

**2016 Survey of Japanese-Affiliated Firms in Asia and Oceania**

Thank you for participating in this survey. It will take 15 to 20 minutes to answer.

1. This survey is conducted annually in order to understand the business activities of Japanese-affiliated firms (i.e., **companies for which the Japanese direct or indirect investment ratio is 10% or more**). As the objective of the survey is to ask about business environments of Japanese-affiliated companies in Asia and Oceania, we ask you to please **respond from the local subsidiary's point of view**. Please note that in this survey "your company" refers to the local subsidiary (or local branch office).
2. **No individual company information will be publicized as your answers will be dealt with as statistical data.** We will use the information you fill in this survey only for the research of JETRO. Please check the following URL, regarding the privacy policy of JETRO.  
<http://www.jetro.go.jp/en/privacy/>
3. If you have any technical problems, please contact the persons mentioned below. Please contact your local JETRO office if you have any questions regarding the contents of the survey.
4. In addition, the phrase "country/region" is used in some parts. Please note that "region" here is not a reference to regional economic zones like ASEAN, but rather Hong Kong and Taiwan.

If the ratio of Japanese (direct or indirect) investment in your affiliated company is less than 10%, or your company operates as a representative office, please do not complete this survey as you are not included in its scope. In such a case, please fill in your company name, your name, telephone number and E-mail below, and send it to us by E-mail or FAX. Thank you.

**Please reply to this survey no later than November 11 2016.**

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

★Company name: (In Japanese or English)

★Answerer's name:

★Telephone number:

★E-mail address:

★**Industry:** (Please select the key area of your business from the list below)

\* For companies that have manufacturing operations in any place other than Hong Kong but do not have manufacturing sites in Hong Kong, please select "Non-manufacturers."

<Manufacturing\*>

(\*Companies that engage in production or processing activities in your area fall under "Manufacturing.\*" Even if your Japanese parent company is a manufacturer, your company should be regarded as a "Sales company" in the <Non-Manufacturing> category if your company engages only in product sales in your area.)

- Foods, processed agricultural or marine products
- Textiles (yarn, cloth, synthetic fabrics)

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- 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 goods
- Other manufacturing industry (      )

### <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 service business (      ) |   |  |

★Type of operation: (Please select the main clients of the major products that your company produces or distributes.)

- Companies                       General consumers                       Others (      )

★Classification: Your parent company in Japan is:

- A large enterprise                       A small or medium-sized enterprise\*

\*Companies that fall under the categories specified in Japan's Small and Medium-Sized Enterprise Basic Act are regarded as small and medium-sized enterprises. The categories are as follows:

- (1) Manufacturing, construction, transport and other industries except (2) to (4) below: Corporations capitalized at 300 million yen or less or with 300 or fewer employees
- (2) Wholesaling: Corporations capitalized at 100 million yen or less or with 100 or fewer employees
- (3) Services: Corporations capitalized at 50 million yen or less or with 100 or fewer employees
- (4) Retailing: Corporations capitalized at 50 million yen or less or with 50 or fewer employees

★Type of market entry (Please select an item below that applies to your company's case.)

- 1) Wholly owned subsidiary
- 2) Joint venture (capital-to-asset ratio of more than 50%)  
 Japanese partner    Local partner    Other (Nationality: )
- 3) Joint venture (capital-to-asset ratio of 50% or less)  
 Japanese partner    Local partner    Other (Nationality: )

★Year of establishment:

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\*Year when your parent company entered the local market or made investment into the local market

★Number of employees: (Please fill out boxes below with the current number of employees in round figures.)

