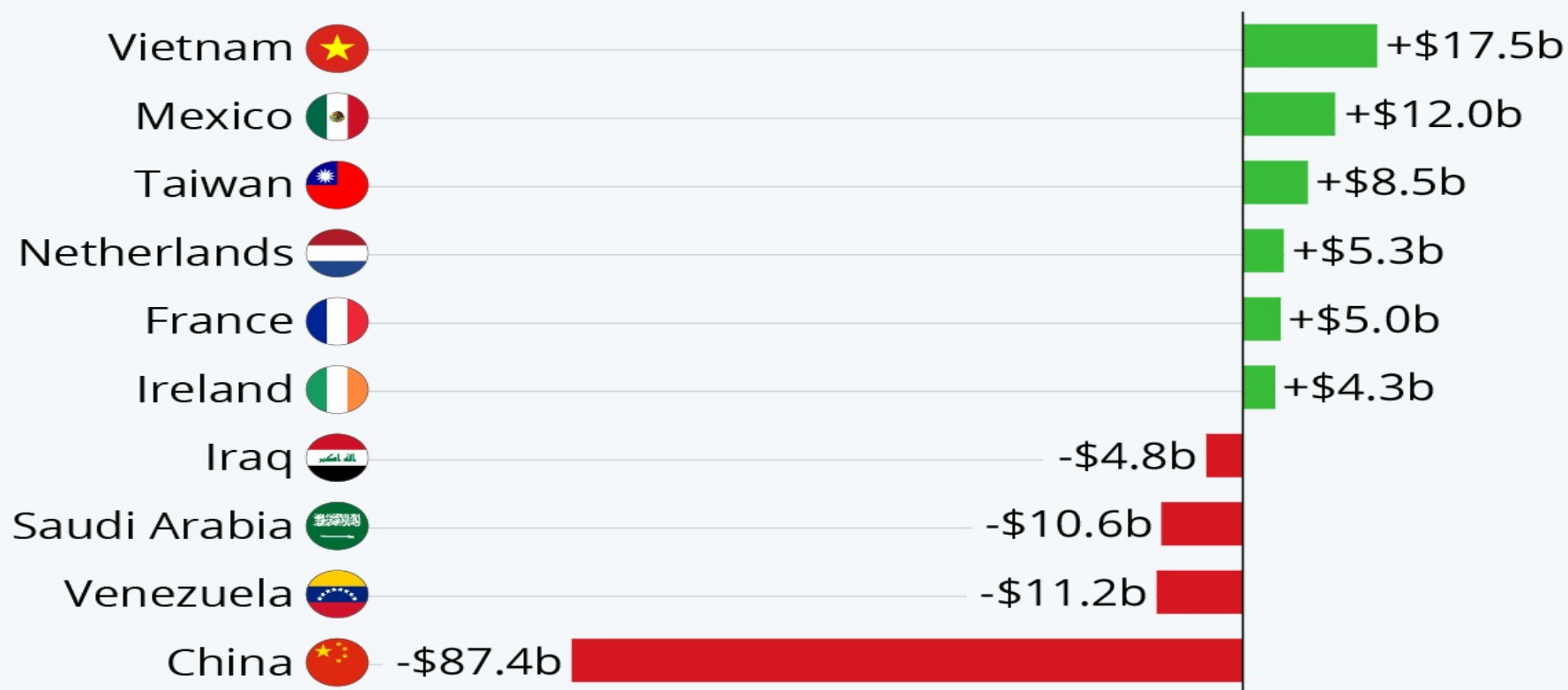
Total Value of China's Exports by Country



<https://howmuch.net/articles/chinas-exports-imports-trade-balance>
International Monetary Fund - <https://data.imf.org/>

U.S. Imports From China Dropped by \$87 Billion in 2019

Countries/territories with the largest absolute change in goods exports to the U.S. in 2019



Source: U.S. Census Bureau

China's Biggest Trade Deficits/Surpluses by Country



howmuch.net

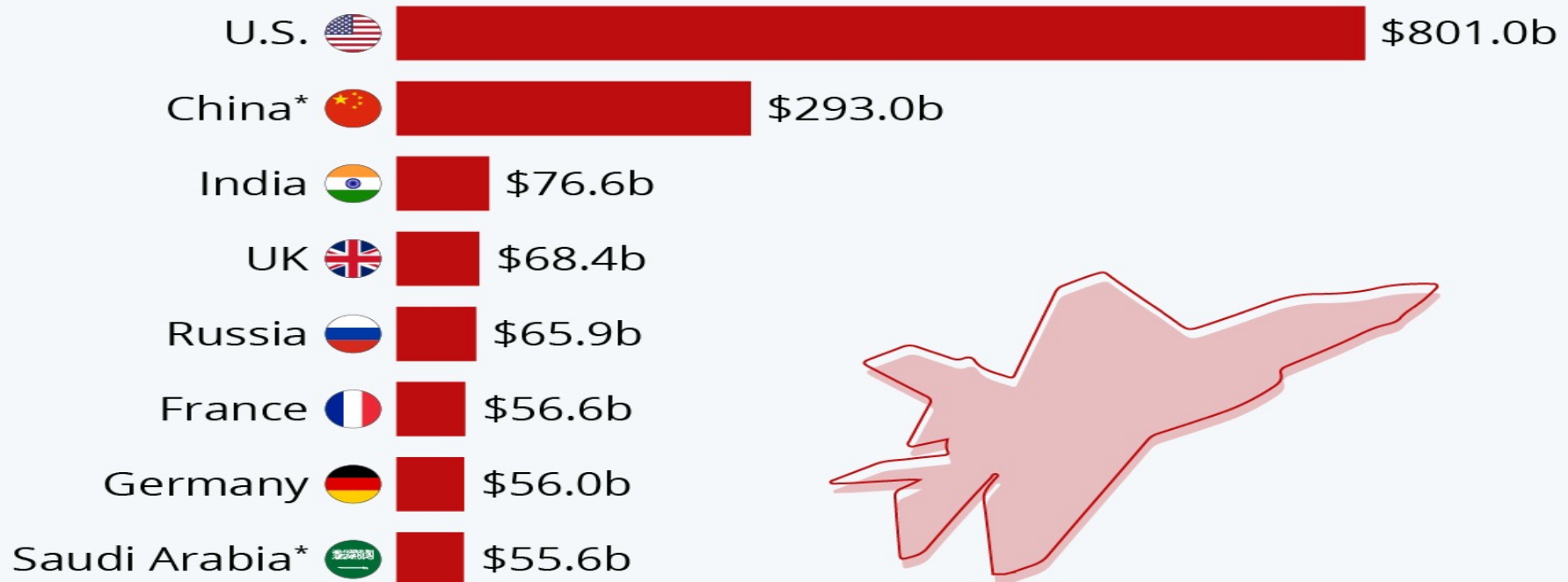
Questions?

Allies, Threats

Military Expenditure in \$bn (2021) (China, India)

The Countries With the Highest Military Expenditure

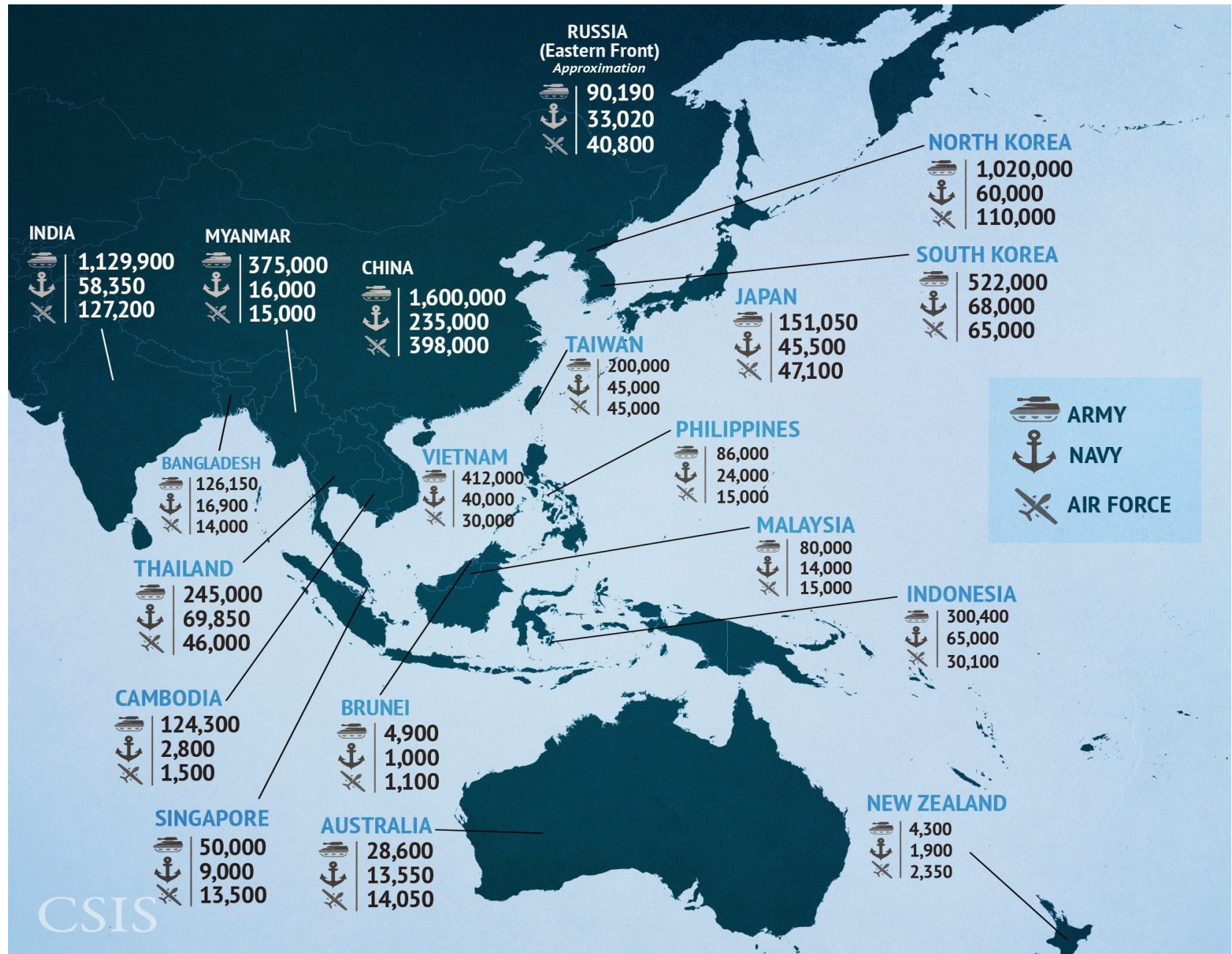
Total military expenditure by country in 2021



* Estimate

Source: SIPRI

Indo Pacific Army/Navy/Air Force (CSIS – 2021)



Ally or Threat (Pew Research Ctr, as of 2019)

