

Questionnaire

2008 Survey of Japanese-Affiliated Firms in Asia and Oceania (Manufacturing Industry)

1. This survey is conducted annually to understand the business activities in Japanese-affiliated Firms (i.e., companies with over 10% of Japanese direct/indirect investment ratio). As the objective of the survey is to ask business environments, we kindly ask you to answer from local subsidiary's point of view. Please note that "your company" refers to the local subsidiary in this survey.
2. No individual company information will be publicized as your answers will be dealt as statistical figures.
3. If you should have any questions regarding the survey, please contact the persons below.

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Corporate Information (Sections with "*" must be completed.)

Country/Region *:

- | | | |
|--------------------------------------|-------------------------------------|------------------------------------|
| <input type="checkbox"/> Indonesia | <input type="checkbox"/> Malaysia | <input type="checkbox"/> Myanmar |
| <input type="checkbox"/> Philippines | <input type="checkbox"/> Singapore | <input type="checkbox"/> Thailand |
| <input type="checkbox"/> Vietnam | <input type="checkbox"/> Bangladesh | <input type="checkbox"/> India |
| <input type="checkbox"/> Pakistan | <input type="checkbox"/> Sri Lanka | <input type="checkbox"/> Australia |
| <input type="checkbox"/> New Zealand | | |

Company Name*:

(In English)

Name*:

Title:

Telephone Number*:

Fax Number:

E-mail*:

If your company's Japanese direct/indirect investment ratio is 10% or less than 10%, click the button below to exit the survey.

Industry* (Please choose an industry from the list below.)

- Foods, processed agricultural or marine products
- Textiles (yarn, cloth, synthetic fabrics)
- Apparel and textile products
- Lumber and wood products
- Furniture and interior products
- Paper and pulp
- Chemicals

- Petroleum products
- Plastic products
- Pharmaceuticals
- Rubber products
- Ceramics and cement
- Iron and steel (including cast and forged products)
- Nonferrous metals and products
- Fabricated metal products (including plated products)
- General machinery (including metal molds and machine tools)
- Electric machinery and electronic equipment
- Electric and electronic parts and components
- Motor vehicles and motorcycles
- Motor vehicle and motorcycle parts and accessories
- Precision instruments
- Other ()

Type of Operation: (Please select the main customers for your company's major product.)

- Companies General consumers Other ()

Number of Employees*: (Please fill out the current total number of the employees including permanent employees, temporary staff, and contracted employees.)

_____ persons

Start-up year*: _____

- Decrease in local market sales
- Reduction in sales due to higher prices
- Increase in procurement costs
- Reduction in sales due to exchange rate fluctuations
- Increase in personnel expenses
- Hike in interest rates
- Insufficient price transfer
- Increase in fuel costs and utilities (electricity, gas, etc.)
- Other ()

2. Questions about Exports/Imports

Q8 What is the percentage of export sales out of total sales for your local company?

- 0%
- 1% to less than 10%
- 10% to less than 20%
- 20% to less than 30%
- 30% to less than 40%
- 40% to less than 50%
- 50% to less than 60%
- 60% to less than 70%
- 70% to less than 80%
- 80% to less than 90%
- 90% to less than 100%
- 100%

Indirect exports are to be excluded, while exports of products via sales agents or companies in the location (country) of your local company are to be included in the export amount.

Q9 What is the breakdown of your export destinations? (100 = total export amount)

	0%	1% to less than 10%	10% to less than 20%	20% to less than 30%	30% to less than 40%	40% to less than 50%	50% to less than 60%	60% to less than 70%	70% to less than 80%	80% to less than 90%	90% to less than 100%	100%
Japan	<input type="checkbox"/>											
ASEAN	<input type="checkbox"/>											
Mainland China	<input type="checkbox"/>											
Other Asian countries	<input type="checkbox"/>											
Oceania	<input type="checkbox"/>											
US	<input type="checkbox"/>											
Europe	<input type="checkbox"/>											
Middle East	<input type="checkbox"/>											
Other	<input type="checkbox"/>											

Q10 In East Asia, there are various bilateral and multilateral free trade agreements (FTAs) and economic partnership agreements (EPAs). The following questions are about your company's use of such agreements.

Q10-1 Answer this question only if your company engages in export/import activities. Does your company currently use any existing bilateral or multilateral FTAs or EPAs (i.e., those already in force) for import or export activities (including advance tariff reduction measures and early harvest programs*)?

- Exports (Currently in use[=> Go to Q10-2] Considering using[=> Go to Q10-3]
 No plan to use [=> Go to Q10-4])
- Imports (Currently in use[=> Go to Q10-2] Considering using[=> Go to Q10-3]
 No plan to use[=> Go to Q10-4])

* "Early Harvest" refers to an early reduction in customs tariff on specified items.

Q10-2 In Q10-1, if you answered "Currently in use," please select all export/import record and FTA/EPA below that you currently use.* [=> Go to Q10-3]

Sample (Australia)

FTA/EPA Signatories	Company has Export Record		Company has Import Record	
		Company is using FTA/EPA		Company is using FTA/EPA
Australia / New Zealand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Australia / Singapore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Australia / Thailand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outside Australia / Asia / Oceania	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q10-3 In Q10-1, if you answered “Currently in use” or “Considering using,” please select the percentage of result in differences between general duty and FTA duty which would cause you to consider using an FTA (or which caused you to decide to use an FTA). [⇒ Go to Q11]

- 1% or less
- 1% to less than 3%
- 3% to less than 5%
- 5% to less than 7%
- 7% to less than 9%
- 9% to less than 10%
- 10% or above

Q10-4 In Q10-1, if you answered “No plan to use,” please select the reason(s). **(Select all that apply)**

No plan to use FTA/EPAs for exports:

- No advantages to an FTA since the general duty on the export destinations is low
- No advantages to an FTA since the export destinations are exempt from payment of import duty
- Rules of Origin create too many obstacles
- Cost incurred in screening and issuance of certificates of origin
- Complicated procedures involved in obtaining certificates of origin
- Obtaining the necessary documents is impossible since our parts-supplying companies are not aware of FTA/EPAs
- Complexity arising because existing FTA/EPA regulations vary in different countries of origin
- No FTA or EPA exists with the export destinations
- Other ()

No plan to use FTA/EPAs for imports:

Already enjoy exemption from tariffs through investment benefit schemes (EPZ, investment incentives, etc.)

