

CHAPTER 2

Survey on the Doing-Business Environment in ASEAN

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CHAPTER 2

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2.1 Introduction

This chapter reports on a survey of the business environment in Association of Southeast Asian Nations (ASEAN) Member States (AMS) conducted by the Economic Research Institute of ASEAN and East Asia (ERIA) in collaboration with Deloitte Consulting. The purpose of this survey was to answer the following questions: (i) what difficulties do companies based in ASEAN find when doing business, (ii) how serious are the difficulties, (iii) what they expect governments to do to overcome these difficulties, and (iv) how they are responding to the digital economy to realise a sustainable and resilient future. The survey had four categories of questions: trading across borders, human resources development, the digital economy, and others on doing business.

Results show that many companies perceived difficulties in trading across borders due to three significant factors: time-consuming manual or on-site procedures because of the limited scope of electronic services, time-consuming manual or on-site procedures due to unclear customs procedures, and corruption or lack of compliance of customs officers. Further, many companies expected governments or public institutions to promote improvement in customs authority compliance, provide online services to compare available economic partnership agreements (EPAs) or free trade agreements (FTAs), and develop references for customs officers to determine Harmonized System (HS) codes.

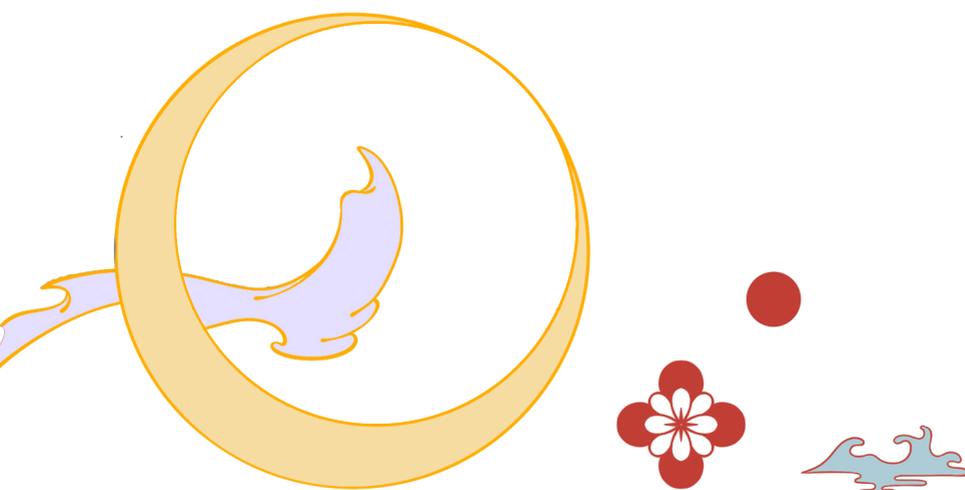
The private sector found challenges in securing human resources to achieve medium- or long-term business growth goals, such as middle managers to drive business transformation or innovation and/or to manage existing business processes. Leadership, strategy development, and business modelling and planning, in particular, were highlighted in the shortage of skills amongst middle

managers. In addition, many companies struggled with hiring and training new graduates (i.e. potential workers) and professionals (i.e. existing workers) due to a gap between the skills required by the private sector and educational curriculum or materials, as well as a lack of opportunities for working professionals to reskill. To overcome challenges in securing human resources, governments and public institutions were expected to encourage educational institutions to incorporate common skills into their curriculum, define the common skills necessary before beginning to work, and enhance the mobility of human resources across countries.

A wave of digital technologies is stimulating the private sector to deal with social agendas for a sustainable and resilient future, such as upgrading administrative processes, smart logistics and supply chain resilience, sustainable energy, cybersecurity, smart cities, and e-government. However, many companies found difficulties in collecting the necessary information for the creation of innovative products and services, such as a lack of information on competitors and a lack of innovative business ideas or technical seeds. Many companies also experienced difficulties in obtaining funding, such as internal capital or investment budgets, and found loans inaccessible due to strict conditions. For the private sector to be innovative and productive, governments and public institutions were expected to support their expansion globally or through overseas collaborations and regulatory support (e.g. creation of a sandbox to deregulate technology to encourage companies to innovate).

Lastly, results on other matters on doing business suggest that many companies experienced difficulties in paying taxes (i.e. complicated systems of taxation) and integrating sustainability agenda into their businesses.

This chapter is organised as follows. Section 2 describes how the survey was designed. Section 3 reports the results of the survey. Section 4 concludes.



2.2 Questionnaire Design

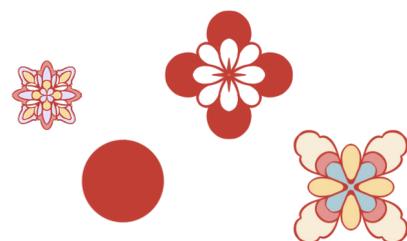
2.2.1 Development of Questionnaire Items

To design the survey, desktop research and expert interviews with public agencies (e.g. the Japan External Trade Organization [JETRO]) were conducted regarding challenges that companies face in doing business, initial hypotheses were formulated, and questionnaire items were consequently developed. These items were distributed online with the support of relevant stakeholders.

To formulate initial hypotheses, 12 indicators¹ were adopted from World Bank (2020), as they are a comprehensive set of issues faced in the business environment. Desktop research was then conducted to identify the challenges of the 12 indicators in businesses operating in AMS. The material for the desktop research was from publicly available sources, including the Asian Development Bank (ADB), Organisation for Economic Co-operation and Development (OECD), and World Bank (World Bank, 2020; IMD, 2021; OECD, 2021; IEA, 2022; Lin et al., 2022; UNESCAP, 2022). The desktop research suggested selecting indicators for the survey relevant to the business operation stage (i.e. after the business starts and before it closes), for example, ‘trading across borders’ and ‘employing workers’.

Next, expert interviews were conducted to examine the initial hypotheses derived from the desktop research. They were conducted with business associations and public agencies (e.g. ASEAN Business Advisory Council [ASEAN-BAC], Federation of Japanese Chambers of Commerce and Industry in ASEAN, and JETRO),² which revealed that ‘trading across borders’ and ‘employing workers’ were the most important indicators in terms of business challenges compared to other indicators. In addition, ‘innovation’ was identified as a key indicator.

The questionnaire items were thus designed to relate to the business environment of the companies. They included four categories of questions: trading across borders, human resources development, digital economy, and other issues on doing business.



¹Indicators included ‘starting a business’, ‘dealing with construction permits’, ‘getting electricity’, ‘registering property’, ‘protecting minority investors’, ‘getting credits’, ‘paying taxes’, ‘trading across borders’, ‘enforcing contracts’, ‘employing workers’, ‘contracting with the government’, and ‘resolving insolvency’.

²To justify the business issues faced by companies, a series of interviews was conducted with public agencies that have close contact with companies in their respective regions to obtain information and opinions from the companies. Interviews with external organisations were conducted online with ASEAN-BAC Brunei Darussalam; JETRO Phnom Penh; JETRO Jakarta; Japanese Chamber of Commerce and Industry, Lao People’s Democratic Republic; JETRO Vientiane; JETRO Kuala Lumpur; ASEAN-BAC Singapore; and Japanese Chamber of Commerce, Bangkok.

2.2.2 Questionnaire Distribution Method

The survey was conducted online to obtain responses from various companies with diverse demographics (e.g. size of enterprise and industry) in AMS. The questionnaire items are listed the appendixes of this chapter. The survey was conducted from 28 October to 1 December 2022. The survey link was distributed to member companies in each AMS through the organisations in Table 2.1. In addition, the project team allowed some companies to answer the survey by leveraging the local network from Deloitte Consulting in AMS to supplement the number of responses.

Table 2.1: Organisations that Supported Questionnaire Distribution

Country	Name
Indonesia	Japan External Trade Organization Indonesia (JETRO Jakarta)
Lao PDR	Japanese Chamber of Commerce and Industry, Lao PDR
Myanmar	Japan Chamber of Commerce and Industry, Myanmar
Philippines	Japanese Chamber of Commerce and Industry of the Philippines
Singapore	Japanese Chamber of Commerce and Industry Singapore
Thailand	The Japanese Chamber of Commerce, Bangkok
Viet Nam	Japanese Chamber of Commerce and Industry in Ho Chi Minh City
Viet Nam	Japanese Chamber of Commerce and Industry in Vietnam

Lao PDR = Lao People's Democratic Republic.
Source: Authors.

2.3 Results

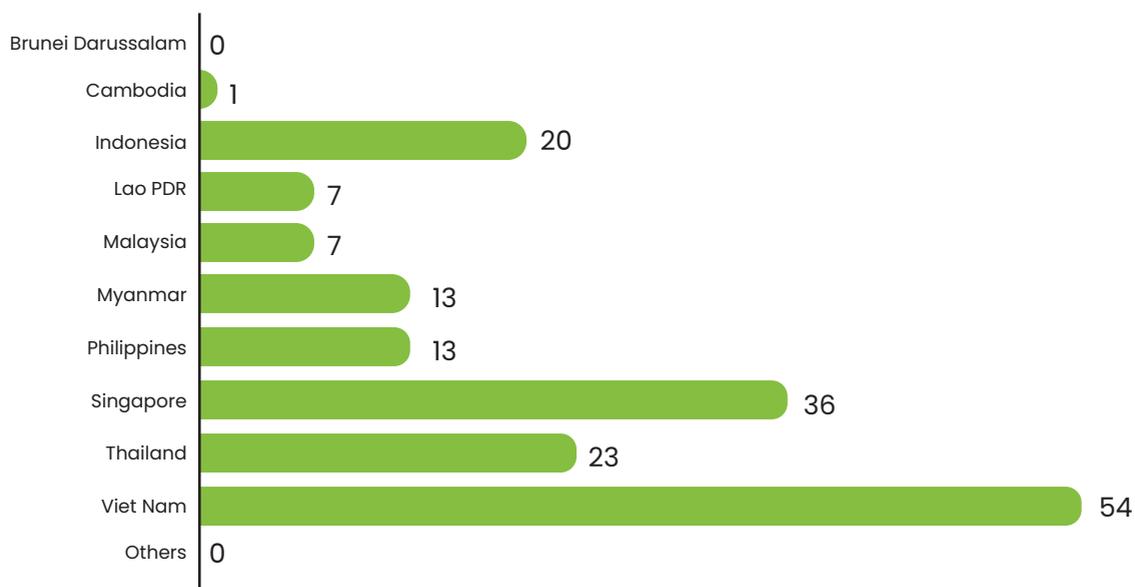
2.3.1 Respondent Overview

In total, 174 valid responses were obtained by the deadline from the companies.

2.3.2 Location of Respondents

Figure 2.1 shows that most companies are in Viet Nam (54), followed by Singapore (36), Thailand (23), Indonesia (20), Myanmar (13), the Philippines (13), Malaysia (7), Lao People's Democratic Republic (Lao PDR) (7), and Cambodia (1). No respondents were from Brunei Darussalam or 'Others' countries.

Figure 2.1: Location of Respondents

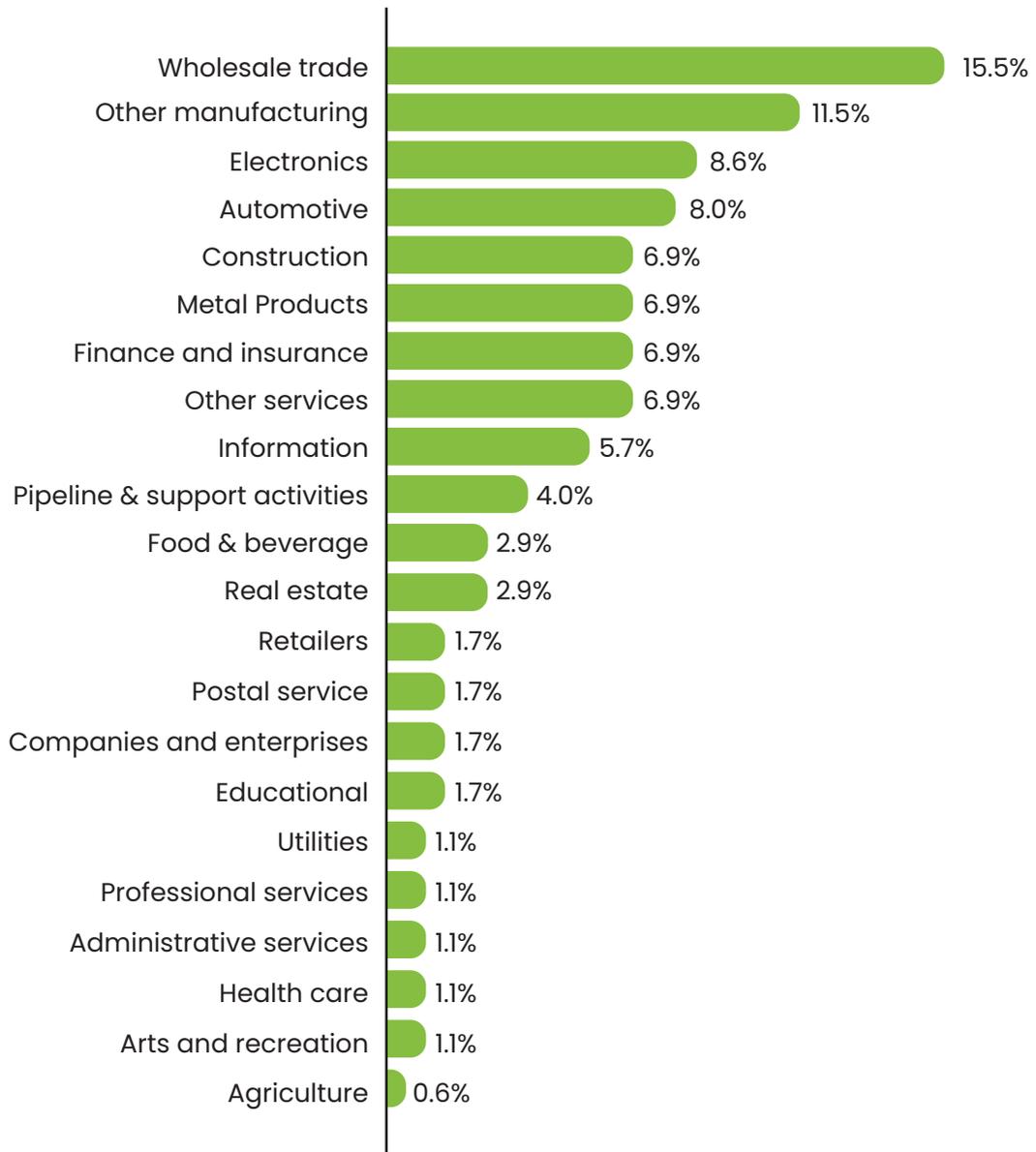


Lao PDR = Lao People's Democratic Republic.
Note: Q3-1. Please provide your company's location.
Source: Authors.

2.3.3 Main Business Areas of Respondents

Figure 2.2 shows that 22 sectors were captured by the survey. The top four sectors were 'wholesale trade' (15.5% of respondents), followed by 'other manufacturing' (11.5%), 'electronics' (8.6%), and 'automotive' (8.0%).

Figure 2.2: Main Business Areas of Respondents

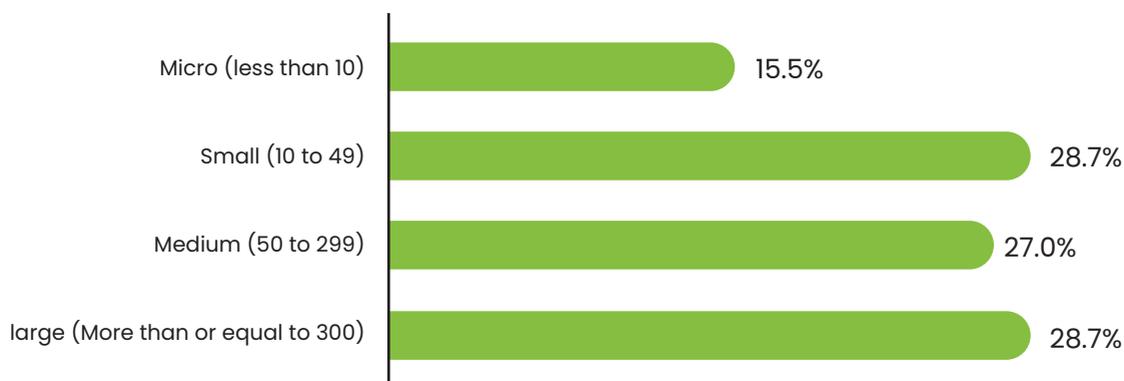


Note: Q4. Which industry is your company's main business?
Source: Authors.

2.3.4 Size of Respondent Enterprises

Figure 2.3 shows respondents by company size. The top groups are small enterprises (i.e. 10–49 employees) and large enterprises (i.e. more than 300 employees), both representing 28.7%, followed by medium enterprises (i.e. 50–299 employees) with 27.0%, and micro enterprises (i.e. less than 10 employees) with 15.5%.

Figure 2.3: Size of Respondent Enterprises



Note: Q7. How many regular employees work for your company?
Source: Authors.