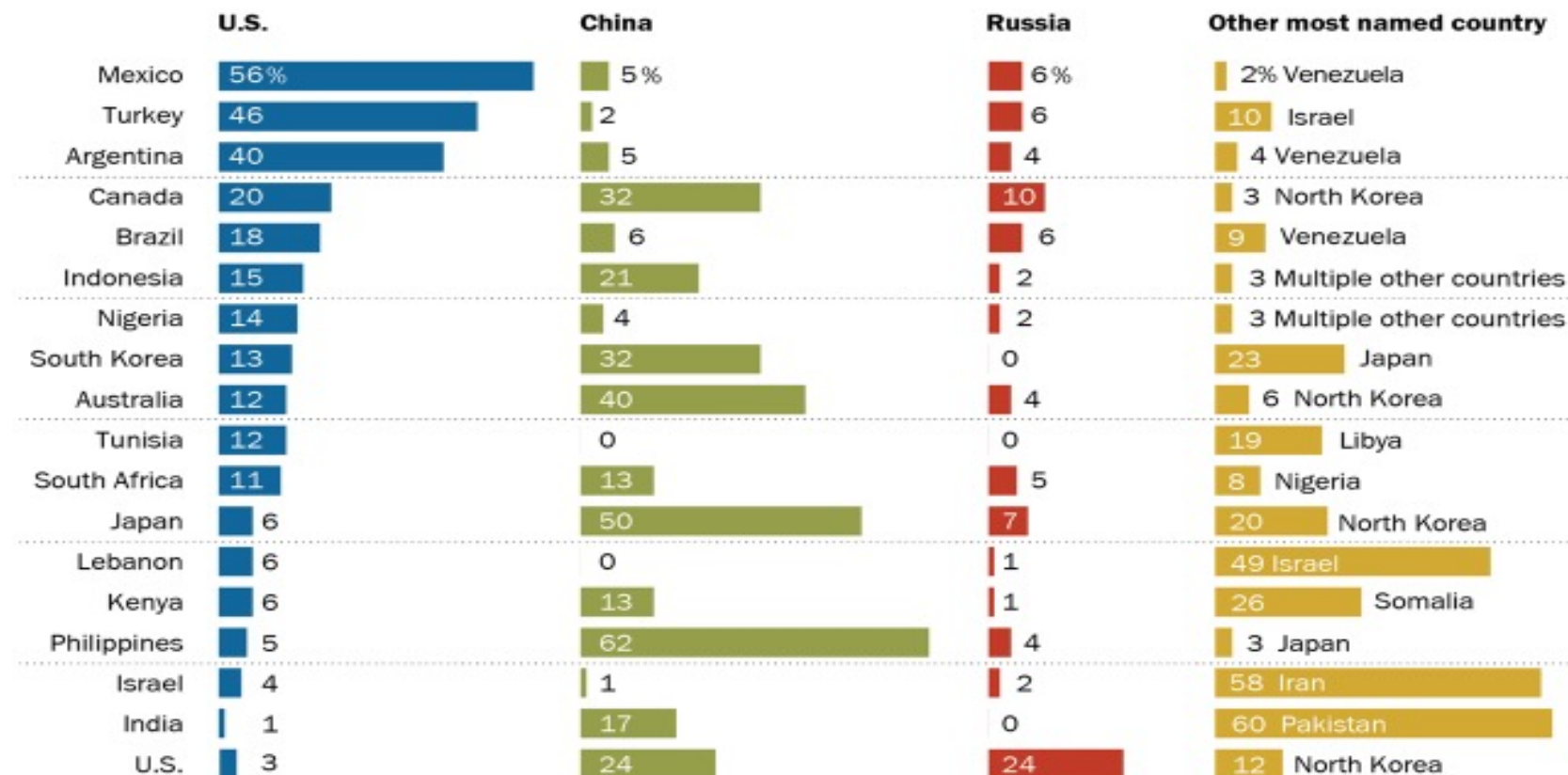
Allies and Threats in Asia				
	<u>Closest allies</u>	<u>%</u>	<u>Biggest threats</u>	<u>%</u>
Bangladesh	India	54	U.S.	72
	China	45	India	47
	U.S.	44	Pakistan	32
China	Russia	46	U.S.	66
	EU	21	Japan	63
	S. Korea	20	Taiwan	18
India	U.S.	46	Pakistan	75
	Russia	43	al Qaeda	32
	Japan	34	China	30
Indonesia	Japan	41	U.S.	63
	Malaysia	36	China	17
	China	24	Russia	13
Japan	U.S.	74	N. Korea	66
	China	26	China	49
	EU	20	U.S.	23
Malaysia	China	39	U.S.	46
	Japan	32	Abu Sayyaf	7
	U.S.	15	N. Korea	6
Pakistan	S. Arabia	60	U.S.	64
	China	58	India	45
	Iran	25	Israel	32
S. Korea	U.S.	75	Japan	70
	China	48	China	64
	EU	29	N. Korea	50

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Ally or Threat (as of 2019)

Across different countries, both the U.S. and China emerge as key threats

% who say ___ is the country or group that poses the greatest threat to their country in the future



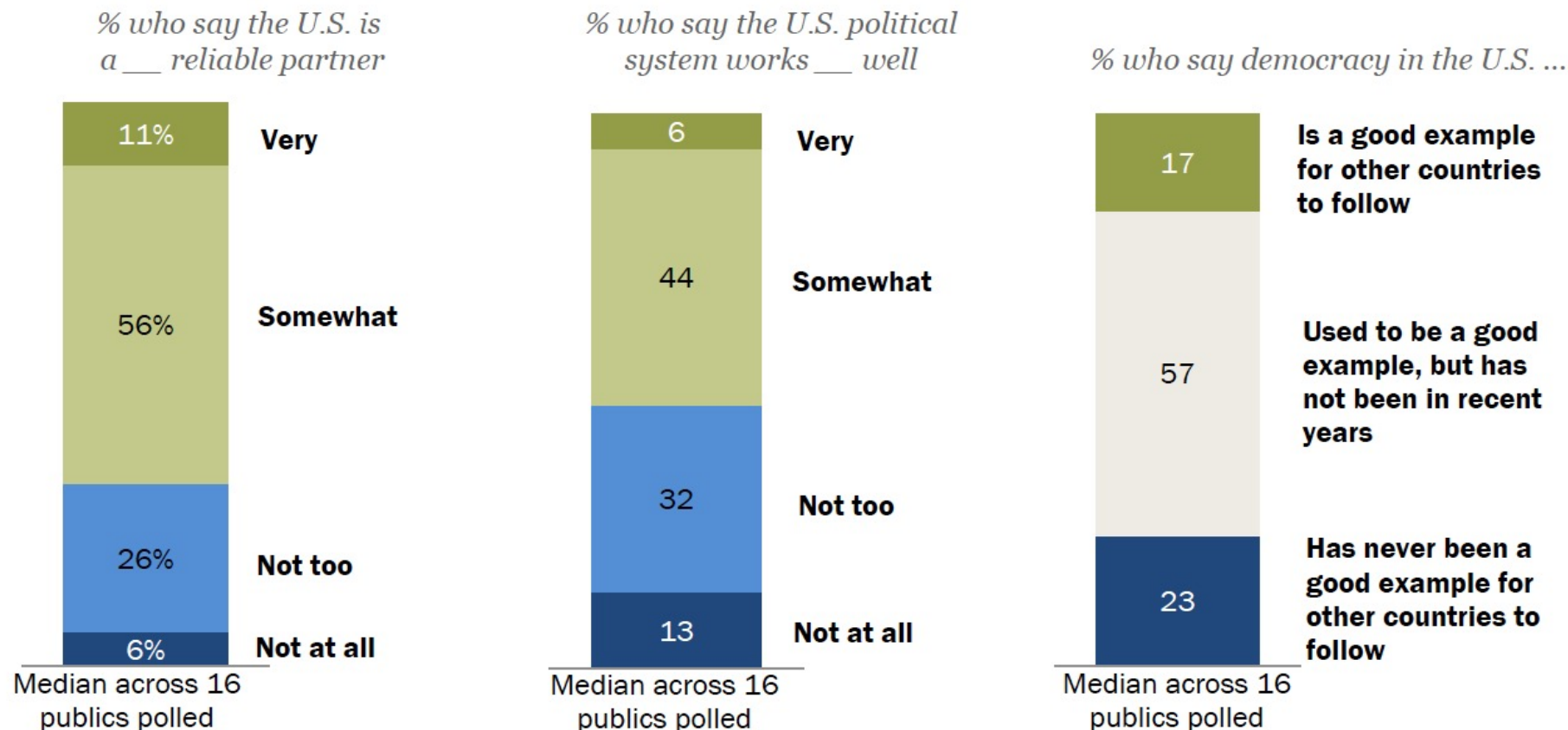
Note: Figures represent results of an open-ended question, where interviewers selected from a precoded list. Other countries named not shown.
Source: Spring 2019 Global Attitudes Survey. Q23.

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US as reliable partner (2021)

Most say the U.S. is a somewhat reliable partner but no longer see it as a model democracy



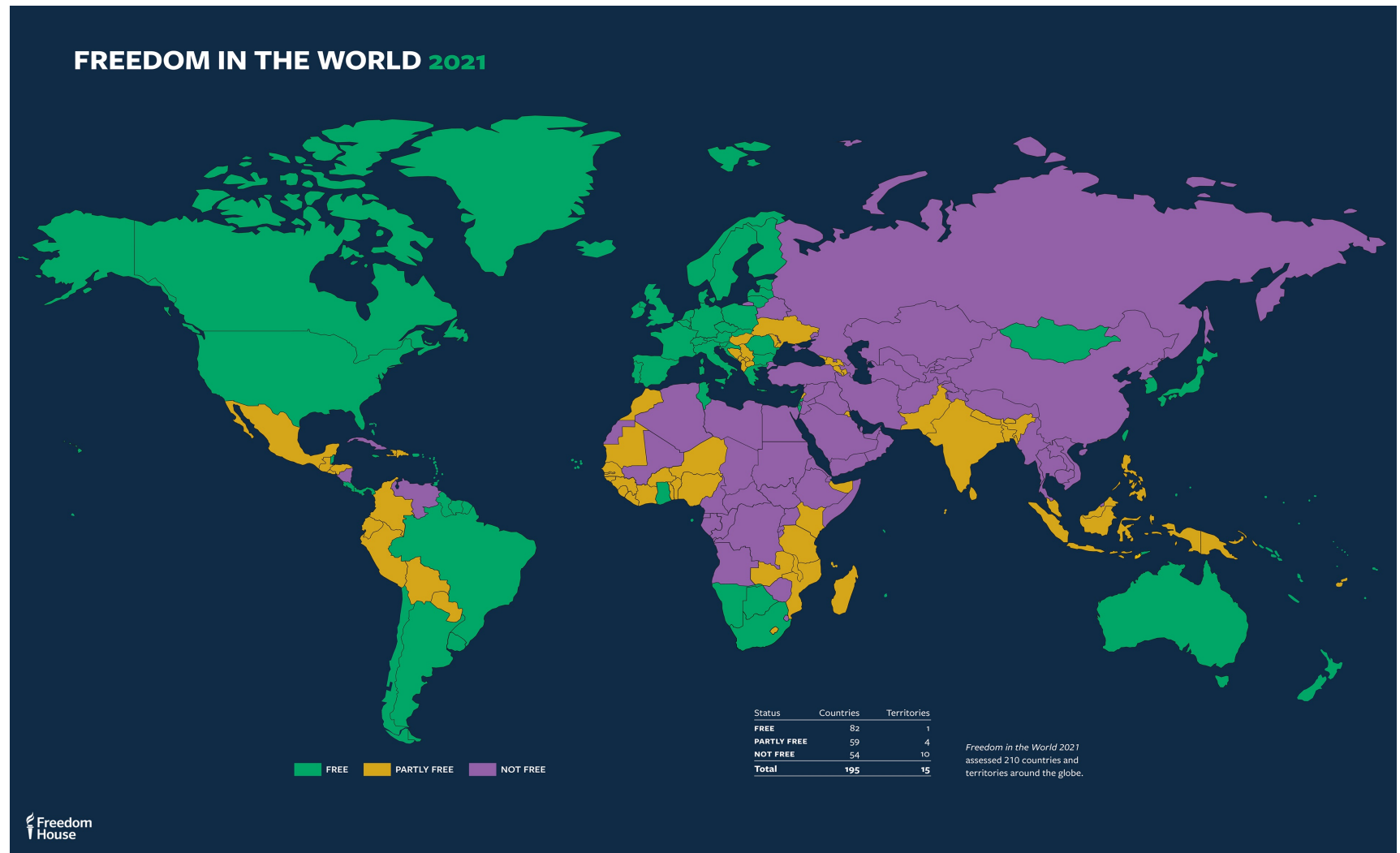
Note: Those who did not answer are not shown.