The total number of employees:  , including the number of regular staff:

The number of managers:  , including the number of local managers:

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< Manufacturing and non-manufacturing >

## 1. Sales forecast

**Q1. What is your operating profit forecast for 2016 (from January to December)?**

- 1) Profit                       2) Breakeven                       3) Loss

**Q2. How will your operating profits for 2016 (from January to December) change compared to 2015?**

- 1) Increase                       2) Remain the same                       3) Decrease  
→ Go to Q3                      → Go to Q5                      → Go to Q4

**Q3. (This question is only for those who answered “1” in Q2.) What are the reasons for increased operating profits forecast for 2016? (Multiple answers allowed.)**

- 1) Increased sales due to export expansion  
 2) Increased sales in local markets  
 3) Effects of exchange rate fluctuation  
 4) Reduction of procurement costs  
 5) Reduction of labor costs  
 6) Reduction of other expenditures (e.g., administrative/utility/fuel costs)  
 7) Improvement of production efficiency\* (manufacturing industry only)  
 8) Improvement of sales efficiency\*\*  
 9) Other ( \_\_\_\_\_ )

\* “Improvement of production efficiency” here includes improvement of manufacturing procedures (e.g., introduction of a cell production system) and computerized production management.

\*\* “Improvement of sales efficiency” here includes improvement in the efficiency of product distribution and decrease of inventory.

**Q4. (This question is only for those who answered “3” in Q2.) What are the reasons for decreased operating profits forecast for 2016? (Multiple answers allowed.)**

- 1) Decreased sales due to export slowdown  
 2) Decreased sales in local markets  
 3) Effects of exchange rate fluctuation  
 4) Increase of procurement costs  
 5) Increase of labor costs  
 6) Increase of other expenditures (e.g., administrative/utility/fuel costs)  
 7) Rising interest rates  
 8) Production costs insufficiently shifted to selling price of goods  
 9) Other ( \_\_\_\_\_ )

**Q5. What is your operating profit forecast for 2017 compared to 2016?**

- 1) Increase                       2) Remain the same                       3) Decrease  
→ Go to Q6                      → Go to Q8                      → Go to Q7

**Q6. (This question is only for those who answered “1” in Q5.) What are the reasons for increased operating profits forecast for 2017? (Multiple answers allowed.)**

- 1) Increased sales due to export expansion  
 2) Increased sales in local markets  
 3) Effects of exchange rate fluctuation  
 4) Reduction of procurement costs  
 5) Reduction of labor costs  
 6) Reduction of other expenditures (e.g., administrative/utility/fuel costs)  
 7) Improvement of production efficiency\* (the manufacturing industry only)  
 8) Improvement of sales efficiency\*  
 9) Other ( \_\_\_\_\_ )

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\* “Improvement of production efficiency” here includes improvement of manufacturing procedures (e.g., introduction of a cell production system) and computerized production management.

\*\* “Improvement of sales efficiency” here includes improvement in the efficiency of product distribution and decrease of inventory.

**Q7. (This question is only for those who answered “3” in Q5.) What are the reasons for decreased operating profits forecast for 2017? (Multiple answers allowed.)**

- 1) Decreased sales due to export slowdown
- 2) Decreased sales in local markets
- 3) Effects of exchange rate fluctuation
- 4) Increase of procurement costs
- 5) Increase of labor costs
- 6) Increase of other expenditures (e.g., administrative/utility/fuel costs)
- 7) Rising interest rates
- 8) Production costs insufficiently shifted to selling price of goods
- 9) Other (\_\_\_\_\_)

## **2. Future business plan**

**Q8. What is your approach to future business challenges in the next one or two years?**

- 1) Expansion  
→ Go to Q9&10
- 2) Remaining the same  
→ Go to Q12
- 3) Reduction  
→ Go to Q11
- 4) Transferring to a third country/region or withdrawal from current local markets  
→ Go to Q11

**Q9. (This question is only for those who answered “1” in Q8.) What are the reasons for the future business expansion? (Multiple answers allowed.)**

- 1) Increased sales
- 2) High growth potential
- 3) High receptivity for high value-added products
- 4) Reduction of costs (e.g., procurement/labor costs)
- 5) Deregulations
- 6) Ease in securing labor force
- 7) Reconsideration of production and distribution networks
- 8) Relationship with clients
- 9) Other (\_\_\_\_\_)