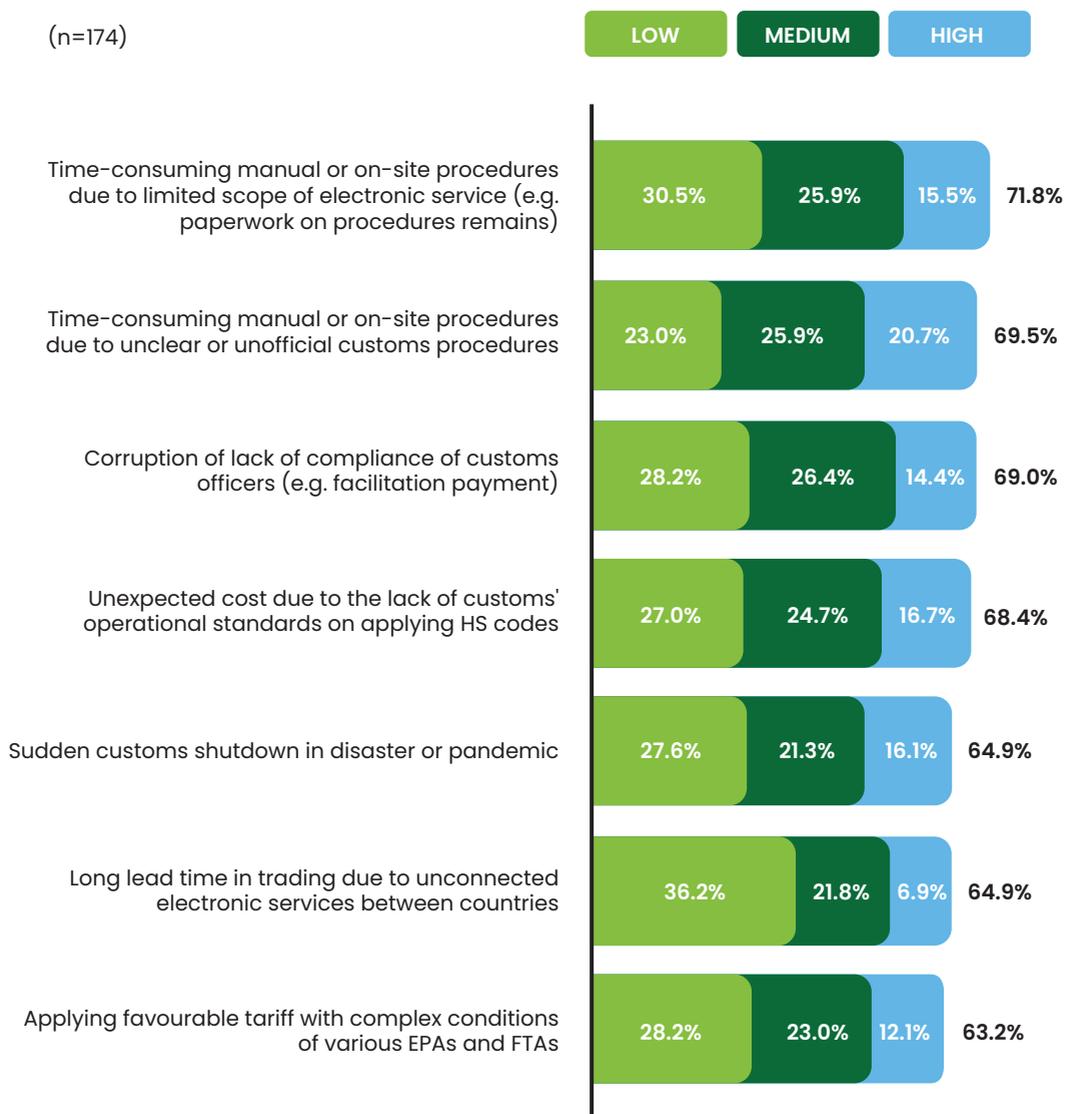
2.4 Trading across Borders

This section provides insights into and implications of trading across borders based on survey results (i.e. Q8–Q9). It covers the difficulties in trading across borders in general by country, by industry, and by company size; and the expectations of public initiatives to solve difficulties in trading across borders.

2.4.1 Difficulties in Trading across Borders

Figure 2.4 illustrates the perceived difficulties in trading across borders and the impact on respondents' business profits at three levels, 'low', 'medium', and 'high'. When adding 'low', 'medium', and 'high' responses together, more than 60% of the respondents indicated difficulties in trading across borders. Notably, the most significant difficulty was noted as 'time-consuming or on-site procedures due to limited scope of electronic services', with 71.8% of the respondents indicating this issue.

Figure 2.4: Difficulties in Trading across Borders



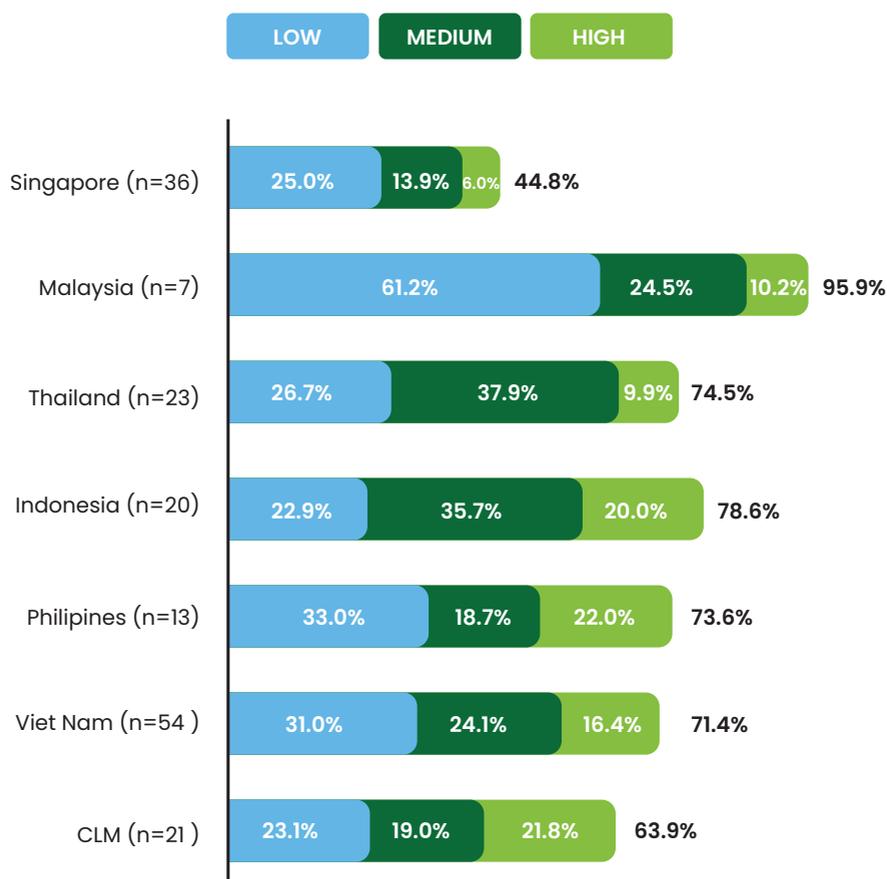
EPA = economic partnership agreement, FTA = free-trade agreement, HS = Harmonized System.

Notes: Excludes 'never recognized as difficulties or issues'. (Q8. Do you have difficulties or issues in trading across borders? If you have those, please select the impact of each on profits of your business as follows: (1) high, (2) medium, (3) low, or (4) never recognized as difficulties or issues.)

Source: Authors.

Figure 2.5 examines by country the same responses as Figure 2.4. Malaysia presented the most significant difficulties with 95.9% of respondents indicating issues; Malaysian companies do experience higher costs of trading despite the country’s high economic development level. However, note that the number of responses from Malaysia is limited (i.e. 7); the country also had the highest score for ‘low’ challenges at 61.2%. Indonesia followed with 78.6%, and there was no significant difference amongst other AMS. Singapore had the least perceived challenges, with only 44.8% of respondents noting them. Adding together ‘high’ and ‘medium’ responses, Indonesia scored the highest with 55.7% of respondents indicating issues, and Thailand followed with 47.8%.

Figure 2.5: Difficulties in Trading across Borders by Country

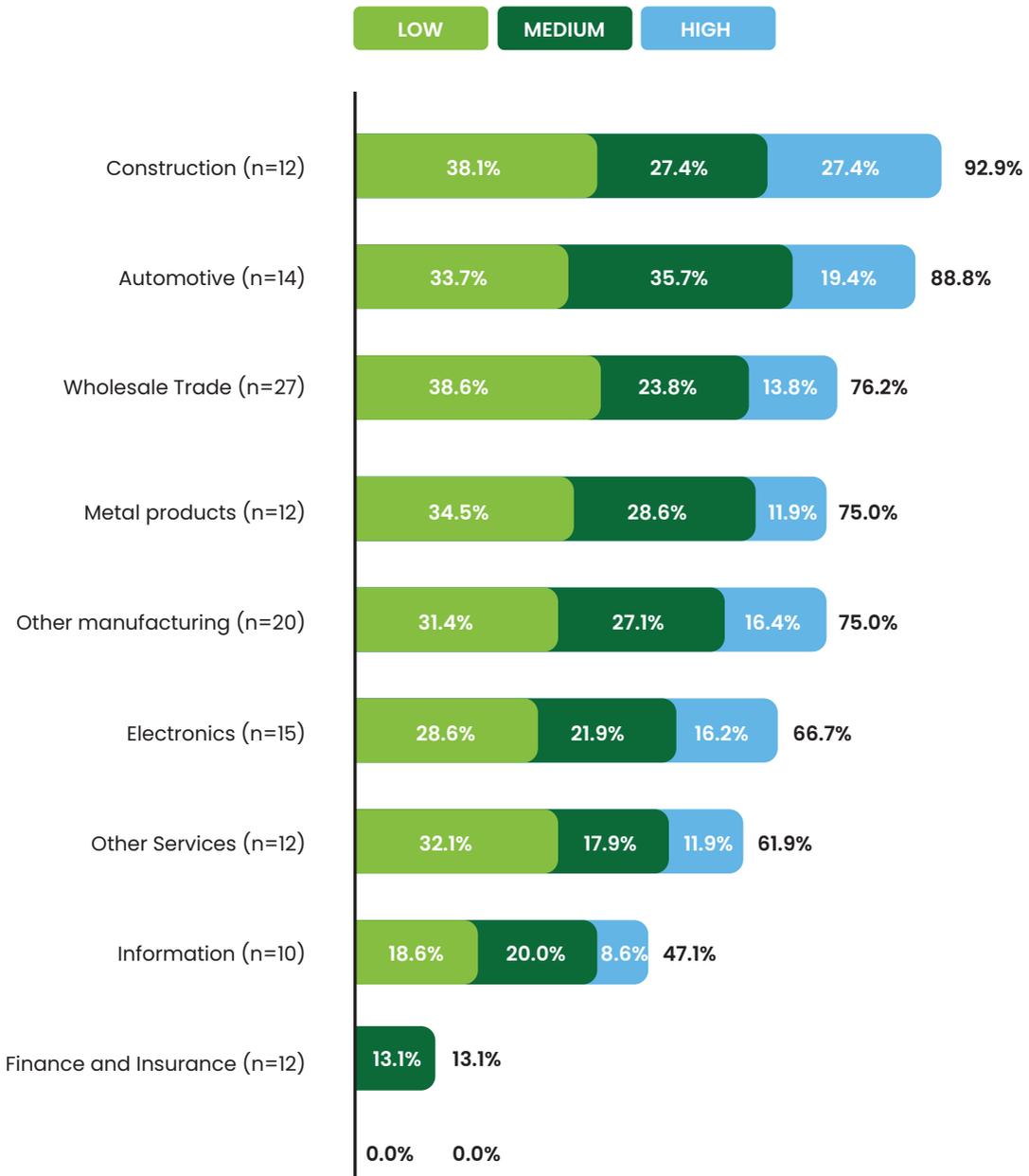


CLM = Cambodia, Lao People’s Democratic Republic, and Myanmar.

Notes: Brunei Darussalam is excluded since no responses were obtained. The countries are in order by gross national income per capita. (Q8. Do you have difficulties or issues in trading across borders? If you have those, please select the impact of each on profits of your business as follows: (1) high, (2) medium, (3) low, or (4) never recognized as difficulties or issues.)

Source: Authors.

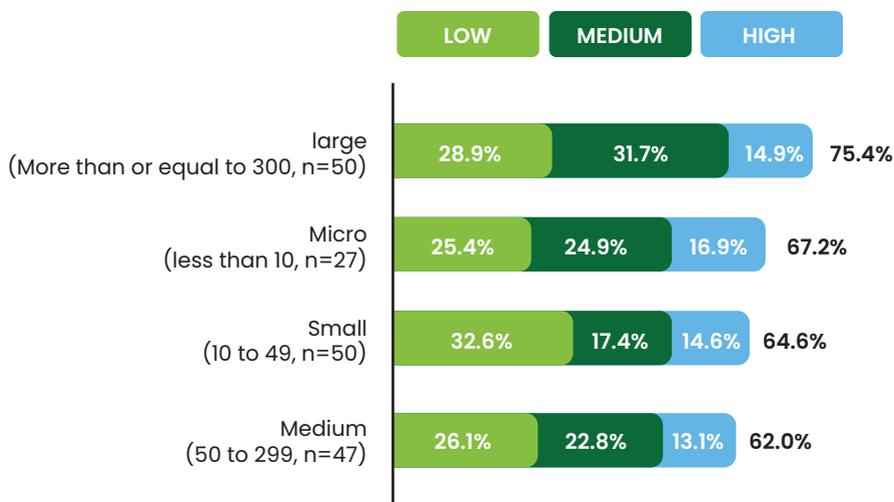
Figure 2.6: Difficulty in Trading across Borders by Industry



Notes: The data used only include industries with 10 respondents or more. (Q8. Do you have difficulties or issues in trading across borders? If you have those, please select the impact of each on profits of your business as follows: (1) high, (2) medium, (3) low, or (4) never recognized as difficulties or issues.)
 Source: Authors.

Figure 2.7 examines, by company size, the same responses as Figure 2.4. Large companies indicated slightly higher challenges in trading across borders, with 75.4% compared to micro, small, and medium-sized companies.

Figure 2.7: Difficulties in Trading across Borders by Company Size

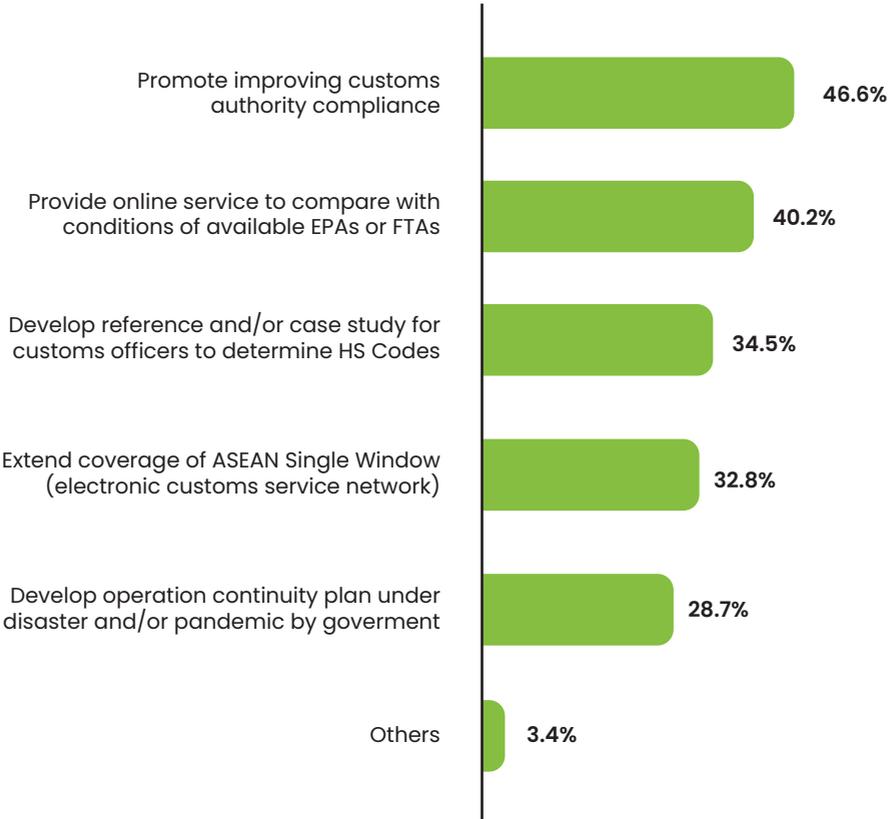


Note: Q8. Do you have difficulties or issues in trading across borders? If you have those, please select the impact of each on profits of your business as follows: (1) high, (2) medium, (3) low, or (4) never recognized as difficulties or issues. Source: Authors.

2.4.2 Expectations of Public Initiatives to Solve Difficulties in Trading across Borders

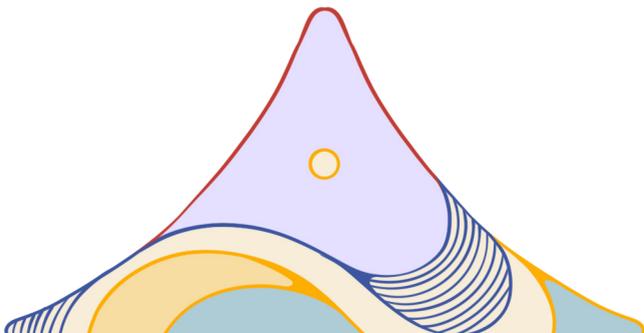
Figure 2.8 shows public initiatives that companies expected to resolve difficulties in trading across borders. The top priority of public initiatives should be to 'promote improving customs authority compliance', with 46.6% of respondents agreeing with this statement. This was followed by 'provide online service to compare with condition of available EPAs or FTAs' with 40.2%. The third priority should be to 'develop reference or case study for customs officers to determine HS codes' with 34.5%.

Figure 2.8: Expectations toward Public Initiatives to Solve Difficulties in Trading across



ASEAN = Association of Southeast Asian Nations, EPA = economic partnership agreement, FTA = free-trade agreement, HS = Harmonized System.
 Note: Q9-1. Please select the initiatives [that] you expect public institutions to take to solve the difficulties or issues.
 Source: Authors.

Several responses were received to the open-ended question regarding expected public initiatives, such as ‘make [a] clear standard for legal interpretation, as legal interpretations vary from province to province, which is very difficult [when obtaining] approvals from [each province]’ (Viet Nam).



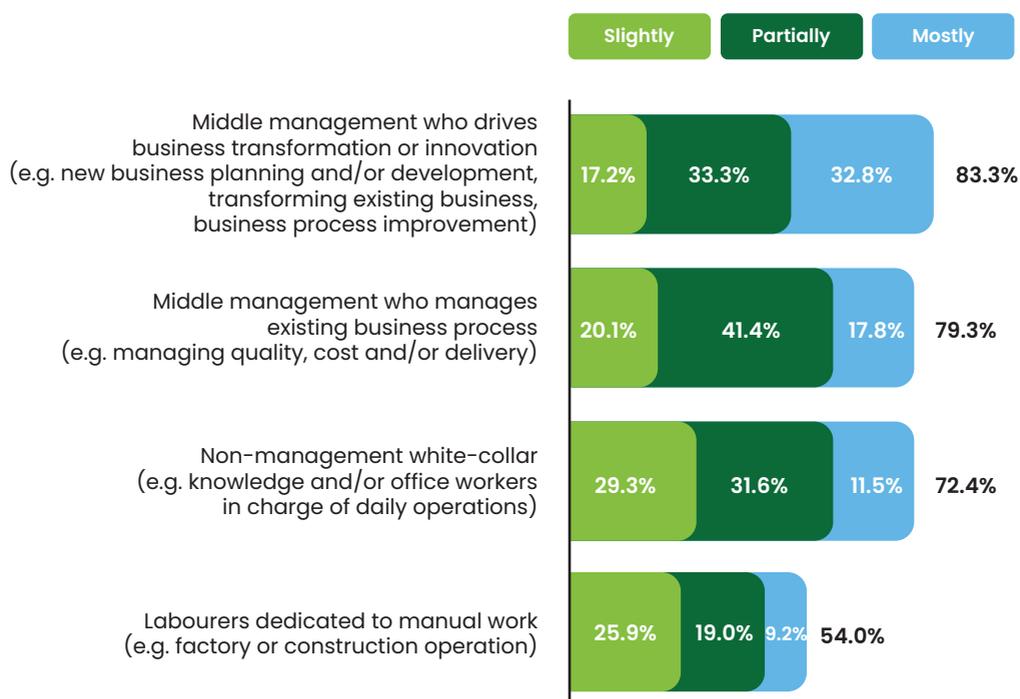
2.5 Human Resources Development

This section examines the results of the survey regarding human resources development (i.e. Q10–Q14). It covers (i) types of human resources that respondents felt were insufficient to achieve business growth, (ii) shortages of skills required for middle management, (iii) difficulties that respondents found in hiring and training workers, and (iv) public initiatives regarding human resources development that respondents expected.