Source: Spring 2021 Global Attitudes Survey. Q6N, Q16 & Q18.

"America's Image Abroad Rebounds With Transition From Trump to Biden"

2021 Freedom House annual rept: Democracy in retreat around the world for 15th yr in a row

(India downgraded from Free to Partly Free: incr. pressure on H.rights grps; intimidatn/harass of journalists/academics; policies harmful to relig. minor.; politicizatn of Indian judiciary. FH: watchdog grp.)



2021 Freedom in the World (based on 195 countries)

A Shifting International Balance

In 2020, the number of Free countries in the world reached its lowest level since the beginning of a 15-year period of global democratic decline, while the number of Not Free countries reached its highest level.



2021 Freedom in the World (2)

GLOBAL EROSION OF DEMOCRATIC NORMS



ELECTIONS

Over the last 4 years, electoral processes have declined more than any other measure of freedom.



TERM LIMITS FOR EXECUTIVES

Leaders in 34 countries have tried to revise term limits in the last 13 years and were successful 31 times.



FREEDOM OF EXPRESSION

Freedom of expression, already in decline, has taken a steeper downturn in the past 6 years.



ETHNIC CLEANSING

Instances of forced changes in the ethnic makeup of a country are more widespread than in 2005.



SAFETY OF EXPATS

Nearly half of Not Free countries have physically targeted their nationals and diasporas in other countries in the last 13 years.



RIGHTS OF MIGRANTS

Eight democracies have declined since the migrant crisis of 2015 due to government treatment of migrants.



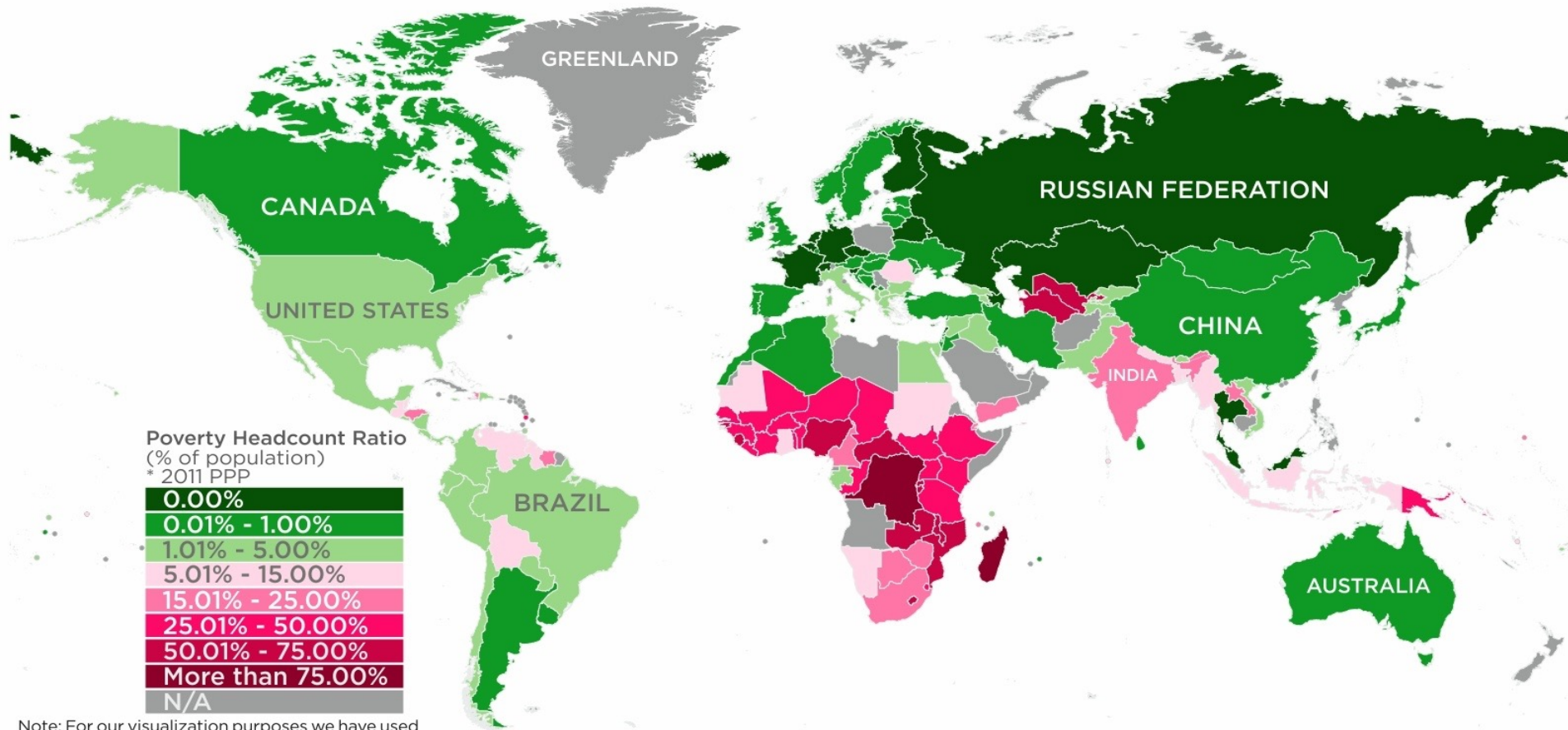
 Freedom House

Asia Challenges and Future

Poverty in Asia (2018) – Percent of population living on less than \$1.90 a day: <1% China; 1-5% VN/PKT; 5-15% MM/Indons/Bangladesh; 15-25% India.

People Living in Extreme Poverty

Percentage of Population Living on less than \$1.90 a day*



Note: For our visualization purposes we have used data for the latest available year in each country.

Article & Sources:

<https://howmuch.net/articles/people-living-in-extreme-poverty-2018>

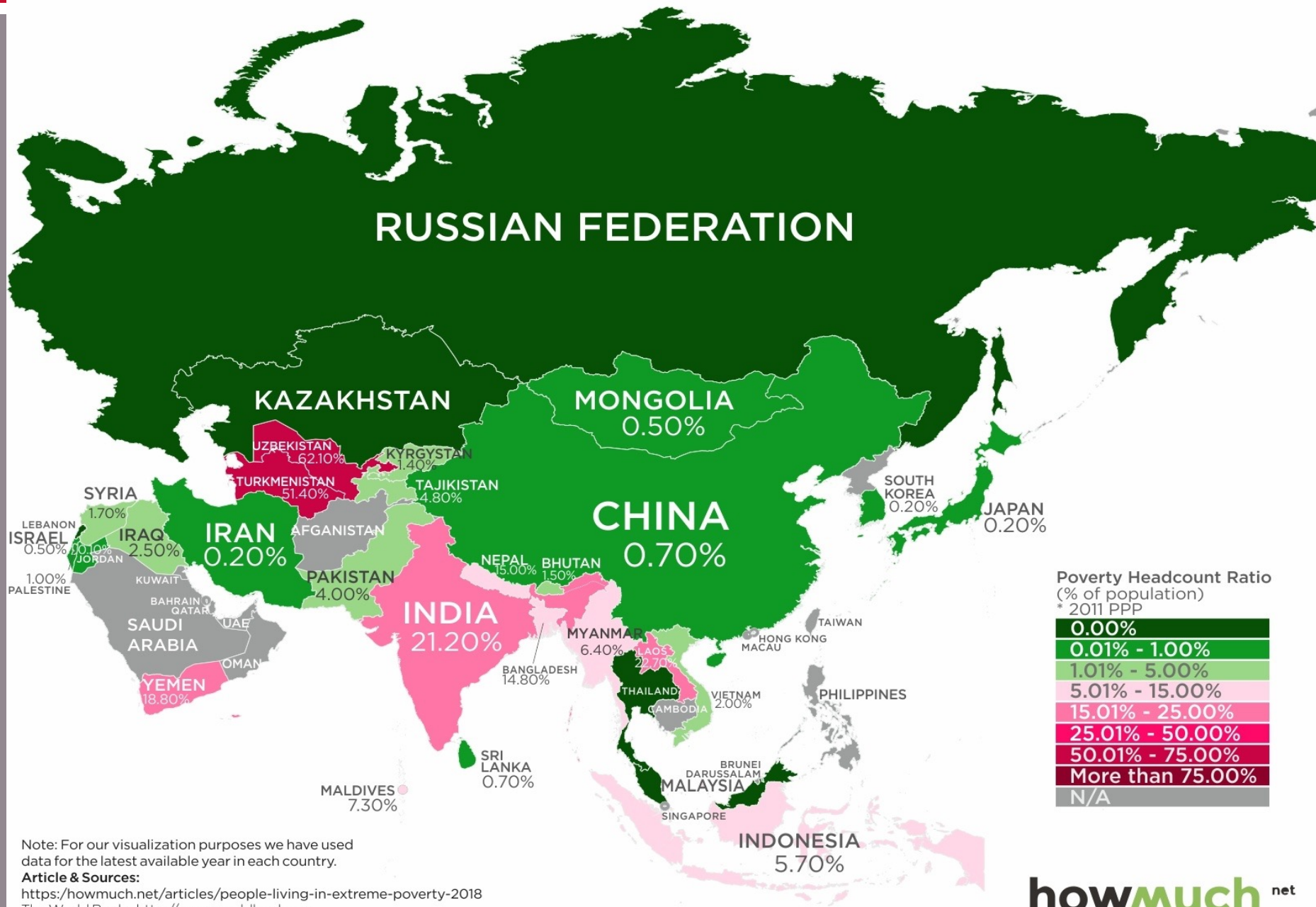
The World Bank - <http://www.worldbank.org>

