

Interim report of the questionnaire survey

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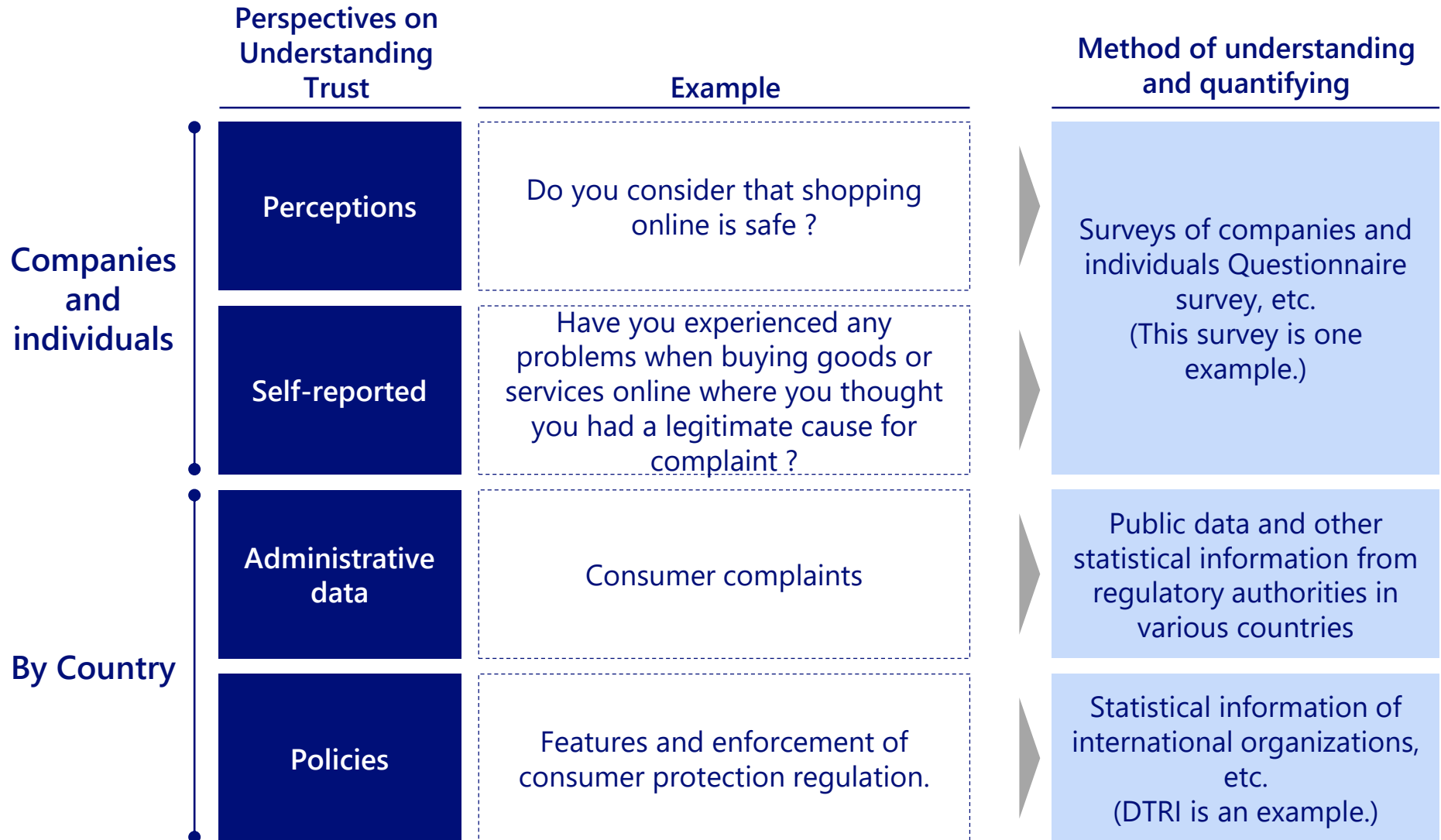
■ Outline of the survey

- Countries surveyed: India, Indonesia, Vietnam, Philippines, Malaysia, Singapore, Thailand, Taiwan (8 countries)
- Survey period: January 2021 - Present (Survey via ASOCIO started in January 2021)
- Survey method: 1) Survey questionnaires were sent to companies in each country via ASOCIO member organizations 2) Survey questionnaires were sent to companies in each country via MX (Market Xcel), a group company of NRI India
- Number of questionnaires collected: Survey Method 1) 96 (including 80 from Vietnam)
Survey Method 2) 400 (20 x 8 countries)

■ Questionnaire

- Number of questions: Up to 18
- Questions: Respondents' attributes, status of cross-border data transfer, awareness of regulations on cross-border data transfer, etc.

