

Questionnaire

2009 Survey of Japanese-Affiliated Firms in Asia and Oceania

1. This survey is conducted annually to understand the business activities of 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 (or local branch office) 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 technical problems, please contact the persons below. Any questions regarding the contents of the survey, please contact your local JETRO office.

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If your company's Japanese investment ratio (direct/ indirect) is less than 10%, or your company operates as a representative office, it is not eligible for this survey. For such cases, please click the button to exit the survey. Thank you.

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

★Country:

- | | | |
|--------------------------------------|-------------------------------------|------------------------------------|
| <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)

Japanese Parent

Company Name:

★ Name:

★ Telephone Number:

★ E-mail:

★ Industry: (Please choose an industry from the list below)

<Manufacturing*>

(*Applies to companies that conduct production and processing activities in your area. Companies that only conduct sales in your area are applicable as a "Sales company" within the <Non-Manufacturing> category, even if the Japanese parent company is a manufacturer.)

- 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 and 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
- Medical Devices
- Printed and Published
- Other Manufacturing industries ()

<Non-Manufacturing>

- | | | |
|--|---|--|
| <input type="checkbox"/> Fishery | <input type="checkbox"/> Agriculture and forestry | <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 clients of the major products that your company produces and distributes

- Companies General consumers Other ()

Year Established:

Capital: (Local Currencies*)

** Please make sure the currency unit is filled out correctly.*

Japan Investment Ratio: %

Number of Employees*: (Please fill out the current number of the employees) (In general figures)

Total: people

<Permanent full-time employees: people, Japanese expatriate employees people>

(* Units of Currency)

Indonesia : Million rupiah, Thailand : Million Baht, Philippines : Million pesos, India : Million rupees,
Sri Lanka : Million Sri Lankan rupees, Pakistan : Million Pakistan rupees, Bangladesh : Million takas,
Vietnam : Million Dong, Singapore : Thousand Singapore dollars, Malaysia : Thousand ringgit,
Australia : Thousand Australian dollars, New Zealand : Thousand New Zealand dollars,
Myanmar: Thousand US dollars

For specific countries ⇒ Regional classifications in the forms below, before question 1

<India>

- ① New Delhi and Surrounding Areas ② Mumbai and Surrounding Areas
 ③ Bangalore and Surrounding Areas ④ Chennai and Surrounding Areas
 ⑤ Other

<Vietnam>

- ① North ② Central ③ South

<Indonesia>

- ① Jakarta and Surrounding Areas ② Batam Island ③ Other

<Philippines>

- ① Manila and Surrounding Areas ② Calabarzon ③ Subic-Clark
 ④ Cebu Island ⑤ Other

2009 Survey and Questionnaire of Japanese-Affiliated Firms

- 11) Improved production efficiency (manufacturing only)
- 12) Improved collection of credit accounts
- 13) Other ()

Q7 If you answered in Q5 that operating profit for 2010 is forecast to “Worsen”, please select the reason(s).

(Select all that apply) [⇒ Then go to Q8]

- 1) Decrease in sales due to sluggish exports
- 2) Decrease in local market sales
- 3) Reduction in sales due to higher prices
- 4) Reduction in sales due to exchange rate fluctuations
- 5) Increase in procurement costs (manufacturing only)
- 6) Lack of progress in building sales (service) network
- 7) Increase in personnel expenses
- 8) Higher interest rates
- 9) Insufficient price increase
- 10) Increase in fuel costs and utilities (electricity, gas, etc.)
- 11) Other ()

2. Impact of Economic Recession and Countermeasures

Q8 What impact has the global recession had on your company since October 2008?

- 1) Significantly negative impact
- 2) Slightly negative impact
- 3) No impact [⇒ Then go to Q12]
- 4) Slightly positive impact [⇒ Then go to Q12]
- 5) Significantly positive impact [⇒ Then go to Q12]

Q9 After the recession impacted your company, when did / will your company's sales reach its lowest point?

- 1) October - December 2008
- 2) January - March 2009
- 3) April - June 2009
- 4) July - September 2009
- 5) October - December 2009
- 6) First half of 2010
- 7) Latter half of 2010
- 8) From January 2011
- 9) Not sure

Q10 When will / did your company's sales recover to pre-financial crisis level (prior to September 2008)?