howmuch net

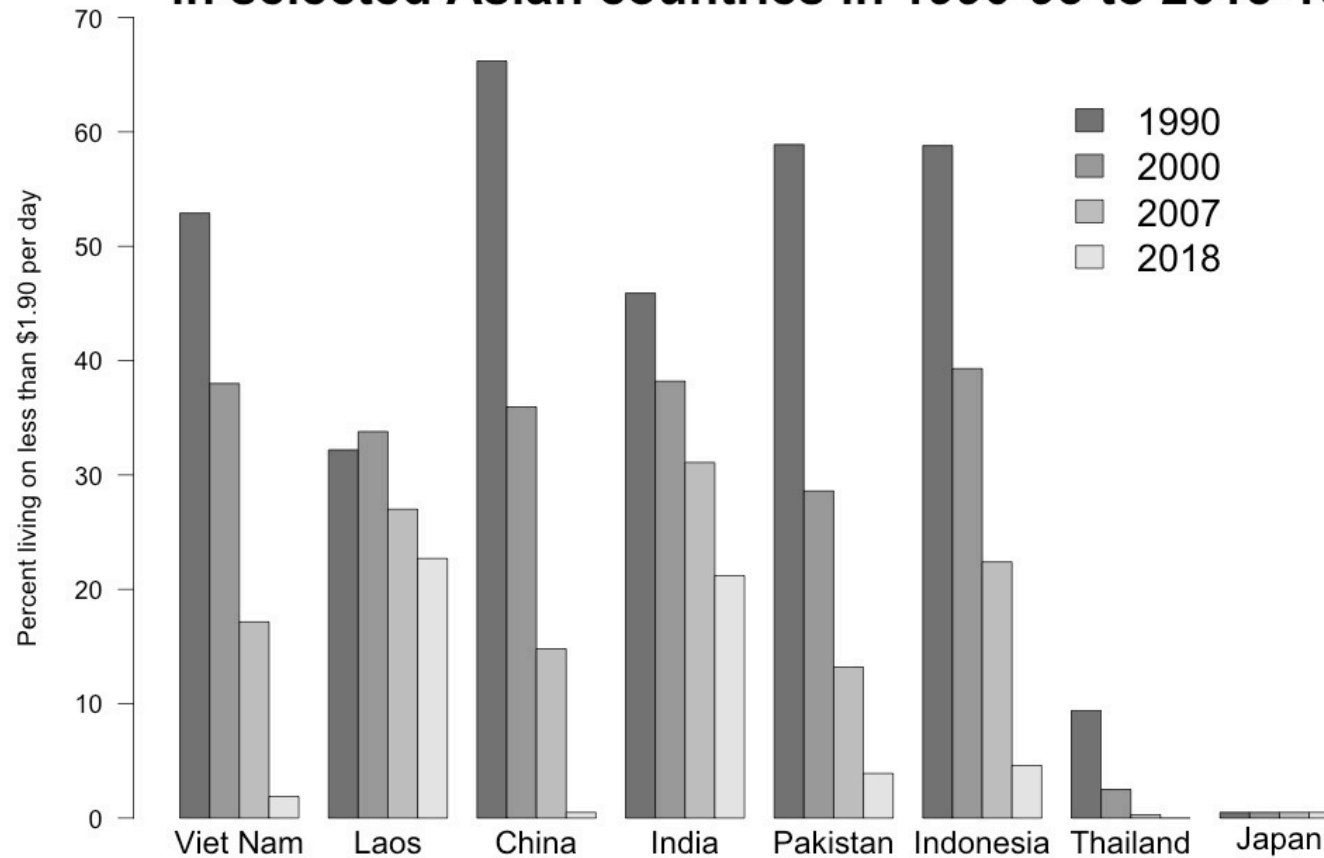
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People Living in Extreme Poverty in Asia

Percentage of Population Living on less than \$1.90 a day*



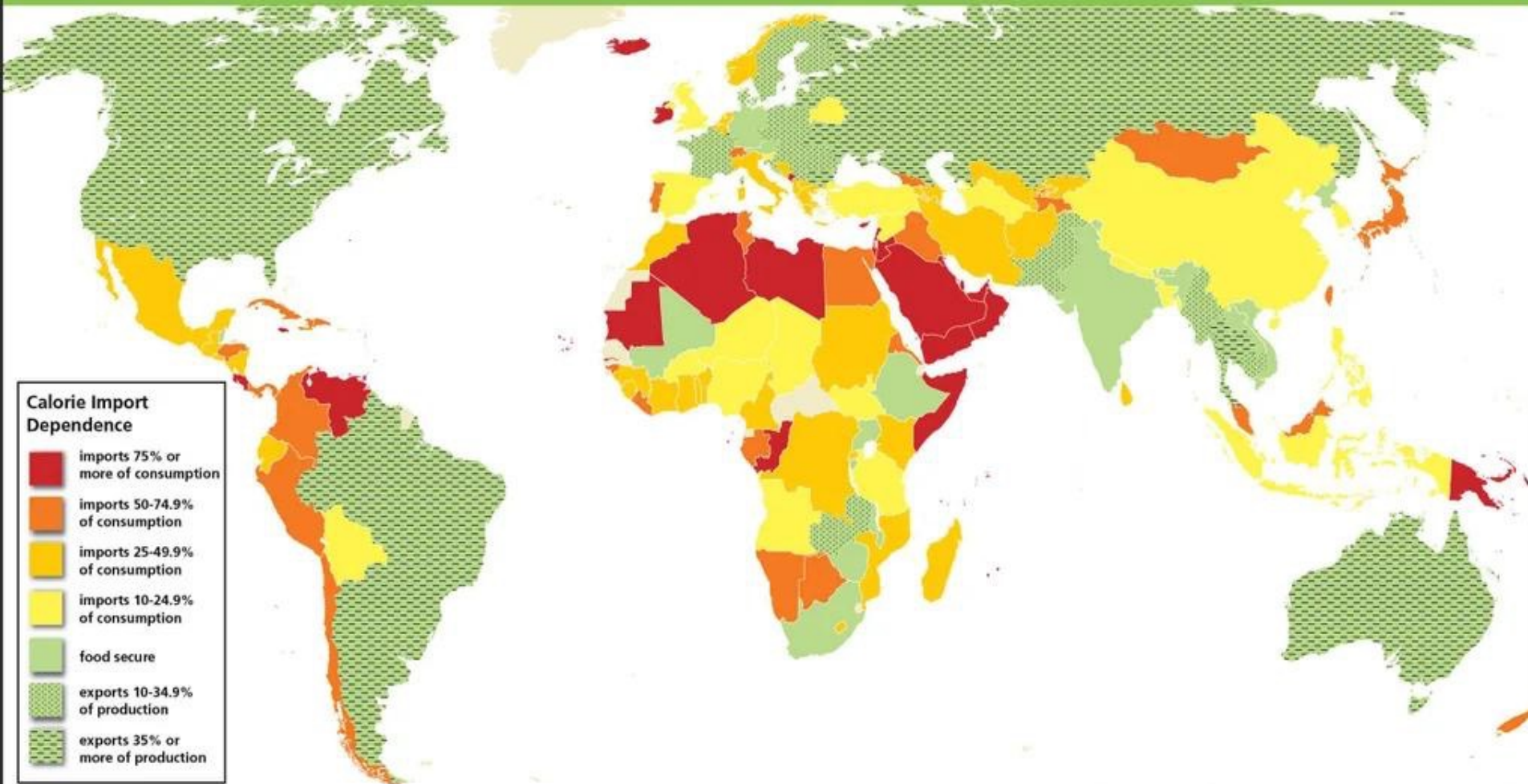
Extent of extreme poverty in selected Asian countries in 1990-93 to 2015-18



Source: World Bank DataBank export 2020-08-12

Food insecurity in Asia (2020) – imports 50-74.9% of consumption: Japan, Brunei; imports 10-24.9%: China, Korea, Indonesia Philippines; Sri Lanka.

Food (In)Security



Trade and consumption of raw maize, wheat, rice, soybeans, and other minor grains for any purpose.

Sources: USDA FAS, UN FAO, and UNCOMTRADE © 2020 Zeihan on Geopolitics

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Income Inequality (2018) – 55% of nat. income in 2016 received by top 10% earners in India, against 31% in 1980.

Income inequality by country

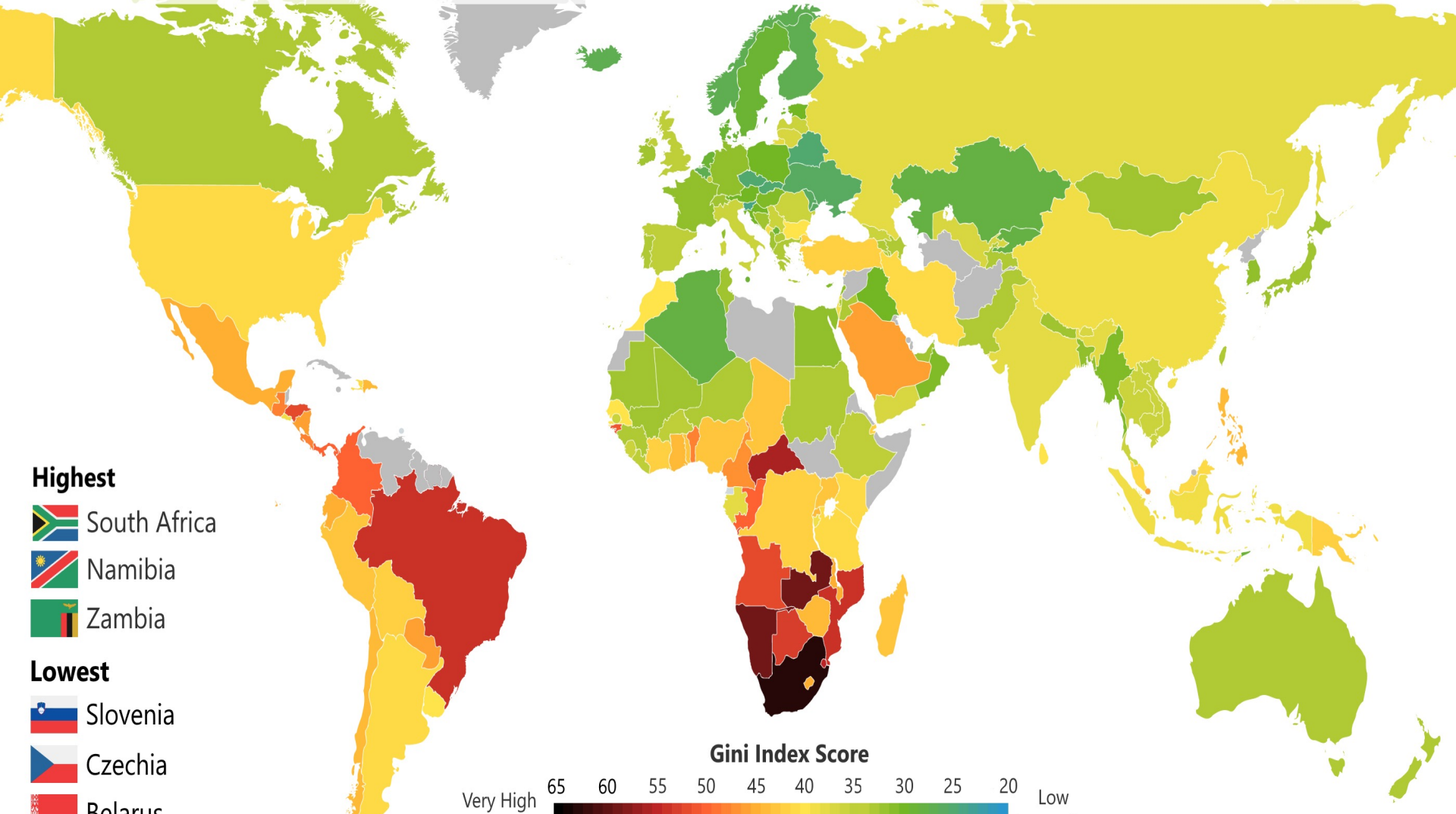
The Gini coefficient/Gini index is a measure that represents the income inequality within a country, where 100 represents max inequality and 0 represents max equality [Wikipedia]. South Africa ranks the highest with a score of 63, and essentially has a dual economy: part of the country appears developed and rich, whereas the other resembles an underdeveloped sub-Saharan African country. On average the top 20% holds about half of the income, in SA they hold 70% [IMF]. About 40% of SA's black population live in poverty, less than 1% of whites do [BBC]