Perspectives on Measuring Reliability in Digital Environments

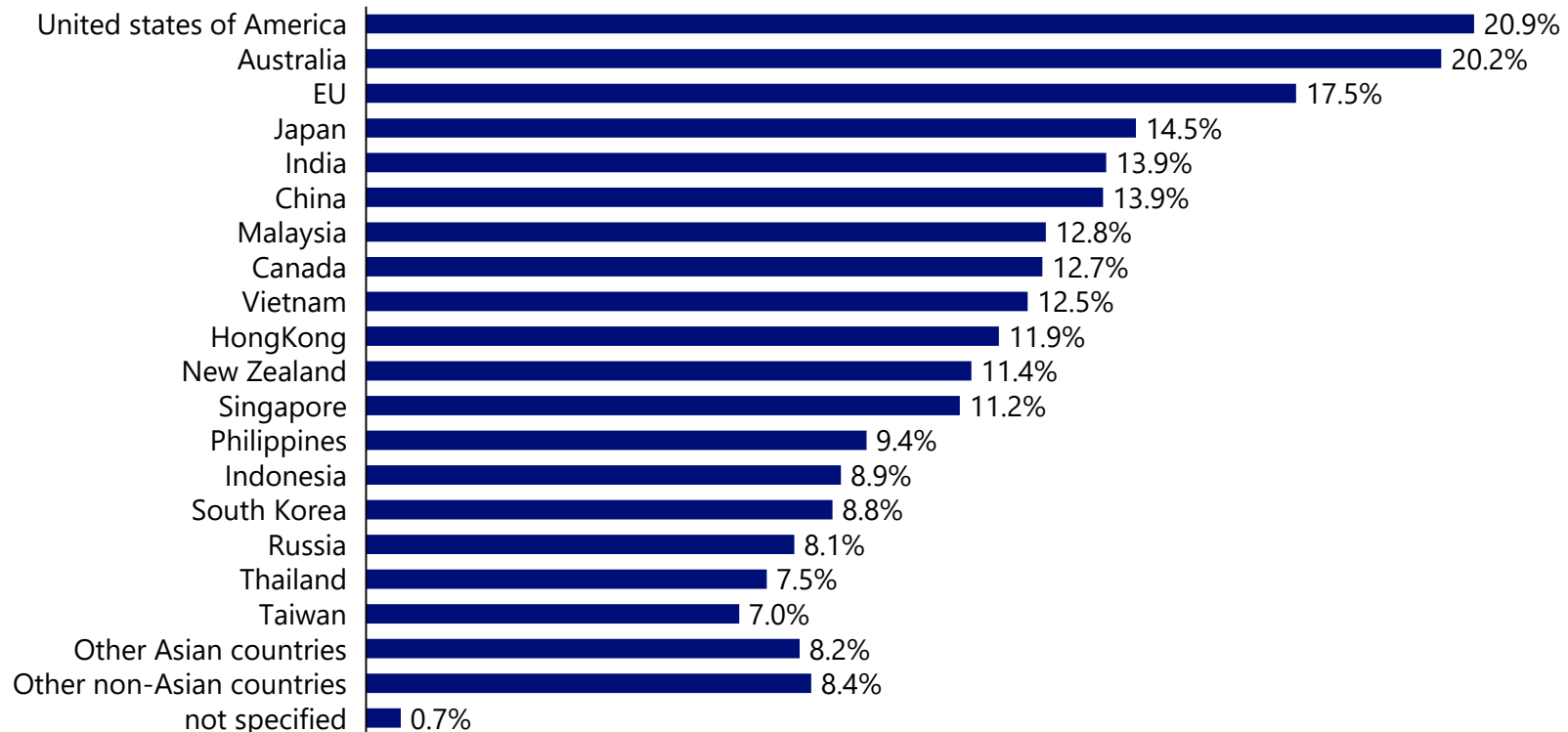


The countries which are frequent destinations for the cross-border data transfer

- The top countries for frequent data transfers are developed countries and countries with large economies, such as the US, Australia, and EU countries.
- On the other hand, the countries ranked lower are those with relatively small economies or countries that are physically far from Asia.