[⇒ Go to Q10-5]

- Insignificance of domestic sales on which tariffs are charged
- Our parts-supplying companies are not aware of FTA/EPAs
- Application of an FTA is not allowed in intermediate trade
- No advantages to an FTA since general duty is low
- No advantages to an FTA since the FTA duty is progressively lowered, minimizing the difference between it and the general duty
- No FTA or EPA exists with the import origins
- Other ()

Q10-5 In Q10-4, under “No plan to use FTA/EPAs for imports,” if you answered “Already enjoy exemption from tariffs through investment benefit schemes (EPZ, investment incentives, etc.),” then you incur management costs when utilizing the benefit scheme, such as for management of raw materials inventories and reports to the government. What are these management costs as a percentage of the raw materials’ import value?

- 1% or less
- 1% to less than 3%
- 3% to less than 5%
- 5% to less than 7%

- 7% to less than 9%
- 9% to less than 10%
- 10% or above

3. Questions about Procurement of Raw Materials and Parts

Q11 What is the ratio of the cost of raw materials and parts to the manufacturing cost* of major items produced by your local company? **(On a monetary base; 100 = estimated manufacturing cost ratio for 2008)**

- Less than 50%
- 50% to less than 60%
- 60% to less than 70%
- 70% to less than 80%
- 80% to less than 90%
- 90% or above

* **“Manufacturing cost”** refers to the total cost of manufacturing products and includes the cost of raw materials, labor costs, and other costs incurred at the manufacturing site.

Q12-1 What is the breakdown of your procurement sources? **(100 = total amount procured)**

	0%	1% to less than 10%	10% to less than 20%	20% to less than 30%	30% to less than 40%	40% to less than 50%	50% to less than 60%	60% to less than 70%	70% to less than 80%	80% to less than 90%	90% to less than 100%	100%
Local	<input type="checkbox"/>											
Japan	<input type="checkbox"/>											
ASEAN	<input type="checkbox"/>											
Mainland China	<input type="checkbox"/>											
Other Asian countries	<input type="checkbox"/>											
Oceania	<input type="checkbox"/>											
US	<input type="checkbox"/>											
Europe	<input type="checkbox"/>											
Middle East	<input type="checkbox"/>											
Other	<input type="checkbox"/>											

Q12-2 If you selected “Local” as a procurement source in Q12-1, what is the breakdown of your local procurement sources?

(100= total amount procured locally)

	0%	1% to less than 10%	10% to less than 20%	20% to less than 30%	30% to less than 40%	40% to less than 50%	50% to less than 60%	60% to less than 70%	70% to less than 80%	80% to less than 90%	90% to less than 100%	100%
Japanese-affiliated companies	<input type="checkbox"/>											
Local companies	<input type="checkbox"/>											
Other foreign-affiliated companies	<input type="checkbox"/>											

Q13 What is your plan(s) for procuring raw materials and parts in the future? **(Select all that apply)**

- Increase ratio of local procurement
- Increase ratio of procurement from ASEAN
- Increase ratio of procurement from China
- Increase ratio of procurement from Japan
- Maintain current ratios of local procurement
- Other ()

Q14 What factor(s) is necessary to increase local procurement ratios of raw materials and parts? **(Select all that apply)**

- Quality improvement by local suppliers
- Cost reduction by local suppliers
- Strict observance of delivery dates by local suppliers
- Design changes in products manufactured by your local company
- Localization of inspection and technological certification control divisions
- Localization of design and research & development divisions
- Improvement in the local logistical and transportation infrastructure
- Improvement in the logistical and transportation infrastructure in ASEAN

- Expansion of affiliated suppliers into the local area
- Other ()

Q15 What percentage of the total amount of raw materials and parts imported by your company is not subject to tariffs?*

(100 = total amount procured from other countries)

- 0%
- 1% to less than 10%
- 10% to less than 30%
- 30% to less than 50%
- 50% to less than 70%
- 70% to less than 90%
- 90% to less than 100%
- 100%

*“Tariffs” refers to the taxes that apply to all imports in accordance with the laws of the country but excludes value-added tax and other inland duties apply in principle.

Q16 If your affiliated company is also manufacturing (or considering manufacturing) in China, please answer this question concerning the main products manufactured by your company. Assuming that the manufacturing cost for the same product at an affiliated company in China is 100, what is the ratio of the manufacturing cost in the country where your local company is located?

- Less than 80%
- 80% to less than 90%
- 90% to less than 100%
- 100% to less than 110%
- 110% to less than 120%
- 120% to less than 130%
- 130% to less than 140%
- 140% to less than 150%
- 150% or above

4. Questions about Business Problems

The following questions ask which issues in each of the following categories you perceive as particularly serious business problems for your company in the country where it is located. Please select all answers that apply for each category.

Q17 Problem(s) in sales or other business activities (**Select all that apply**)

- Decrease in production orders from headquarters
- Decrease in orders from clients
- Major clients requesting lower prices
- Sluggishness in major sales markets (consumption downturn)
- No increase in new clients or markets
- Decrease in sales prices due to global oversupply
- Inflow of cheap imported goods into local markets
- Competitors' growing market shares (quality-wise competition)
- Accounts receivable in arrears
- Other ()

Q18 Problem(s) in production (**Select all that apply**)

- Insufficient production capacity due to lack of facilities
- Limited cost-cutting measures available
- Increase in procurement costs

- Difficulty in local procurement of parts and raw materials
- Difficulty in changeover of production items within a short timeframe
- Difficulty in quality control
- High customs duties on imported capital goods and intermediary goods
- Stricter environmental regulations
- Electric power shortage
- Other ()

Q19 Problem(s) in financial affairs, financing, or foreign exchange (**Select all that apply**)

- Shortage of cash flow necessary for capital investment
- Difficulty in procuring funds from local financial institutions
- Volatility of local currency's exchange rate against the US dollar
- Volatility of local currency's exchange rate against the Japanese yen
- Volatility of the Japanese yen against the US dollar
- Restrictions on fund procurement and settlements
- Tax burdens (i.e. corporate taxes and transfer pricing taxes)
- Rising interest rates
- Other ()

Q20 Problem(s) with labor or employment (**Select all that apply**)

- Increase in employee wages
- Difficulty in recruiting general staff
- Difficulty in recruiting middle management staff
- Difficulty in recruiting engineer staff
- Low rate of worker retention
- Personnel costs of Japanese (expatriate) officers and staff
- Restrictions on staff dismissal and reduction
- Difficulty in localizing managers and site supervisors
- Restrictions on employing foreign workers
- Other ()

Q21 Problem(s) in the investment environment (**Select all that apply**)

- Unstable or insecure political or social conditions
- Underdeveloped infrastructure (electric power, transportation, communications, etc.)
- Unclear policy management by the local government
- Complicated administrative procedures (to acquire permits, etc.)
- Complicated tax procedures
- Undeveloped economic and legal systems, and arbitrary application of the legal system
- Restrictions on foreign investment including restrictions on foreign capital ratio
- Lack of protection of intellectual property rights
- Lowering of custom tariff levels (including the lowering of custom tariff due to FTA/EPA)
- Other ()

Q22 Problem(s) in the foreign trade system (**Select all that apply**)

- Complicated customs clearance procedures
- Time-consuming customs procedures
- Lack of thorough publicizing of trade rules and regulations
- Method of assessment of customs duties is unclear
- Criteria for determining classification for customs duties are obscure
- Unclear inspection system
- High non-tariff barriers*
- Strict quarantine system
- Other ()

* Non-tariff barriers other than tariffs to curb imports and are used to protect domestic industries from imported goods. They include quantitative trade restrictions and means not directly related to trade, such as production subsidies and consumption tax.