2.5.1 Types of Human Resources Insufficient to Achieve Business Growth

Figure 2.9 examines the perceived insufficiency at three levels of four types of human resources to achieve medium- or long-term business growth ('slightly', 'partially', and 'mostly'). More than 50% of respondents indicated a failure of human resources to help achieve medium- or long-term business growth. Notably, middle management – who drives business transformation and/or innovation – were perceived as having the least capability with 83.3% of respondents indicating this. Specifically, 66.1% of the respondents indicated 'partially' and 'mostly' middle management are unable to drive business transformation or innovation.

Figure 2.9: Types of Human Resources Insufficient to Achieve Business Growth



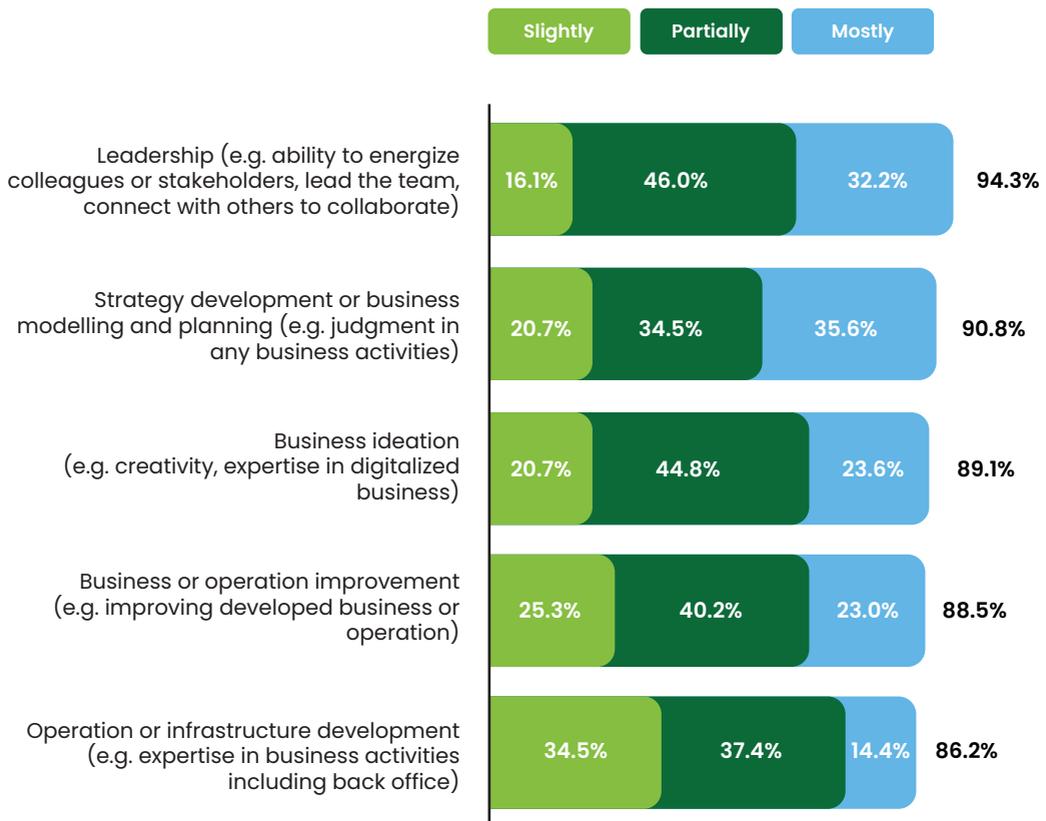
Notes: Excludes 'never recognized the lack'. (Q10. Do the following human resources lack in your company to achieve medium- or long-term business growth? If so, please indicate to what extent your company lacks for each human resources as follows: (1) mostly, (2) partially, (3) slightly, or (4) never recognized the lack.)

Source: Authors.

2.5.2 Shortages of Skills Required for Middle Management

Figure 2.10 indicates the perceived shortage of skills required for middle management at three levels, 'slightly', 'partially' and 'mostly'. Around 90% of respondents indicated experiencing a shortage of skill sets amongst middle management for all skills. Notably, 94.3% of respondents mentioned that they had experienced a shortage of 'leadership' skills amongst middle management. The second-highest shortage was 'strategy development or business modelling', with 90.8% of respondents indicating this.

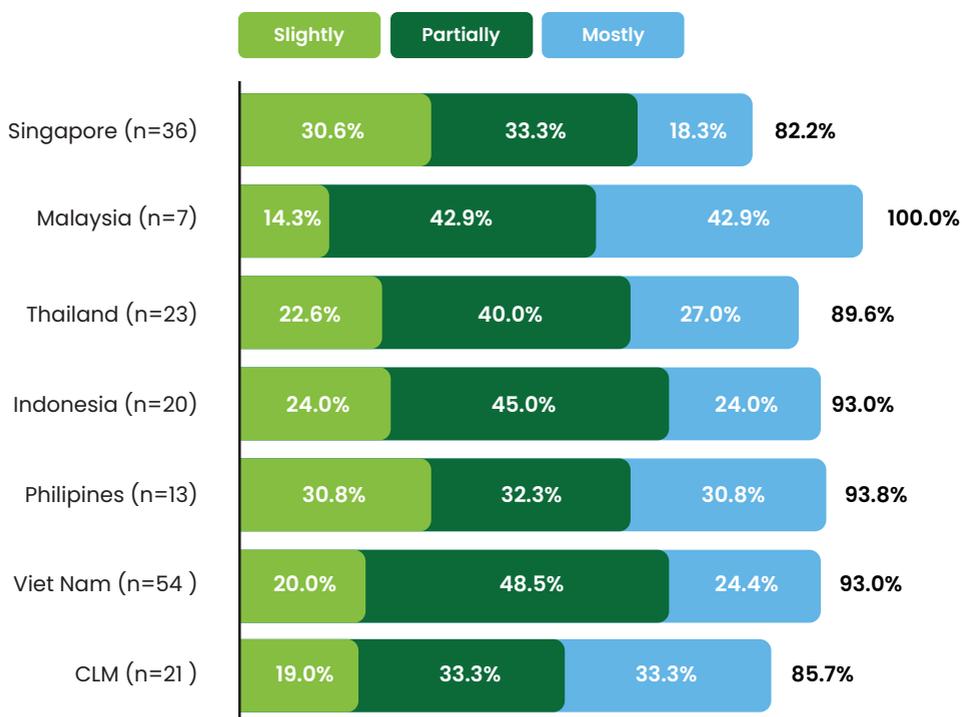
Figure 2.10: Shortages of Skills Required for Middle Management



Note: Q13. Please indicate the degree of shortage of the following skills required for middle management to drive business transformation or innovation: (1) mostly, (2) partially, (3) slightly, or (4) never recognized the lack.
Source: Authors.

Further, Figure 2.11 shows that all surveyed companies experienced a shortage of skill sets amongst middle management. Although Malaysia stood out as a country that scored 100% on this indicator, as previously mentioned, it should be noted that the responses from Malaysia were limited.

Figure 2.11: Shortages of Skills Required for Middle Management by Country



CLM = Cambodia, Lao People's Democratic Republic, and Myanmar.

Notes: Excludes 'never recognized the shortage'. Brunei Darussalam is excluded since no responses were obtained. The countries are in the order of gross national income per capita. (Q13. Please indicate the degree of shortage of the following skills required for middle management to drive business transformation or innovation: (1) mostly, (2) partially, (3) slightly, or (4) never recognized the lack.)

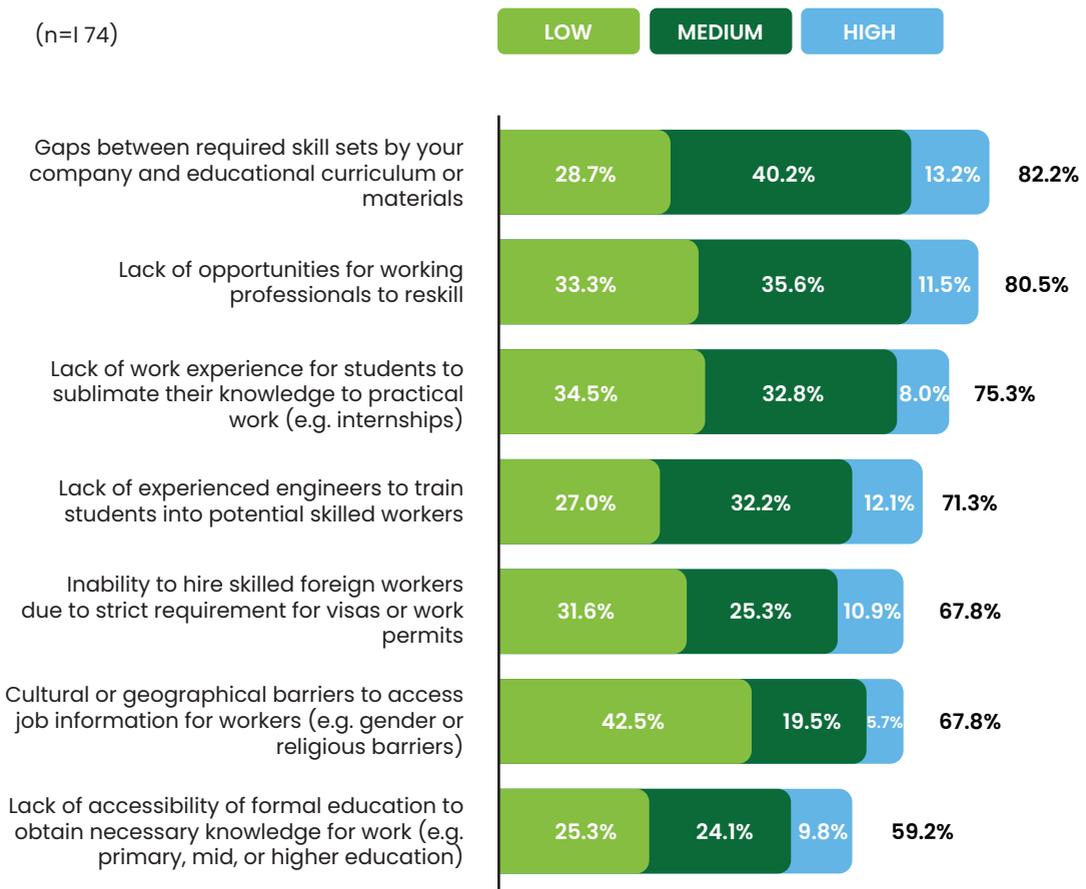
Source: Authors.

The questionnaire also asked an open-ended question about the shortage of skills in middle management. The responses included 'the skills of logical thinking and Plan-Do-Check-Act (PDCA) improvement cycle are important because they can promote revolution [in] other departments' (Viet Nam); 'managers often focus on short-term goals and do not have much experience [in considering] long-term strategy' (Viet Nam); and 'it is very difficult to find talented employees for a management role that matches the standard salary, [as] the salary expectations of talented professionals are very high, and they tend to work only in the finance, consulting, or government sectors' (Singapore).

2.5.3 Difficulties in Hiring and Training Workers

Figure 2.12 indicates the difficulties in hiring and training new graduates and professionals and their impacts on respondents' business profits at three levels, 'low', 'medium', and 'high'. The most significant difficulty indicated was 'gaps between required skill sets by [the] company and educational curriculum and materials', with 82.2% of respondents selecting this. The second difficulty was 'lack of opportunities for working professionals to reskill', with 80.5% of the respondents agreeing with the statement.

Figure 2.12: Difficulties in Hiring and Training New Graduates and Professionals

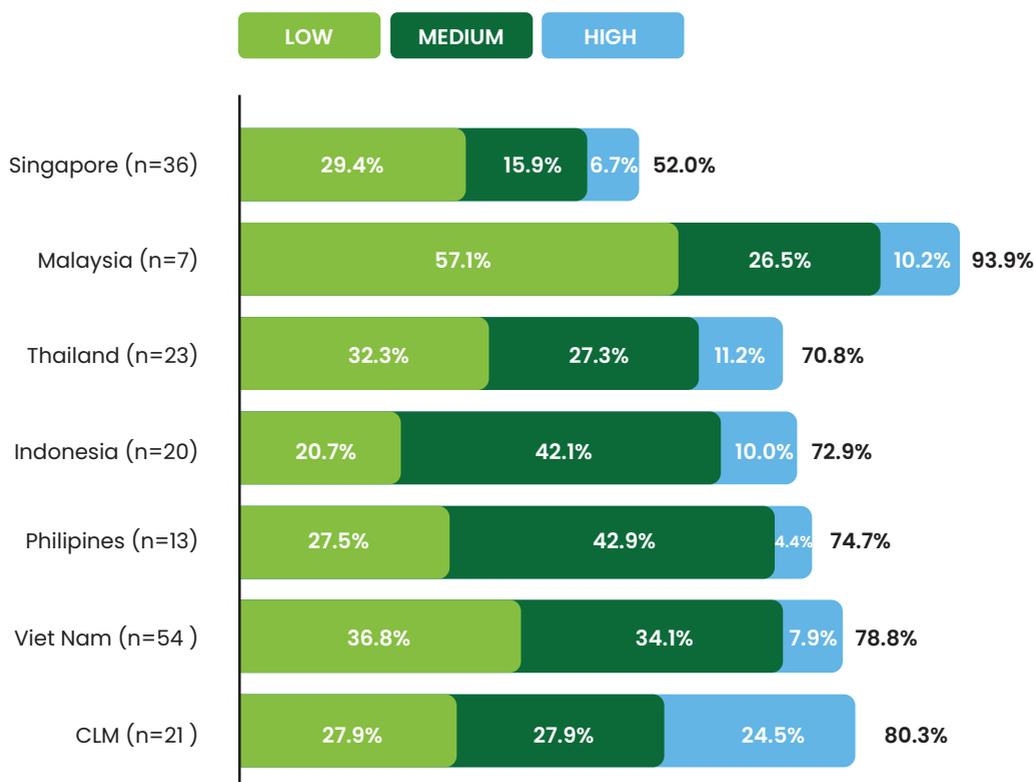


Notes: Excludes 'never recognized as difficulties or issues'. (Q11. Do you have difficulties or issues in hiring or training new graduates and professionals? Please select the impact of each on the profits of your business as follows: (1) mostly, (2) partially, (3) slightly, or (4) never recognized the lack.)

Source: Authors.

Figure 2.13 shows the recognised difficulties in hiring and training new graduates and professionals. Malaysia experienced the most difficulties, with 93.9% citing difficulties in hiring and training new graduates and professionals. Singapore experienced the fewest difficulties with 52.0%. When adding together 'medium' and 'high' responses, Cambodia, Lao PDR, and Myanmar have the most with 52.4% of respondents indicating difficulties, and Indonesia followed with 52.1%.

Figure 2.13: Difficulties in Hiring and Training New Graduates and Professionals by Country



CLM = Cambodia, Lao People's Democratic Republic, and Myanmar.

Notes: Brunei Darussalam is excluded since no responses were obtained. The countries are in order by gross national income per capita. (Q11. Do you have difficulties or issues in hiring or training new graduates and professionals? Please select the impact of each on the profits of your business as follows: (1) high, (2) medium, (3) low, or (4) never recognized as difficulties or issues.)

Source: Authors.

Table 2.2 offers further insight by looking at only 'medium' and 'high' responses from Figure 2.12. By examining the shares of types of difficulties in hiring and training workers, Singapore indicated the most significant challenge as the 'inability to hire skilled foreign workers due to strict requirements for visas or work permits', with 55.6% of respondents citing this; however, Singapore experienced minor difficulties

compared to other countries. Focussing on the most significant difficulty for the other countries, 'gaps between required skill sets by [the] company and educational curriculum or materials' ranked at the top for Indonesia; the Philippines; Viet Nam; and Cambodia, Lao PDR, and Myanmar. A 'lack of opportunities for working professionals to reskill' ranked at the top for Malaysia, and 'lack of experienced engineers to train students' ranked at the top for Thailand.

Table 2.2: Difficulties in Hiring and Training New Graduates and Professionals by Country

Difficulty	SGP	MYS	THA	IDN	PHL	VNM	CLM
Lack of accessibility of formal education to obtain necessary knowledge for work	8.3%	28.6%	39.1%	50.0%	61.5%	27.8%	57.1%
Lack of experienced engineers to train students	13.9%	42.9%	56.5%	55.0%	61.5%	48.1%	52.4%
Gaps between required skill sets by company and educational curriculum or materials	25.0%	42.9%	52.2%	65.0%	69.2%	59.3%	71.4%
Lack of work experience for students to sublimate their knowledge to practical work	22.2%	28.6%	39.1%	60.0%	38.5%	42.6%	57.1%
Lack of opportunities for working professionals to reskill	22.2%	57.1%	34.8%	60.0%	38.5%	57.4%	66.7%
Cultural or geographical barriers to access job information for workers	11.1%	14.3%	26.1%	30.0%	38.5%	25.9%	38.1%
Inability to hire skilled foreign workers due to requirements for visas or work permits	55.6%	42.9%	21.7%	45.0%	23.1%	33.3%	23.8%

CLM = Cambodia, Lao PDR, and Myanmar (n = 21); IDN = Indonesia (n = 20); MYS = Malaysia (n = 7); PHL = Philippines (n = 13); SGP = Singapore (n = 36); THA = Thailand (n = 23); VNM = Viet Nam (n = 54).

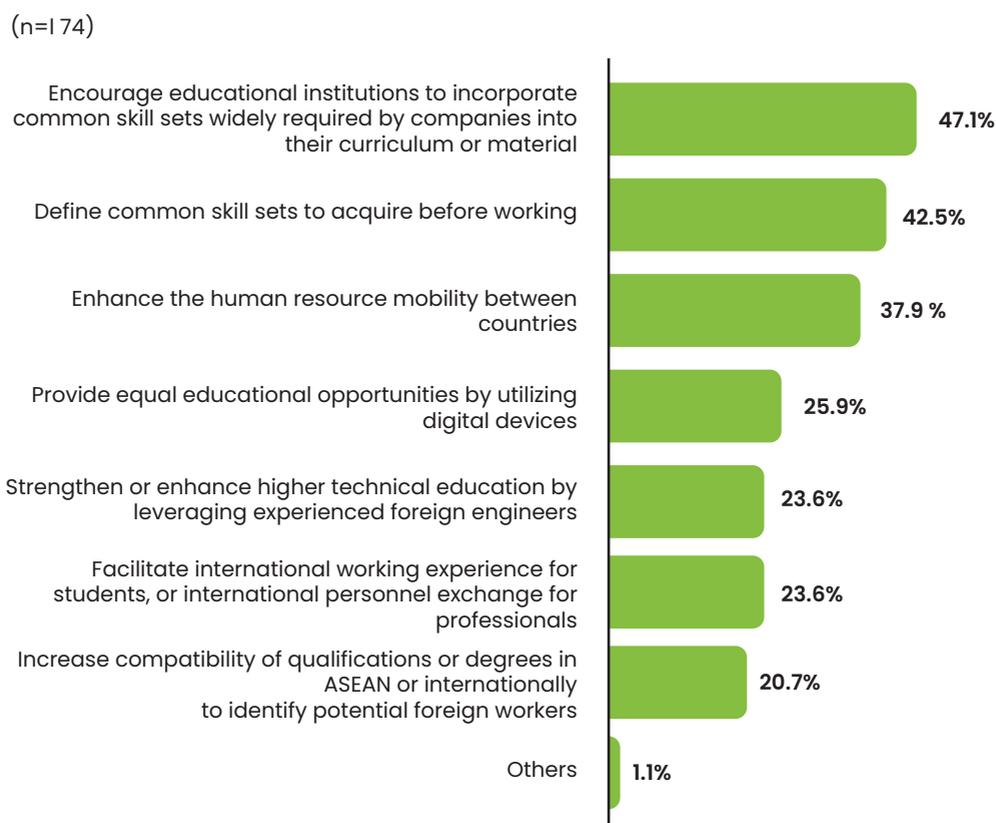
Notes: Brunei Darussalam is excluded since no responses were obtained. The countries are in order by gross national income per capita. (Q11. Do you have difficulties or issues in hiring or training new graduates and professionals? Please select the impact of each on the profits of your business as follows: (1) high, (2) medium, (3) low, or (4) never recognized as difficulties or issues.)