Q11. Please select the countries which are frequent destinations for the cross-border data transfer? (Select from the most frequent up to three) (N=385.4)

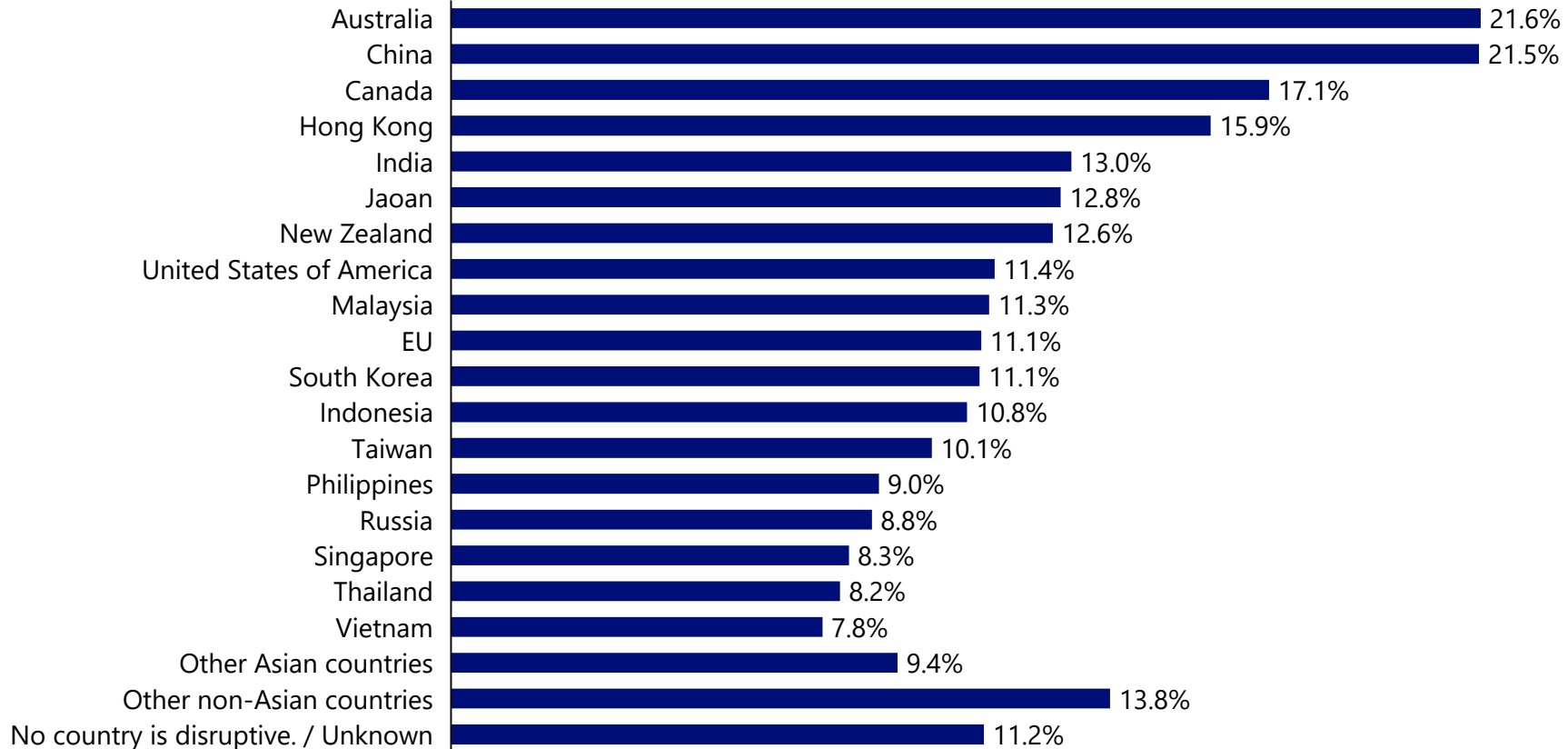
※ For the eight countries to which the questionnaire was distributed, the respondents were not allowed to select their own country.