**Q10. (This question is only for those who answered “1” in Q8.) What functions would you like to expand? (Multiple answers allowed.)**

- 1) Sales function
- 2) Production (ubiquitous products)
- 3) Production (high value-added products)
- 4) R&D
- 5) Function of regional headquarters
- 6) Logistics function
- 7) Administrative functions in providing services (e.g., shared services center, call center)
- 8) Other (\_\_\_\_\_)

**Q11. (This question is only for those who answered “3” or “4” in Q8.) What are the reasons for the future reduction, transfer or withdrawal? (Multiple answers allowed.)**

- 1) Decreased sales
- 2) Low growth potential
- 3) Low receptivity for high value-added products
- 4) Increase of costs (e.g., procurement/labor costs)
- 5) Tightening of regulations
- 6) Difficulty in securing labor force
- 7) Reviewing production and distribution networks

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- 8) Relationship with clients  
 9) Other ( \_\_\_\_\_ )

**Q12. Please check the boxes below regarding the number of employees in your company.**

	Number of local employees			Number of Japanese expatriates		
	Increase	No change	Decrease	Increase	No change	Decrease
Changes in the number of employees in a year-on-year comparison	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Future plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### **3. Management matters**

Regarding management of Japanese-affiliated companies in local markets, which of the followings do you consider as serious problems? Please check the boxes below that apply.

**Q13 Problem(s) in sales or other business activities (Multiple answers allowed)**

- 1) Decreased production orders from headquarters  
 2) Decreased orders from clients  
 3) Major clients requesting lower prices  
 4) Sluggishness in major sales markets (consumption downturn)  
 5) Difficulty in developing new clients  
 6) Decreased sales prices due to global oversupply  
 7) Inflow of cheap imported goods into local markets  
 8) Growing market shares of competitors (quality-wise competition)  
 9) Growing market shares of competitors (cost-wise competition)  
 10) Stagnant progress in local deregulations  
 11) Accounts receivable in arrears  
 12) Difficulty in developing new outlet       13) Other ( \_\_\_\_\_ )  
 14) No particular problem

**Q14 Problem(s) in financial affairs, financing, or foreign exchange (Multiple answers allowed)**

- 1) Cash flow shortage for expansion of business scale  
 2) Difficulty in acquiring 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 Japanese yen against US dollar  
 6) Restrictions on finance and settlements  
 7) Restrictions on foreign remittance  
 8) Tax burdens (i.e. corporate taxes and transfer pricing taxes)  
 9) Rising interest rates  
 10) Other ( \_\_\_\_\_ )  
 11) No particular problem

**Q15 Problem(s) with labor or employment (Multiple answers allowed)**

- 1) Increased wages  
 2) Difficulty in recruiting general staff  
 3) Difficulty in recruiting middle management staff

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- 4) Difficulty in recruiting general workers (manufacturing only)
- 5) Difficulty in recruiting engineering staff (manufacturing only)
- 6) Employee retention rate
- 7) Quality of employees
- 8) Personnel costs of Japanese (expatriate) managers and staff
- 9) Visa restrictions on Japanese (expatriate) managers and staff
- 10) Restrictions on staff dismissal and reduction
- 11) Difficulty in localizing managers and site supervisors
- 12) Restrictions on employing foreign workers
- 13) Other ( )
- 14) No particular problem

### Q16 Problem(s) in the foreign trade system (Multiple answers allowed)

- 1) Complicated customs clearance procedures
- 2) Time-consuming customs procedures
- 3) Lack of thorough information on trade rules and regulations
- 4) Unclear methods for assessing customs duties, obscure criteria for determining classification of customs duties
- 5) High import duties
- 6) Unclear inspection system
- 7) High non-tariff barriers\*
- 8) Strict or unclear quarantine system
- 9) Export restrictions and export taxes
- 10) Other ( )
- 11) No particular problem