Source: Authors.

2.5.4 Expected Public Initiatives Regarding Human Resources Development

Figure 2.14 shows expected public initiatives from respondents to solve the difficulties in employing workers. The most selected option was to 'encourage educational institutions to incorporate common skill sets widely required by companies into their curriculum or material' (47.1%). The second was to 'define common skill sets to acquire before working' (42.5%). The third was to 'enhance human resource mobility between countries' (37.9%).

Figure 2.14: Expectations towards Public Initiatives to Solve Difficulties in Employing Workers



ASEAN = Association of Southeast Asian Nations.

Note: Q12-1. Please select the initiatives that you expect public institutions to take to solve the difficulties.

Source: Authors.

Other expected public initiative responses included: 'the labour laws [are] not in line with actual implementation . . . initiatives [are needed] to address the gap between the public appearance of the labour law and the actual implementation by public institutions . . . to comply with the rules and laws' (Viet Nam) and 'it would be beneficial for both employers and employees if there were courses on the various software programs used by the companies' (Singapore).

2.6 Digital Economy

This section discusses the results of survey questions on the digital economy (i.e. Q15–Q17). It includes (i) areas of interest to create innovative products and services with digital technologies, (ii) difficulties in creating innovative products or services regarding information collection in general and by country, (iii) difficulties in creating innovative products and services regarding funding in general and by country, and (iv) expectations of public initiatives in creating innovation.

2.6.1 Areas of Interest

Figure 2.15 shows companies' areas of interest in creating innovative products and services with digital technologies. The first category was 'business process and product innovation'. The most popular area was 'upgrading administrative operations', which was selected by 67.8% of respondents. This was followed by 'upgrading sales and marketing' with 53.4%.

The second category was 'mobility'; 44.3% of respondents were highly interested in 'smart logistics' and 'supply chain resilience'. For the third category of 'environment and energy', the most selected answer was 'sustainable energy', with 61.5%; 'energy management' followed with 43.1%. The fourth category was 'safety and security'. 'Cybersecurity' ranked at the top, with 69.0% of respondents. The option of 'disaster management' was also selected by many respondents – 46.0%. Regarding the fifth category of 'living and health', 'smart cities, buildings, and homes' ranked at the top with 45.4%, and 'well-being' followed with 41.4%. Lastly, for the sixth category of 'government and education', 'e-government' ranked at the top with 52.9%.

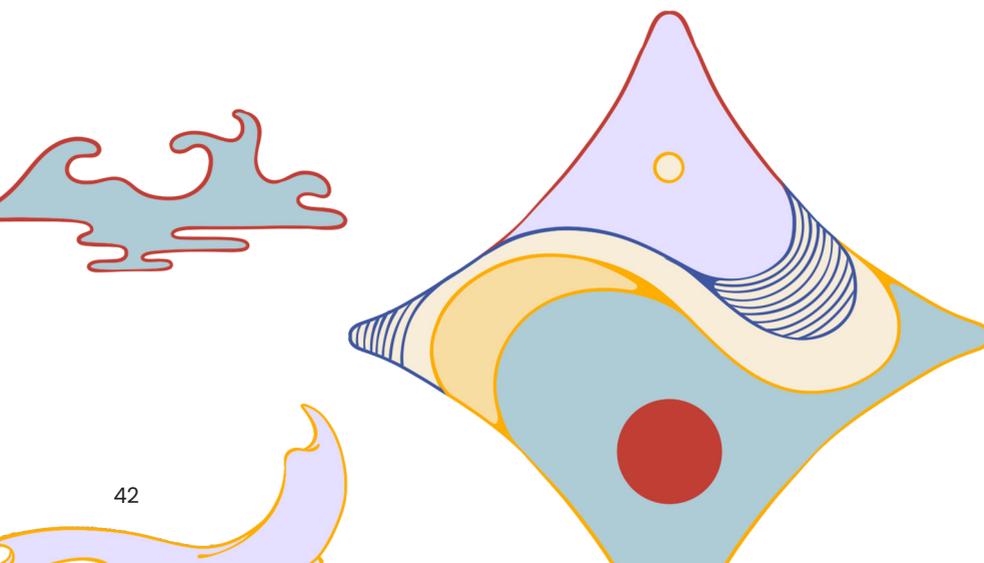
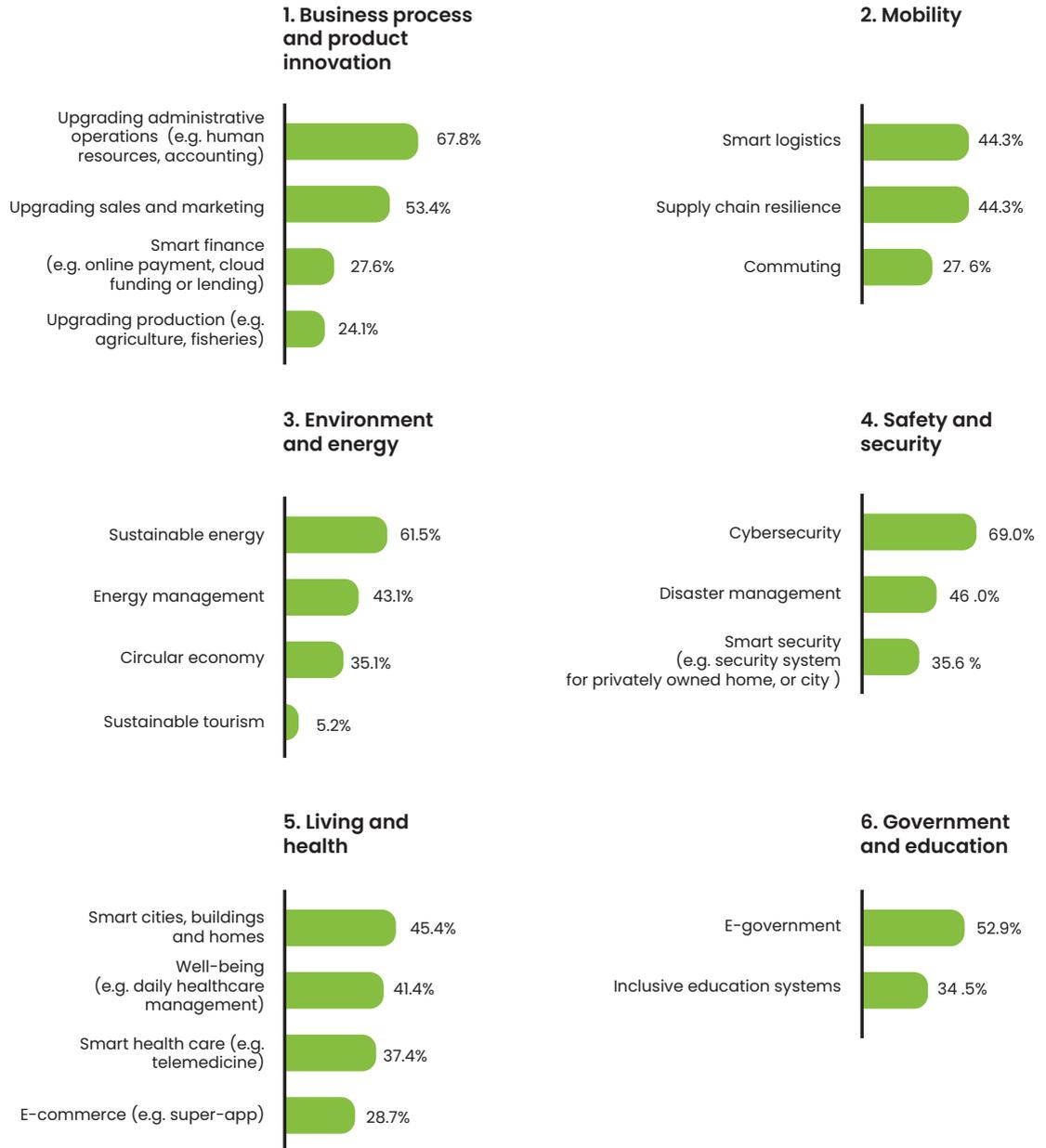


Figure 2.15: Areas of Interest of Corporate Activities

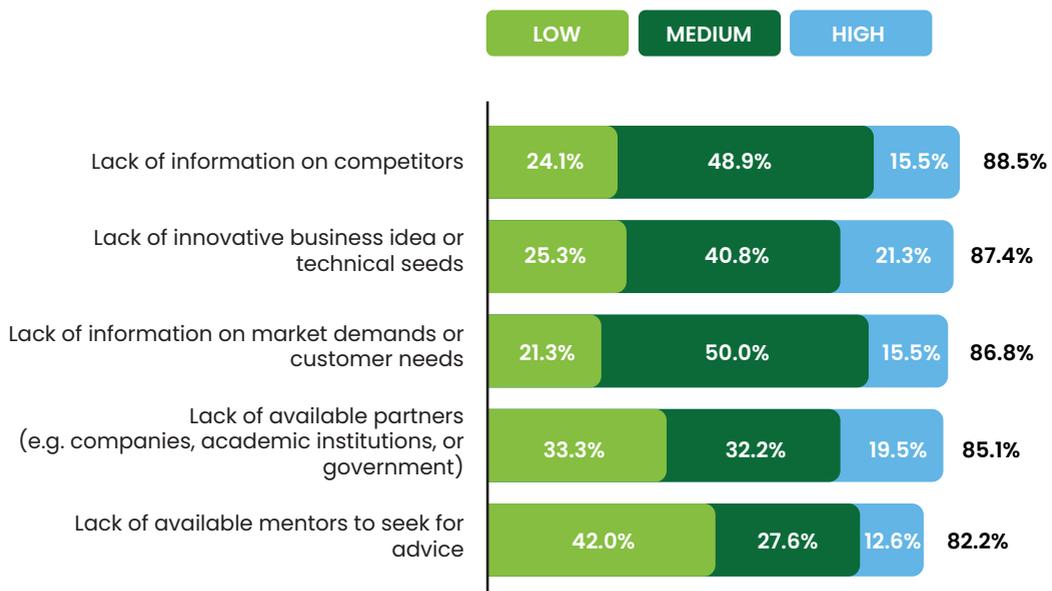


Note: Q15. Are you interested in corporate activities to create innovative products or services with digital technology? Please select the social agendas based on your interest.
Source: Authors.

2.6.2 Difficulties in Collecting Information

Figure 2.16 indicates the perceived difficulties in collecting necessary information for the creation of innovative products and services at three levels, 'low', 'medium', and 'high'. More than 80% of the respondents experienced all difficulties listed in Figure 2.16. Although significant differences amongst difficulties were not observed, the most prevalent was 'lack of information on competitors', with 88.5% affirming. Specifically, 64.4% of the respondents indicated 'medium' or 'high' to 'lack of information on competitors' as a difficulty in creating innovative products and services.

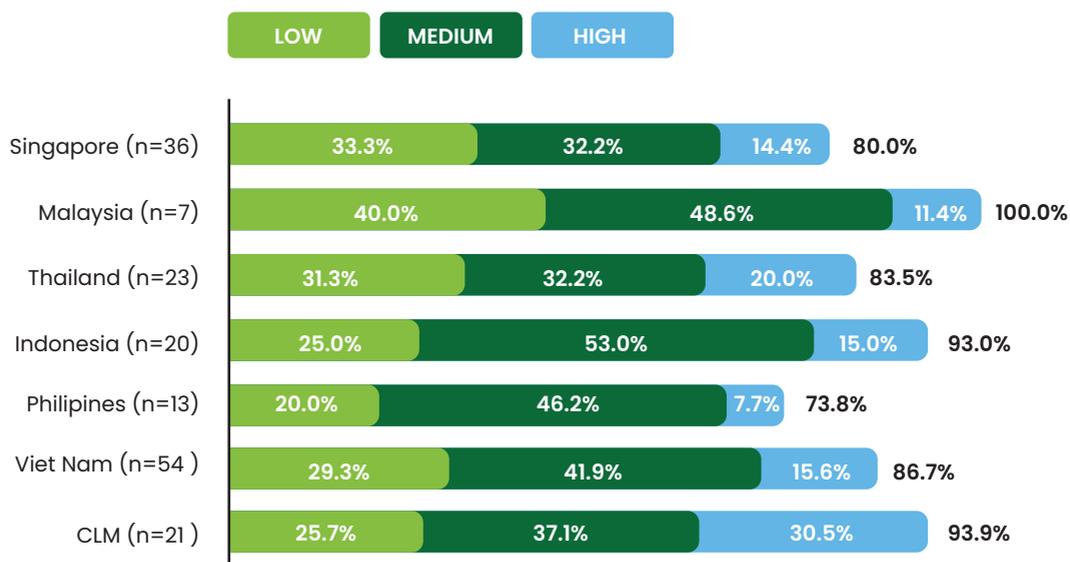
Figure 2.16: Difficulties in Creating Innovative Products and Services



Notes: Excludes 'never recognized as difficulties or issues'. (Q16-1-1. (Collecting necessary information) Do you have difficulties or issues in creating innovative products or services? Please select the difficulties in the categories below.)
Source: Authors.

Figure 2.17 examines by country the same responses as Figure 2.16. More than 70% of respondents from all AMS experienced difficulties in collecting information to create innovative products and services. Notably, although the total number of responses from Malaysia is limited, all of these respondents answered that they experienced difficulties. Cambodia, Lao PDR, and Myanmar, and Indonesia followed with more than 90% affirming this.

Figure 2.17: Difficulties in Creating Innovative Products and Services by Country



CLM = Cambodia, Lao People's Democratic Republic, and Myanmar.

Notes: Excludes 'never recognized as difficulties or issues'. Brunei Darussalam is excluded since no responses were obtained. The countries are in order by gross national income per capita. (Q16-1-1. (Collecting necessary information) Do you have difficulties in creating innovative products or services? Please select the difficulties or in the categories below.)

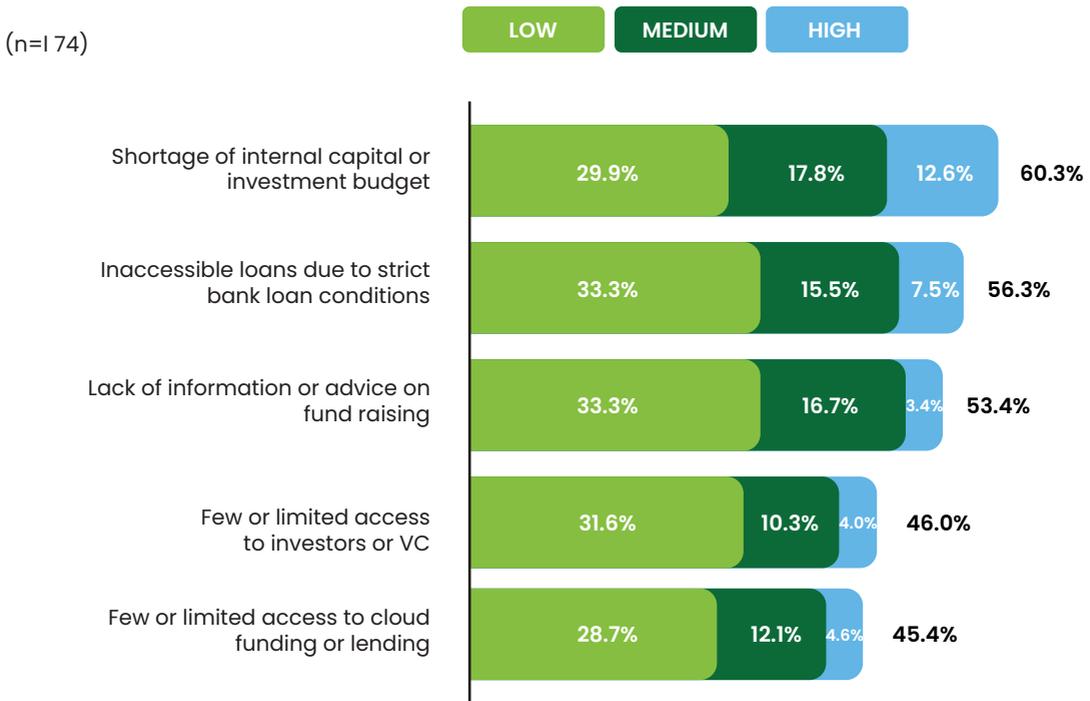
Source: Authors.

Several respondents commented on difficulties in collecting information to create innovative products and services, such as 'market information is not organized to cover everything' (Philippines), 'the details of the information are difficult to find' (Viet Nam), 'it is difficult to collect information because of the lack of sales and marketing staffs' (Myanmar), and 'there is no place [in] education regarding advanced technology' (Myanmar).

2.6.3 Difficulties in Funding

Figure 2.18 indicates the difficulties related to funding for the creation of innovative products and services at three levels, 'low', 'medium', and 'high'. Notably, 'shortage of internal capital or investment budget' ranked at the top with 60.3% affirming, and 30.4% of respondents indicated 'medium' or 'high' regarding the same difficulty in creating innovative products and services.

Figure 2.18: Difficulties in Funding



VC = venture capital.

Notes: Excludes 'never recognized as difficulties or issues'. (Q16-2-1. (Funding) Do you have difficulties in creating innovative products or services? Please select difficulties in the categories below.)

Source: Authors.

Figure 2.19 examines by country the same responses as Figure 2.18. Indonesia had the most significant difficulties, with 62.0% indicating issues. Cambodia, Lao PDR, and Myanmar followed with 61.9%. Singapore experienced minor difficulties in funding with just 39.4% agreeing. When highlighting only 'medium' and 'high', Indonesia showed the highest perceived funding issues with 34.0% of respondents confirming difficulties, and Cambodia, Lao PDR, and Myanmar followed with 32.3%.

