Driving Forces of Change

Globalization → CONTINUES

Government → GIVEN NEW PERMISSION

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The centerpiece of global integration is economics

AND

the game changing enabler is IT

Due to the globally integrated economy and IT, we are living in a very demand-oriented world and economy

The globally integrated economy is much more multi-dimensional

Mature ⟺ Mature

Mature ⟺ Growth

Growth ⟺ Growth

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A Changed World → Economic Leaders

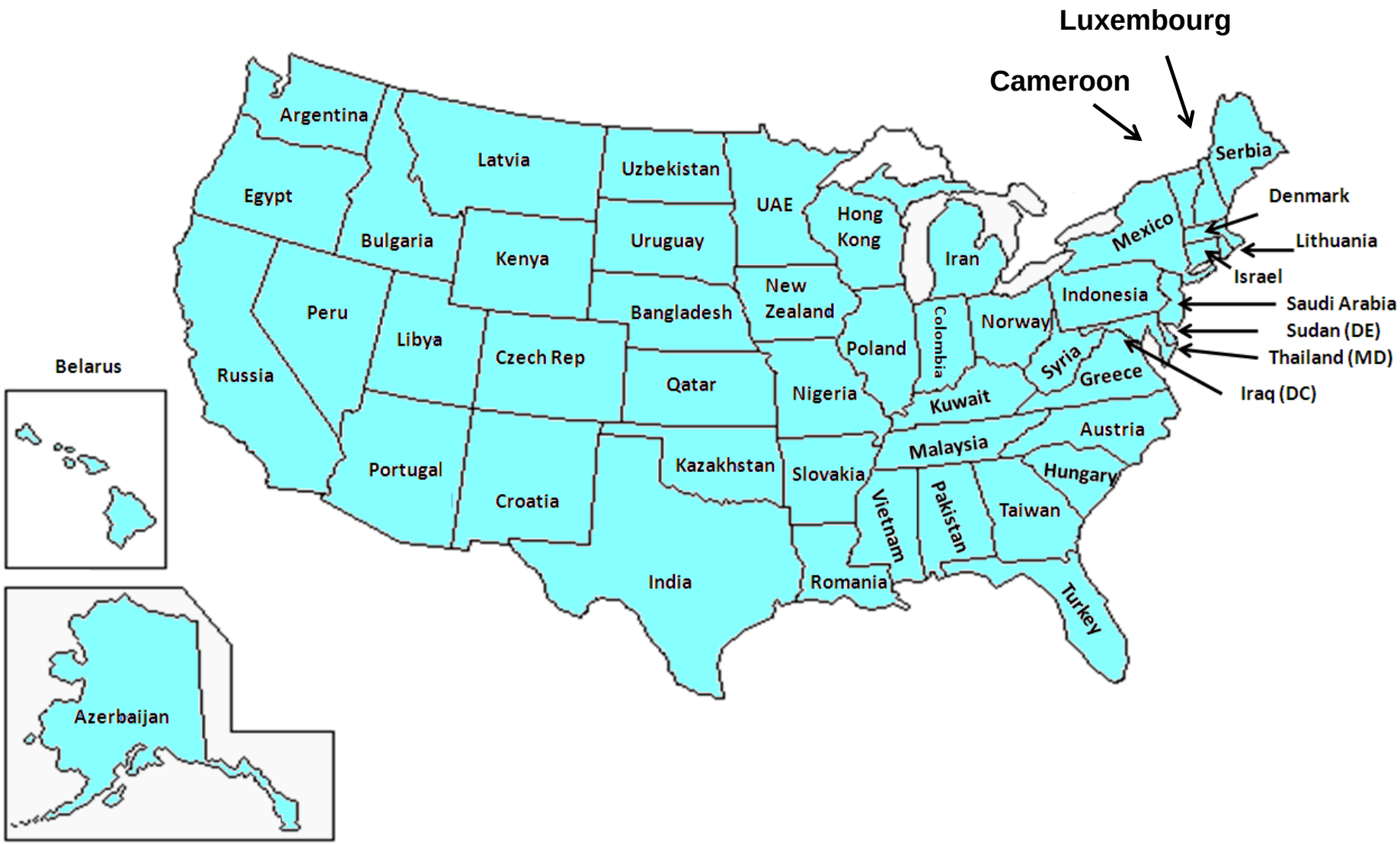
- The "Trillion Dollar Club*" refers to the group of economies whose GDP in 2008 exceeded one trillion dollars:

Country	GDP (PPP)
USA	14.29
China	7.80
Japan	4.35
India	3.27
Germany	2.86
UK	2.23
Russia	2.23
France	2.10
Brazil	1.99
Italy	1.82
Mexico	1.56
Spain	1.38
Canada	1.31
South Korea	1.28