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

### Q17 (Manufacturers only. Non-manufacturers go to Q18) Problems in production (Multiple answers allowed)

- 1) Insufficient production capacity due to lack of facilities
- 2) No more room for cost-cutting
- 3) Increase in financing costs
- 4) Difficulty in local procurement of raw materials and parts
- 5) Difficulty in changeover of production items within a short period of time
- 6) Difficulty in quality control
  - a) Low stability of skilled workers
  - b) Excess of errors by inspectors
  - c) Difficulty in mechanizing inspection procedures
  - d) Low quality awareness of workers
- 7) High tariffs on imported capital goods and intermediary goods
- 8) Power shortages or blackouts
- 9) Inadequate logistics infrastructure
- 10) Tightening environmental regulations
- 11) Other ( )
- 12) No particular problem

## 4. Merits and risks related to investment environment

### Q18 Which of the following factors can be considered as merits when you make an investment? (Multiple answers allowed)

- 1) Political/social stability
- 2) Market scale, growth potential
- 3) Plentiful land/offices, low land prices/rent
- 4) Sufficient infrastructure (power/logistics/communications)





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- 3) Almost no impact  
 4) No impact

**Q21 If you answered “Significantly” or “Somewhat” in Q20, please select the specific type(s) of inflation countermeasure(s). (Multiple answers allowed)**

- 1) Increasing prices of products (or services)  
 2) Cost-cutting through mass production and volume sales  
 3) Reviewing production (consolidation of lineup, improvement, adding of value)  
 4) Reviewing suppliers of raw materials and procurement content  
 5) Cost-cutting through increasing local procurement rate  
 6) Encouraging automation and power-conservation (e.g., introducing industrial robots)  
 7) Shifting production/service capabilities to third country/areas  
 8) Cost-cutting (e.g., administration cost, indirect cost)  
 9) Encouraging recruitment of local staff, reducing payroll expenses  
 10) Other ( )  
 11) No particular measures

### **6. Procurement of raw materials and parts (manufactures only)**

**Q22 Regarding your major products, please indicate the following rates: (1) cost of materials/parts to production cost, (2) cost of labor to production cost (forecasted rates for 2016, based on monetary amounts using a scale in which the rate of production cost is set at 100%)**

(1) Material costs (raw materials, parts)	( )%
(2) Labor costs	( )%

(Please indicate rates above by using integer numbers from 0 to 100. The total numbers of (1) + (2) should be below 100.)

\*Production cost includes the costs of all resources consumed in producing a product, such as materials, labor, etc.

**Q23 Regarding your major local products, please indicate their production costs in proportion with that of the same products in Japan, with the value for Japan set to 100. (Based on monetary amounts)**

Around ( )

Note 1: Please indicate the figures above by using numbers from 1 to 200.

Note 2: Production cost includes the costs of all resources consumed in producing a product, such as materials, labor, etc.

**Q24 What is the breakdown of your procurement sources? (Based on monetary amounts. Please ensure that the rates of all items below total to 100%)**

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> 1) Local (____%)          | <input type="checkbox"/> 2) Japan (____%)                 | <input type="checkbox"/> 3) ASEAN (____%)        |
| <input type="checkbox"/> 4) Mainland China (____%) | <input type="checkbox"/> 5) South Korea (____%)           | <input type="checkbox"/> 6) Taiwan (____%)       |
| <input type="checkbox"/> 7) India (____%)          | <input type="checkbox"/> 8) Other Asian countries (____%) | <input type="checkbox"/> 9) Oceania (____%)      |
| <input type="checkbox"/> 10) US (____%)            | <input type="checkbox"/> 11) Europe (____%)               | <input type="checkbox"/> 12) Middle East (____%) |
| <input type="checkbox"/> 12) Other (____%)         |   |  |

**Q25 If you selected “Local” in Q24, please indicate the rates for each item below. (Based on monetary amounts. Please ensure that the rates of all items below total to 100%.)**