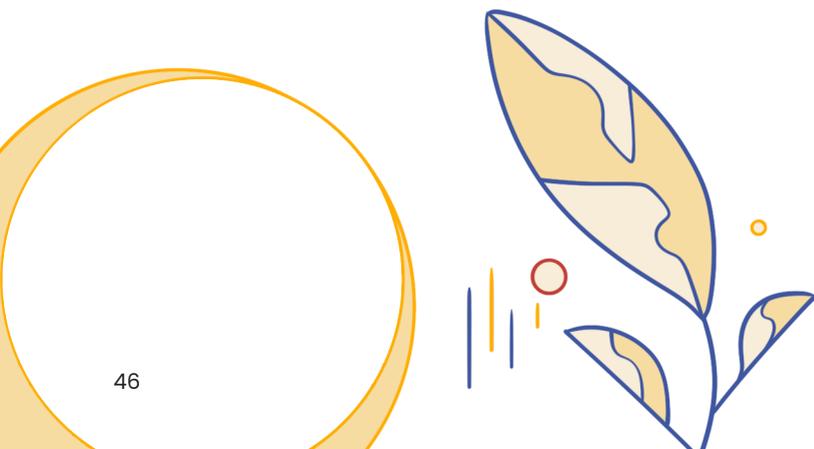
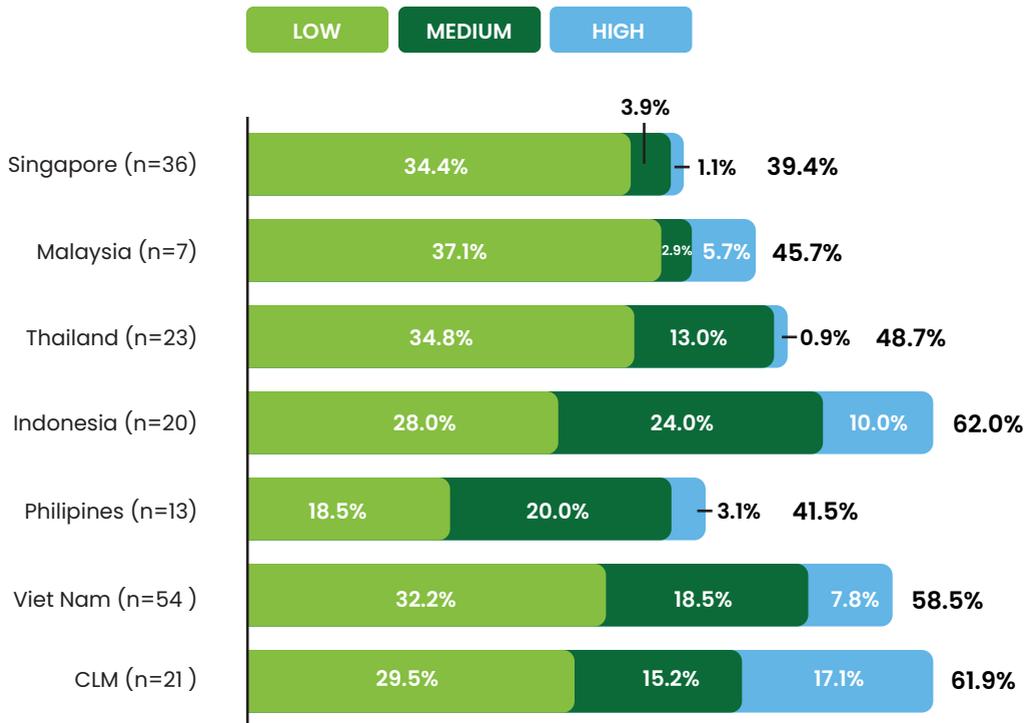


Figure 2.19: Difficulties in Funding by Country



CLM = Cambodia, Lao People's Democratic Republic, and Myanmar.

Notes: Brunei Darussalam is excluded since no responses were obtained. The countries are in order by gross national income per capita. (Q16-2-1. (Funding) Do you have difficulties in creating innovative products or services? Please select the difficulties in the categories below.)

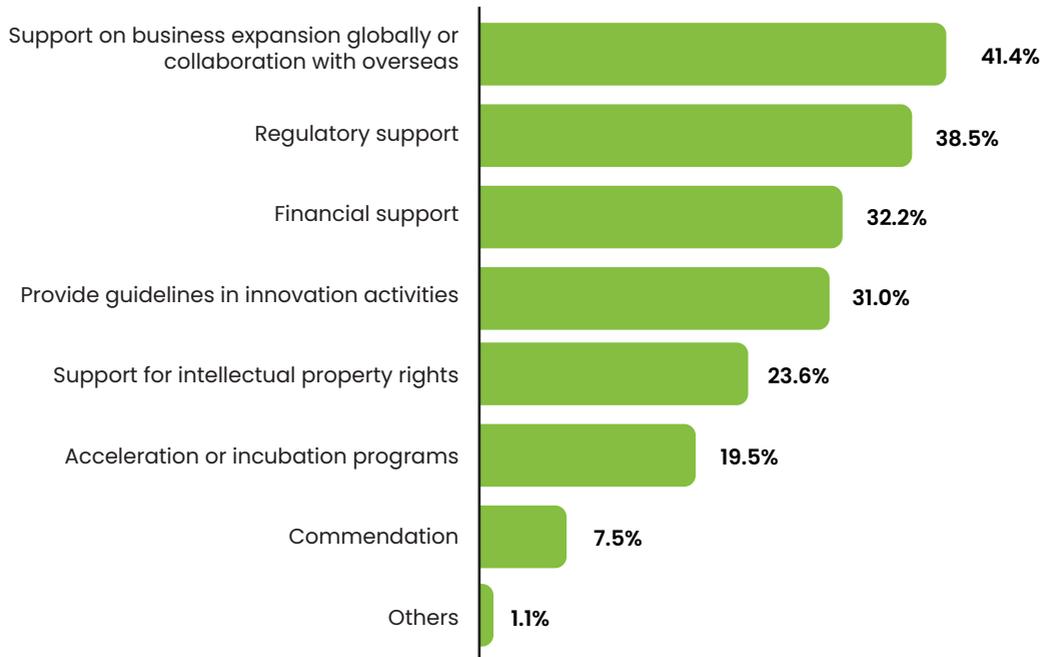
Source: Authors.

Many respondents commented on perceived difficulties in funding to create innovative products or services, such as 'most foreign companies do not invest in Myanmar now' (Myanmar) and 'there are restrictions on international remittances' (Myanmar).

2.6.4 Expected Public Initiatives to Create Innovation

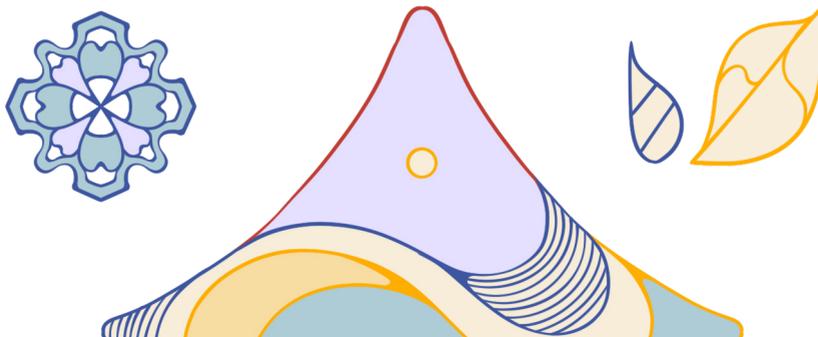
Figure 2.20 shows public initiatives that companies expected to support innovation. The most selected answer was 'support [for] business expansion globally or [in] collaboration with overseas', with 41.4% of respondents choosing that option. The second was 'regulatory support' (38.5%), and the third was 'financial support' (32.2%).

Figure 2.20: Expected Public Initiatives to Create Innovation



Notes: The percentage to the right of each bar is calculated by dividing the total number of responses of the corresponding row expectation by the total respondents of the questionnaire. (Q17-1. Please select the initiatives that you expect institutions to take to create innovation.)
Source: Authors.

The questionnaire also captured respondents' comments on public initiatives that would be helpful for creating innovation, such as 'I would welcome deregulation, such as licensing for foreign companies, as strict regulations ... make it difficult to start a new business' (Indonesia) and 'they would like to see a relaxation of customs regulations for starting new logistics businesses and a relaxation of restrictions on foreign investment' (Myanmar).



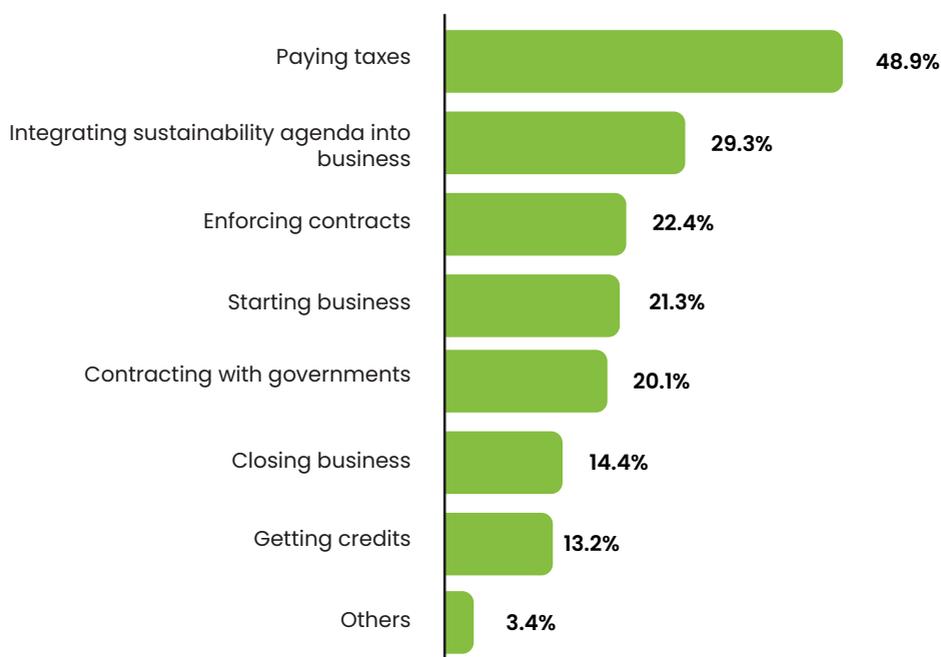
2.7 Others on Doing Business

This section shares an overview and key takeaways on other matters related to doing business elicited from the survey results (i.e. Q18–Q19). The data analysis is composed of (i) challenges in doing business within the country where the company is located; (ii) business operation in foreign countries; and (iii) the country with the most significant difficulties in doing business, detailing countries with the most difficulties (i.e. Japan, Myanmar, Viet Nam, and Indonesia)

2.7.1 Challenges in Doing Business within a Country

Figure 2.21 indicates the perceived challenges in doing business within the country where a company is located. Amongst the top four difficulties, ‘paying taxes’ ranked at the top with 48.9% of respondents indicating this, followed by ‘integrating the sustainability agenda into businesses’ with 29.3%.

Figure 2.21: Challenges in Doing Business within a Country Where a Company Is Located



Note: Q18-1. Other than the previous questions, please select any difficulties that you experience in doing business within the country in which your company is located.
Source: Authors.

For respondents who selected the 'others' in Figure 2.21, the questionnaire also captured details, such as 'difficulty of obtaining a work visa for expatriates' (Singapore), 'strict criteria for the employment pass' (Singapore), and 'licenses and other regulations are too strict' (Indonesia).

Table 2.3 examines by country the same responses as Figure 2.21. Despite scoring the highest in 'integrating sustainability agenda into business' with 33.3% of respondents indicating this and 'others' with 11.1%, Singapore had fewer issues in doing business compared to other AMS. Notably, all AMS experienced considerable difficulties with 'paying taxes', except for Singapore.

Table 2.3: Difficulties in Doing Business within a Country Where a Company Is Located by Country

Difficulty	SGP	MYS	THA	IDN	PHL	VNM	CLM
Starting a business	8.3%	14.3%	17.4%	45.0%	23.1%	27.8%	9.5%
Integrating a sustainability agenda into business	33.3%	0.0%	34.8%	45.0%	46.2%	22.2%	19.0%
Getting credits	2.8%	14.3%	17.4%	15.0%	15.4%	16.7%	14.3%
Paying taxes	2.8%	57.1%	47.8%	90.0%	76.9%	55.6%	52.4%
Enforcing contracts	5.6%	14.3%	8.7%	45.0%	38.5%	27.8%	23.8%
Contracting with governments	8.3%	28.6%	13.0%	40.0%	23.1%	14.8%	38.1%
Closing businesses	2.8%	0.0%	17.4%	15.0%	38.5%	13.0%	23.8%
Others	11.1%	0.0%	0.0%	5.0%	0.0%	0.0%	4.8%

CLM = Cambodia, Lao People's Democratic Republic, and Myanmar (n = 21); IDN = Indonesia (n = 20); MYS = Malaysia (n = 7); PHL = Philippines (n = 13); SGP = Singapore (n = 36); THA = Thailand (n = 23); VNM = Viet Nam (n = 54).

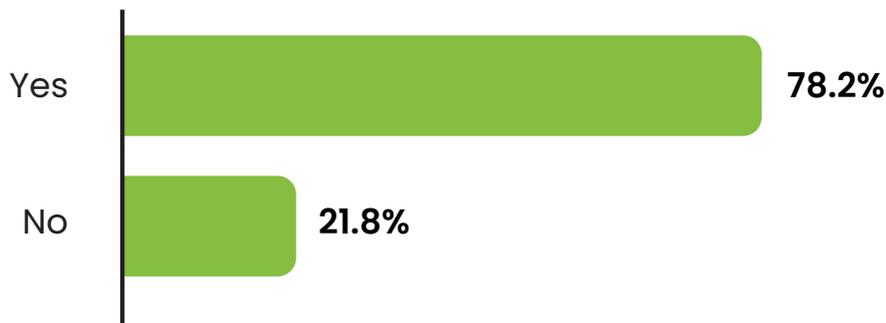
Note: Q18-1. Other than the previous questions, please select any difficulties that you experience in doing business within the country in which your company is located.

Source: Authors.

2.7.2 Business Operation in Foreign Countries

Figure 2.22 shows the percentage of respondents operating their businesses in foreign countries. About 78.2% of respondents operated their businesses abroad.

Figure 2.22: Business Operations in Foreign Countries



Note: Q19-1. Are you operating the business in a foreign country?
Source: Authors.

2.7.3 Countries with Most Significant Difficulties in Doing Business

Figure 2.23 shows the countries with the most significant perceived difficulties in doing business. Of the most difficult countries to do business in, Japan ranked at the top with 16.9% of respondents citing it, followed by Myanmar with 16.2%, Viet Nam with 8.1%, and Indonesia with 7.4%.

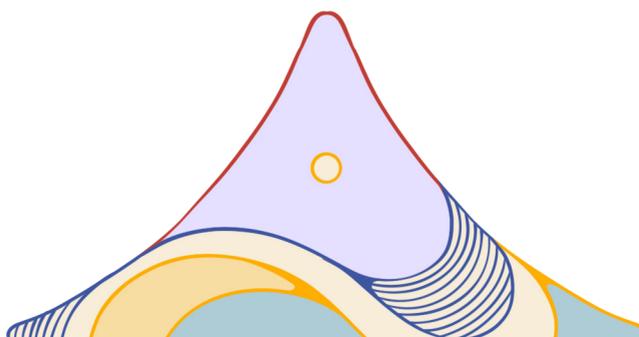
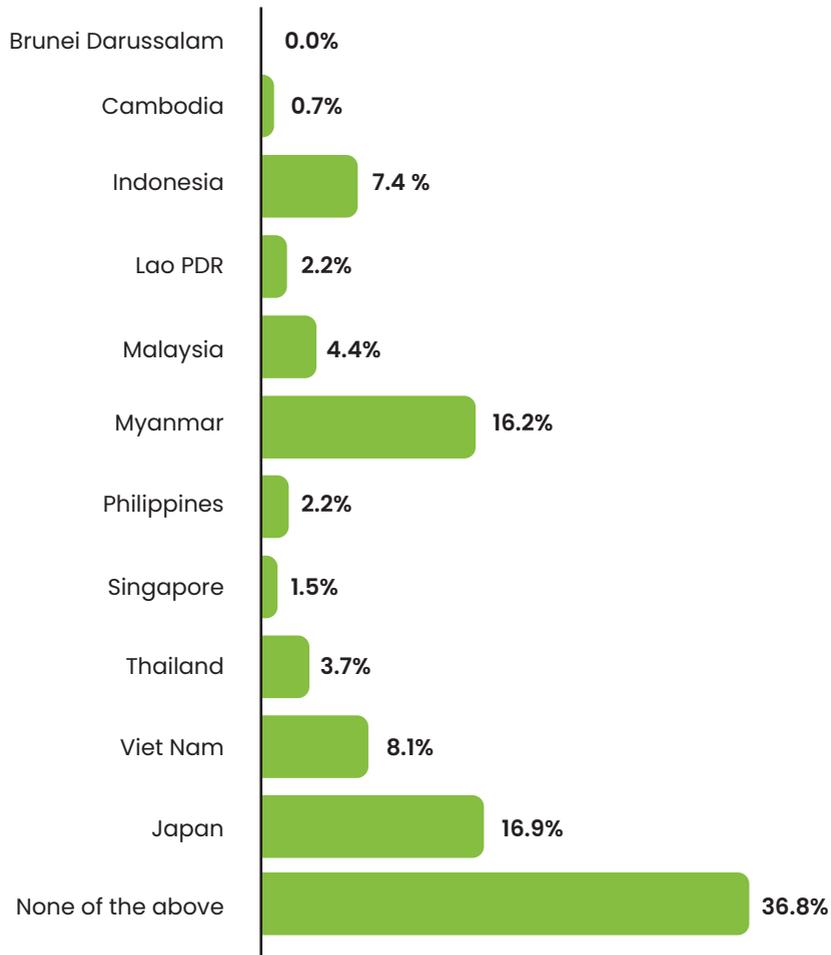


Figure 2.23: Most Significant Difficulties in Doing Business

(n=136)



Lao PDR = Lao People's Democratic Republic.

Note: Q19-2. Please indicate the specific country with the most significant difficulties in doing business (countries in ASEAN and Japan).

Source: Authors.

Figure 2.24 indicates the perceived difficulties in doing business in the countries selected in Figure 2.23. Amongst the difficulties, 'trading across borders' ranked at the top with 36.8%, followed by 'paying taxes' with 33.8%.

