

社団法人 日本経済調査協議会
葛西委員会

平成23年12月19日

日本の競争力とグローバル人材

グレン・S・フクシマ
エアバス・ジャパン株式会社取締役会長
元在日米国商工会議所会頭
元米国通商代表部代表補代理

Introduction

- Thank you for inviting me to speak today
- Today's topic: "Japan's Competitiveness and Global Leaders"
- Three caveats:
 - ◆ Japanese is a foreign language
 - ◆ Slides English, speech Japanese
 - ◆ Based on experience, not research

Agenda

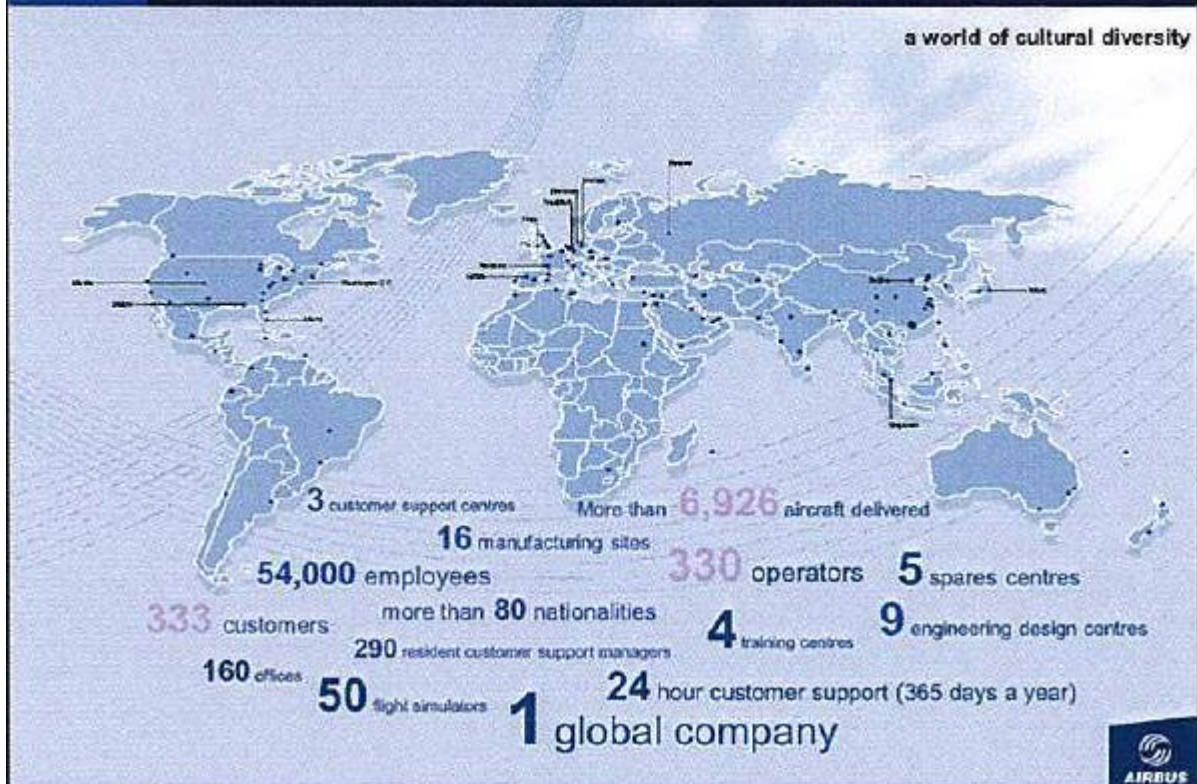
- Introduction
- Globalization
- Japan's Insularity
- Implications
- How to Develop Global Leaders
- Conclusions

Background

- Personal background:
 - ◆ U.S. citizen of Japanese ancestry working in Japan for a European company
- Professional background:
 - ◆ Academia, journalism, law, government, business, nonprofit sector
 - ◆ Companies: AT&T, Arthur D. Little, Cadence Design Systems, NCR, Airbus
 - ◆ United States, Asia, Europe
 - ◆ Global travel over 20 times a year

Airbus As a Global Company

a world of cultural diversity



Six Drivers of Globalization

- Political environment
- Demand-side factors
- Supply-side factors
- Technology
- Government policy
- Workforce factors

Political Environment

- **Fall of the Berlin Wall (Nov. 9, 1989)**
- **Diminution of political barriers, power of government to control the market**
- **Rise of market forces around the world**
- **Opening of markets for trade and investment**
- **Deploying scarce resources strategically to produce the best results**
- **Temporary impact of Sept. 11, 2001 and financial crisis of 2008**

Demand-side Factors

- **Rising power of customers—individuals and institutions (companies, governments)**
- **Customers want high performance, high quality, low price—for “any one, any where, any time” (e.g., BlackBerry)**
- **Meeting the requirements of demanding customers is a key to corporate success**
- **Producing superior products is not enough; services to support the products can be key**

Supply-side Factors

- **Actions of competitors**
- **Mergers, acquisitions, consolidations, strategic alliances—virtually all industries**
- **Scale of investment; barriers to entry; sophistication of technology; scarcity of people**
- **Industry lines are becoming blurred—e.g., Google, Microsoft, Yahoo, Apple, Sony**
- **Competition, Cooperation, Coopetition**
- **AT&T, NTT, BT, WorldCom, and MCI**

Technology

- **Use of technology to drive business growth**
- **Contributor to, and result of, globalization**
- **Information technology, transportation**
- **India—Silicon Valley, Wall Street, politics**
- **Productivity of individuals, efficiency of governments, competitiveness of companies**
- **Key strategic tool for competitiveness**
- **Cultural, social, and psychological factors in the effective use of technology**