5. Questions about Competitiveness

Q23 Which country or region do you currently see as your main source of competitors in selling products in your local market? (Select the nationality of the company, not the country or region where the products are manufactured.) **Please select only one answer and exclude Japanese companies in the same line of business.** *Response to this question is unnecessary if your company's export ratio is 100%.

- | | | |
|---|---|-------------------------------------|
| <input type="checkbox"/> Indonesia | <input type="checkbox"/> Malaysia | <input type="checkbox"/> Myanmar |
| <input type="checkbox"/> Philippines | <input type="checkbox"/> Singapore | <input type="checkbox"/> Thailand |
| <input type="checkbox"/> Vietnam | <input type="checkbox"/> Other ASEAN countries() | <input type="checkbox"/> Bangladesh |
| <input type="checkbox"/> India | <input type="checkbox"/> Pakistan | <input type="checkbox"/> Sri Lanka |
| <input type="checkbox"/> Other Southwest Asian countries() | <input type="checkbox"/> Australia | <input type="checkbox"/> Taiwan |
| <input type="checkbox"/> New Zealand | <input type="checkbox"/> China | <input type="checkbox"/> Other () |
| <input type="checkbox"/> South Korea | <input type="checkbox"/> Europe | |
| <input type="checkbox"/> US | | |
| <input type="checkbox"/> No competitors | | |

Q24 What is the main reason(s) for the competitiveness of such companies? (Select all that apply)

- Price
- Quality
- Branding
- Aggressive capital investment
- Excellent human resources
- Large range of products
- R&D capabilities
- Marketing (including sales networks and business tie-ups with other companies)
- Strong network of companies/individuals in the country
- Other ()

Q25 What countermeasure(s) will your company take (or is planning to take) against your competitors? (Select all that apply)

- Strengthen R&D capabilities
- Expand facilities
- Enhance added value of products
- Reduce price
- Launch new products or models
- Bolster sales and marketing capabilities (including acquisition of customers in new fields and expansion of the sales network)
- Enhance after-sales service
- Improve efficiency of logistics
- Focus and concentrate on existing products/operations
- Other ()

6. Questions about Future Business Development

Q26 What is the most appropriate direction for your company's business development over the next one to two years?

- | | | | |
|------------------------------------|-------------------------------------|-------------------------------------|---|
| <input type="checkbox"/> Expansion | <input type="checkbox"/> Status quo | <input type="checkbox"/> Downsizing | <input type="checkbox"/> Move to a third country (region) or withdraw |
| [⇒ Go to Q27-1] | [⇒ Go to Q28] | [⇒ Go to Q27-2] | [⇒ Go to Q27-2] |

Q27-1 If you selected "Expansion" in Q26, please select the specific business plan(s). (Select all that apply) [⇒ Then go to Q28]

- Expansion of business size through additional investments
- Enhancement of high added-value production items
- Expansion (diversification) of production items
- Strengthening of design, research, and development functions
- Production consolidation of specific manufacturing items in your local company
- Other ()

Q27-2 If you selected “Downsizing” or “Move to a third country (region) or withdraw” in Q26, please select the specific policy.

- Integrate the bases within the local country (region) [=⇒ Go to Q28]
- Move the production base to a third country (region) [=⇒ Go to Q27-3]
- Transfer the production of certain items to an affiliate in a third country (region) [=⇒ Go to Q27-3]

Q27-3 If you selected either “Move the production base to a third country (region)” or “Transfer the production of certain items to an affiliate in a third country (region)” in Q27-2, please select the possible place(s) where you will be relocating to.

(Select all that apply)

- | | | |
|--|--|--------------------------------------|
| <input type="checkbox"/> Indonesia | <input type="checkbox"/> Malaysia | <input type="checkbox"/> Myanmar |
| <input type="checkbox"/> Philippines | <input type="checkbox"/> Singapore | <input type="checkbox"/> Thailand |
| <input type="checkbox"/> Vietnam | <input type="checkbox"/> Other ASEAN countries () | <input type="checkbox"/> Bangladesh |
| <input type="checkbox"/> India | <input type="checkbox"/> Pakistan | <input type="checkbox"/> Sri Lanka |
| <input type="checkbox"/> Other Southwest Asian countries () | | <input type="checkbox"/> Australia |
| <input type="checkbox"/> New Zealand | <input type="checkbox"/> Japan | <input type="checkbox"/> China |
| <input type="checkbox"/> Hong Kong | <input type="checkbox"/> Taiwan | <input type="checkbox"/> South Korea |
| <input type="checkbox"/> US | <input type="checkbox"/> Europe | <input type="checkbox"/> Other |

()

Q27-4 Please select the reason(s) why you have decided to move to the location chosen in Q27-3. **(Select all that apply)**

- Size of the market
- Growth prospects and potential of the market
- Competitive strengths of your company in the market
- Absolute number of suppliers in the market
- Administrative and operation costs
- Level of wages
- Quality of human resources
- Other ()

Q28 In the medium to long term (5 to 10 years), which country or region (including your current country (region)) do you see as the optimum location for your company’s operations / production base? What roles or functions do you expect your optimum production base to fulfill for your company?