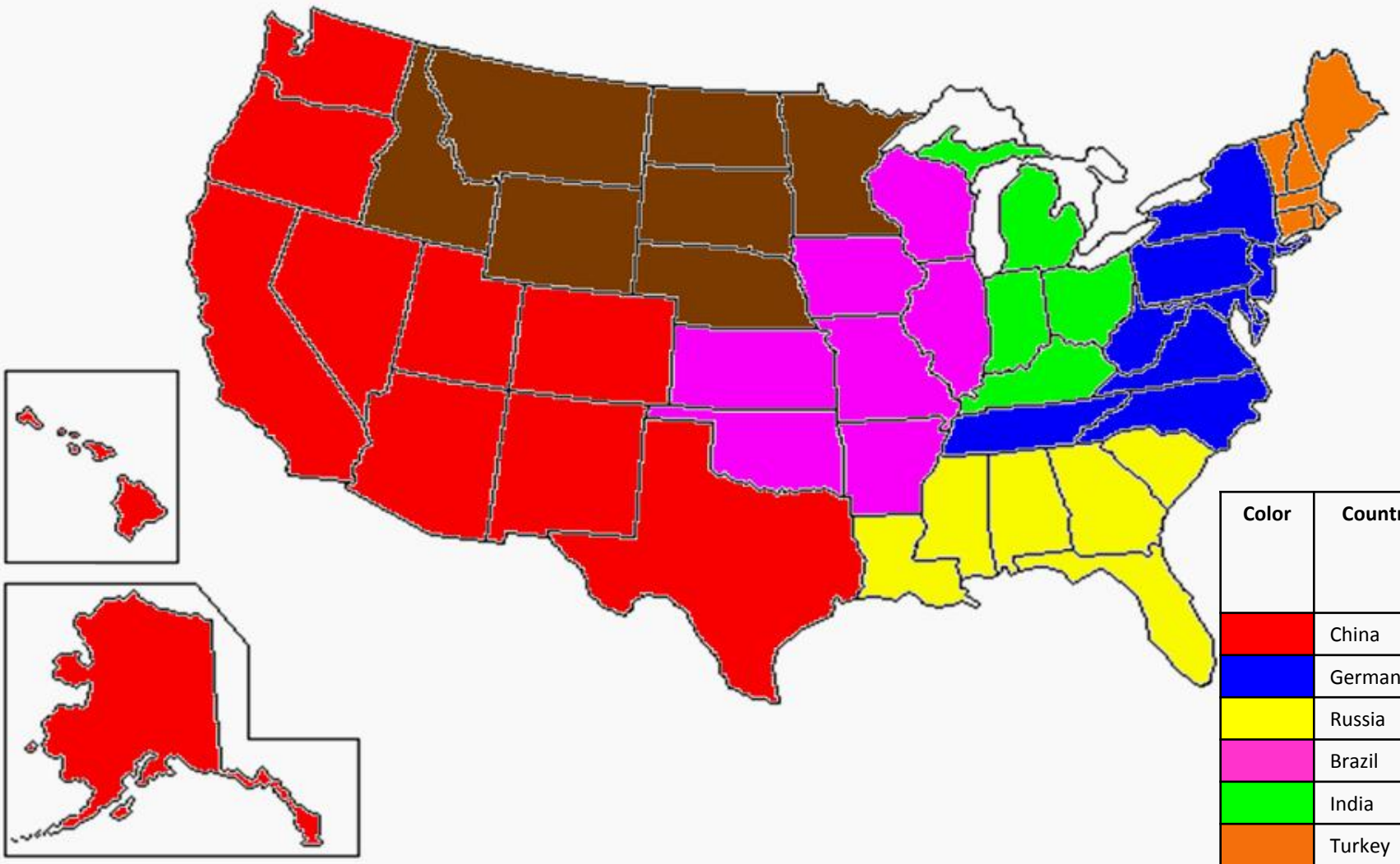
*Peterson Institute for International Economics, September 23, 2008

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US States' GDPs and Corresponding National GDPs