- 1) Japanese-affiliated companies (\_\_\_\_%)  
 2) Local companies (\_\_\_\_%)  
 3) Other foreign-affiliated companies (\_\_\_\_%)

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**Q26 A. (This question is only for manufacturers which procure raw materials/parts from Japan) Are there any raw materials/parts that can be purchased only in Japan?**

- Yes  No

**B. (This question is only for those who selected “Yes” in A.) Please specifically indicate what they are.**

(Name of parts/raw materials: \_\_\_\_\_ )

**C. Please indicate the reason why it is difficult to procure the raw materials/parts mentioned in B from countries other than Japan.**

- 1) Because they cannot be produced in areas other than Japan in terms of quality/technology  
 2) Because those Japanese products have a competitive advantage in terms of their production costs  
 3) Because Japanese providers have a competitive advantage by providing stable supply/timely delivery services.  
 4) Because our client(s) requests us to procure raw materials/parts from Japan.  
 5) To prevent technology drain or to protect our intellectual property  
 6) Because it is difficult to dissolve our relationship with our Japanese providers  
 7) Because it is essential for us to respond swiftly and flexibly in terms of specification changes/services/maintenance  
 8) Other ( \_\_\_\_\_ )

**Q27 For which country or region do you plan to raise the dependency rate for procuring raw materials and parts in the future? (Multiple answers allowed)**

Country/region for which your company will raise dependency rate when purchasing raw materials and parts	Reasons
<input type="checkbox"/> (1) Local market	<input type="checkbox"/> 1) To lower costs <input type="checkbox"/> 2) To improve quality <input type="checkbox"/> 3) To follow instructions of clients <input type="checkbox"/> 4) To diversify risks <input type="checkbox"/> 5) To shorten lead time <input type="checkbox"/> 6) To speed up after-sales/maintenance services <input type="checkbox"/> 7) Reduced tariffs in line with FTA <input type="checkbox"/> 8) Other
<input type="checkbox"/> (2) ASEAN	<input type="checkbox"/> 1) To lower costs <input type="checkbox"/> 2) To improve quality <input type="checkbox"/> 3) To follow instructions of clients <input type="checkbox"/> 4) To diversify risks <input type="checkbox"/> 5) To shorten lead time <input type="checkbox"/> 6) To speed up after-sales/maintenance services <input type="checkbox"/> 7) Reduced tariffs in line with FTA <input type="checkbox"/> 8) Other
<input type="checkbox"/> (3) Mainland China	<input type="checkbox"/> 1) To lower costs <input type="checkbox"/> 2) To improve quality <input type="checkbox"/> 3) To follow instructions of clients <input type="checkbox"/> 4) To diversify risks <input type="checkbox"/> 5) To shorten lead time <input type="checkbox"/> 6) To speed up after-sales/maintenance services <input type="checkbox"/> 7) Reduced tariffs in line with FTA <input type="checkbox"/> 8) Other
<input type="checkbox"/> (4) India	<input type="checkbox"/> 1) To lower costs <input type="checkbox"/> 2) To improve quality <input type="checkbox"/> 3) To follow instructions of clients <input type="checkbox"/> 4) To diversify risks <input type="checkbox"/> 5) To shorten lead time <input type="checkbox"/> 6) To speed up after-sales/maintenance services <input type="checkbox"/> 7) Reduced tariffs in line with FTA <input type="checkbox"/> 8) Other
<input type="checkbox"/> (5) Japan	<input type="checkbox"/> 1) To lower costs <input type="checkbox"/> 2) To improve quality <input type="checkbox"/> 3) To follow instructions of clients <input type="checkbox"/> 4) To diversify risks <input type="checkbox"/> 5) To shorten lead time <input type="checkbox"/> 6) To speed up after-sales/maintenance services <input type="checkbox"/> 7) Reduced tariffs in line with FTA <input type="checkbox"/> 8) Other
<input type="checkbox"/> (6) None	
<input type="checkbox"/> (7) Other	<input type="checkbox"/> 1) To lower costs <input type="checkbox"/> 2) To improve quality <input type="checkbox"/> 3) To follow instructions of clients <input type="checkbox"/> 4) To diversify risks <input type="checkbox"/> 5) To shorten lead time <input type="checkbox"/> 6) To speed up after-sales/maintenance services <input type="checkbox"/> 7) Reduced tariffs in line with FTA <input type="checkbox"/> 8) Other