- 1) October - December 2008
- 2) January - March 2009
- 3) April - June 2009
- 4) July - September 2009
- 5) October - December 2009
- 6) First half of 2010
- 7) Latter half of 2010
- 8) From January 2011
- 9) Not sure

Q11 What measures has your company taken in the past 1 year since the global recession took hold? **(Select all that apply)**

- 1) Cancellation or postponement of new investment / facility investment
- 2) Downsizing of existing business
- 3) Closure / withdrawal of business base (including part of a business base)
- 4) Increased efficiency through management integration within the group (intensification of other bases, a shift to bases in other countries, etc.)
- 5) Employment adjustments
- 6) Reduction in days/hours for sales and operations
- 7) Rise in sales price
- 8) Reduction in sales price
- 9) Review suppliers (limit number of suppliers, change to cheaper suppliers, etc.)
- 10) Review delivering companies (change in delivering companies and new business development, including exports)
- 11) Launching new business
- 12) Reduction in costs through improved efficiency of production and sales
- 13) Expand the range of high value-added products / services
- 14) Expand the range of low price products / services
- 15) No measures have been taken
- 16) Other ()

2009 Survey and Questionnaire of Japanese-Affiliated Firms

Q12 Please provide an answer about changes in the number of employees in the past one year and the forecast for the next one year.

	Changes in the No. of employees (increase / decrease) As of September 2008 to September 2009			Expectations for changes in the No. of employees (increase / decrease) As of September 2009 to September 2010		
	Increase	No change	Decrease	Increase	No change	Decrease
Local employees (Non-permanent)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local employees (Permanent)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Japanese (expatriate) employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q13 Compared to the past one year (October 2008- September 2009), to what extent will your company increase / decrease capital investment over the next one year (October 2009- September 2010)?

- 1) Increase of at least 50%
 2) 40% increase
 3) 30% increase
 4) 20% increase
 5) 10% increase
 6) No change
 7) 10% decrease
 8) 20% decrease
 9) 30% decrease
 10) 40% decrease
 11) Decrease of at least 50%
 12) Not sure

3. 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.

Q14 Problem(s) in sales or other business activities (**Select all that apply**)

- 1) Decrease in production orders from headquarters
 2) Decrease in orders from clients
 3) Major clients requesting lower prices
 4) Sluggishness in major sales markets (consumption downturn)
 5) No increase in new clients or markets
 6) Decrease in sales prices due to global oversupply
 7) Inflow of cheap imported goods into local markets
 8) Competitors' growing market shares (quality-wise competition)
 9) Competitors' growing market shares (cost-wise competition)
 10) Lack of progress in local deregulation
 11) Accounts receivable in arrears
 12) Other ()

Q15 Problem(s) in financial affairs, financing, or foreign exchange (**Select all that apply**)

- 1) Insufficient cash flow necessary for business scale expansion
 2) Difficulty in procuring funds from local financial institutions
 3) Volatility of local currency's exchange rate against the US dollar
 4) Volatility of local currency's exchange rate against the Japanese yen
 5) Volatility of the Japanese yen against the US dollar
 6) Restrictions on fund procurement and settlements
 7) Tax burdens (i.e. corporate taxes and transfer pricing taxes)
 8) Rising interest rates
 9) Other ()

Q16 Problem(s) with labor or employment (**Select all that apply**)

- 1) Increase in employee wages
 2) Difficulty in recruiting general staff

2009 Survey and Questionnaire of Japanese-Affiliated Firms

- 3) Difficulty in recruiting middle management staff
- 4) Difficulty in recruiting general worker (Manufacturing only)
- 5) Difficulty in recruiting engineer staff (Manufacturing only)
- 6) Low rate of worker retention
- 7) Personnel costs of Japanese (expatriate) officers and staff
- 8) Restrictions on staff dismissal and reduction
- 9) Difficulty in localizing managers and site supervisors
- 10) Restrictions on employing foreign workers
- 11) Other ()

Q17 Problem(s) in the foreign trade system (**Select all that apply**)

- 1) Complicated customs clearance procedures
- 2) Time-consuming customs procedures
- 3) Lack of thorough publicizing of trade rules and regulations
- 4) Method for the assessment of customs duties is unclear
- 5) Criteria for determining classification of customs duties are obscure
- 6) Unclear inspection system
- 7) High non-tariff barriers*
- 8) Strict quarantine system
- 9) 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.