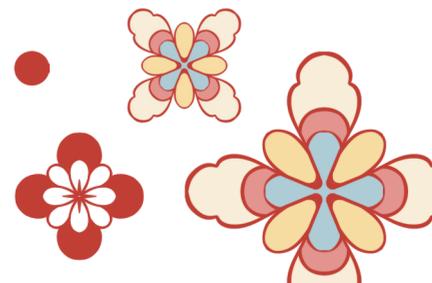
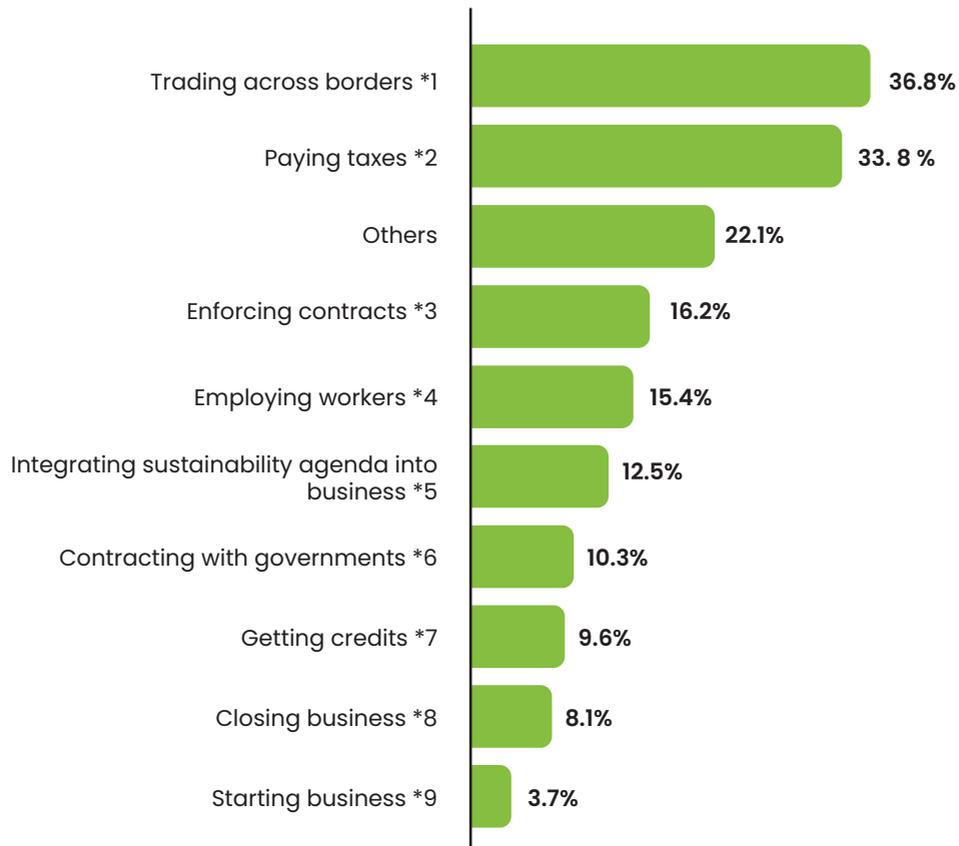


Figure 2.24: Difficulties in Doing Business in the Country Selected Above



Note: Q19-3. Please indicate any difficulties that you experience in doing business in the country selected above.

*1 (e.g. unclear or unofficial customs procedures, limited scope of electronic services)

*2 (e.g. complicated taxation, corruption of authorities)

*3 (e.g. complicated or inefficient judicial procedures, corruption of judicial authorities)

*4 (e.g. lack of accessibility of primary and mid education, lack of work experience)

*5 (e.g. reengineering production or procurement processes, regulatory compliance)

*6 (e.g. complicated government procurement, unequal information on bidding)

*7 (e.g., complicated or inefficient loan processes, long lead times to receive funds)

*8 (e.g. complicated or long lead times of procedures to close businesses)

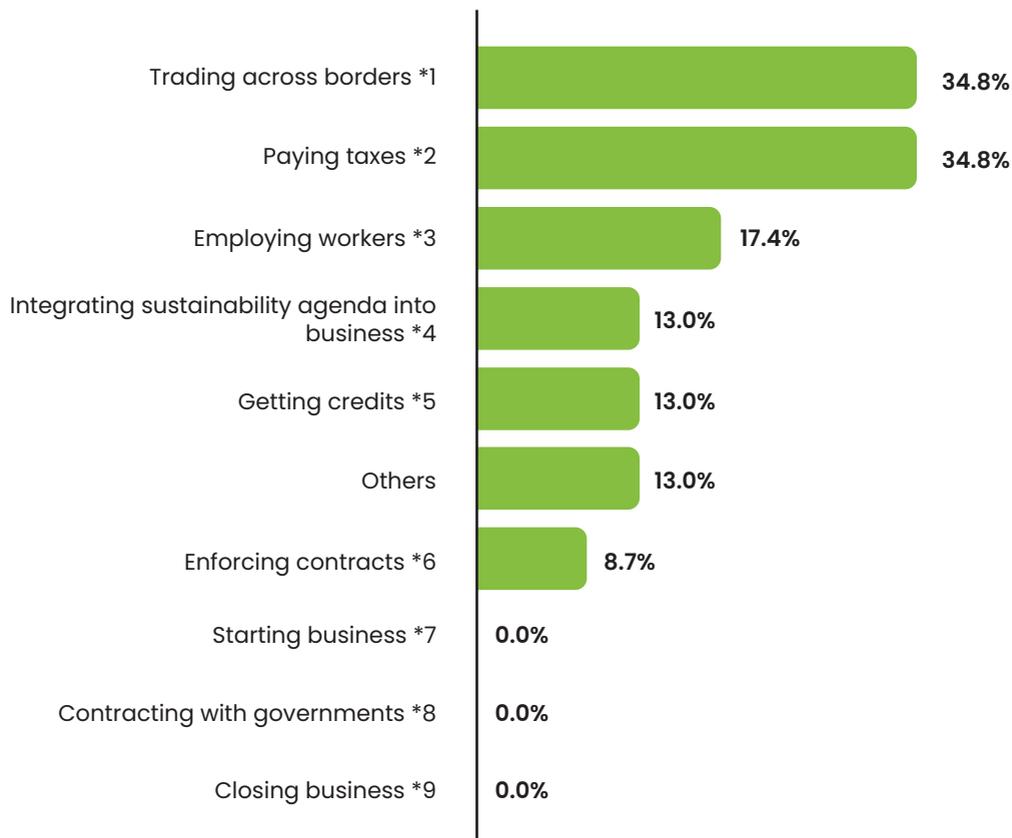
*9 (e.g. time-consuming or complicated procedures)

Source: Authors.

The respondents who selected 'others' in Figure 2.24 provided several comments. One respondent from Myanmar was concerned about the 'unstable ... political situation'. One individual from Singapore mentioned that 'different business cultures, market participants, and regulations compared with Asia' can be difficult.

Figure 2.25 shows that 'trading across borders' and 'paying taxes' ranked at the top of perceived difficulties in doing business in Japan.

Figure 2.25: Difficulties in Doing Business in Japan from the Viewpoint of Foreign Companies



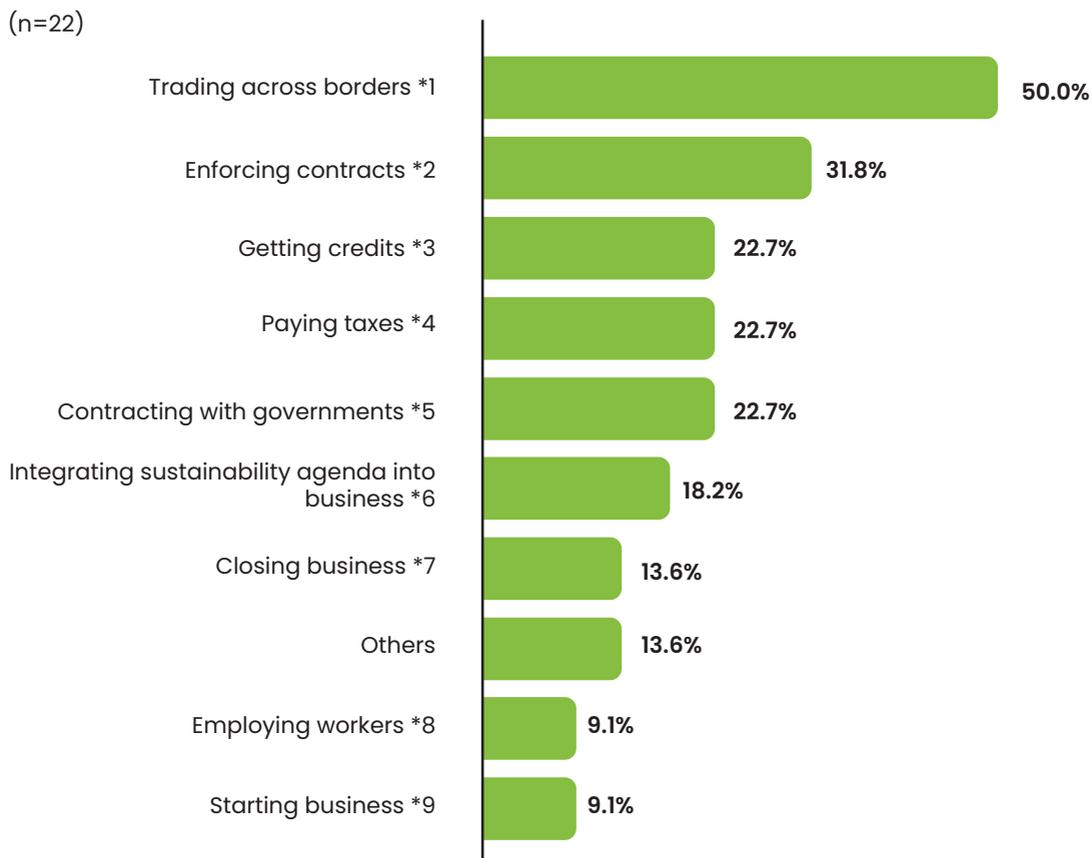
Note: Q19-3. Please indicate any difficulties that you experience in doing business in the country selected above (Japan).

- *1 (e.g. unclear or unofficial customs procedures, limited scope of electronic services)
- *2 (e.g. complicated taxation, corruption of authorities)
- *3 (e.g. lack of accessibility of primary and mid education, lack of work experience)
- *4 (e.g. reengineering production or procurement processes, regulatory compliance)
- *5 (e.g. complicated or inefficient loan processes, long lead time to receive funds)
- *6 (e.g. complicated or inefficient judicial procedures, corruption of judicial authorities)
- *7 (e.g. time-consuming or complicated procedures)
- *8 (e.g. complicated government procurement, unequal information on bidding)
- *9 (e.g. complicated or long lead time of procedures to close businesses)

Source: Authors.

Figure 2.26 shows that in Myanmar, 'trading across borders' ranked as the most significant difficulty in doing business there with 50.0% of respondents indicating this, followed by 'enforcing contracts'.

Figure 2.26: Difficulties in Doing Business in Myanmar from the Viewpoint of Foreign Companies



Note: Q19-3. Please indicate any difficulties that you experience in doing business in the country selected above (Myanmar).

- *1 (e.g. unclear or unofficial customs procedures, limited scope of electronic services)
- *2 (e.g. complicated or inefficient judicial procedures, corruption of judicial authorities)
- *3 (e.g. complicated or inefficient loan process, long lead time to receive funds)
- *4 (e.g. complicated taxation, corruption of authorities)
- *5 (e.g. complicated government procurement, unequal information on bidding)
- *6 (e.g. reengineering production or procurement processes, regulatory compliance)
- *7 (e.g. complicated or long lead time of procedures to close businesses)
- *8 (e.g. lack of accessibility of primary and mid education, lack of work experience)
- *9 (e.g. time-consuming or complicated procedures)

Source: Authors.

Figure 2.27 shows that in Viet Nam, 'paying taxes' ranked as the most significant difficulty in doing business by 81.8% of respondents, followed by 'trading across borders'.

Figure 2.27: Difficulties in Doing Business in Viet Nam from the Viewpoint of Foreign Companies



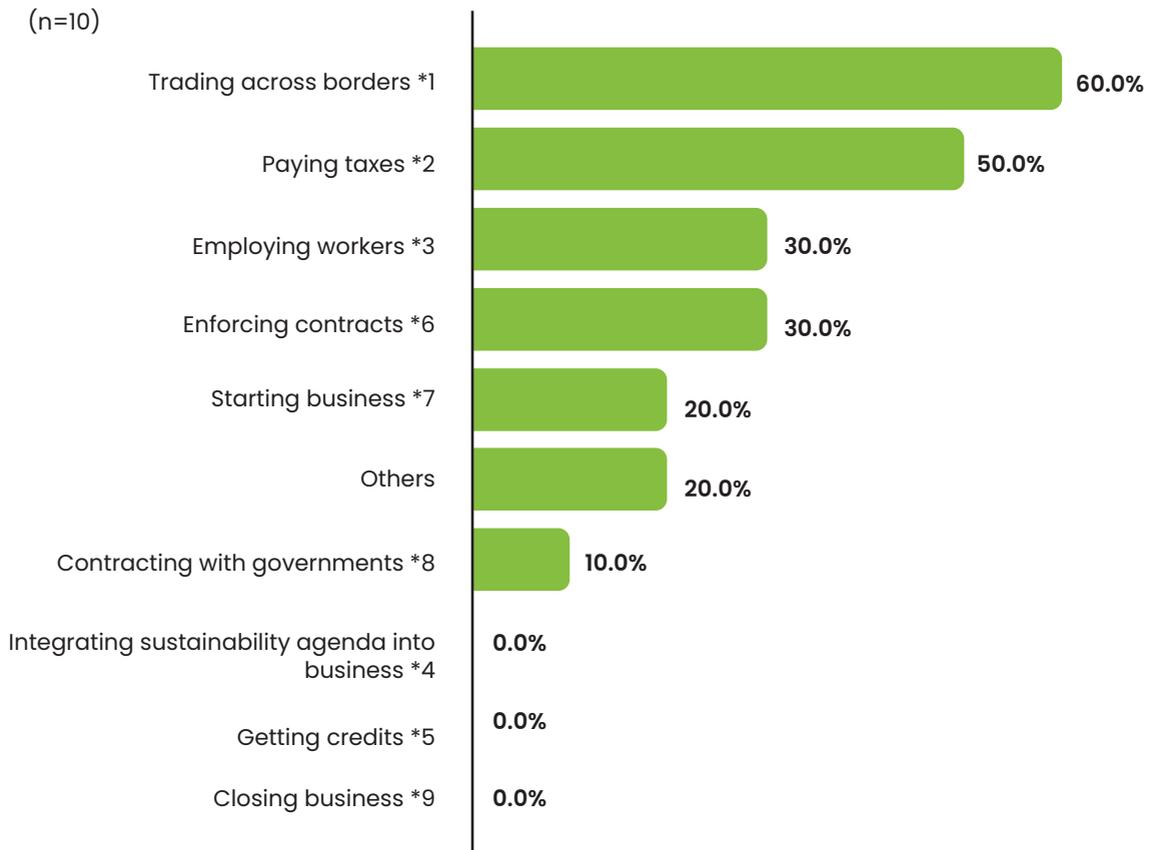
Note: Q19-3. Please indicate any difficulties that you experience in doing business in the country selected above (Viet Nam).

- *1 (e.g. complicated taxation, corruption of authorities)
- *2 (e.g. unclear or unofficial customs procedures, limited scope of electronic service)
- *3 (e.g. lack of accessibility of primary and mid education, lack of work experience)
- *4 (e.g. complicated or long lead time of procedures to close businesses)
- *5 (e.g. reengineering production or procurement processes, regulatory compliance)
- *6 (e.g. complicated government procurement, unequal information on bidding)
- *7 (e.g., time-consuming or complicated procedures)
- *8 (e.g. complicated or inefficient judicial procedures, corruption of judicial authorities)
- *9 (e.g. complicated or inefficient loan process, long lead time to receive funds)

Source: Authors.

Figure 2.28 shows that in Indonesia, 'trading across borders' ranked as the most significant difficulty in doing business by 60.0% of the respondents, followed by 'paying taxes'.

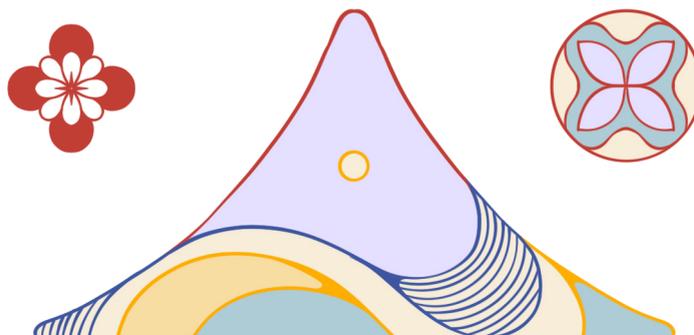
Figure 2.28: Difficulties in Doing Business in Indonesia from the Viewpoint of Foreign Companies



Note: Q19-3. Please indicate any difficulties that you experience in doing business in the country selected above (Indonesia).

- *1 (e.g. unclear or unofficial customs procedures, limited scope of electronic services)
- *2 (e.g. complicated taxation, corruption of authorities)
- *3 (e.g. lack of accessibility of primary and mid education, lack of work experience)
- *4 (e.g. complicated or inefficient judicial procedures, corruption of judicial authorities)
- *5 (e.g. time-consuming or complicated procedures)
- *6 (e.g. complicated government procurement, unequal information on bidding)
- *7 (e.g. reengineering production or procurement processes, regulatory compliance)
- *8 (e.g. complicated or inefficient loan process, long lead time to receive funds)
- *9 (e.g. complicated or long lead time of procedures to close businesses)

Source: Authors.



2.8 Conclusion

2.8.1 Trading across Borders

The first category of questions focussed on the business environment of trading across borders. More than half of the respondents perceived difficulties in trading across borders, mainly due to three main factors: time-consuming manual or on-site procedures because of the limited scope of electronic services, time-consuming manual or on-site procedures due to unclear customs procedures, and corruption or lack of compliance of customs officers.

Focussing on differences amongst AMS, Malaysia had the most perceived difficulties in trading across borders compared to other countries. Malaysia was followed by Indonesia; there was no significant difference amongst other AMS except for Singapore. Singapore was considered to be the least difficult for trading across borders amongst the AMS.

The construction, automotive, and wholesale trade sectors experienced more significant perceived difficulties in trading across borders compared to other industries. Large companies (i.e. with 300 employees or more) seemed to have experienced slightly more difficulties in trading across borders compared to micro, small, and medium-sized companies.

Many companies expected public institutions to solve difficulties in trading across borders by promoting customs authority compliance, providing online services to compare available EPAs or FTAs, and developing a reference for customs officers to determine HS codes.

2.8.2 Human Resources Development

The second category of questions focussed on human resources. More than half of the respondents perceived that human resources were often unable to achieve medium- or long-term business growth goals, mainly middle management who drives business transformation and/or innovation, and middle management who manages existing business processes. Moreover, around 90% of respondents pointed out the lack of skill sets expected for middle management, in particular, leadership, strategy development, and/or business modelling and planning. More than 60% of respondents experienced difficulties in hiring and training new graduates and professionals due to gaps between required skill sets by the company and educational curriculum or materials, and the lack of opportunities for working professionals to reskill.