**Q28 This question is only for those who selected “1” in Q27. Which of the following suppliers are important for you to raise local dependency rate? (Multiple answers allowed)**

- 1) Local companies  2) Japanese-affiliated companies  3) Chinese companies  
 4) Korean companies  5) Taiwanese companies  6) European companies  
 7) US companies  8) Other ( \_\_\_\_\_ )  9) None in particular

### **7. Exports/imports**

**Q29 What is the proportion of export sales\* to the total sales of your company? ( \_\_\_\_\_ %)**

\* Indirect exports included (Sales for bonded factories included)

Products that are sold in mainland China after being re-imported to the mainland via Hong Kong, or other regions, should not be

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added to the amount of export.

**Q30 What is the breakdown of your export destinations? (Based on monetary amounts. Please ensure that the percentages total 100%)**

- |   |   |
|---|---|
| <input type="checkbox"/> 1) Japan (____%)                           | <input type="checkbox"/> 2) ASEAN (____%)       |
| <input type="checkbox"/> 3) Mainland China (____%)                  | <input type="checkbox"/> 4) South 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(Australia, New Zealand) (____%) | <input type="checkbox"/> 10) US (____%)         |
| <input type="checkbox"/> 11) Europe (____%)                         | <input type="checkbox"/> 12) Russia (____%)     |
| <input type="checkbox"/> 13) Middle East (____%)                    | <input type="checkbox"/> 14) Africa (____%)     |
| <input type="checkbox"/> 15) Other (____%)                          |   |

**Q31 Which of the following countries/territories do you see as the most promising export market for your company's business/products over the next one to three years? Please select one from the list below.**

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> 1) Indonesia                     | <input type="checkbox"/> 2) Malaysia                          | <input type="checkbox"/> 3) Vietnam    |
| <input type="checkbox"/> 4) Philippines                   | <input type="checkbox"/> 5) Singapore                         | <input type="checkbox"/> 6) Thailand   |
| <input type="checkbox"/> 7) CLM (Cambodia, Laos, Myanmar) | <input type="checkbox"/> 8) India                             | <input type="checkbox"/> 9) Japan      |
| <input type="checkbox"/> 10) South Korea                  | <input type="checkbox"/> 11) Mainland China                   | <input type="checkbox"/> 12) Hong Kong |
| <input type="checkbox"/> 13) Taiwan                       | <input type="checkbox"/> 14) Other Asia (_____)               | <input type="checkbox"/> 15) US        |
| <input type="checkbox"/> 16) Europe                       | <input type="checkbox"/> 17) Oceania (Australia, New Zealand) | <input type="checkbox"/> 18) Russia    |
| <input type="checkbox"/> 19) Middle East                  | <input type="checkbox"/> 20) Africa                           |  |
| <input type="checkbox"/> 21) Others (_____)               |   |  |

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East Asia has been in the process of introducing bilateral and multilateral free trade agreements (FTAs) and economic partnership agreements (EPAs) for various sectors. The following questions concern your company's use of such agreements.