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

- 1) Insufficient production capacity due to lack of facilities
- 2) Limited cost-cutting measures available
- 3) Increase in procurement costs
- 4) Difficulty in local procurement of parts and raw materials
- 5) Difficulty in changeover of production items within a short timeframe
- 6) Difficulty in quality control
- 7) High customs duties on imported capital goods and intermediary goods
- 8) Stricter environmental regulations
- 9) Electric power shortage
- 10) Inadequate logistics infrastructure
- 11) Other ()

Q19 What problems have your company encountered in the localization of management? (**Select all that apply**)

- 1) Difficulty in recruiting executive staff
- 2) A high turnover rate of executive staff
- 3) Conflict with head office policy regarding appointment of staff
- 4) Low-level language ability (Japanese and English)
- 5) Difficulty in reduction of Japanese expatriate staff
- 6) No progress with development of local staff
- 7) No progress with the transfer of authority from head office to local level
- 8) Capabilities in developing local products and services are weak
- 9) Capabilities in local planning and marketing are weak
- 10) Other ()

Q20 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.)

2009 Survey and Questionnaire of Japanese-Affiliated Firms

4. Investment Environment

Q21 What are the advantages (Strong points) in the investment environment? (Select all that apply)

- 1) Stable political and social conditions
- 2) Market scale / Growth potential
- 3) An abundance of land / office space, cheap land prices / rent
- 4) Ample infrastructure (electricity, transportation, telecommunications, etc.)
- 5) Cluster of supporting industries (local procurement is easy)
- 6) Plenty of partner companies (delivering companies)
- 7) An abundance of staff due to low costs
- 8) High quality staff
- 9) Tax incentives (corporate tax, export / import customs duties, etc.)
- 10) An array of investment incentive schemes
- 11) All types of procedures are prompt
- 12) English is widely spoken
- 13) A good living environment for expatriate staff
- 14) Other ()

Q22 What are the disadvantages (Problem(s)) in the investment environment? (Select all that apply)

- 1) Unstable political and social conditions
- 2) Insufficient land / office space, rising land prices/rent
- 3) Underdeveloped infrastructure (electric power, transportation, communications, etc.)
- 4) Unclear policy management by the local government
- 5) Complicated administrative procedures (to acquire permits, etc.)
- 6) Complicated tax procedures
- 7) Underdeveloped economic and legal systems, and arbitrary application of the legal system
- 8) Restrictions on foreign investment including restrictions on foreign capital ratio
- 9) Lack of protection of intellectual property rights
- 10) Lowering of custom tariff levels (including the lowering of custom tariffs due to FTA/EPA)
- 11) Other ()

5. Future Business Development

Q23 What is the most appropriate direction for your company's business development over the next one to two years?

- 1) Expansion 2) Status quo 3) Downsizing 4) Move to a third country (region) or withdraw
- [⇒ Go to Q24] [⇒ Go to Q28] [⇒ Go to Q25] [⇒ Go to Q25]

Q24 If you selected "Expansion" in Q23, please select the specific business plan(s). (Select all that apply) [⇒ Then go to Q28]

- 1) Expansion of existing business scale through additional investment
- 2) Consolidation of production and service bases for specific products
- 3) Purchasing of local market enterprises (M&A)
- 4) Diversification of product and services contents (sector expansion)
- 5) Increase in high value-added products and services
- 6) Creation of new markets (expand business / sales networks)
- 7) Strengthening of planning and research development and design functions.
- 8) Other ()

Q25 If you selected "Downsizing" or "Move to a third country (region) or withdraw" in Q23, please select the specific policy. (Select all that apply)

- 1) Integrate the bases within the local country (region) [⇒ Go to Q28]
- 2) Move the production base to a third country (region) [⇒ Go to Q26]
- 3) Transfer the production of certain items to an affiliate in a third country (region) [⇒ Go to Q26]

Q26 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 Q25, please select the possible country where you will be relocating.