Government Policy

- Deregulation, regulatory reform
- Telecommunications, financial services, pharmaceuticals, transportation, etc.
- Domestic, regional (APEC, NAFTA, EU), global (WTO)
- Changing the rules of competition
- Impact of FTAs, EPAs, EIAs, etc.
- Japan lagging behind South Korea in FTAs with the U.S. and with the EU

Workforce Factors

- Increasing *mobility* of labor
- Increasing *diversity* of labor
- Increasing *specialization* of labor
- Winning the “War for Talent”
- Nationality and gender no longer relevant
- Success of U.S. firms in India
- Underutilization of women, seniors, non-Japanese
- Scarcity of truly global talent in Japan

Japan's Insularity: Evidence

- Asian financial crisis (1997-1998)
- University of St. Gallen ISC (May 2000)
- Harvard Business School (Dec. 2004)
- A major Japanese foundation (Dec. 2004)
- Japan Management Association (Oct. 2008)
- Japanese students in the U.S. (47,073 in 1997 → 21,290 in 2010)
- Foreign students at Harvard University (227 → 463, 183 → 315, 151 → 101 from 1999 → 2009)
- U.S. business schools (HBS 18 → 7, SBS 8 → 3 from 1990 → 2010)
- Japanese students abroad (82,945 in 2004 → 66,833 in 2008)
- Asia Society Global Forum (June 2010)
- San Francisco Bay Area (August 2011)

Japan's Insularity: Causes

- Lack of interest in things foreign
- Comfort and complacency
- Tight job market
- Protective parents, risk averseness
- Role of the Internet
- Organizations not as affluent as before
- Companies afraid of employees being hired away
- Japanese applicants less competitive
- Little reward for studying abroad
- Paucity of global leaders as role models
- Mass media
- Educational system

Japan's Insularity: Caveats

- **Bifurcation of youth**
 - Hyper-global
 - Hyper-local
- **Bifurcation of companies, institutions**
 - Newcomer globals (e.g., Rakuten, Uniqlo, etc.)
 - Traditional domestics
- **Women more global than men**
- **Japanese companies starting to change**
- **Keizai Doyukai: globalization, diversity, innovation**
- **Who's fault is it?**

Implications

- **Academic study: Theory, methodology, empirical research**
- **Language**
- **Leadership development**
- **Global networks and communities**
- **Contributions to global rule-making, institutions, and infrastructure**
- **Recognition for global contributions**
- **Presence/appeal on the world stage**
- **Japan losing friends and supporters abroad**

Competitive Environment

- BRICs
- Asia
- Singapore EDB
- German states (e.g., Bavaria)
- Effects of March 11
 - Tourism to Japan
 - Global industrial supply chain
 - Exports from Japan
 - Foreign direct investment to Japan
 - Energy supply

Western Model of Leadership*

- Charisma
- Communication
- Honesty
- Vision
- Knowledge
- Passion

- Results

**Harvard Business School Bulletin, February 2001*

Attributes of Global Leaders (グローバルリーダーの要件)

Position Specification (求められている要件)

	Professional Attributes (専門的資質)	Personal Attributes (個人的資質)	
Professional Skills (職務能力)	<ul style="list-style-type: none"> • Business sense (ビジネスセンス) • Entrepreneurship/Autonomy (企/起業家精神) • Communication Skills (コミュニケーション力 multilingual, multicultural) • Crisis management ability (危機管理能力) • Creative, flexible problem-solving ability (創造力、柔軟な問題解決能力) • Information technology (情報技術) 	<ul style="list-style-type: none"> • Strategic (戦略的思考) • Logical/analytical (論理的思考) • Bright (頭脳明晰) • Articulate (説得力がある) • People-oriented (人間中心) • Self-reliant (自律・自立) • Sensitive to cultural diversity (異文化性) 	Basic Competencies (基礎的能力)
	<ul style="list-style-type: none"> • Global industry expertise (業界の知識) • 5-10 years of general management experience (5年-10年のP&Lの責任) • Sales & marketing experience (セールスとマーケティングの経験) • Overseas experience (海外経験) • Diversity management experience (多様性管理経験) 	<ul style="list-style-type: none"> • Dynamic/decisive (ダイナミック) • Energetic/charismatic (エネルギー感/カリスマ性がある) • Creative (創造的) • Flexible/agile (柔軟な) • Positive (前向きな) • Risk taker (リスクを取る) • Integrity (誠実さ) 	

How to Develop Global Leaders (1)

- **Thinking**
 - ◆ Logical thinking
 - ◆ Critical thinking
 - ◆ Strategic thinking
 - ◆ Creative thinking
 - ◆ Problem solving
- **Communicating**
 - ◆ Writing
 - ◆ Presenting
 - ◆ Discussing
 - ◆ Debating
 - ◆ Listening
 - ◆ Asking questions

How to Develop Global Leaders (2)

- **Managing Diversity**
 - ◆ Age
 - ◆ Gender
 - ◆ Nationality
 - ◆ Ethnicity
 - ◆ Religion
 - ◆ Physical condition
 - ◆ Sexual preference
- **Acquiring Global Experience**
 - ◆ Living abroad
 - ◆ Studying abroad
 - ◆ Working abroad
 - ◆ Learning and using foreign languages

Conclusions

- **Globalization**
- **Companies**
- **Government agencies**
- **Educational institutions**
- **Mass media**
- **Political leaders**
- **A sense of urgency?**