Q28-1 The optimal production base is: **(Select one answer)**

- | | | |
|--|--|--------------------------------------|
| <input type="checkbox"/> Indonesia | <input type="checkbox"/> Malaysia | <input type="checkbox"/> Myanmar |
| <input type="checkbox"/> Philippines | <input type="checkbox"/> Singapore | <input type="checkbox"/> Thailand |
| <input type="checkbox"/> Vietnam | <input type="checkbox"/> Other ASEAN countries () | <input type="checkbox"/> Bangladesh |
| <input type="checkbox"/> India | <input type="checkbox"/> Pakistan | <input type="checkbox"/> Sri Lanka |
| <input type="checkbox"/> Other Southwest Asian countries () | | <input type="checkbox"/> Australia |
| <input type="checkbox"/> New Zealand | <input type="checkbox"/> Japan | <input type="checkbox"/> China |
| <input type="checkbox"/> Hong Kong | <input type="checkbox"/> Taiwan | <input type="checkbox"/> South Korea |
| <input type="checkbox"/> US | <input type="checkbox"/> Europe | <input type="checkbox"/> Other |

()

Q28-2 Please select the core role(s) or function(s) that you seek in your ideal production base selected in Q28-1. **(Select all that apply)**

- Production base for general-purpose goods for the domestic market
- Production base for high value-added products for the domestic market

- Production base for inexpensive general-purpose goods for export to a third country
- Production base for high value-added products for export to a third country
- Base where R&D is also conducted (for specification changes for the local market)
- Base where R&D is also conducted (for development of new products)
- Base to provide products to other countries and regions making use of FTA/EPAs
- Other ()

Q29 Which country(ies)/region(s) shows potential as a market for your company's operations/products in the medium to long term (5 to 10 years)? (Select up to 3 answers)

Country(ies)/region(s) on which you will concentrate as a market for sales of products manufactured by your company in the medium to long term (5 to 10 years):

- | | | |
|--|--|--------------------------------------|
| <input type="checkbox"/> Indonesia | <input type="checkbox"/> Malaysia | <input type="checkbox"/> Myanmar |
| <input type="checkbox"/> Philippines | <input type="checkbox"/> Singapore | <input type="checkbox"/> Thailand |
| <input type="checkbox"/> Vietnam | <input type="checkbox"/> Other ASEAN countries () | <input type="checkbox"/> Bangladesh |
| <input type="checkbox"/> India | <input type="checkbox"/> Pakistan | <input type="checkbox"/> Sri Lanka |
| <input type="checkbox"/> Other Southwest Asian countries () | | <input type="checkbox"/> Australia |
| <input type="checkbox"/> New Zealand | <input type="checkbox"/> Japan | <input type="checkbox"/> China |
| <input type="checkbox"/> Hong Kong | <input type="checkbox"/> Taiwan | <input type="checkbox"/> South Korea |
| <input type="checkbox"/> US | <input type="checkbox"/> Europe | <input type="checkbox"/> Middle East |
| <input type="checkbox"/> Other () | | |

7. Questions about Inflation

Q30 Since the beginning of 2008 inflation has increased in countries in Asia and Oceania, propelled by soaring prices of raw materials such as crude oil and foodstuffs.

Q30-1 Has the advance of inflation impacted your company's profits?

- Significantly worsened [⇒ Go to Q30-2]
- Significantly improved [⇒ Go to Q30-2]
- Slightly worsened [⇒ Go to Q30-2]
- Slightly improved [⇒ Go to Q30-2]
- Hardly any impact [⇒ Go to Q31-1]
- No impact [⇒ Go to Q31-1]

Q30-2 If you answered "Significantly (improved/worsened)" or "Slightly (improved/worsened)" in Q30-1, please select the specific type(s) of impact from inflation. **(Select all that apply)** [⇒ Go to Q32-1]

- Increase in procurement costs
- Increase in fuel costs
- Increase in transportation costs
- Increase in personnel costs
- Increase in utilities costs (electricity, gas, etc.)
- Increase in sales
- Decrease in sales
- Delays or changes in plans for capital investment
- Other ()

Q31-1 If you answered "Hardly any impact" or "No impact" in Q30-1, is your company taking countermeasures against inflation?

- | | |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| [⇒ Go to Q31-2] | [⇒ Go to Q32-1] |

Q31-2 If you answered "Yes" in Q31-1, please select the specific type(s) of inflation countermeasures. **(Select all that apply)**

- Raised the prices of products (services)
- Switched to alternative fuel

- Promoted greater efficiency and cost-cutting
- Reduced the number of employees
- Downsized plants and offices
- Reconsidered suppliers of raw materials and procurement content
- Introduced energy-saving equipment
- Reconsidered/changed production plant and equipment investment
- Left wages unchanged / raised wages
- Other ()

8. Questions about Intellectual Property Rights Infringement

Q32-1 In the past year, has your company suffered damage from imitations or pirated products?

- Yes No
 [⇒ Go to Q32-2] [⇒ Go to Q33-1]

Q32-2 If you answered “Yes” in Q32-1, what sort(s) of damage occurred? (Select all that apply)

- Exact copy of product design and packaging
- Partial copy of product design
- Illegal use of trademarks such as the brand logo
- Patent infringement through diffusion of technology
(usage of product technology/functions without permission)
- Copyright infringement of CDs, DVDs, or publications through illegal copying
- Other()

Q32-3 What was the approximate amount of the damage?

- Less than US\$10,000
- US\$10,000 to less than US\$100,000
- Over US\$100,000
- Don't know

Q33-1 Is your company taking countermeasures against imitations?

- Yes No
 [⇒ Go to Q33-2] [⇒ Go to Q34]

Q33-2 If you answered “Yes” in Q33-1, what sort(s) of countermeasures are you taking against imitations?

(Select all that apply)

- Request a stronger crackdown on imitations passing through customs
- Acquire domestic intellectual property rights (registration) early
- Establish a post in the company for a staff member in charge of intellectual property (imitation countermeasures)
- Send warnings to manufacturers and sellers of imitations / pirated products
- Conduct educational activities for consumers either as a single company or in collaboration with an industrial body.
- Participate in the Intellectual Property Group (IPG)*
- Other ()

* IPG is a forum organized by local subsidiaries and JETRO for the purpose of exchanging information about intellectual property rights.

9. Questions about Standardization

Q34 What standards does your company use when you produce your company's main products? Select its affects.

(Select all that apply)

- In-house standards which are stricter than any other standards
- International standards

- European standards
- Japan Industrial Standards
- US standards
- Local standards

Q35 For production of your company's main products, are you certified to any standards in areas for which there are no international standards? **(Select all that apply)**

- Yes European standards
- Japan Industrial Standards
- US standards
- Local standards
- Other standards (Specify: _____)
- No

Q36 There have been multiple cases in recent years that the European standards became the international standards. Has this affected the production of any of your company's products up to now? **(Select all that apply)**

- Yes Reperformed R&D Reviewed suppliers and procurement items Cost increased due to the change of standards
- Stopped exporting Stopped production Other
- No European standards already acquired In-house standards are stricter than European standards
- Other

Q37 What measures are you taking for exports to multiple countries with differing product standards? Select an answer based on your experience up to now. (Please answer the question if your company exports goods.)