- 1) Indonesia 2) Malaysia 3) Myanmar
- 4) Philippines 5) Singapore 6) Thailand

2009 Survey and Questionnaire of Japanese-Affiliated Firms

- | | | |
|--|---|--|
| <input type="checkbox"/> 7) Vietnam | <input type="checkbox"/> 8) Other ASEAN countries () | <input type="checkbox"/> 9) Bangladesh |
| <input type="checkbox"/> 10) India | <input type="checkbox"/> 11) Pakistan | <input type="checkbox"/> 12) Sri Lanka |
| <input type="checkbox"/> 13) Other Southwest Asian countries () | <input type="checkbox"/> 14) Australia | <input type="checkbox"/> 17) China |
| <input type="checkbox"/> 15) New Zealand | <input type="checkbox"/> 16) Japan | <input type="checkbox"/> 20) South Korea |
| <input type="checkbox"/> 18) Hong Kong | <input type="checkbox"/> 19) Taiwan | <input type="checkbox"/> 23) Other () |
| <input type="checkbox"/> 21) US | <input type="checkbox"/> 22) Europe | |

Q27 Please select the reason(s) why you have decided to move to the location chosen in Q26. **(Select all that apply)**

- 1) Size of the market
- 2) An array of investment incentive schemes
- 3) Growth prospects and potential of the market
- 4) Competitive strengths of your company in the market
- 5) Absolute number of suppliers in the market
- 6) Administrative and operation costs
- 7) Level of wages
- 8) Completeness of logistics infrastructure
- 9) Quality of general staff/workers
- 10) Quality of engineers
- 11) Quality of managers
- 12) Other ()

Q28 Which countries show potential as a market for your company's future operation/products over the next 1-3 years? Select three markets in order of importance. (Please rank the countries 1-3).

Rank 1 (No. _____) Rank 2 (No. _____) Rank 3 (No. _____)

- | | | |
|--|--------------|-----------------|
| 1) Indonesia | 2) Malaysia | 3) Vietnam |
| 4) Philippines | 5) Singapore | 6) Thailand |
| 7) CLM (Cambodia, Laos, Myanmar) | 8) India | |
| 9) Other Southwest Asian countries () | | 10) Japan |
| 11) Korea | 12) China | 13) Hong Kong |
| 14) Taiwan | 15) US | 16) Europe |
| 17) Oceania (Australia, New Zealand) | 18) Russia | 19) Middle East |
| 20) Others() | | |

Q29 What measures have you taken to enter the market you ranked No.1 in question 28? **Alternatively, if you chose the domestic country, please use the country you ranked No.2. (Select all that apply)**

- 1) Compilation of information
- 2) Implementation of market surveys
- 3) Shipment of samples
- 4) Initiation of export transactions
- 5) Identification and expansion of sales channels (sales agents, etc).
- 6) Production relocation
- 7) Establishment of joint venture companies
- 8) Establishment of a representative office
- 9) Consideration (by head office etc.) of establishing local manufacturing bases
- 10) Consideration (by head office etc.) of establishing local sales bases
- 11) Establishment of local corporations (manufacturing)
- 12) Establishment of local corporations (sales)
- 13) Nothing has been initiated yet
- 14) Other ()

2009 Survey and Questionnaire of Japanese-Affiliated Firms

6. Procurement of Raw Materials and Parts

Q30 What percentage of production costs is attributable to raw material and parts? (100%= Total production cost in 2009)

- 1) Less than 50%
- 2) 50% to less than 60%
- 3) 60% to less than 70%
- 4) 70% to less than 80%
- 5) 80% to less than 90%
- 6) 90% or above

* "Production 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.

Q31 What is the breakdown of your procurement sources? (Please ensure the ratios total 100%)

- 1) Local (____%) 2) Japan (____%) 3) ASEAN (____%)
- 4) Mainland China (____%) 5) Other Asian countries (____%)
- 6) Oceania (____%) 7) US (____%)
- 8) Europe (____%) 9) Middle East (____%)
- 10) Other (____%)

Q32 If you selected "Local" as a procurement source in Q31, what is the breakdown of your local procurement sources?