**Q32 How has your company been utilizing existing bilateral or multilateral FTAs/ EPAs including prior tariff reduction measures and/or Early Harvest\*<sup>1</sup>? Furthermore, has your company been utilizing accumulation\*<sup>2</sup> in multilateral FTAs/ EPAs? (Multiple answers allowed)**

	Does your company currently exporting to or importing from the following countries/territory?		< For export activities > Is your company using or considering the use of preferential tariff measures under the FTA?				< For import activities > Is your company using or considering the use of preferential tariff measures under the FTA?			
	Export	Import	Currently in use	Considering using	No plan to use	Using accumulation	Currently in use	Considering using	No plan to use	Using accumulation
(Country of region)	<input type="checkbox"/> <sub>1</sub>	<input type="checkbox"/> <sub>2</sub>	<input type="checkbox"/> <sub>3</sub>	<input type="checkbox"/> <sub>4</sub>	<input type="checkbox"/> <sub>5</sub>	<input type="checkbox"/> <sub>6</sub>	<input type="checkbox"/> <sub>7</sub>	<input type="checkbox"/> <sub>8</sub>	<input type="checkbox"/> <sub>9</sub>	<input type="checkbox"/> <sub>10</sub>

\*<sup>1</sup>Early Harvest refers to an early tariff reduction undertaken on specified products.

\*<sup>2</sup>“Accumulation” means that, when the production of goods using the raw materials or parts originated from one country with which an FTA is signed, those materials and parts shall be considered to originate in the other country where working or processing of the finished product has taken place.

**Q33 Do you expect any impact of the TPP on your business when it is entry into force?**

- 1) Yes    2) No    3) Unknown

**Q34 (This question is only for those who answered “1) Yes” in Q.18 (1)) Please choose possible impacts you may have. (Multiple answers allowed.)**

- 1) Increase of production in your location \*This choice is only for manufacturing  
→ From which country/region do you transfer its production?

<List of countries / regions>

**TPP participants:**

1) Japan    2) Singapore    3) Vietnam    4) Malaysia    5) Brunei  
 6) Australia    7) New Zealand    8) US    9) Canada    10) Mexico  
 11) Chile    12) Peru

**Non-TPP participants:**

Northeast Asia:  
 13) China    14) Hong Kong / Macao    15) South Korea    16) Taiwan

ASEAN  
 17) Thailand    18) Indonesia    19) Philippines    20) Cambodia  
 21) Myanmar    22) Laos

Southwest Asia:  
 23) India    24) Bangladesh    25) Sri Lanka    26) Pakistan

Other:  
 27) Other (                    )    28) Unknown

- 2) Decrease of production in your location \*This choice is only for manufacturing  
→ To which country/region do you transfer its production?

<List of countries / regions>

**TPP participants:**

1) Japan    2) Singapore    3) Vietnam    4) Malaysia    5) Brunei  
 6) Australia    7) New Zealand    8) US    9) Canada    10) Mexico  
 11) Chile    12) Peru

**Non-TPP participants:**

Northeast Asia:  
 13) China    14) Hong Kong / Macao    15) South Korea    16) Taiwan