- In-house standards are the strictest of any, so no measures are necessary
- Products are produced to meet the strictest of the differing standards
- Products are produced to meet each country's standards
- Exports to some countries are reconsidered
- Other (_____)

Q38 Do you have any wishes regarding standardization? **(Select all that apply)**

- Preparation of Asian standards using the Japan Industrial Standards as the core
- Preparation of international standards through collaboration between Japan and other Asian countries
- Preparation of international standards through collaboration between Japan and Europe
- Participation in preparation of standards in the local country/region
- Harmonization of Japan Industrial Standards and European Standards
- Expansion of items and countries/regions with reciprocal certification
- Strengthening of the crackdown at points of entry on items without approved standards
- Strengthening of the crackdown in markets on items without approved standards
- Other (_____)

10. Questions about CSR

Q39 There has been increasing discussion in recent years concerning corporate social responsibility (CSR) due to the growing awareness of environmental problems, product and service safety, and employment issues. Please select the CSR activity(ies) below which is particularly sought in your country. **(Select all that apply)**

- Strict observance of local laws and regulations, and respect for international standards such as ISO
- Ensuring product and service safety as well as (or) offering new products and services
- Endeavors to improve the working environment
- Human resources training, technology transfer, or increase of the local procurement ratio
- Engagement in local (or wider area) poverty and education issues
- Engagement in local (or wider area) environmental issues
- Support for charitable activities, the arts, and cultural activities
- Other (_____)

Q40 Please select the organizer(s) with whom you collaborate when your company engages in CSR activities.

(Select all that apply)

- Our company (group) conducts CSR activities independently (planning, implementation, evaluation, etc.)
- Japan Chamber of Commerce, etc., in the local area
- Local government agencies
- International institutions
- Private non-profit bodies (NGOs or NPOs)
- Other ()

Q41 If any issues or problems exist in your company's CSR activities, please select them from below. (Select all that apply)

- No action plan for CSR has been decided, or it has not been fully shared with local officials
- There is an inadequate mechanism for incorporating the opinions and evaluations of interested parties, or there is an inadequate mechanism for providing information and disclosing plans to interested parties
- There are insufficient budget, experts and human resources
- Cooperation with the headquarters is not smooth
- It is difficult to verify cost-effectiveness
- There is no environment for supporting CSR efforts, such as assistance from the government
- Business partner's CSR activities are not thoroughly implemented (difficult to supervise)
- Organizational collaboration with international institutions, government assistance agencies, and NGO/NPOs is inadequate
- Problems in the local government agencies' observance of laws and regulations, such as enforcement of the laws and corruption
- Other ()

11. Questions about New Strains of Influenza

Q42 To what extent is your company taking measures against possible outbreaks of new strains of influenza?

- Adequate measures [⇒ Go to Q42-1]
- Some measures [⇒ Go to Q42-1]
- Not many measures [⇒ Go to Q42-1]
- No measures [⇒ Go to Q43]

Q42-1 This is a question for those of you who answered "Adequate measures," "Some measures," or "Not many measures" in Q42. According to the specialized institution, it is advisable to have a top-level local manager or equivalent person involved in establishing the measures for new strains of influenza. Is he/she involved in establishing the measures for new strains of influenza in your company?

- Yes
- No

Q42-2 What specific measure(s) has your company established? (Select all that apply)

- Health education concerning covering the mouth when coughing and hand washing
- Preparation of a manual
- Stockpiling of antibiotics
- Establishment of a staff member in charge
- Maintenance of means of communication such as satellite phone
- Stockpiling of daily goods
- Draw up guidelines for evacuation of expatriate employees
- Plan for working from home in the case of an outbreak
- Preparation of a Business Continuity Plan
- Other ()

Q43 Does your company plan to devise measures in the future for an outbreak?

Yes
[⇒ Go to Q44]

No
[⇒ Go to Q43-1]

Q43-1 If you answered “No” in Q43, what is your reason(s) for not establishing (or being unable to establish) measures?

(Select all that apply)

- Have no information on which to base decisions
- Do not know what should be done
- Have not received instructions from headquarters
- An outbreak will not occur very soon
- We do not think that an outbreak will occur
- Other ()

12. Questions about Wages

Q44 What are the approximate average wages of employees in the following job types in your company?

Please give an average figure (average wage per employee), not a range of figures.

Q44-1 Worker (Regular employees who are general workers with 3 years experience, not including subcontractors or trainees)

Base salary only (monthly): _____ (local currency displayed automatically hereinafter)
Annual salary*: _____

Q44-2 Engineer (Regular employees who are core technicians, who are graduates of technical schools or colleges, and who have 5 years of experience)

Base salary only (monthly): _____
Annual salary*: _____

Q44-3 Manager (Regular employees who are section managers in charge of sales, who graduated from university, and who have 10 years experience)

Base salary only (monthly): _____
Annual salary*: _____

* Annual salary per employee (annual total of base salary, allowances, social security, overtime, and bonuses, etc.)

Thank you very much for your cooperation

2008 Survey of Japanese-Affiliated Firms in Asia and Oceania (Non-Manufacturing Industry)

1. This survey is conducted annually to understand the business activities in Japanese-affiliated Firms (i.e., companies with over 10% of Japanese direct/indirect investment ratio). As the objective of the survey is to ask business environments, we kindly ask you to answer from local subsidiary's point of view. Please note that "your company" refers to the local subsidiary in this survey.
2. No individual company information will be publicized as your answers will be dealt as statistical figures.
3. If you should have any questions regarding the survey, please contact the persons below.

Attn: Mr. Okabe/ Mr. Asakura / Ms. Tomita
 Asia and Oceania Division, Overseas Research Department
 Japan External Trade Organization (JETRO)
 Ark Mori Bldg. 6F, 1-12-32 Akasaka
 Minato-ku, Tokyo 107-6006
 Tel: 03-3582-5179 Fax: 03-3582-5309 E-mail: ORF@jetro.go.jp

Corporate Information (Sections with "*" must be completed.)

Country/Region *:

- | | | |
|--------------------------------------|-------------------------------------|------------------------------------|
| <input type="checkbox"/> Indonesia | <input type="checkbox"/> Malaysia | <input type="checkbox"/> Myanmar |
| <input type="checkbox"/> Philippines | <input type="checkbox"/> Singapore | <input type="checkbox"/> Thailand |
| <input type="checkbox"/> Vietnam | <input type="checkbox"/> Bangladesh | <input type="checkbox"/> India |
| <input type="checkbox"/> Pakistan | <input type="checkbox"/> Sri Lanka | <input type="checkbox"/> Australia |
| <input type="checkbox"/> New Zealand | | |

Company Name*:

(In English)

Name*:

Title:

Telephone Number*:

Fax Number:

E-mail*:

If your company's Japanese direct/indirect investment ratio is 10% or less than 10%, click the button below to exit the survey.

Industry* (Please choose an industry from the list below.)