Highest

-  South Africa
-  Namibia
-  Zambia

Lowest

-  Slovenia
-  Czechia
-  Belarus

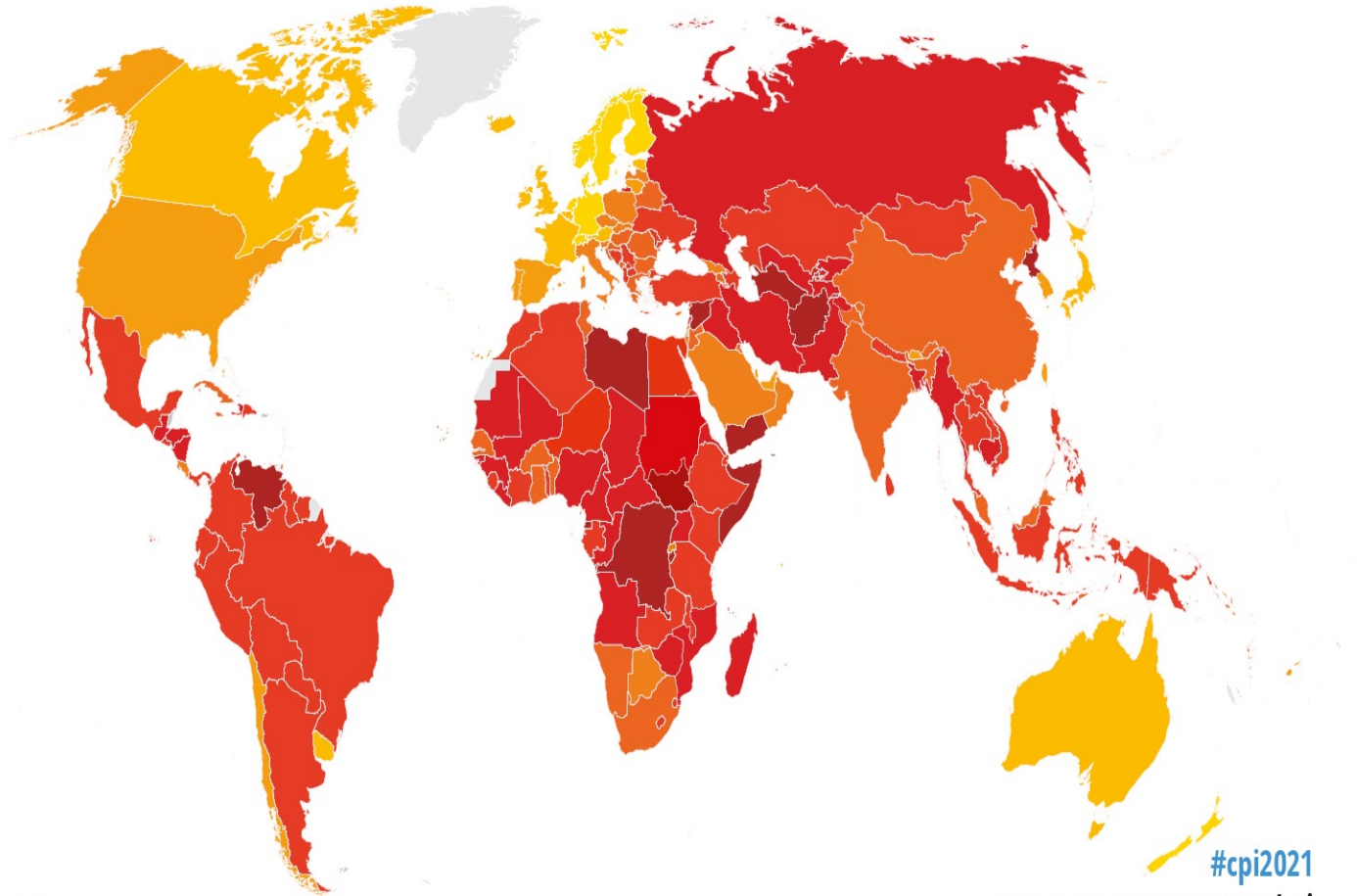
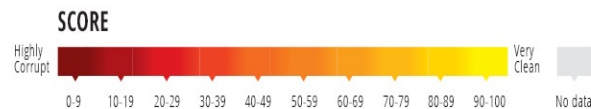


Public Sector Corruption in 180 countries (2021)



CORRUPTION PERCEPTIONS INDEX 2021

The perceived levels of public sector corruption in 180 countries/territories around the world.



#cpi2021

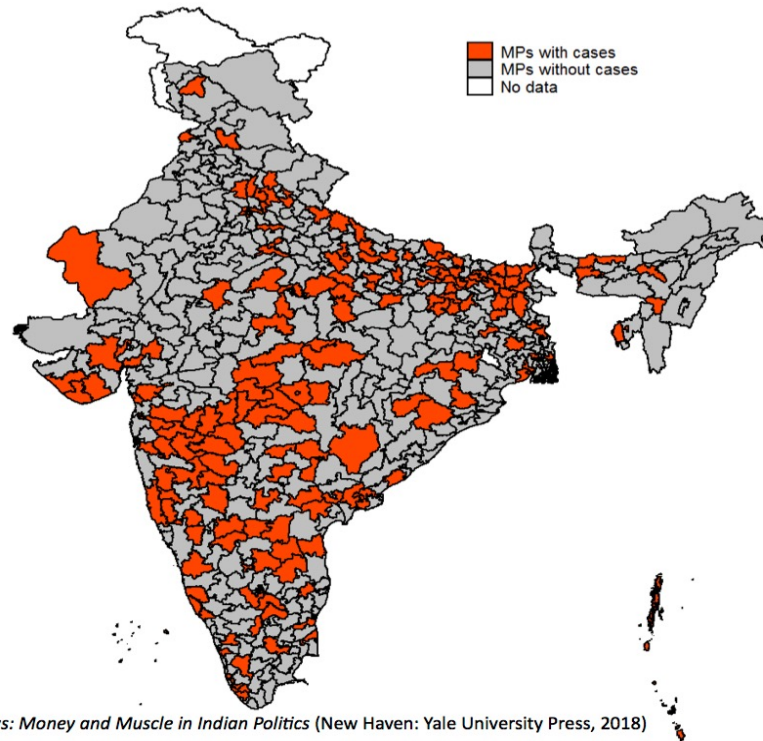
www.transparency.org/cpi

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Crime-Politics in India (2018)

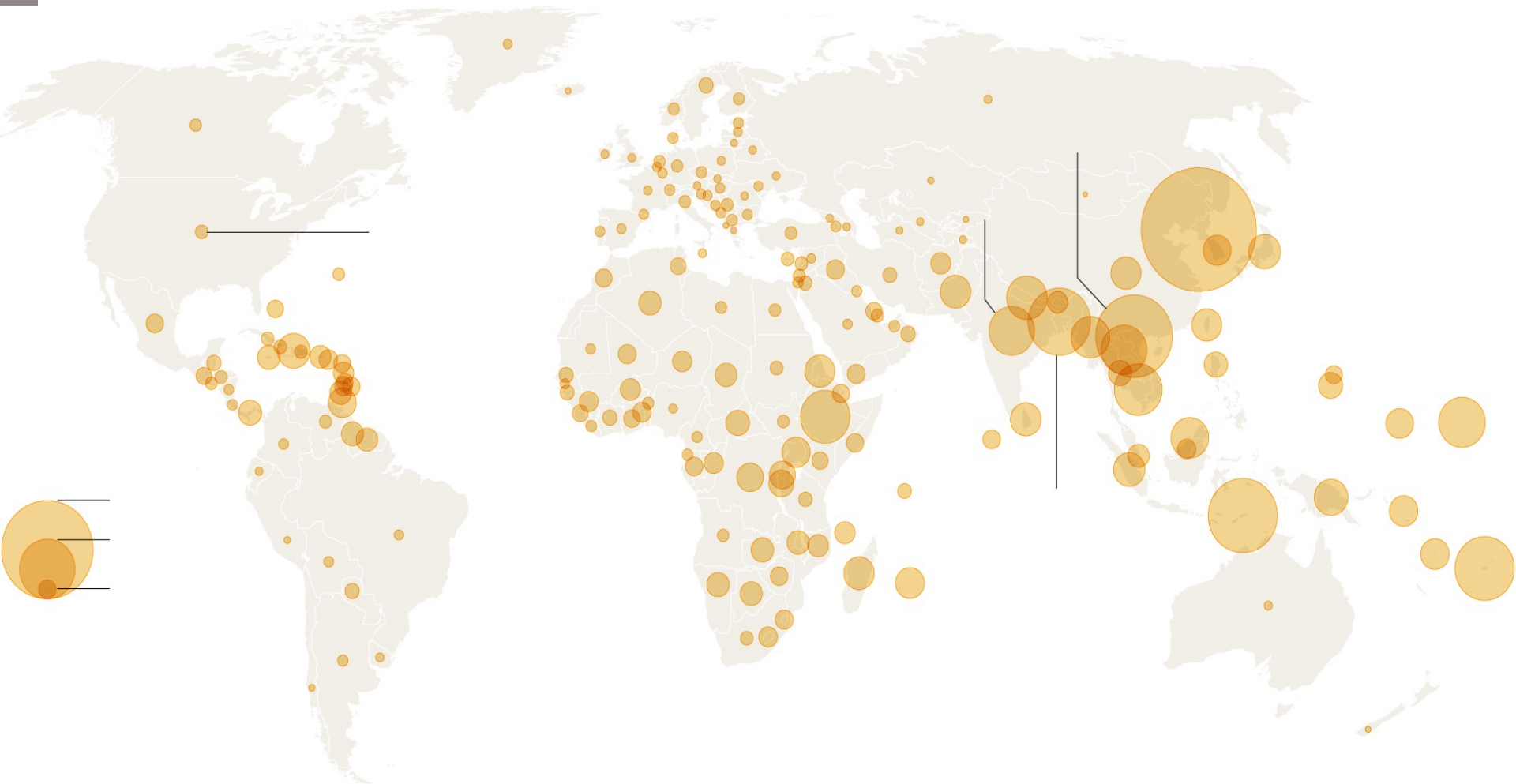
The crime-politics nexus is widespread, found in virtually all parts of the country



Source: Milan Vaishnav, *When Crime Pays: Money and Muscle in Indian Politics* (New Haven: Yale University Press, 2018)