ASEAN

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- 17) Thailand     18) ~~Indonesia~~     19) Philippines     20) Cambodia  
 21) Myanmar     22) Laos  
Southwest Asia:  
 23) India     24) Bangladesh     25) Sri Lanka     26) Pakistan  
Other:  
 27) Other (                    )     28) Unknown
- 3) Increase of export from your location  
 → Where do you increasingly export?
- <List of countries / regions>**  
**TPP participants:**  
 1) Japan     2) Singapore     3) Vietnam     4) Malaysia     5) Brunei  
 6) Australia     7) New Zealand     8) US     9) Canada     10) Mexico  
 11) Chile     12) Peru  
**Non-TPP participants:**  
Northeast Asia:  
 13) China     14) Hong Kong / Macao     15) South Korea     16) Taiwan  
ASEAN  
 17) Thailand     18) ~~Indonesia~~     19) Philippines     20) Cambodia  
 21) Myanmar     22) Laos  
Southwest Asia:  
 23) India     24) Bangladesh     25) Sri Lanka     26) Pakistan  
Other:  
 27) Other (                    )     28) Unknown
- 4) Decrease of export from your location  
 → Where do you decreasingly export?
- <List of countries / regions>**  
**TPP participants:**  
 1) Japan     2) Singapore     3) Vietnam     4) Malaysia     5) Brunei  
 6) Australia     7) New Zealand     8) US     9) Canada     10) Mexico  
 11) Chile     12) Peru  
**Non-TPP participants:**  
Northeast Asia:  
 13) China     14) Hong Kong / Macao     15) South Korea     16) Taiwan  
ASEAN  
 17) Thailand     18) ~~Indonesia~~     19) Philippines     20) Cambodia  
 21) Myanmar     22) Laos  
Southwest Asia:  
 23) India     24) Bangladesh     25) Sri Lanka     26) Pakistan  
Other:  
 27) Other (                    )     28) Unknown
- 5) Increase of sales in your location  
 6) Decrease of sales in your location  
 7) Reduction of procurement costs for raw materials or parts you purchase from existing suppliers.  
 8) Change of suppliers for procuring raw materials or parts.  
 a) From which countries or regions?
- <List of countries / regions>**  
**TPP participants:**  
 1) Japan     2) Singapore     3) Vietnam     4) Malaysia     5) Brunei  
 6) Australia     7) New Zealand     8) US     9) Canada     10) Mexico  
 11) Chile     12) Peru  
**Non-TPP participants:**  
Northeast Asia:  
 13) China     14) Hong Kong / Macao     15) South Korea     16) Taiwan  
ASEAN  
 17) Thailand     18) Indonesia     19) Philippines     20) Cambodia  
 21) Myanmar     22) Laos  
Southwest Asia:  
 23) India     24) Bangladesh     25) Sri Lanka     26) Pakistan  
Other:  
 27) Other (                    )     28) Unknown
- b) To which countries or regions?
- <List of countries / regions>**  
**TPP participants:**  
 1) Japan     2) Singapore     3) Vietnam     4) Malaysia     5) Brunei



## 2016 Questionnaire Survey of Japanese-Affiliated Firms

- B.** Engineer (Regular employees who are core technicians, graduates of a vocational college or university, and have 5 years of experience)

Base salary\* only (monthly): \_\_\_\_\_ [local currency]

Bonus: Base salary × \_\_\_\_\_ months

Annual salary\*\* : \_\_\_\_\_ [local currency]

- C.** Manager (Regular employees who are section managers in charge of sales, university graduates, and who have 10 years of work experience)

Base salary only\* (monthly): \_\_\_\_\_ [local currency]

Bonus: Base salary × \_\_\_\_\_ months

Annual salary\*\* : \_\_\_\_\_ [local currency]

- D.** Wage increase rate for the previous fiscal year, compared to the previous year (FY2015 to FY2016, average in all job types: \_\_\_\_\_ %)

- E.** Outlook for wage increase rate for the next fiscal year, compared to the previous year (FY2016 to FY2017, average in all job types: \_\_\_\_\_ %)

### <Non-manufacturers>

- A.** Staff (regular general workers with 3 years of work experience, not including dispatched and probationary workers)

Base salary\* only (monthly): \_\_\_\_\_ [local currency]

Bonus: Base salary × \_\_\_\_\_ months

Annual salary\*\* : \_\_\_\_\_ [local currency]

- B.** Manager (regular employees who are section managers in charge of sales, university graduates, and who have 10 years of work experience)

Base salary\* only (monthly): \_\_\_\_\_ [local currency]

Bonus: Base salary × \_\_\_\_\_ months

Annual salary\*\* : \_\_\_\_\_ [local currency]

- C.** Wage increase rate for the previous fiscal year, compared to the previous year (FY2015 to FY2016, average in all job types: \_\_\_\_\_ %)

- D.** Outlook for wage increase rate for the next fiscal year, compared to the previous year (FY2016 to FY2017, average in all job types: \_\_\_\_\_ %)

\* The base salary excludes benefits, as of October 2016.

\*\* The total liability to an employee includes the total of annual base salary, benefits, social security, overtime allowances and bonuses are added, but excludes severance benefits. As of FY2016.

**Thank you for your cooperation.**