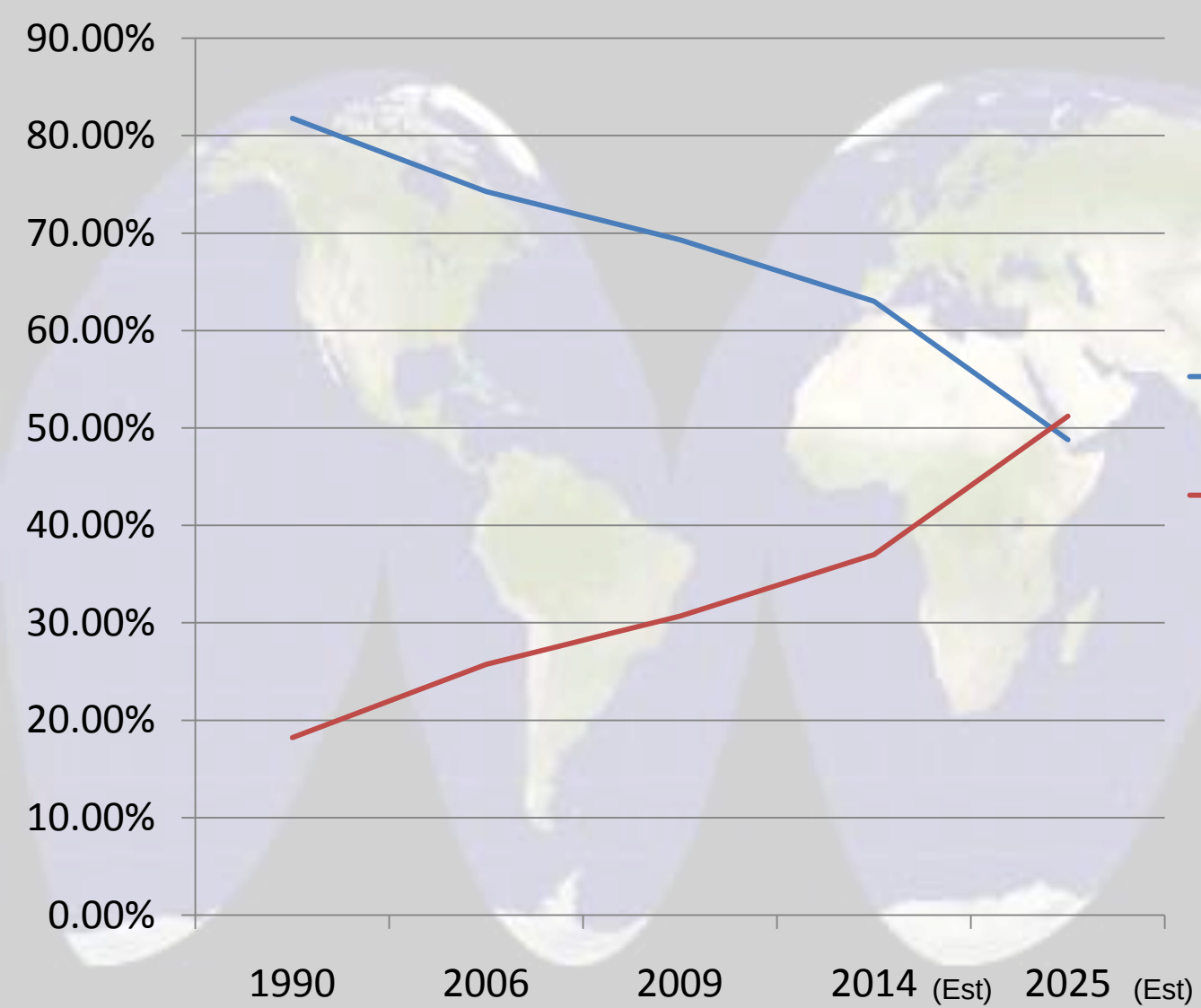


Key World Economies' GDP as a Portion of the U.S. Economy



Color	Country	GDP 2008 (Trillions US$)
	China	4.4
	Germany	3.67
	Russia	1.68
	Brazil	1.57
	India	1.21
	Turkey	.729
	Indonesia	.511

A Changed World → Shares of World GDP



Note: The 2014 data has been estimated by the IMF, while the 2025 data has been extrapolated from the IMF estimations.

Source: 2009 IMF

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A Changed World → GDP Growth and Crisis Impact

Country	Pre-crisis	Crisis	Future
	2007	2009	2011
China	12.00%	6.50%	8.50%
India	9.00%	5.10%	8.50%
Egypt*	7.10%	3.80%	5.00%
Brazil	5.70%	-1.10%	4.10%
South Africa*	5.10%	-1.50%	4.10%
Canada	2.70%	-2.70%	2.50%
Spain	3.80%	-3.00%	2.00%
USA	2.00%	-3.00%	2.50%
France	2.30%	-3.50%	1.80%
South Korea	5.10%	-5.00%	5.00%
UK	3.00%	-5.00%	2.00%
Italy	1.50%	-5.00%	1.50%
Mexico	3.30%	-5.80%	3.00%
Germany	2.60%	-5.80%	2.10%
Japan	2.30%	-6.80%	2.00%
Russia	8.10%	-7.50%	3.00%

- Developing nations have generally exhibited an ability to weather economic downturn better than have the developed nations.

AND

- Are forecast for more robust growth in 2011



= Developed Nation
(G7, EU, CIA Advanced Economy)

= Developing Nation

Source: 2009 IMF

*Not Members of the "Trillion Dollar Club", included for further illustration only.

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A Changed World → Current Account Balance / External Debt, 2008

	Current Account Balance (Billions US$)	External Debt (Billions US$)	External Debt % of GDP
India	-38.39	163.8	5.01%
China	368.2	420.8	5.39%
Egypt *	1.48	28.84	6.51%
South Africa*	-21.67	39.69	8.10%
Mexico	-13.45	181.2	11.62%
Brazil	-27.33	236.6	11.89%
Russia	976	527.1	23.69%
South Korea	-6.41	380.5	29.77%
Japan	187.8	1,492	34.31%
Canada	12.82	758.6	58.04%
Italy	-68.82	1,060	58.21%
USA	-568.8	12,250	85.72%
Germany	267.1	4,489	156.79%
Spain	-152.5	2,478	179.83%
France	-58	5,370	256.08%
UK	-72.54	10,450	468.40%

- The developing economies' all have a lower external debt as a percentage of GDP than the developed economies'.

- The average current account balance of the developing economies is 207.2 Billion US$. The average current account balance of the developed economies is -51 Billion US$.

Source: 2009 CIA

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