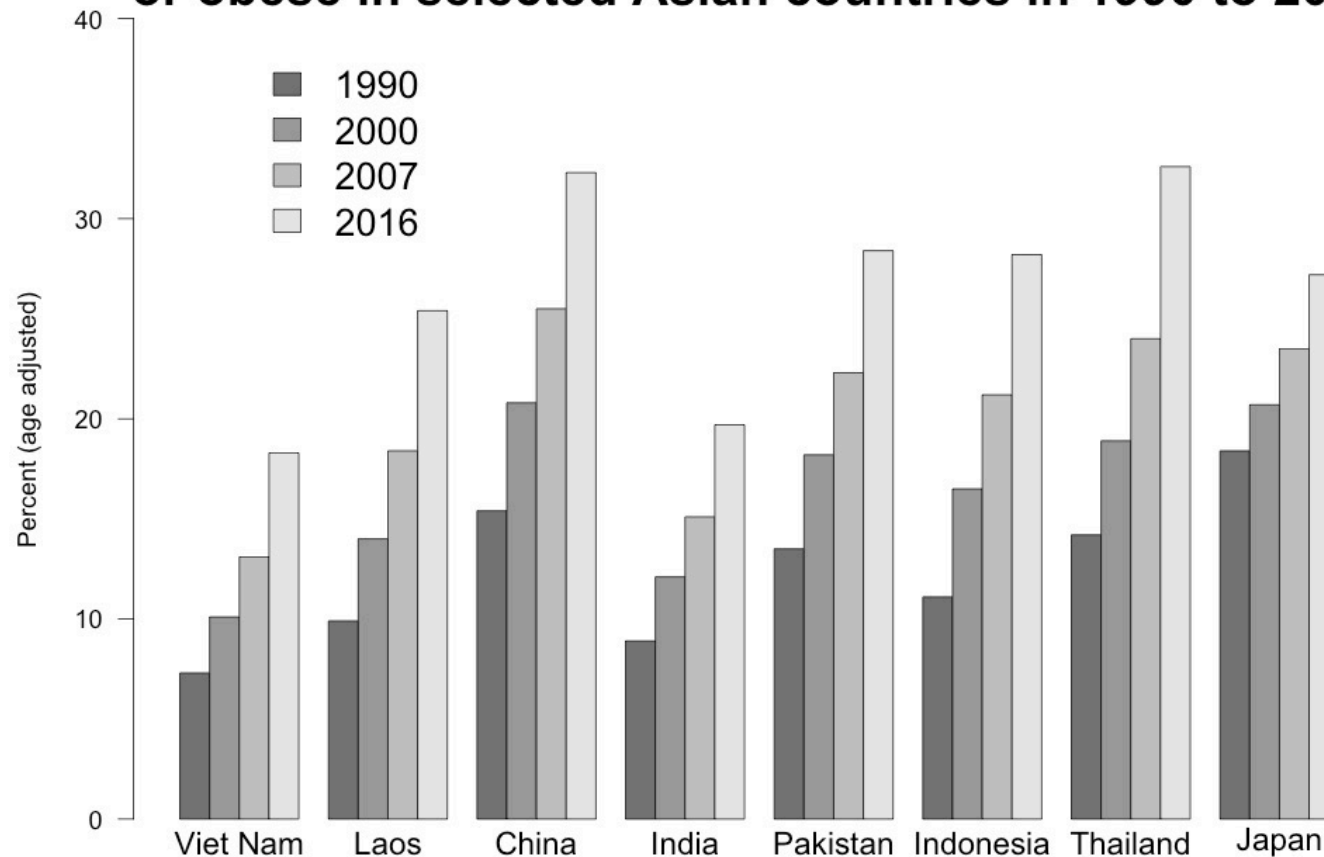
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Obesity in Asia (2018) - 20/60/100 adults w. diabetes for every 100 who are overweight. India, S.Asia, SE Asia: # w. diabetes much higher relative to # overweight. Data: U. of Washington Study.



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Percent of adults aged 25 years and over overweight or obese in selected Asian countries in 1990 to 2016

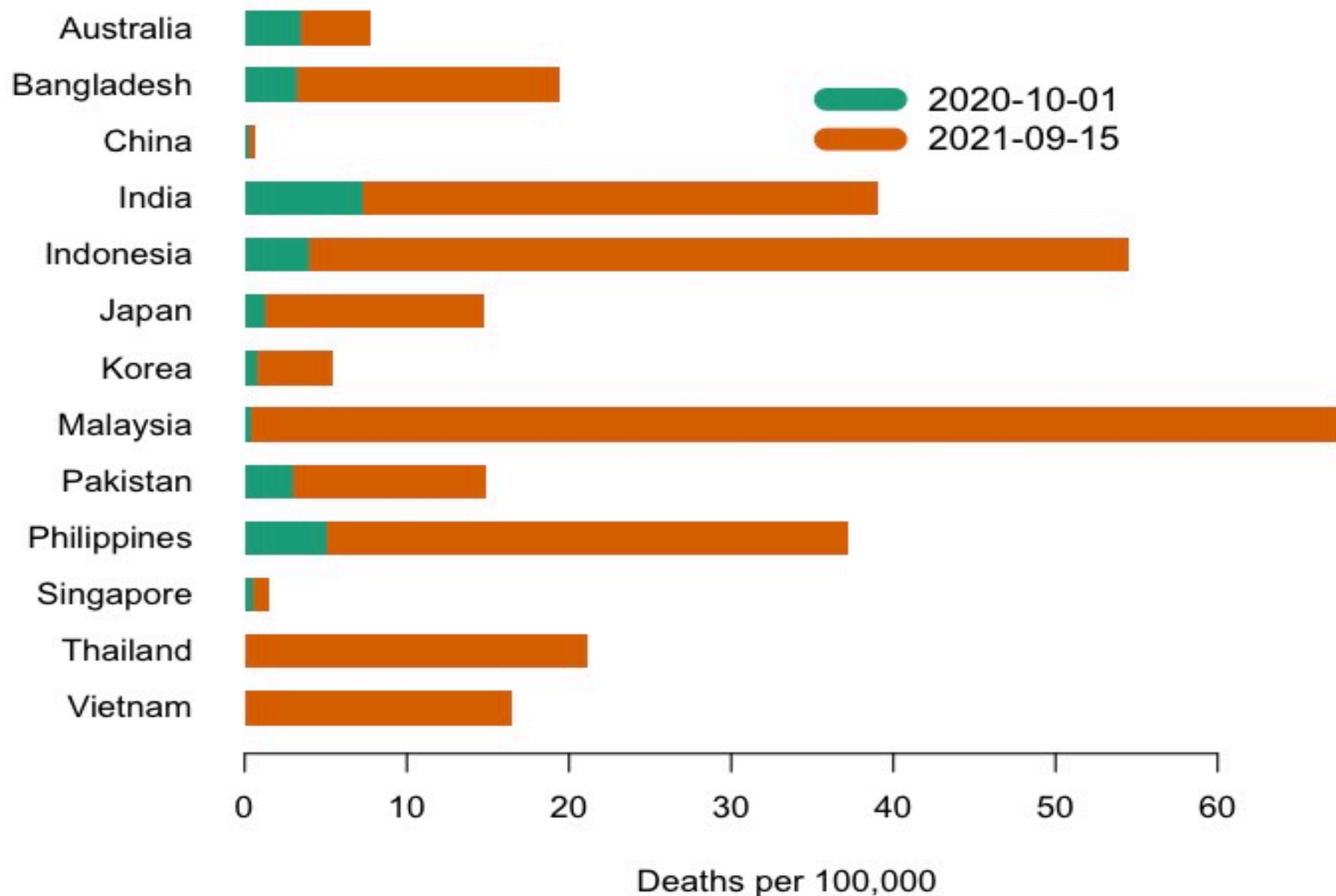


Overweight is percentage of adults ages 18 and over whose Body Mass Index (BMI) is more than 25 kg/m².

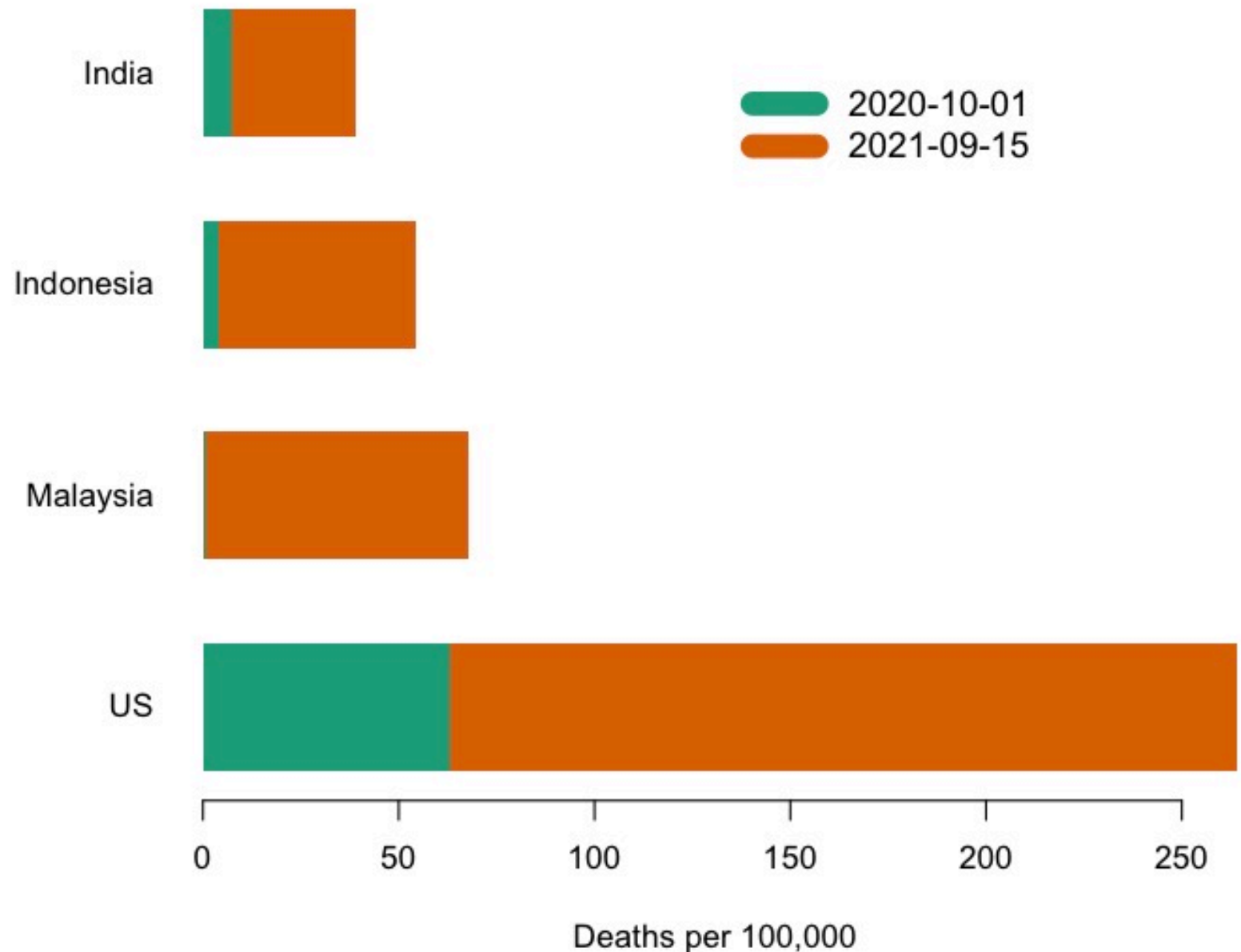
Source: World Bank DataBank export 2020-08-12

Number of Reported Covid 19 Deaths on 2 dates by Country		
Country	October 1, 2020	September 15, 2021
Australia	890	1128
Bangladesh	5272	27058
China	4739	4849
India	99773	443928
Indonesia	10856	139682
Japan	1580	16993
Korea	416	2386
Laos	0	16
Malaysia	136	22009
New Zealand	25	27
Pakistan	6499	27004
Philippines	5562	35742
Singapore	27	58
Thailand	59	14765
US	207886	666607
Vietnam	35	16186