- | | | |
|---|---|--|
| <input type="checkbox"/> Fish and marine products | <input type="checkbox"/> Agricultural and forestry products | <input type="checkbox"/> Mining |
| <input type="checkbox"/> Distribution | <input type="checkbox"/> Trading company | <input type="checkbox"/> Sales company |
| <input type="checkbox"/> Banking | <input type="checkbox"/> Insurance | <input type="checkbox"/> Securities |
| <input type="checkbox"/> Transport/warehousing | <input type="checkbox"/> Real estate | <input type="checkbox"/> Judicial affairs/taxation |
| <input type="checkbox"/> Hotel/travel/restaurant | <input type="checkbox"/> Communications/software | <input type="checkbox"/> Construction/plants |
| <input type="checkbox"/> Other () | | |

Type of Operation: (Please select the main customers for your company's major product.)

Companies General consumers Other ()

Number of Employees*: (Please fill out the current total number of the employees including permanent employees, temporary staff, and contracted employees.)

_____ persons

Start up year*: _____

- Decrease in sales due to sluggish exports
- Increase in personnel expenses
- Reduction in sales due to exchange rate fluctuations
- Increase in other expenditures
- Lack of progress in formation of sales and service networks
- Hike in interest rates
- Increase in fuel costs and utilities (electricity, gas, etc.)
- Other ()

Q8 Please enter the breakdown of your operating income. (100 = total operating income)

	0%	1% to less than 10%	10% to less than 20%	20% to less than 30%	30% to less than 40%	40% to less than 50%	50% to less than 60%	60% to less than 70%	70% to less than 80%	80% to less than 90%	90% to less than 100%	100%
Local	<input type="checkbox"/>											
Japan	<input type="checkbox"/>											
ASEAN	<input type="checkbox"/>											
Mainland China	<input type="checkbox"/>											
Other Asian countries	<input type="checkbox"/>											
Oceania	<input type="checkbox"/>											
US	<input type="checkbox"/>											
Europe	<input type="checkbox"/>											
Middle East	<input type="checkbox"/>											
Other	<input type="checkbox"/>											

2. Questions about Business Problems

The following questions ask which issues in each of the following categories you perceive as particularly serious business problems for your company in the country where it is located. Please select all answers that apply for each category.

Q9 Problem(s) in sales or other business activities (Select all that apply)

- Decrease in orders from headquarters
- Major clients requesting lower prices
- Sluggishness in major sales markets (consumption downturn)
- No increase in new clients or markets
- Decrease in sales prices
- Competitors' growing market shares (cost-wise competition)
- Competitors' growing market shares (quality-wise competition)
- Lack of progress in local deregulation
- Accounts receivable in arrears
- Other ()

Q10 Problem(s) in financial affairs, financing, or foreign exchange (Select all that apply)

- Shortage of cash flow necessary for expansion of sales (service)
- Difficulty in procuring funds from local financial institutions
- Volatility of local currency's exchange rate against the US dollar
- Volatility of local currency's exchange rate against the Japanese yen
- Volatility of the Japanese yen against the US dollar
- Restrictions on fund procurement and settlements
- Tax burdens (i.e. corporate taxes and transfer pricing taxes)
- Rising interest rates
- Other ()

Q11 Problem(s) with labor or employment (Select all that apply)

- Increase in employee wages
- Difficulty in recruiting general staff
- Difficulty in recruiting engineer staff
- Low rate of worker retention

- Personnel costs of Japanese (expatriate) officers and staff
- Restrictions on staff dismissal and reduction
- Restrictions on employing foreign workers
- Difficulty in localizing managers and site supervisors
- Labor problems (strikes, union problems, etc.)
- Other ()

Q12 Problem(s) in the investment environment (Select all that apply)

- Unstable or insecure political or social conditions
- Lack of office space and rising rent
- Underdeveloped infrastructure (electric power, transportation, communications, etc.)
- Unclear policy management by the local government
- Complicated administrative procedures (to acquire permits, etc.)
- Complicated tax procedures
- Undeveloped economic and legal systems, and arbitrary application of the legal system
- Restrictions on foreign investment including restrictions on foreign capital ratio
- Lack of protection for intellectual property rights
- Other ()

Q13 Problems in the foreign trade system (Select all that apply)

- Complicated customs clearance procedures
- Time-consuming customs procedures
- Lack of thorough publicizing of trade rules and regulations
- Method of assessment of customs duties is unclear
- Criteria for determining classification for customs duties are obscure
- Unclear inspection system
- High non-tariff barriers*
- Strict quarantine system
- Other ()

* Non-tariff barriers other than tariffs to curb imports and are used to protect domestic industries from imported goods. They include quantitative trade restrictions and means not directly related to trade, such as production subsidies and consumption tax.

Q14 If there are any other business problems, please describe them below.

(i.e.: Development of new business is difficult because our capital relationship with our merger partner cannot be dissolved.)

3. Questions about Competitiveness

Q15 Which country or region do you currently see as your main source of competitors in selling products/services in your local market? (Select the nationality of the company, not the country or region where the products/services are manufactured.) Please select only one answer and exclude Japanese companies in the same line of business.

- | | | |
|---|---|-------------------------------------|
| <input type="checkbox"/> Indonesia | <input type="checkbox"/> Malaysia | <input type="checkbox"/> Myanmar |
| <input type="checkbox"/> Philippines | <input type="checkbox"/> Singapore | <input type="checkbox"/> Thailand |
| <input type="checkbox"/> Vietnam | <input type="checkbox"/> Other ASEAN countries() | <input type="checkbox"/> Bangladesh |
| <input type="checkbox"/> India | <input type="checkbox"/> Pakistan | <input type="checkbox"/> Sri Lanka |
| <input type="checkbox"/> Other Southwest Asian countries() | | <input type="checkbox"/> Australia |
| <input type="checkbox"/> New Zealand | <input type="checkbox"/> China | <input type="checkbox"/> Taiwan |
| <input type="checkbox"/> South Korea | <input type="checkbox"/> US | <input type="checkbox"/> Europe |
| <input type="checkbox"/> Other () | <input type="checkbox"/> No competitors | |

Q16 What is the main reason(s) for the competitiveness of such companies? (Select all that apply)

- Price
- Quality
- Branding
- Aggressive capital investment
- Excellent human resources
- Large range of products
- R&D capabilities
- Marketing (including sales networks and business tie-ups with other companies)
- Strong network of companies/individuals in the country
- Other ()

Q17 What countermeasure(s) will your company take (or is planning to take) against your competitors? **(Select all that apply)**

- Expand facilities
- Enhance added value of products/services
- Reduce price
- Launch new products or services
- Increase new clients
- Bolster sales and marketing capabilities (including acquisition of customers in new fields and expansion of the sales network)
- Enhance after-sales service
- Focus and concentrate on existing products/services/operations
- Other ()

4. Questions about Future Business Development

Q18 What is the most appropriate direction for your company's business development over the next one to two years?