The countries which have business disruptive regulations

- Australia, China, Canada, etc. were listed as the top countries where regulations are inhibiting, while few companies chose Singapore, Thailand, Vietnam, etc. as countries where regulations are disruptive.

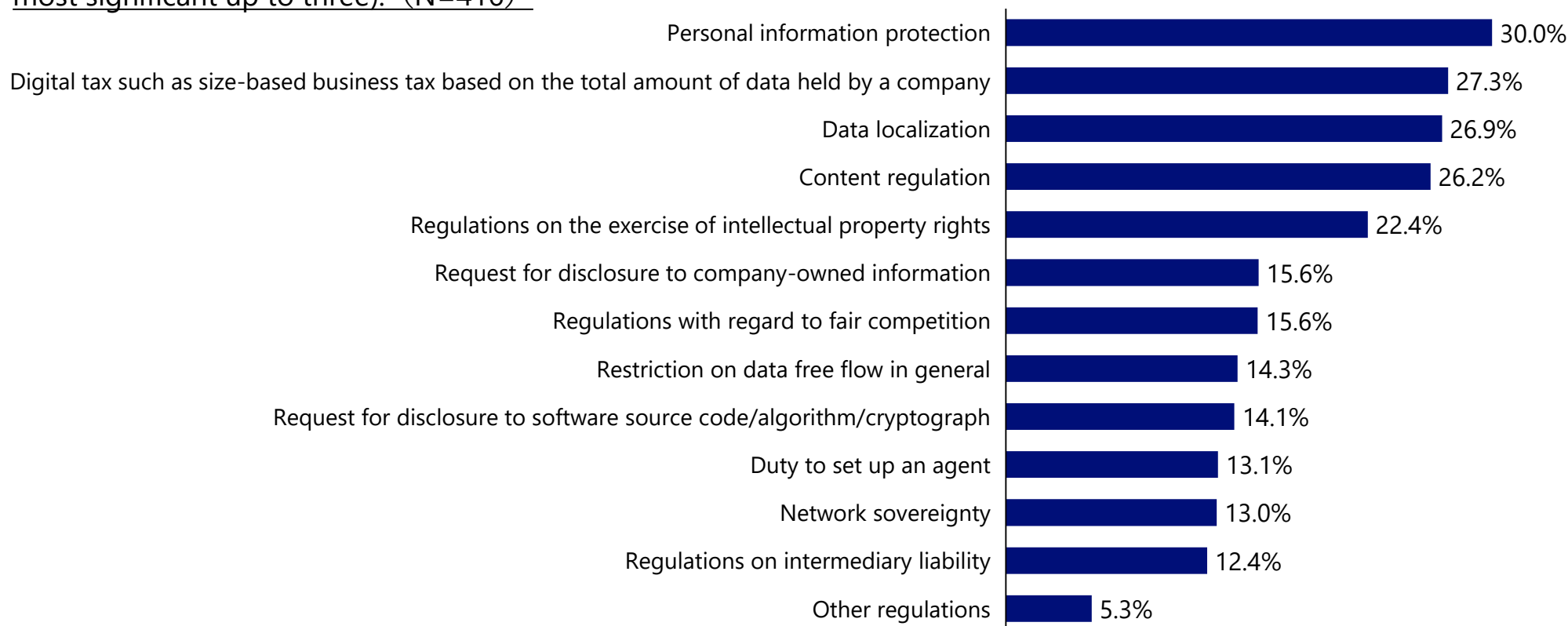
Q14. Please select the countries which have business disruptive regulations on cross-border data transfers. (Select up to 3 from the top.) (N = 416)



Regulations that have a significant impact on business (other countries)

- Among the regulations in other countries, digital taxation and data localization, including personal information protection and external standard taxation based on the total amount of data held, are cited as inhibiting regulations.
- On the other hand, few companies cite intermediary liability and network sovereignty as disincentive regulations.