Reported C19 Deathrate by Country



Reported C19 Deathrate by Country (global context)

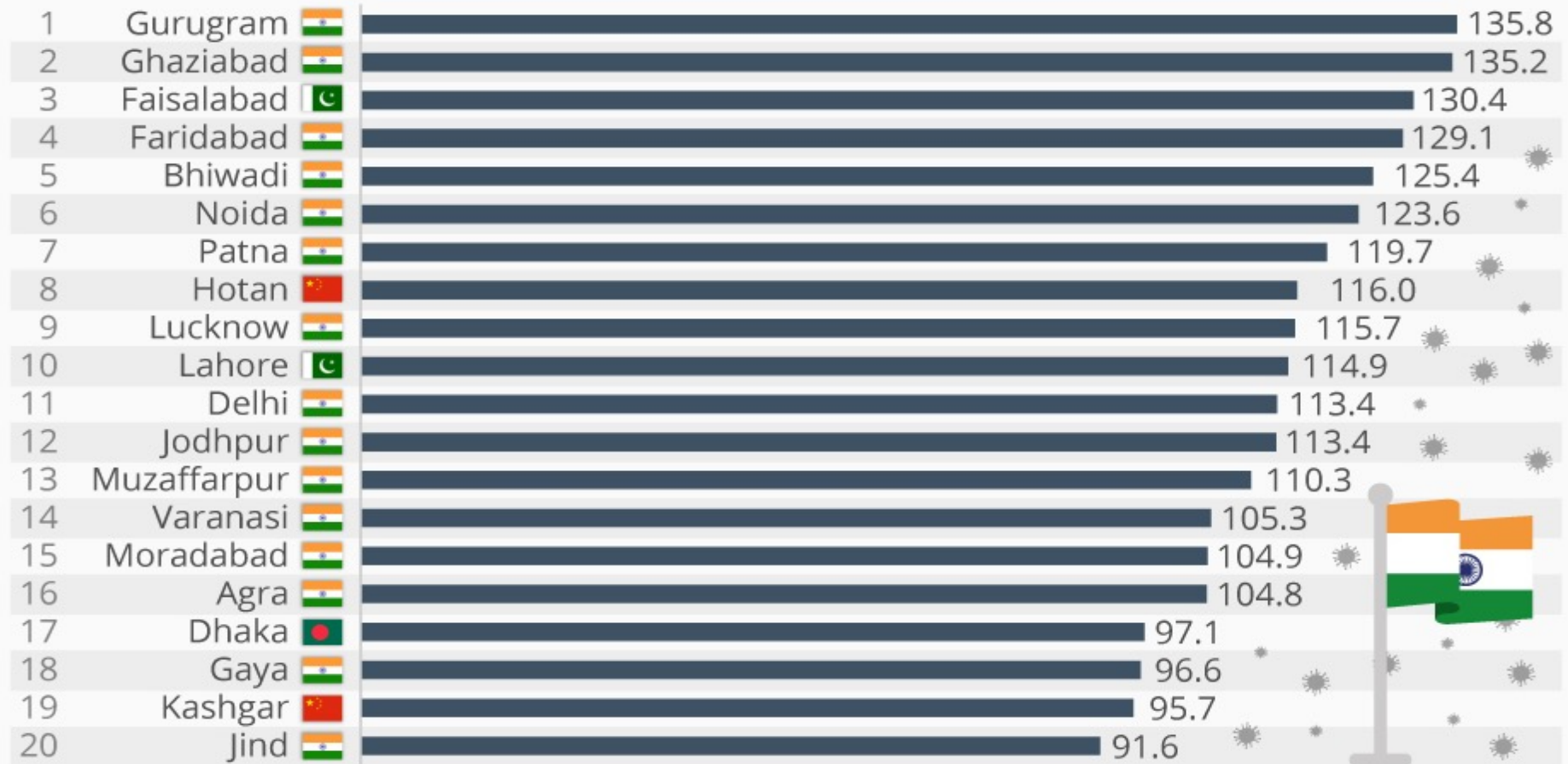


Source: John's Hopkins University and the Centre for Humanitarian Data with population estimates from the World Bank DataBank

WHO Pollution Survey Results (14 in India, 2018)

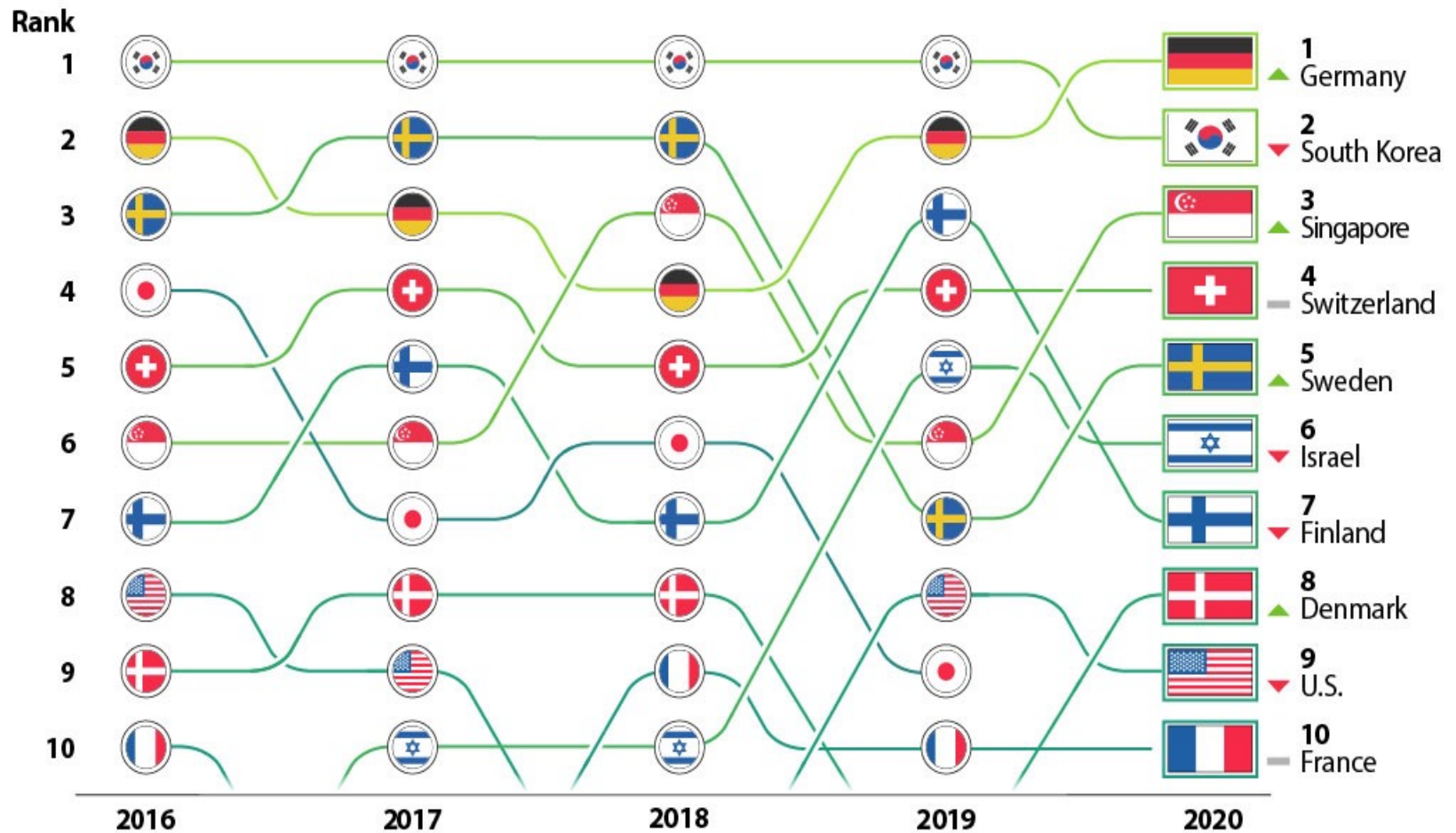
India Has The Most Polluted Cities On Earth

Average level of particulate matter (PM 2.5) pollution in 2018



S. Korea, SIN in top10 - 2016-2020

WORLD'S MOST INNOVATIVE ECONOMIES 2016-2020



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Global Innovation Index - 2018

WHICH ASIAN COUNTRIES ARE THE MOST INNOVATIVE?

Singapore, South Korea and Japan are the most innovative countries in Asia while as Pakistan and Bangladesh are the least innovative.

(The numbers show Asian ranking)