- Expansion Status quo Downsizing Move to a third country (region) or withdraw
 [= Go to Q19-1] [= Go to Q20] [= Go to Q19-2] [= Go to Q19-2]

Q19-1 If you selected "Expansion" in Q18, please select the specific business plan(s). **(Select all that apply)**

- Expansion of business size through additional investments
- Expansion of product/service content (diversification)
- Expansion of product/service scope (market development)
- Strengthening of planning, research, and development functions
- Consolidation of specific product/service bases in your local company
- Other ()

Q19-2 If you selected "Downsizing" or "Move to a third country (region) or withdraw" in Q18, please select the specific policy.

- Integrate the bases within the local country (region) [= Go to Q20]
- Move the current base to a third country (region) [= Go to Q19-3]
- Transfer some products/services to an affiliate in a third country (region) [= Go to Q19-3]

Q19-3 If you selected either "Move the current base to a third country (region)" or "Transfer some products/services to an affiliate in a third country (region)" in Q19-2, please select the location(s) to which you are moving.

(Select all that apply)

- | | | |
|---|---|-------------------------------------|
| <input type="checkbox"/> Indonesia | <input type="checkbox"/> Malaysia | <input type="checkbox"/> Myanmar |
| <input type="checkbox"/> Philippines | <input type="checkbox"/> Singapore | <input type="checkbox"/> Thailand |
| <input type="checkbox"/> Vietnam | <input type="checkbox"/> Other ASEAN countries() | <input type="checkbox"/> Bangladesh |
| <input type="checkbox"/> India | <input type="checkbox"/> Pakistan | <input type="checkbox"/> Sri Lanka |
| <input type="checkbox"/> Other Southwest Asian countries() | | <input type="checkbox"/> Australia |

- | | | |
|--------------------------------------|---------------------------------|--------------------------------------|
| <input type="checkbox"/> New Zealand | <input type="checkbox"/> Japan | <input type="checkbox"/> China |
| <input type="checkbox"/> Hong Kong | <input type="checkbox"/> Taiwan | <input type="checkbox"/> South Korea |
| <input type="checkbox"/> US | <input type="checkbox"/> Europe | <input type="checkbox"/> Other () |

Q19-4 Please select the reason(s) why you have decided to move to the location chosen in Q19-3. **(Select all that apply)**

- Size of the market
- Growth prospects and potential of the market
- Competitive strengths of your company in the market
- Completeness of logistical infrastructure
- Administrative and operation costs
- Level of wages
- Quality of general staff/workers
- Quality of engineers/managers
- Other ()

Q20 In the medium to long term (5 to 10 years), which country or region (including your current country (region)) do you see as the optimum location for your company's operations / sales base? What roles or functions do you expect your optimum sales base to fulfill for your company?

Q20-1 The optimal sales base is: **(Select one answer)**

- | | | |
|---|---|--------------------------------------|
| <input type="checkbox"/> Indonesia | <input type="checkbox"/> Malaysia | <input type="checkbox"/> Myanmar |
| <input type="checkbox"/> Philippines | <input type="checkbox"/> Singapore | <input type="checkbox"/> Thailand |
| <input type="checkbox"/> Vietnam | <input type="checkbox"/> Other ASEAN countries() | <input type="checkbox"/> Bangladesh |
| <input type="checkbox"/> India | <input type="checkbox"/> Pakistan | <input type="checkbox"/> Sri Lanka |
| <input type="checkbox"/> Other Southwest Asian countries() | | <input type="checkbox"/> Australia |
| <input type="checkbox"/> New Zealand | <input type="checkbox"/> Japan | <input type="checkbox"/> China |
| <input type="checkbox"/> Hong Kong | <input type="checkbox"/> Taiwan | <input type="checkbox"/> South Korea |
| <input type="checkbox"/> US | <input type="checkbox"/> Europe | <input type="checkbox"/> Middle East |
| <input type="checkbox"/> Other () | | |

Q20-2 Please select the core role(s) or function(s) that you seek in your ideal sales base selected in Q20-1. **(Select all that apply)**

- Sales base for the domestic market
- Sales base for a third country/region
- Base where R&D is also conducted (for specification changes for the local market)
- Base where R&D is also conducted (for development of new products)
- Regional headquarters
- Headquarters of the supply chains in the region
- Base to provide products/services to other countries and regions making use of FTA/EPA
- Other ()

5. Questions about Inflation

Q21 Since the beginning of 2008 in countries, inflation has increased in Asia and Oceania, propelled by soaring prices of raw materials such as crude oil and foodstuffs.

Q21-1 Has the advance of inflation impacted your company's profits?

- Significantly worsened [⇒ Go to Q21-2]
- Significantly improved [⇒ Go to Q21-2]
- Slightly worsened [⇒ Go to Q21-2]
- Slightly improved [⇒ Go to Q21-2]
- Hardly any impact [⇒ Go to Q22-1]
- No impact [⇒ Go to Q22-1]

Q21-2 If you answered "Significantly (improved/worsened)" or "Slightly (improved/worsened)" in Q21-1, please

- select the specific type(s) of impact from inflation. **(Select all that apply)** [⇒ Go to Q23-1]
- Increase in procurement costs
 - Increase in fuel costs
 - Increase in transportation costs
 - Increase in personnel costs
 - Increase in utilities costs (electricity, gas, etc.)
 - Increase in sales
 - Decrease in sales
 - Delays or changes in plans for capital investment
 - Other ()

Q22-1 If you answered “Hardly any impact” or “No impact” in Q21-1, is your company taking countermeasures against inflation?

- Yes [⇒ Go to Q22-2] No [⇒ Go to Q23-1]

Q22-2 If you answered “Yes” in Q22-1, please select the specific type(s) of inflation countermeasures. **(Select all that apply)**

- Raised the prices of products (services)
- Switched to alternative fuel
- Promoted greater efficiency and cost-cutting
- Reduced the number of employees
- Downsized plants and offices
- Reconsidered suppliers of raw materials and procurement content
- Introduced energy-saving equipment
- Reconsidered/changed production plant and equipment investment
- Left wages unchanged / raised wages
- Other ()

6. Questions about Intellectual Property Rights Infringement

Q23-1 In the past year, has your company suffered damage from imitations or pirated products?

- Yes [⇒ Go to Q23-2] No [⇒ Go to Q24-1]

Q23-2 If you answered “Yes” in Q23-1, what sort(s) of damage occurred? **(Select all that apply)**

- Exact copy of product (Contents) design and packaging
- Partial copy of product (Contents) design
- Illegal use of trademarks such as the brand logo
- Patent infringement through diffusion of technology (usage of product technology/functions without permission)
- Copyright infringement of CDs, DVDs, or publications through illegal copying
- Other()

Q23-3 What was the approximate amount of the damage?