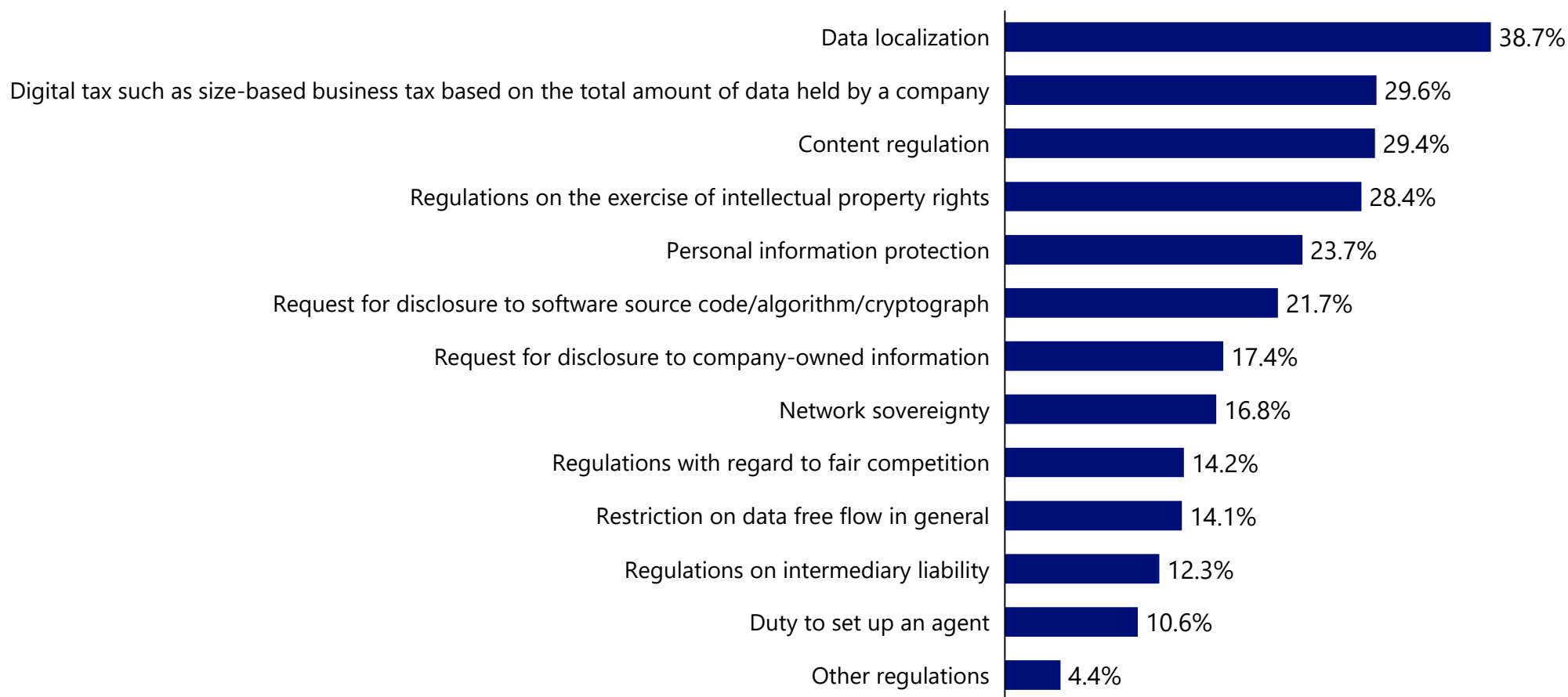
Q15. Which of the following regulations of your country have negative impact on your business? (Select from the most significant up to three). (N=416)



Regulations that have a significant impact on business (one's own country)

- Among the regulations in their own country, data localization was cited as the most disincentive, while few companies cited the obligation to establish an agent or intermediary liability as regulations with a disincentive impact.