MOST INNOVATIVE COUNTRIES



INNOVATIVE COUNTRIES



LEAST INNOVATIVE COUNTRIES

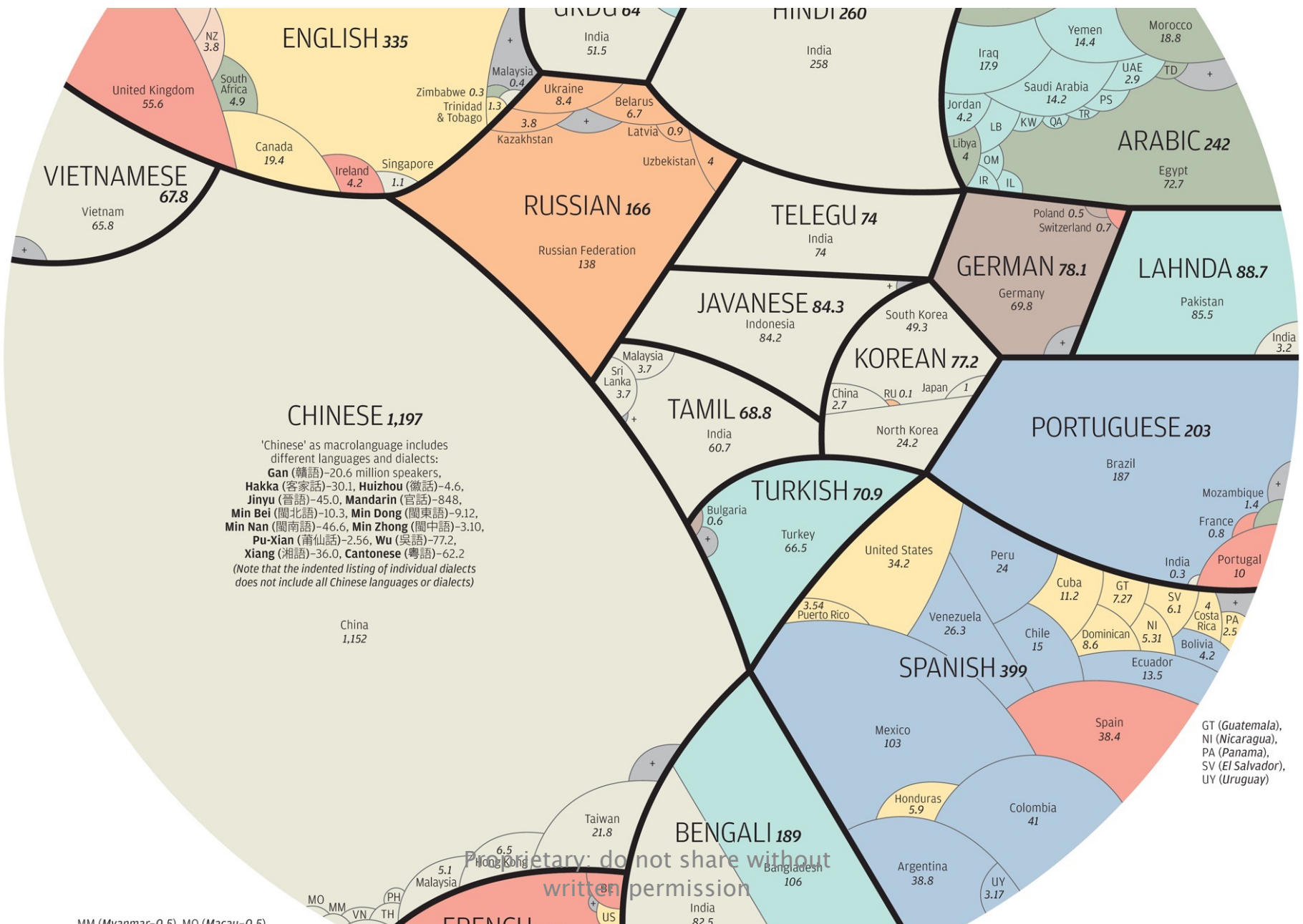


Compiled by: ANN/DataLEADS

Source: Global Innovation Index, 2018

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A World of Languages



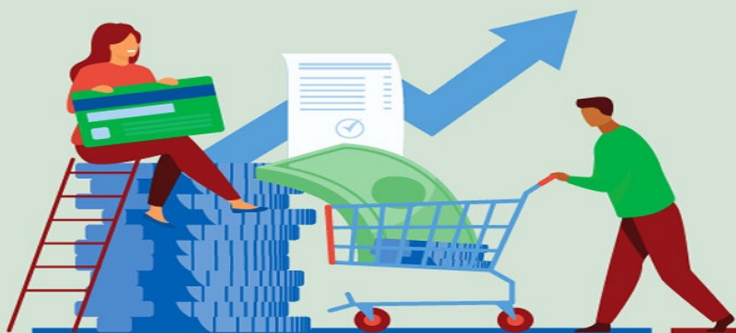
GDP Growth Forecasts for Asia (2021)

GDP Growth Forecasts



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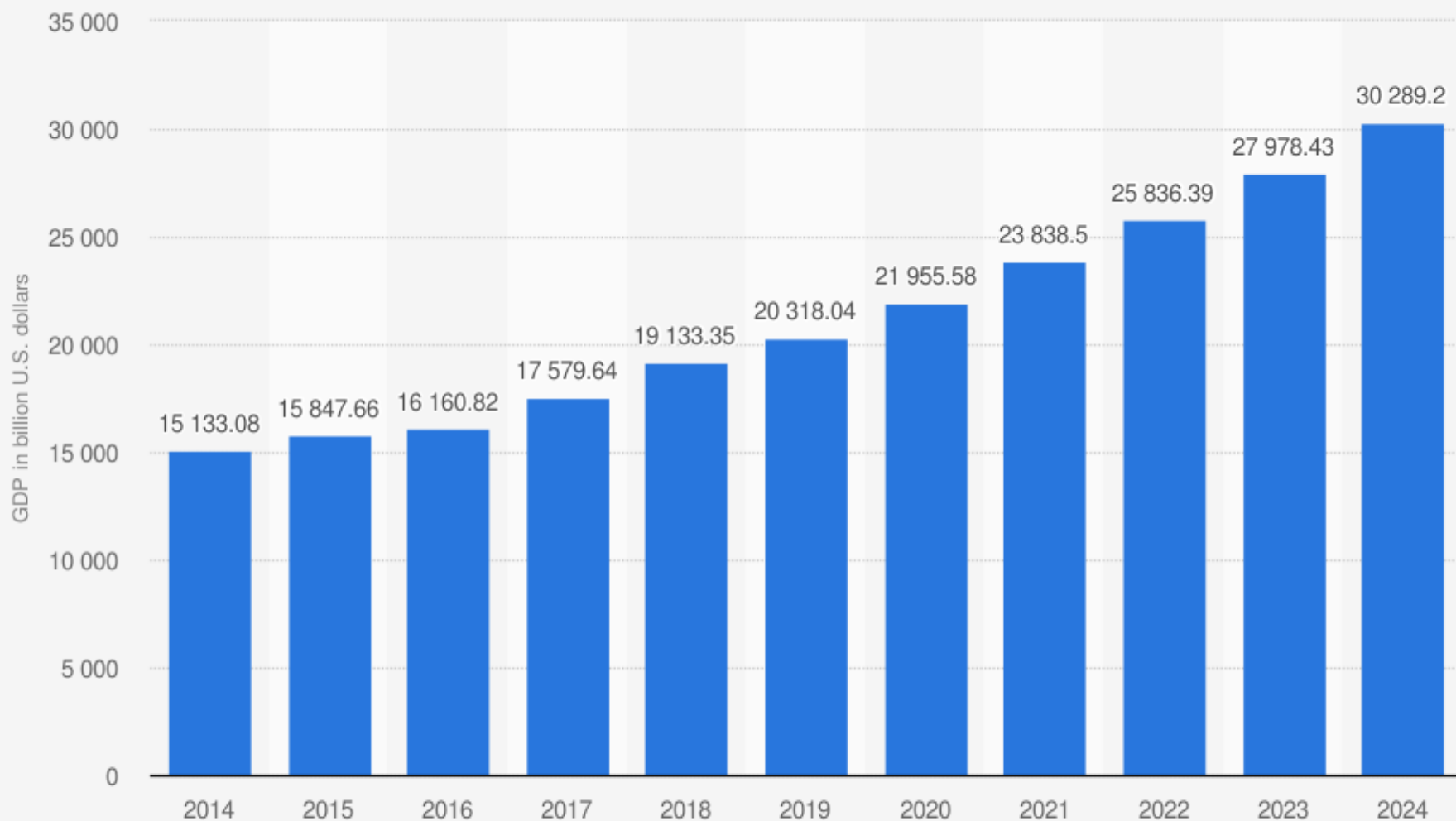
Asian Dev Bank Forecast



SOUTHEAST ASIAN ECONOMIC GROWTH FORECASTS

Country		2020		2021	
		Previous	New	Previous	New
	Brunei	2	1.4	3	3
	Cambodia	2.3	-5.5	5.7	5.9
	East Timor	-2	-3.7	4	4
	Indonesia	2.5	-1	5	5.3
	Laos	3.5	-0.5	6	4.5
	Malaysia	0.5	-4	5.5	6.5
	Myanmar	4.2	1.8	6.8	6
	Philippines	2	-3.8	6.5	6.5
	Singapore	0.2	-6	2	3.2
	Thailand	-4.8	-6.5	2.5	3.5
	Vietnam	4.8	4.1	6.8	6.8
	Southeast Asia	1	-2.7	4.7	5.2

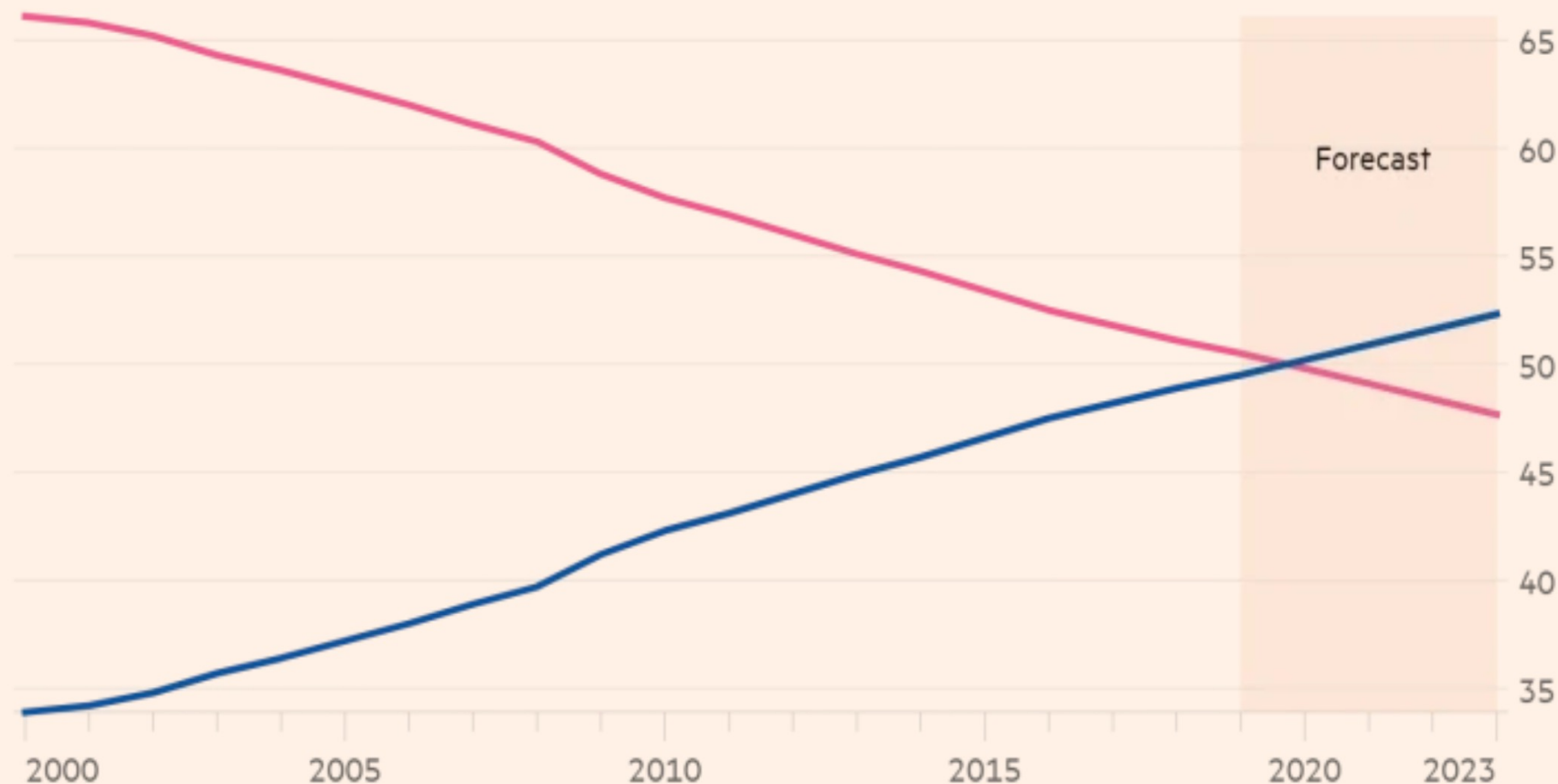
Emerging and developing Asia: Gross domestic product (GDP) from 2014 to 2024 (in billion U.S. dollars)



The Asian century is about to begin

Share of world GDP at PPP \$

— Asia — Rest of the world



Unctad definition of Asia

Sources: IMF, @valentinaromei

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UNDERSTANDING ASIA

END of OVERVIEW

Questions?

9-week Outline

- 1. Asia overview
- 2. What has changed in China?
- 3. How has economic development impacted poverty/family/gender patterns in Asia?
- 4. How is Health & Healthcare in Asia?
- 5. Where are Asia's flashpoints & insurgencies?
- 6. What drives business & how is technology used in Asia?
- 7. How is Asia dealing with disastrous pollution?
- 8. Where are opportunities for major change in Asia?
- 9. Cultural expectations: East vs West.
- QUESTIONS?

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