- Less than US\$10,000
- US\$10,000 to less than US\$100,000
- Over US\$100,000
- Don't know

Q24-1 Is your company taking countermeasures against imitations?

- Yes [⇒ Go to Q24-2] No [⇒ Go to Q25]

Q24-2 If you answered “Yes” in Q24-1, what sort(s) of countermeasures are you taking against imitations?

(Select all that apply)

- Request a stronger crackdown on imitations passing through customs
- Acquire domestic intellectual property rights (registration) early
- Establish a post in the company for a staff member in charge of intellectual property (imitation countermeasures)
- Send warnings to manufacturers and sellers of imitations/ pirated products
- Conduct educational activities for consumers either as a single company or in collaboration with an industrial body.
- Participate in the Intellectual Property Group (IPG)*
- Other ()

* IPG is a forum organized by local subsidiaries and JETRO for the purpose of exchanging information about intellectual property rights.

7. Questions about Standardization

Q25 What standards does your company use when you provide the major service of the company? **(Select all that apply)**

- In-house standards which are stricter than any other standards
- International standards
- European standards
- Japan Industrial Standards
- US standards
- Local standards
- No standards in the area

Q26 Regarding the major service of your company, are you certified to any standards in areas without international standards?

(Select all that apply)

- Yes
 - European standards
 - Japan Industrial Standards
 - US standards
 - Local standards
 - Other standards (Specify:)
- No
- No standards in the area

Q27 There have been multiple cases in recent years that the European standards became the international standards. Has this affected your company up to now?

- Yes
- No

Q28 This question is for the companies that export/provide services (i.e. engineering service) to multiple countries with different standards. What measures are you taking for exports to multiple countries with different standards? Please select an answer based on your experience up to now.

- In-house standards are the strictest of any, so no measures are necessary
- Adjust to the strictest standards
- Adjust to each country’s standards
- Exports to some countries are reconsidered
- Other ()

Q29 Do you have any wishes regarding standardization? **(Select all that apply)**

- Formulation of Asian standards using the Japan Industrial Standards as the core
- Formulation of international standards through collaboration between Japan and other Asian countries
- Formulation of international standards through collaboration between Japan and Europe

- Participation in the formulation of standards in the local country/region
- Harmonization of Japan Industrial Standards and European Standards
- Expansion of covered areas and countries/regions with mutual recognition
- Strengthening of the crackdown at points of entry on areas without approved standards
- Strengthening of the crackdown in markets on areas without approved standards
- Other ()

8. Questions about CSR

Q30 There has been increasing discussion in recent years concerning corporate social responsibility (CSR) due to the growing awareness of environmental problems, product and service safety, and employment issues. Please select the CSR activity(ies) below which is particularly sought in your country. **(Select all that apply)**

- Strict observance of local laws and regulations, and respect for international standards such as ISO
- Ensuring product and service safety as well as (or) offering new products and services
- Endeavors to improve the working environment
- Human resources training, technology transfer, or increase of the local procurement ratio
- Engagement in local (or wider area) poverty and education issues
- Engagement in local (or wider area) environmental issues
- Support for charitable activities, the arts, and cultural activities
- Other ()

Q31 Please select the organizer(s) with whom you collaborate when your company engages in CSR activities. **(Select all that apply)**

- Our company (group) conducts CSR activities independently (planning, implementation, evaluation, etc.)
- Japan Chamber of Commerce, etc., in the local area
- Local government agencies
- International institutions
- Private non-profit bodies (NGOs or NPOs)
- Other ()

Q32 If any issues or problems exist in your company's CSR activities, please select them from below. **(Select all that apply)**

- No action plan for CSR has been decided, or it has not been fully shared with local officials
- There is an inadequate mechanism for incorporating the opinions and evaluations of interested parties, or there is an inadequate mechanism for providing information and disclosing plans to interested parties
- There are insufficient budget, experts and human resources
- Cooperation with the headquarters is not smooth
- It is difficult to verify cost-effectiveness
- There is no environment for supporting CSR efforts, such as assistance from the government
- Business partner's CSR activities are not thoroughly implemented (difficult to supervise)
- Organizational collaboration with international institutions, government assistance agencies, and NGO/NPOs is inadequate
- Problems in the local government agencies' observance of laws and regulations, such as enforcement of the laws and corruption
- Other ()

9. Questions about New Strains of Influenza

Q33 To what extent is your company taking measures against outbreaks of new strains of influenza?

- Adequate measures [⇒ Go to Q33-1]
- Some measures [⇒ Go to Q33-1]
- Not many measures [⇒ Go to Q33-1]
- No measures [⇒ Go to Q34]

Q33-1 This is a question for those of you who answered “Adequate measures,” “Some measures,” or “Not many measures” in Q33. According to the specialized institution, it is advisable to have a top-level local manager or equivalent person involved in establishing the measures for new strains of influenza. Is he/she involved in establishing the measures for new strains of influenza in your company?

Yes

No

Q33-2 What specific measure(s) has your company established? (**Select all that apply**)

- Health education concerning covering the mouth when coughing and hand washing
- Preparation of a manual
- Stockpiling of antibiotics
- Establishment of a staff member in charge
- Maintenance of means of communication
- Stockpiling of daily goods
- Plan for evacuation of expatriate employees
- Plan for working from home in the case of an outbreak
- Preparation of a Business Continuity Plan
- Other ()

Q34 Does your company plan to devise measures in the future for an outbreak?

Yes

No

[⇒ Go to Q35]

[⇒ Go to Q34-1]

Q34-1 If you answered “No” in Q34, what is your reason(s) for not establishing (or being unable to establish) measures?

(**Select all that apply**)

- Have no information on which to base decisions
- Do not know what should be done
- Have not received instructions from headquarters
- An outbreak will not occur very soon
- We do not think that an outbreak will occur
- Other ()

10. Questions about Wages

Q35 What are the approximate average wages of employees in the following job types in your company?

Please give an average figure (average wage per employee), not a range of figures.

Q35-1 Staff (Regular employees who are general workers with 3 years experience, not including temporary employees or trainees)

Base salary only (monthly): _____ (local currency displayed automatically hereinafter)

Annual salary*: _____

Q35-2 Manager (Regular employees who are section managers in charge of sales, who graduated from university, and who have 10 years experience)

Base salary only (monthly): _____

Annual salary*: _____

* Annual salary per employee (annual total of base salary, allowances, social security, overtime, and bonuses, etc.)

Thank you very much for your cooperation

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