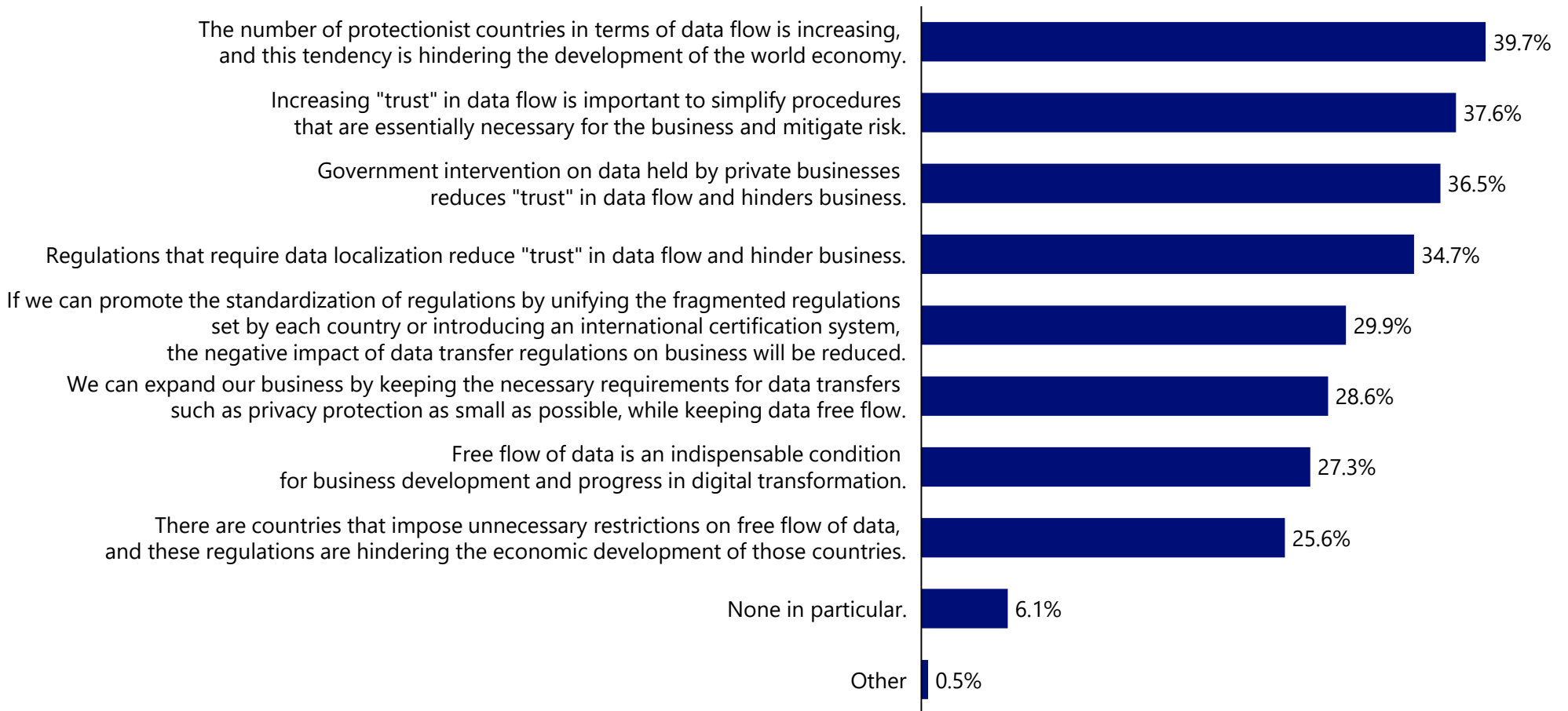
Q16. What are your thoughts on regulations on cross-border data transfer? (*Please select up to three.) (N=416社)



Thoughts on regulations on cross-border data transfer

- About 40% of companies agree with the idea that "an increasing number of countries are becoming protectionist when it comes to data distribution, and this is hindering the development of the global economy."

Q17. What are your thoughts on regulations on cross-border data transfer? (*Please select up to three.) (N=416)



Comparison of this study and DTRI (Digital Trade Restrictiveness Index) of ECIPE

- There is a discrepancy between the disincentive points in this survey and DTRI of ECIPE.
- We will be doing additional analysis for countries such as Australia and Canada.