(Please ensure the ratios total 100%)

- 1) Japan-affiliated companies (____%)
- 2) Local companies (____%)
- 3) Other foreign-affiliated companies (____%)

Q33 What are your plan(s) for procuring raw materials and parts in the future? (Select all that apply)

- 1) Increase ratio of local procurement
- 2) Increase ratio of procurement from ASEAN
- 3) Increase ratio of procurement from China
- 4) Increase ratio of procurement from Japan
- 5) Maintain current ratios of local procurement
- 6) Other (_____)

Q34 What percentage of the total amount of raw materials and parts imported by your company is not subject to tariffs?*

(100%=Total import amount)

- 1) 0%
- 2) 1% to less than 10%
- 3) 10% to less than 30%
- 4) 30% to less than 50%
- 5) 50% to less than 70%
- 6) 70% to less than 90%
- 7) 90% to less than 100%
- 8) 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.

Q35 If your affiliated company is also manufacturing (or considering manufacturing) in China, please answer the following question; Assuming that the production cost of your products is 100 units to produce in China, how many units would it cost in your host country?

- 1) Less than 80
- 2) 80 to less than 90
- 3) 90 to less than 100
- 4) 100 to less than 110
- 5) 110 to less than 120
- 6) 120 to less than 130
- 7) 130 to less than 140
- 8) 140 to less than 150
- 9) 150 or above

2009 Survey and Questionnaire of Japanese-Affiliated Firms

7. Measures for Influenza (A/H1N1)

Q36 What kind of problems is your company facing in terms of its response to the new strain of influenza (A/H1N1) which is currently spreading throughout the world? **(Select all that apply)**

- 1) Adopt different measures depending on severity of illness
- 2) Observing staff who has returned from affected countries
- 3) Procurement of masks
- 4) Making the judgment whether to evacuate expatriate staff and families or not
- 5) Procurement of flu vaccines
- 6) Absence of employees due to themselves or their families being affected by the virus etc.
- 7) Health checks of visitors to workplaces
- 8) Deciding whether to continue operations or not
- 9) There are no particular problems
- 10) Other ()

Q37 What are your company's main countermeasures for the spread of this new influenza strain? **(Select all that apply)**

- 1) Preparation of a manual
- 2) Health education concerning covering the mouth when coughing and hand washing
- 3) Stockpiling of anti-flu medicine (e.g. Tamiflu)
- 4) Stockpiling daily items, masks and disinfectants
- 5) Establishment of a staff member in charge
- 6) Limiting business trips
- 7) Send expatriate staff home temporarily
- 8) Preparation of a business continuity plan
- 9) Implementation plan for working at home during the spread of the virus
- 10) Seasonal flu-vaccine inoculations
- 11) No particular countermeasures have been taken
- 12) Other ()

Q38 In the future, if the new strain of influenza mutates and causes a high fatality rate of up to 2%, is your company planning to evacuate its expatriate employees to their home countries and to surrounding countries?

- 1) Prompt evacuation to home countries or surrounding countries
- 2) Evacuation to home countries or surrounding countries of some expatriate employees only
- 3) Remain in the local area
- 4) Unknown
- 5) Other ()

8. Exports/Imports

Q39 What is the percentage of export sales out of total sales for your local company? (_____ %)

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.

Q40 What is the breakdown of your export destinations? **(Please ensure the ratios total 100%)**

- | | |
|---|---|
| <input type="checkbox"/> 1) Japan (_____ %) | <input type="checkbox"/> 2) ASEAN (_____ %) |
| <input type="checkbox"/> 3) Mainland China (_____ %) | <input type="checkbox"/> 4) Korea (_____ %) |
| <input type="checkbox"/> 5) Hong Kong (_____ %) | <input type="checkbox"/> 6) Taiwan (_____ %) |
| <input type="checkbox"/> 7) India (_____ %) | <input type="checkbox"/> 8) Other Asia (_____ %) |
| <input type="checkbox"/> 9) Oceania (_____ %) | <input type="checkbox"/> 10) US (_____ %) |
| <input type="checkbox"/> 11) Europe (_____ %) | <input type="checkbox"/> 12) Middle-East (_____ %) |
| <input type="checkbox"/> 13) Others (_____ %) | |

2009 Survey and Questionnaire of Japanese-Affiliated Firms

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.

Q41 Please answer the following 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 1) Currently in use 2) Considering using
 3) No plan to use
- Imports 1) Currently in use 2) Considering using
 3) No plan to use

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

Q42 If you answered "Currently in use" in Q41, please select FTA/EPA below that you currently use.