Companies in most AMS experienced challenges in human resources. Companies based in Singapore – one of the most advanced countries doing business – responded specifically that there have been difficulties in ‘hiring skilled foreign

workers due to strict requirements for visas or work permits'. For other AMS, companies selected, as significant challenges, 'gaps between required skill sets by [the] company and educational curriculum or materials', 'lack of opportunities for working professionals to reskill', and 'lack of experienced engineers to train students into potential skilled workers'.

To solve difficulties in employing workers, companies expected public institutions to encourage educational institutions to incorporate common skill sets into their curriculum, define common skill sets to acquire before working, and enhance human resources mobility between countries.

2.8.4 Other Issues in Doing Business

The last category of questions was on other issues in doing business. The top two difficulties that respondents experienced in doing business were paying taxes and integrating a sustainability agenda into business. Singapore had fewer issues in doing business compared to other AMS. However, Singapore experienced significant difficulty in integrating a sustainability agenda into business compared to other countries.

About 78% of companies amongst the respondents engaged in business overseas. When asked about the most difficult countries in which to do business, most respondents indicated 'none of the above'. However, Japan ranked at the top with the most significant difficulties in doing business, especially 'trading across borders'. Myanmar followed with the most difficulty in 'trading across borders'. Viet Nam had with the most difficulty in 'paying taxes', and Indonesia followed with 'trading across borders'.



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Appendix:

Questionnaire Items and Response Number

1. Company Overview

Q1-1. Please provide your company's name (Please provide the official name, not an abbreviation).

Q1-2. Please provide your company URL.

Q2-1. Please provide your company telephone number (e.g. +XX-XXX-XXXX).

Q2-2. Please provide your company e-mail address (If you provide it to us, we will send the report based on this survey to the e-mail indicated).

Q3-1. Please provide your company's location (single choice) (Table A1.1).

Table A1.1: Please Provide Your Company's Location

Country	No. of Companies
Brunei Darussalam	0 (0.0%)
Cambodia	1 (0.6%)
Indonesia	20 (11.5%)
Lao People's Democratic Republic	7 (4.0%)
Malaysia	7 (4.0%)
Myanmar	13 (7.5%)
Philippines	13 (7.5%)
Singapore	36 (20.7%)
Thailand	23 (13.2%)
Viet Nam	54 (31.0%)
Others	0 (0%)

Note: n = 174.
Source: Authors.

Q3-2. In which city is your company located? (single choice) (Table A1.2)

Table A1.2: Which City Is Your Company Located in?

Country	Province or City	No. of Companies
Brunei Darussalam	Bandar Seri Begawan	0 (0.0%)
	Kuala Belait	0 (0.0%)
	Seria	0 (0.0%)
	Others	0 (0.0%)
Cambodia	Greater Phnom Penh Area	1 (0.6%)
	Takeo	0 (0.0%)
	Sihanoukville	0 (0.0%)
	Battambang	0 (0.0%)
	Siem Reap	0 (0.0%)
	Others	0 (0.0%)
	Indonesia	Greater Jakarta Area
Surabaya	0 (0.0%)	
Medan	0 (0.0%)	
Bandung	0 (0.0%)	
Semarang	0 (0.0%)	
Others	1 (0.6%)	
Lao People's Democratic Republic	Vientiane	4 (2.3%)
	Savannakhet	0 (0.0%)
	Pakse	3 (1.7%)

Country	Province or City	No. of Companies
Malaysia	Thakhek	0 (0.0%)
	Luang Prabang	0 (0.0%)
	Others	0 (0.0%)
	Greater Kuala Lumpur Area	5 (2.9%)
	Kota Bharu	0 (0.0%)
	Johor Bahru	0 (0.0%)
	Seberang Perai	1 (0.6%)
	George Town	0 (0.0%)
	Others	1 (0.6%)
Myanmar	Greater Yangon Area	12 (6.9%)
	Mandalay	0 (0.0%)
	Nay Pyi Taw	1 (0.6%)
	Mawlamyine	0 (0.0%)
	Taunggyi	0 (0.0%)
	Others	0 (0.0%)
	Others	0 (0.0%)
Philippines	Greater Manila Area	8 (4.6%)
	Davao City	0 (0.0%)
	Budta	0 (0.0%)
	Cebu City	0 (0.0%)
	Zamboanga City	0 (0.0%)
	Others	5 (2.9%)
	Others	0 (0.0%)
Singapore	Singapore	36 (20.7%)
Thailand	Bangkok Greater Area	12 (6.9%)

Country	Province or City	No. of Companies
Viet Nam	Eastern Economic Corridor (Chon Buri, Rayong, Chachoengsao)	6 (3.4%)
	Udon Thani	0 (0.0%)
	Nakhon Ratchasima	0 (0.0%)
	Chiang Mai	0 (0.0%)
	Others	5 (2.9%)
	Greater Ho Chi Minh City Area	30 (17.2%)
	Greater Ha Noi Area	16 (9.2%)
	Can Tho	0 (0.0%)
	Da Nang	0 (0.0%)
	Hue	0 (0.0%)
Others	8 (4.6%)	

Note: n = 174.
Source: Authors.

Q4. Which industry is your company's main business? (single choice) (Table A1.3)

Table A1.3: Which Industry Is Your Company's Main Business?

Sector	No. of Companies
Administrative services	2 (1.1%)
Agriculture	1 (0.6%)
Arts and recreation	2 (1.1%)
Automotive	14 (8.0%)
Companies and enterprises	3 (1.7%)
Construction	12 (6.9%)
Educational	3 (1.7%)

Sector	No. of Companies
Electronics	15 (8.6%)
Finance and insurance	12 (6.9%)
Health care	2 (1.1%)
Information	10 (5.7%)
Metal products	12 (6.9%)
Other manufacturing	20 (11.5%)
Other services	12 (6.9%)
Pipeline and support activities	7 (4.0%)
Postal service	3 (1.7%)
Professional services	2 (1.1%)
Real estate	5 (2.9%)
Retailers	3 (1.7%)
Utilities	2 (1.1%)
Wholesale trade	27 (15.5%)

Note: n = 174.
Source: Authors.



Q5. Which year was your company established? (single choice) (Table A1.4)

Table A1.4: Which Year was Your Company Established?

Country	Year Company Established									
	Before 1950	1950–1959	1960–1969	1970–1979	1980–1989	1990–1999	2000–2009	2010–2019	2020–2023	Total
Brunei Darussalam	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)
Cambodia	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	1 (0.6%)	0 0 (0.0%)	1 (0.6%)
Indonesia	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	5 (2.9%)	1 (0.6%)	4 (2.3%)	3 (1.7%)	6 (3.4%)	1 (0.6%)	20 (11.5%)
Lao People's Democratic Republic	1 (0.6%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	2 (1.1%)	4 (2.3%)	0 0 (0.0%)	7 (4.0%)
Malaysia	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	2 (1.1%)	3 (1.7%)	2 (1.1%)	0 0 (0.0%)	7 (4.0%)
Myanmar	2 (1.1%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	11 (6.3%)	0 0 (0.0%)	13 (7.5%)
Philippines	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	2 (1.1%)	0 0 (0.0%)	5 (2.9%)	3 (1.7%)	3 (1.7%)	0 0 (0.0%)	13 (7.5%)
Singapore	0 0 (0.0%)	0 0 (0.0%)	1 (0.6%)	11 (6.3%)	6 (3.4%)	6 (3.4%)	3 (1.7%)	7 (4.0%)	2 (1.1%)	36 (20.7%)
Thailand	0 0 (0.0%)	1 (0.6%)	1 (0.6%)	2 (1.1%)	3 (1.7%)	2 (1.1%)	6 (3.4%)	8 (4.6%)	0 0 (0.0%)	23 (13.2%)
Viet Nam	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	1 (0.6%)	6 (3.4%)	22 (12.6%)	23 (13.2%)	2 (1.1%)	53 (31.0%)
Others	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)	0 0 (0.0%)
Total	3 (1.7%)	1 (0.6%)	2 (1.1%)	20 (11.5%)	11 (6.3%)	25 (14.4%)	42 (24.1%)	65 (37.4%)	5 (2.9%)	174 (100.0%)

Note: n = 174.
Source: Authors.

Q6. What is your company's ownership type? (single choice) (Table A1.5)

Table A1.5: What Is Your Company's Ownership Type?

Country	Year Company Established		
	Domestic Company	Foreign-Affiliated Company	Total
Brunei Darussalam	0 (0.0%)	0 (0.0%)	0 (0.0%)
Cambodia	0 (0.0%)	1 (0.6%)	1 (0.6%)
Indonesia	0 (0.0%)	20 (11.5%)	20 (11.5%)
Lao People's Democratic Republic	1 (0.6%)	6 (3.4%)	7 (4.0%)
Malaysia	1 (0.6%)	6 (3.4%)	7 (4.0%)
Myanmar	1 (0.6%)	12 (6.9%)	13 (7.5%)
Philippines	1 (0.6%)	12 (6.9%)	13 (7.5%)
Singapore	6 (3.4%)	30 (17.2%)	36 (20.7%)
Thailand	6 (3.4%)	17 (9.8%)	23 (13.2%)
Viet Nam	7 (4.0%)	47 (27.0%)	54 (31.0%)
Total	23 (13.2%)	151 (86.8%)	174 (100.0%)

Note: n = 174.
Source: Authors.



Q7. How many regular employees work for your company? (single choice) (Table A1.6)

Table A1.6: How Many Regular Employees Work for Your Company?

No. of employees	No. of companies
< 10	27 (15.5%)
50-299	50 (28.7%)
50-299	47 (27.0%)
300-999	28 (16.1%)
1,000-4,999	16 (9.2%)
> = 5,000	6 (3.4%)

Note: n = 174.
Source: Authors.

2. Doing Business Environment – Trading across Borders

Q8. Do you have difficulties or issues in trading across borders? If you do, please select the impact of each on profits of your business as follows: (1) high, (2) medium, (3) low, or (4) never recognized as difficulties or issues. (single choice) (Table A2.1)

Table A2.1: Do You Have Difficulties or Issues in Trading across Borders?

Difficulties	High	Medium	Low	Never Recognised as Difficulties
1. Applying favourable tariffs with complex conditions of various EPAs or FTAs	21 (12.1%)	40 (23.0%)	49 (28.2%)	64 (36.8%)
2. Unexpected costs due to the lack of customs operational standards on applying HS codes	29 (16.7%)	43 (24.7%)	47 (27.0%)	55 (31.6%)
3. Time-consuming manual or on-site procedures due to unclear or unofficial customs procedures	36 (20.7%)	45 (25.9%)	40 (23.0%)	53 (30.5%)
4. Time-consuming manual or on-site procedures due to limited scope of electronic service (e.g. paperwork on procedures remains)	27 (15.5%)	45 (25.9%)	53 (30.5%)	49 (28.2%)

Difficulties	High	Medium	Low	Never Recognised as Difficulties
5. Sudden customs shutdown in disaster or pandemic	28 (16.1%)	37 (21.3%)	48 (27.6%)	61 (35.1%)
6. Corruption or lack of compliance of customs officers (e.g. facilitation payments)	25 (14.4%)	46 (26.4%)	49 (28.2%)	54 (31.0%)
7. Long lead time in trading due to unconnected electronic services between countries	12 (6.9%)	38 (21.8%)	63 (36.2%)	61 (35.1%)

EPA = economic partnership agreement, FTA = free trade agreement, HS = Harmonized System.
 Note: n = 174.
 Source: Authors.

Q9-1. Please select the initiatives that you expect public institutions to take to solve the difficulties (multiple choice). (Table A2.2)

Table A2.2: Please Select the Initiatives You Expect Public Institutions to Take to Solve the Difficulties

Initiative	No. of responses
1. Extend coverage of ASEAN Single Window	57 (32.8%)
2. Provide online service to compare conditions of available EPAs or FTAs	70 (40.2%)
3. Develop operation continuity plan under disaster or pandemic scenario by government	50 (28.7%)
4. Develop reference or case study for customs officers to determine HS codes	60 (34.5%)
5. Promote improving customs authority compliance	81 (46.6%)

Initiative	No. of responses
6. Others	6 (3.4%)
7. No particular expectation	37 (21.3%)

ASEAN = Association of Southeast Asian Nations, EPA = economic partnership agreement, FTA = free trade agreement, HS = Harmonized System.

Note: n = 174.

Source: Authors.

Q9-2. Please add your comments on the initiatives that you expect public institutions to take to solve the difficulties (if any). (Table A2.3)

Table A2.3: Please Add Your Comment on the Initiatives You Expect Public Institutions to Take to Solve the Difficulties or Issues

Comments
<ol style="list-style-type: none"> 1. Improve network infrastructure for electronic services (Indonesia). 2. Clarify customs clearance for goods, especially dangerous goods (Philippines). 3. Create an online portal to check customs procedures for export shipments to various ports or countries (Singapore). 4. Clarify and simplify licenses and applications for customs clearance of chemicals (Viet Nam). 5. Make clear standards on legal interpretation. Currently, legal interpretations amongst provinces differ, making it difficult to obtain various approval from different provinces (Viet Nam).

Source: Authors.

3. Doing Business Environment – Employing Workers

Q10. Do the following human resources lack in your company to achieve medium- or long-term business growth? If so, please indicate to what extent your company lacks for each human resources as follows: (1) mostly, (2) partially, (3) slightly, or (4) never recognized the lack. (single choice) (Table A3.1)

Table A3.1: Do the Following Human Resources Lack in Your Company to Achieve Medium- or Long-Term Business Growth?

Human Resources	Mostly	Partially	Slightly	Never Recognized the Lack
1. Labourers dedicated to manual work (e.g. factory or construction operation)	16 (9.2%)	33 (19.0%)	45 (25.9%)	80 (46.0%)
2. Non-management white-collar (e.g. knowledge or office workers in charge of daily operations)	20 (11.5%)	55 (31.6%)	51 (29.3%)	48 (27.6%)
3. Middle management of existing business processes (e.g. managing quality, cost, or delivery)	31 (17.8%)	72 (41.4%)	35 (20.1%)	36 (20.7%)
4. Middle management who drives business transformation or innovation (e.g. new business planning or development, transforming existing business, business process improvement)	57 (32.8%)	58 (33.3%)	30 (17.2%)	29 (16.7%)

Note: n = 174.
Source: Authors.

Q11. Do you have difficulties in hiring or training new graduates and professionals? Please select the impact of each on the profits of your business as follows: (1) high, (2) medium, (3) low, or (4) never recognized as difficulties or issues. (single choice) (Table A3.2)

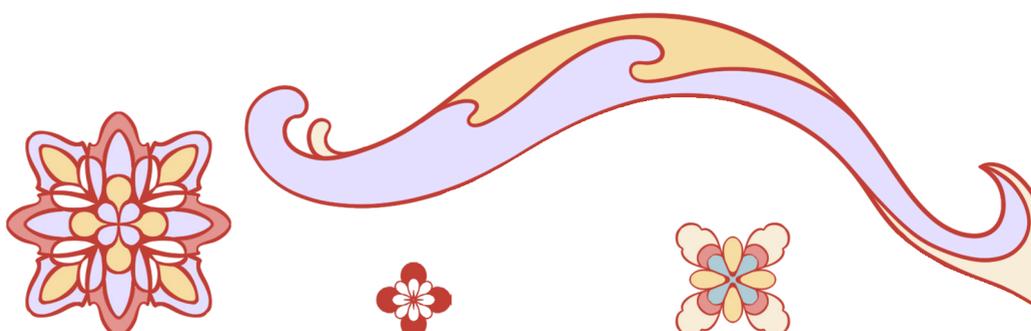


Table A3.2: Do You Have Difficulties or Issues in Hiring or Training New Graduates and Professionals?

Human Resources	Mostly	Partially	Slightly	Never Recognized the Lack
1. Lack of accessibility to formal education to obtain necessary knowledge for work (e.g. primary, mid, or higher education)	17 (9.8%)	42 (24.1%)	44 (25.3%)	71 (40.8%)
2. Lack of experienced engineers to train students into potential skilled workers	21 (12.1%)	56 (32.2%)	47 (27.0%)	50 (28.7%)
3. Gaps between required skill sets by your company and educational curriculum or materials	23 (13.2%)	70 (40.2%)	50 (28.7%)	31 (17.8%)
4. Lack of work experience for students to sublimate their knowledge to practical work (e.g. internships)	14 (8.0%)	57 (32.8%)	60 (34.5%)	43 (24.7%)
5. Lack of opportunities for working professionals to reskill	20 (11.5%)	62 (35.6%)	58 (33.3%)	34 (19.5%)
6. Cultural or geographical barriers to access job information for workers (e.g. gender or religious barriers)	10 (5.7%)	34 (19.5%)	74 (42.5%)	56 (32.2%)
7. Inability to hire skilled foreign workers due to strict requirements for visas or work permits	19 (10.9%)	44 (25.3%)	55 (31.6%)	56 (32.2%)

Note: n = 174.
Source: Authors.

Q12-1. Please select the initiatives that you expect public institutions to take to solve the difficulties (multiple choice). (Table A3.3)

Table A3.3: Please Select the Initiatives You Expect Public Institutions to Take to Solve the Difficulties

Initiative	No. of Responses
1. Define common skill sets to acquire before working (e.g. communication skills or other skills widely required by companies for workers)	74 (42.5%)
2. Encourage educational institutions to incorporate common skill sets into their curriculum or materials	82 (47.1%)
3. Increase compatibility of qualifications or degrees in ASEAN or internationally to identify potential foreign workers	36 (20.7%)
4. Enhance human resources mobility between countries (e.g. ease requirements for visas or work permits)	66 (37.9%)
5. Provide equal educational opportunities by digital devices (i.e. reducing educational disparities caused by internet environment, language, or economic gaps)	45 (25.9%)
6. Strengthen or enhance higher technical education leveraging foreign experienced engineers	41 (23.6%)
7. Facilitate international working experience for students or international personnel exchange for professionals	41 (23.6%)
8. Others	2 (1.1%)
9. No particular expectation	18 (10.3%)

ASEAN = Association of Southeast Asian Nations.

Note: n = 174.

Source: Authors.

Q12-2. If you selected 'Others' in the previous question, please add your comments on the initiatives that you expect public institutions to take to solve the difficulties (if any). (Table A13)

Comments
<p>1. Labour laws are not in line with actual implementation. Initiatives are needed to carry out activities that eliminate the gap between the public appearance of the labour law and its actual implementation (Viet Nam).</p> <p>2. Courses should be created on the various common software used by companies. For example, it is easy to hire someone with 'shipping experience'; however, shipping documents are generated from our off-the-shelf software system, and it is difficult to find someone who has experience in using the system (Singapore).</p>

Source: Authors.