Example: < Australia >

FTA/EPA Signatories	Export	Import
Australia -- New Zealand	<input type="checkbox"/>	<input type="checkbox"/>
Australia -- Singapore	<input type="checkbox"/>	<input type="checkbox"/>
Australia -- Thailand	<input type="checkbox"/>	<input type="checkbox"/>
Australia -- non-Australasia countries	<input type="checkbox"/>	<input type="checkbox"/>

Q43 What is the problem(s) of utilizing a FTA? (Select all that apply)

< For Exports >

- 1) General custom tariffs at export destinations are low, so an FTA provides no advantages
- 2) There is a reduction or exemption of custom tariffs at the export destination, so an FTA provides no advantages
- 3) Rules of Origin create too many obstacles
- 4) The cost of checking and issuing a certificate of origin is high
- 5) The procedures for obtaining a certificate of origin are complicated
- 6) Parts suppliers do not know the FTA/EPA system and cannot obtain the necessary documentation
- 7) Complexity arising because existing FTA/EPA regulations vary in different rules of origin
- 8) No FTA/ EPA exists with the export destinations
- 9) There are no specific problems
- 10) Other ()

< For Imports >

- 1) Since custom tariff exemptions can already be enjoyed through investment benefit schemes (EPZ and investment incentives, etc.), an FTA provide no advantages
- 2) Domestic sales for which custom tariffs are levied is small
- 3) Suppliers do not know the FTA/EPA system
- 4) The FTA has not been acknowledged by the merchandizing trade
- 5) General custom tariffs are low, so an FTA provides no advantages
- 6) The difference between the FTA's graded custom tariff rate reductions and general custom tariffs is small, so there are no advantages
- 7) An FTA/ EPA does not exist between the import destinations
- 8) No specific problems
- 9) Other ()

Q44 (For countries which have not as yet entered into an FTA/EPA with Japan) What importance do you place, if your host country enters into an FTA/EPA with Japan?

- 1) Very important [⇒ Go to Q45]
- 2) Important [⇒ Go to Q45])

2009 Survey and Questionnaire of Japanese-Affiliated Firms

- 3) Neutral [⇒ Go to Q46]
- 4) Unimportant [⇒ Go to Q46]
- 5) No idea [⇒ Go to Q46]

Q45 The following question is for those who answered “Very important” or “Important” in Q44.
What would be the anticipated effects if your company actually concluded an EPA/FTA with Japan?

- 1) Reduction in the custom tariffs of your company’s locating country
- 2) Relaxation of non-tariff barriers relating to the trade of goods of your company’s locating country
- 3) Relaxation of barriers to investment and the services of your company’s locating country
- 4) Expansion of government procurement entry opportunities of your company’s locating country
- 5) Facilitation of the transfer of people between both countries
- 6) Business environment adjustments of your company’s locating country
- 7) Other ()

9. Wages

Q46 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.

<Manufacturing>

Q Worker (Permanent full-time employees who are general workers with 3 years experience, not including subcontractors or trainees)

Base salary only (monthly): _____

Bonus: Base salary x _____ months

Annual salary*: _____

Q Engineer (Permanent full-time employees who are core technicians, who are graduates of vocational college or university, and who have 5 years of experience)

Base salary only (monthly): _____

Bonus: Base salary x _____ months

Annual salary*: _____

Q Manager (Permanent full-time employees who are section managers in charge of sales, who graduated from university, and who have 10 years experience)

Base salary only (monthly): _____

Bonus: Base salary x _____ months

Annual salary*: _____

<Non-Manufacturing>

Q Staff (Permanent full-time employees who are general workers with 3 years experience, not including subcontractors or trainees)

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

Bonus: Base salary x _____ months

Annual salary*: _____

Q Manager (Permanent full-time employees who are section managers in charge of sales, who graduated from university, and who have 10 years experience)

Base salary only (monthly): _____

Bonus: Base salary x _____ months

Annual salary*: _____

*The base salary is the salary excluding benefits, as of September 2009

** Annual salary per employee (annual total of base salary, allowances, social security, overtime, and bonuses, etc.), as of 2009

Thank you very much for your cooperation

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