Q13. Please indicate the degree of shortage of the following skills required for middle management to drive business transformation or innovation (single choice): (1) mostly, (2) partially, (3) slightly, or (4) never recognised the shortage. (single choice) (Table A3.5)

Table A3.5: Please Indicate the Degree of Shortage of the Following Skills Required for Middle Management to Drive Business Transformation or Innovation

Skills	Mostly	Partially	Slightly	Never Recognized the Lack
1. Business ideation (e.g. creativity, expertise in digitalized business)	41 (23.6%)	78 (44.8%)	36 (20.7%)	19 (10.9%)
2. Leadership (e.g. ability to energize colleagues or stakeholders, lead the team, connect with others to collaborate)	56 (32.2%)	80 (46.0%)	28 (16.1%)	10 (5.7%)

Skills	Mostly	Partially	Slightly	Never Recognized the Lack
3. Strategy development or business modelling and planning (e.g. judgment in any business activities)	62 (35.6%)	60 (34.5%)	36 (20.7%)	16 (9.2%)
4. Operation or infrastructure development (e.g. expertise in business activities, including back office)	25 (14.4%)	65 (37.4%)	60 (34.5%)	24 (13.8%)
5. Business or operation improvement (e.g. improving developed business or operation)	40 (23.0%)	70 (40.2%)	44 (25.3%)	20 (11.5%)

Note: n = 174.
Source: Authors.

Q14. Please add your comments on the reason why you think so, and specify the skills required. (Table A3.6)

Table A3.6: Please Add Your Comments on the Reason Why You Think So, and Specify the Specific Skills Required

Comments
1. In the Lao PDR, advanced equipment, machinery, and even consumables – such as jigs and tools – are often of low quality. There is little demand for them, and the variety of products is limited. Therefore, these must be imported from neighbouring countries. We need creative managers who can plan procurement and explain why the procurement is needed. Leadership is also an essential ability to operate the factory smoothly (Lao PDR).
2. Managers often quickly forget what they have learned, are unable to use what they have learned in their actual work, or take no initiative. The ability to think deeply, systematically, and logically is needed (Malaysia).
3. Logical thinking is crucial, as is the PDCA improvement cycle. Managers should be willing to promote innovation and improvement in other departments by enlarging their scope (Viet Nam).

Comments

4. Due to the difference in company cultures, there is lack of knowledge of the business processes of the parent company in Japan (Philippines).

5. Managers need to think and to act on their own instead of waiting for instructions. They lack basic skills. It is unclear whether this is due to their education or whether upper-level management positions have traditionally only given instructions to others. They lack leadership and planning and strategy formulation skills (Thailand).

6. Veteran managers who joined at the start of operations are already in their 16th year; perhaps they feel that improvement in their abilities is sluggish. It is thus necessary to provide continuous education on how to manage policy (Hoshin Kanri). Education is necessary to increase the expertise of each department – e.g. quality, production technology, maintenance, accounting, and general affairs (Viet Nam).

7. Managers have no concern for promoting team members (Indonesia).

8. Many young people in Myanmar display certificates of various training courses (e.g. MS Office or English language), but their actual ability is very low. More practical trainings are required (Myanmar).

9. Business changes so fast, and there is no time to experiment. Skilled managers are needed to drive businesses and innovation (Thailand).

10. Managers should have the ability to translate strategies into action plans and to communicate them to employees (Singapore).

11. There is a local education problem (Singapore).

12. In Singapore, it is no problem to hire operational staff members who are expected to work on existing standards, but it is very difficult to hire talented ones who think of new businesses or take on a leadership role – especially with our standard salary level. Their salary expectations are very high, so they tend to work in finance, consulting, or government (Singapore).

Comments

13. Managers are deficient in IT knowledge (Singapore).

14. Managers need to improve their subordinates' leadership and management skills (Singapore).

15. Few people want to increase their income, because they have no ambition or desire to advance in their careers (Myanmar).

16. Managers are often corrupt (Viet Nam).

17. It may be Myanmar's culture, but we are unable to see proactive proposals from managers – this could be due to a lack of knowledge or capability (Myanmar).

18. Few managers can think and act on their own (Viet Nam)

19. Since there are specific issues in Viet Nam such as lack of LNG, there are often misunderstandings between Japanese headquarters and domestic managers (Viet Nam).

20. The skill to manage a cross-departmental project, or company-wise project, is lacking (Myanmar).

21. Our business depends solely on HQ direction and has few opportunities to launch or to develop strategies by ourselves. Therefore, our middle managers follow their Japanese bosses without submitting their opinions (Thailand).

22. We want to diagnose our business problems, but there are no human resources who can do this (Thailand).



Comments

23. Almost all managers focus on short-term targets; they do not have enough experience to consider a long-term strategy. They lack the foresight to improve daily operations. Because wages are still lower than those of other countries, whole departments are easy to dismiss and to replace (Viet Nam).

24. Machine technology is needed (Indonesia).

25. Managers are hesitant to provide ideas or show leadership in the company (Thailand).

26. Managers' lack of logical thinking and inability to categorise issues by importance are serious problems. Most university graduates do not have such fundamental capabilities or even realise that they are capabilities to acquire (Viet Nam).

27. Local people have a lack of cultural consensus to work for companies (Viet Nam).

28. Managers have little ability and/or experience to think on their own; they need creativity and originality (Viet Nam).

29. Managers are poorly trained to foresee upcoming tasks (Viet Nam).

Source: Authors.



4. Doing Business Environment – Innovation

Q15. Are you interested in corporate activities to create innovative products or services with digital technology? Please select the social agendas based on your interest (multiple choice). (Table A4.1)

Table A4.1: Are You Interested in Corporate Activities to Create Innovative Products or Services with Digital Technology?

Topics	Activities	No. of Responses
1. Business process and product innovation	1.1 Upgrading production (e.g. agriculture, fisheries)	42 (24.1%)
	1.2 Upgrading sales and marketing	93 (53.4%)
	1.3 Upgrading administrative operations (e.g. human resources, accounting)	118 (67.8%)
	1.4 Smart finance (e.g. online payment, cloud funding or lending)	48 (27.6%)
	1.5 Not interested	12 (6.9%)
2. Mobility	2.1 Commuting	48 (27.6%)
	2.2 Smart logistics	77 (44.3%)
	2.3 Supply chain resilience	77 (44.3%)
	2.4 Not interested	38 (21.8%)
3. Environment and energy	3.1 Sustainable energy	107 (61.5%)
	3.2 Energy management	75 (43.1%)
	3.3 Circular economy	61 (35.1%)
	3.4 Sustainable tourism	9 (5.2%)
	3.5 Not interested	28 (16.1%)
4. Safety and security	4.1 Smart security (e.g. security system for privately owned home, or city)	79 (45.4%)
	4.2 Cybersecurity	120 (69.0%)
	4.3 Disaster management	80 (46.0%)
	4.4 Not interested	20 (11.5%)

Topics	Activities	No. of Responses
5. Living and health	5.1 Smart cities, buildings, or homes	79 (45.4%)
	5.2 E-commerce (e.g. super-app)	50 (28.7%)
	5.3 Smart health care (e.g. telemedicine)	65 (37.4%)
	5.4 Well-being (e.g. daily health care management)	72 (41.4%)
	5.5 Not interested	31 (17.8%)
6. Government and education	6.1 E-government	92 (52.9%)
	6.2 Inclusive education systems	60 (34.5%)
	6.3 Not interested	48 (27.6%)

Note: n = 174.
Source: Authors.

Q16-1-1. (Collecting necessary information) Do you have difficulties in creating innovative products or services? Please select difficulties in the categories below (single choice). (Table A4.2)

Table A4.2: Do You Have Difficulties in Creating Innovative Products or Services?

Difficulties	High	Medium	Low	Never Recognized as difficulties or issues
1. Lack of innovative business ideas or technical seeds	37 (21.3%)	71 (40.8%)	44 (25.3%)	22 (12.6%)
2. Lack of information on market demands or customer needs	27 (15.5%)	87 (50.0%)	37 (21.3%)	23 (13.2%)
3. Lack of information on competitors	27 (15.5%)	85 (48.9%)	42 (24.1%)	20 (11.5%)
4. Lack of available partners (e.g. companies, academic institutions, or government)	34 (19.5%)	56 (32.2%)	58 (33.3%)	26 (14.9%)
5. Lack of available mentors to seek for advice	22 (12.6%)	48 (27.6%)	73 (42.0%)	31 (17.8%)

Note: n = 174.
Source: Authors.

Q16-1-2. (Collecting necessary information) For the previous answers, please let us know why you think so. (Table A4.3)

Table A4.3: Please Let Us Know Why You Think So

Comments
1. There are few official internet articles and information sources. Even if we ask a consulting company in Lao PDR to provide information, we cannot obtain the information that we need due to its poor research capabilities. There are no international exhibitions or trade fairs for innovative technologies held in Lao PDR. If necessary, more useful information can be obtained by collecting information at an exhibition in Thailand, whose scale is different (Lao PDR).
2. In Malaysia, there are many people who are satisfied with the current situation and believe that it should continue. There is no one who will champion a business idea (Malaysia).
3. Market information is not organised to cover everything (Philippines).
4. Head office functions include a development department and an overseas sales department, and the overseas subsidiaries manufacture and sell products. Since this function is left to the head office, I do not feel the need to innovate (Viet Nam).
5. I can manage most tasks since I have been in this country for decades. Yet it is still difficult to collect necessary information easily (Myanmar).
6. The most important thing for innovation is information, but it is lacking in Singapore (Singapore).
7. There are no vendors with technical capabilities (Singapore).
8. There is no education regarding advanced technology (Myanmar).
9. Information collection is difficult due to lack of sales and marketing staff (Myanmar).
10. There is separation from the international community (Myanmar).
11. There are few opportunities to acquire new knowledge, and self-development cannot be expected (Thailand).
12. Although anybody can supposedly access general information, details are difficult to retrieve (Viet Nam).

Source: Authors.

Q16-2-1. (Funding) Do you have difficulties in creating innovative products or services? Please select difficulties in the categories below (single choice) (Table A4.4)

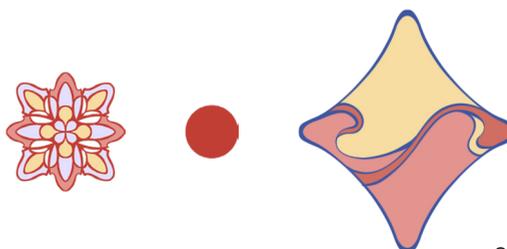


Table A4.4: Do You Have Difficulties in Creating Innovative Products or Services?

Difficulties	High	Medium	Low	Never Recognized as difficulties or issues
1. Shortage of internal capital or investment budget	22 (12.6%)	31 (17.8%)	52 (29.9%)	69 (39.7%)
2. Inaccessible loans due to strict bank loan conditions	13 (7.5%)	27 (15.5%)	58 (33.3%)	76 (43.7%)
3. Few or limited access to cloud funding or lending	8 (4.6%)	21 (12.1%)	50 (28.7%)	95 (54.6%)
4. Few or limited access to investors or venture capital	7 (4.0%)	18 (10.3%)	5 (31.6%)	94 (54.0%)
5. Lack of information or advice on fundraising	6 (3.4%)	29 (16.7%)	58 (33.3%)	81 (46.6%)

Note: n = 174.
Source: Authors.

Q16-2-2 (Funding) For the previous answers, please let us know why you think so. (Table A4.5)

Table A4.5: Please Let Us Know Why You Think So

Comments
1. Internal company issues (Philippines)
2. No worries about funding (Viet Nam)
3. We have enough financial injections from the head office (Myanmar).
4. Almost all foreign companies have given up investing in Myanmar (Myanmar).
5. Restrictions on international remittances (Myanmar)
6. No investment plans (Thailand)
7. Not interested in subject (Viet Nam)

Source: Authors.

Q17-1. Please select the initiatives that you expect institutions to take to create innovation (multiple choice) (Table A4.6)

Table A4.6: Please Select the Initiatives You Expect Institutions to Take to Create Innovation

Initiatives	No. of Responses
1. Financial support (e.g. loans from government financial institutions, tax incentives, subsidies)	56 (32.2%)
2. Acceleration or incubation programs	34 (19.5%)
3. Support for intellectual property rights (e.g. consultation services, support, or lectures on patent application)	41 (23.6%)
4. Provide guidelines in innovation activities (e.g. know-how to collaborate with external parties, contract-related matters, funding)	54 (31.0%)
5. Regulatory support (e.g. a sandbox to deregulate the application of regulations on technology to encourage companies to create innovation)	67 (38.5%)
6. Support business expansion globally or collaboration overseas (e.g. matching with experts)	72 (41.4%)
7. Commendation (e.g. government awards for business or CEOs)	13 (7.5%)
8. Others	2 (1.1%)
9. No particular expectation	33 (19.0%)

Note: n = 174.
Source: Authors.

Q17-2. Please elaborate the public initiatives that would be helpful to have (if any). (Table A4.7)

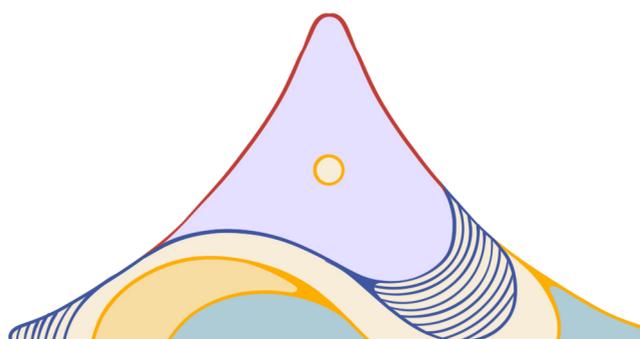


Table A4.7: Please Elaborate the Public Initiatives that Would Be Helpful to Have

Comments
1. International exhibitions (e.g. mechanical equipment, technology, tools) that invite companies from neighbouring countries (Lao PDR)
2. Human resources development that can bring about innovation (Thailand)
3. When I try to start a new business, I am not able to proceed due to strict regulations, such as business licensing for foreign companies. I would like to see deregulation (Indonesia).
4. Establish a support platform that details customs requirement for exports (e.g. all goods must be packed in fumigated pallets, packing lists require a net weight for each item, or invoices must show the net weight of each size) (Singapore).
5. Myanmar needs good instructors and persons who can share their experiences (Myanmar).
6. Both have different goals (Singapore).
7. No support system (Myanmar)
8. Need to relax of customs regulations to create new logistics businesses (Myanmar)
9. Relax restrictions on foreign investment (Myanmar)

Source: Authors.

5. Doing Business Environment – Others in Doing Business

Q18-1. Other than the previous questions, please select any difficulties that you experience in doing business within the country in which your company is located (multiple choice). (Table A5.1)

Table A5.1: Please Select Any Difficulties or Issues You Experience in Doing Business within the Country in Which Your Company Locates

Difficulties	No. of Responses
1. Shortage of internal capital or investment budget	37 (21.3%)
2. Integrating a sustainability agenda into businesses (e.g. reengineering production or procurement processes, regulatory compliance)	51 (29.3%)
3. Getting credits (e.g. complicated or inefficient loan process, long lead time to receive funds)	23 (13.2%)
4. Paying taxes (e.g. complicated taxation, corruption of authorities)	85 (48.9%)

Difficulties	No. of Responses
5. Enforcing contracts (e.g. complicated or inefficient judicial procedures, corruption of judicial authorities)	39 (22.4%)
6. Contracting with governments (e.g. complicated government procurement, unequal information on bidding)	35 (20.1%)
7. Closing businesses (e.g. complicated or long lead time of procedures to close businesses)	25 (14.4%)
8. Others	6 (3.4%)
9. No particular issues	38 (21.8%)

Note: n = 174.
Source: Authors.

Q18-2. If you selected 'Others' in the previous question, please specify the difficulties that you experience in doing business within the country in which your company is located (if any). (Table A5.2)

Table A5.2: Please Specify the Difficulties That You Experience in Doing Business within the Country in Which Your Company Is Located

Comments
1. After the coup d'état, construction work has been suspended, and the military government has forced the conversion of foreign currency (Myanmar).
2. Difficulty of getting visas for expatriates (Singapore)
3. Licenses and other regulations are too strict (Indonesia).
4. Difference in culture and skill level (Singapore)
5. Strict criteria for employment passes (Singapore)
6. Labour cost, access to foreign manpower, inward policy (Singapore)

Source: Authors.

Q19-1. Are you operating the business in a foreign country? (single choice) (Table A5.3)

Table A5.3: Are You Operating Businesses in Foreign Countries?

Operating Businesses in Foreign Countries	No. of Companies
Yes	136 (78.2%)
No	38 (21.8%)

Note: n = 174.
Source: Authors.

Q19-2. (If yes,) Please indicate the specific country with the most significant difficulties in doing business (countries in ASEAN and Japan) (single choice). (Table A5.4)

Table A5.4: Please Indicate the Specific Country with the Most Significant Difficulties in Doing Business

Country	No. of Companies
Brunei Darussalam	0 (0.0%)
Cambodia	1 (0.7%)
Indonesia	10 (7.4%)
Lao People's Democratic Republic	3 (2.2%)
Malaysia	6 (4.4%)
Myanmar	22 (16.2%)
Philippines	3 (2.2%)
Singapore	2 (1.5%)
Thailand	5 (3.7%)
Viet Nam	11 (8.1%)
Japan	23 (16.9%)
None of the above	50 (36.8%)

Note: n = 136.
Source: Authors.

Q19-3. Please indicate any difficulties that you experience in doing business in the country selected above (multiple choice). (Table A5.5)

Table A5.5: Please Indicate Any Difficulties You Experience in Doing Business in the Country Selected Above

Difficulties	No. of Responses
1. Trading across borders (e.g. unclear or unofficial customs procedures, limited scope of electronic service)	50 (36.8%)
2. Employing workers (e.g. lack of accessibility of primary and mid education, lack of work experience)	21 (15.4%)
3. Starting business (e.g. time-consuming or complicated procedures)	5 (3.7%)
4. Integrating sustainability agenda into business (e.g. reengineering production or procurement processes, regulatory compliance)	17 (12.5%)
5. Getting credits (e.g. complicated or inefficient loan process, long lead time to receive funds)	13 (9.6%)
6. Paying taxes (e.g. complicated taxation, corruption of authorities)	46 (33.8%)
7. Enforcing contracts (e.g. complicated or inefficient judicial procedures, corruption of judicial authorities)	22 (16.2%)
8. Contracting with governments (e.g. complicated government procurement, unequal information on bidding)	14 (10.3%)
9. Closing businesses (e.g. complicated or long lead time of procedures to close businesses)	11 (8.1%)
10. Others	30 (22.1%)

Note: n = 174.
Source: Authors.

Q19-4. If you selected 'Others' in the previous question, please specify any difficulties that you experience in doing business in the country selected above. (Table A5.6)

Table A5.6: Please Specify Any Difficulties That You Experience in Doing Business in the Country Selected Above

Comments
1. Unwillingness of the counterparty (i.e. distributor) to disclose information (Singapore)
2. No issues (Singapore)
3. No issues (Viet Nam)
4. No issues (Philippines)
5. No issues (Thailand)
6. Money collection (Singapore)
7. Differences between systems in different countries (Others)
8. Different business culture, players, regulations compared with Asia (Singapore)
9. FATF, banking system (Singapore)
10. Not so difficult to arrange logistics services to and from other ASEAN countries and Japan (Myanmar)
11. Political situation is unstable (Myanmar).
12. Strong competitor in Indonesian market (Viet Nam)
13. Malay (language), market price (Indonesia)
14. Foreign money exchange, remittance issues (Viet Nam)

Source: Authors.

