ASEAN Digital Masterplan 2025 - Stakeholder Questionnaire

This is a questionnaire to gather input for use in the development of the ASEAN Digital Masterplan (2020 – 2025 (ADM 2025). ADM 2025 follows two previous ASEAN ICT Masterplans, AIM 2015 and AIM 2020. The Malaysian Communications and Multimedia Commission (MCMC) is tasked with leading the development of ADM 2025. MCMC has engaged the services of Plum Consulting London LLP (Plum) to assist it in this task.

Your input and views on the current and future state of ICT within individual ASEAN Member States and across the ASEAN region is most valuable and greatly appreciated. So too are your thoughts on what actions need to be taken and what barriers need to be removed to accelerate the transformation of ASEAN to a leading digital community.
All responses to this survey will be treated as confidential. No reference to responses and ideas provided here will identify the source of those responses.

This survey contains 38 questions in total (depending on responses, not all questions will be asked) divided across nine sections. It is possible to move between sections using the "back" and "next" buttons (answers will be remembered). It should take around half an hour to complete. A printer-friendly version can be accessed here: [https://plumconsulting.co.uk/wpdm-package/asean-digital-masterplan-2025-stakeholder-questionnaire/ (https://plumconsulting.co.uk/wpdm-package/asean-digital-masterplan-2025-stakeholder-questionnaire/)](https://plumconsulting.co.uk/wpdm-package/asean-digital-masterplan-2025-stakeholder-questionnaire/)

Your earliest response would be much appreciated. To ensure your response to this questionnaire is able to be considered fully, please submit the response by 17:00 Kuala Lumpur (UTC+8) 30 September 2020. We thank you for your time in completing this survey.

* Required

Establishment Questions

Section 1/9

1. In which country is your organisation based? *

○ Brunei Darussalam

○ Cambodia

○ Indonesia

○ Lao PDR

○ Malaysia

○ Myanmar

○ Philippines

○ Singapore

○ Thailand

○ Viet Nam

○ [   ]

Other

2. What is the name of your organisation? *

[   ]

3. Would you be willing to have a follow-up conversation with the study team? *

○ Yes

○ No

4. If yes, please enter an email address through which we may contact you

5. The ADM 2025 vision is:

"ASEAN as a leading digital community and economic bloc, powered by secure and transformative digital services, technologies and ecosystem"

What are the key barriers to achieving the ASEAN 2025 vision for ASEAN as a region? Please mark all which apply.

☐ Lack of infrastructure investment

☐ Low take-up of digital services/connectivity

☐ Affordability of services

☐ Regulatory barriers to trade in digital services

☐ Coverage of broadband services

☐ Lack of digital skills/digital literacy among end-users

☐ Too much regulation of market players

☐ Lack of allocated spectrum for digital services

☐ Inadequate cybersecurity for digital services

☐ Lack of protection for end users (e.g. scams, potential harms from digital services)

☐ Lack of a harmonised approach across ASEAN

☐ Lack of support for digital businesses

☐ Lack of local content in local languages

☐ [   ]

Other

6. In your view, what are the top three barriers to achieving the ASEAN 2025 vision? Please mark three answers.

☐ Lack of infrastructure investment

☐ Low take-up of digital services/connectivity

☐ Affordability of services

☐ Regulatory barriers to trade in digital services

☐ Coverage of broadband services

☐ Lack of digital skills/digital literacy among end-users

☐ Too much regulation of market players

☐ Lack of allocated spectrum for digital services

☐ Inadequate cybersecurity for digital services

☐ Lack of protection for end users (e.g. scams, potential harms from digital services)

☐ Lack of a harmonised approach across ASEAN

☐ Lack of support for digital businesses

☐ Lack of local content in local languages

☐ [   ]

Other

7. In your view, do national regulations need to change to help facilitate the digital agenda in ASEAN?

○ Yes - additional regulation is needed

○ Yes - existing regulation should be adapted

○ Yes - existing regulation should be reduced or removed

○ No - there is an appropriate level of regulation

9/18/2020

8. If yes, which regulations need to change?

9. Which government or regulatory initiatives in the last five years have been the most successful for advancing the digital agenda?

10. What has been the main impact of COVID-19 (and associated restrictions) on the use of digital services?

   ○ Significant increase in use of digital services (50%+ year on year)

   ○ Increase in the use of digital services (10-50% year on year)

   ○ Slight increase in the use of digital services (0-10% year on year)

   ○ No change/decline in the use of digital services

11. How will COVID-19 (and associated restrictions) affect the development of digital services over the next two to three years?

12. How should the longer term impact of COVID-19 be reflected in ADM 2025?

13. Do you have ICT or telecommunications policies or initiatives related to COVID-19 which have been publicly announced?

   ○ Yes

   ○ No

14. If yes, where could we find information on these policies or initiatives?

15. In your view, how important are the following technologies in facilitating digital development in the ASEAN region?

	Not important	Somewhat important	Important	Very important
Cloud computing	○	○	○	○
Internet of Things/M2M	○	○	○	○
5G	○	○	○	○
AI/Machine Learning	○	○	○	○
Management and analysis of big data	○	○	○	○
Open government data	○	○	○	○

16. What are the three most important areas where an ASEAN-wide approach is needed and where national action is less effective?

17. What are the most appropriate metrics and measures for assessing the success of ADM 2025? Please rank in order by arranging the list below with the most important at the top.

   Internet take-up

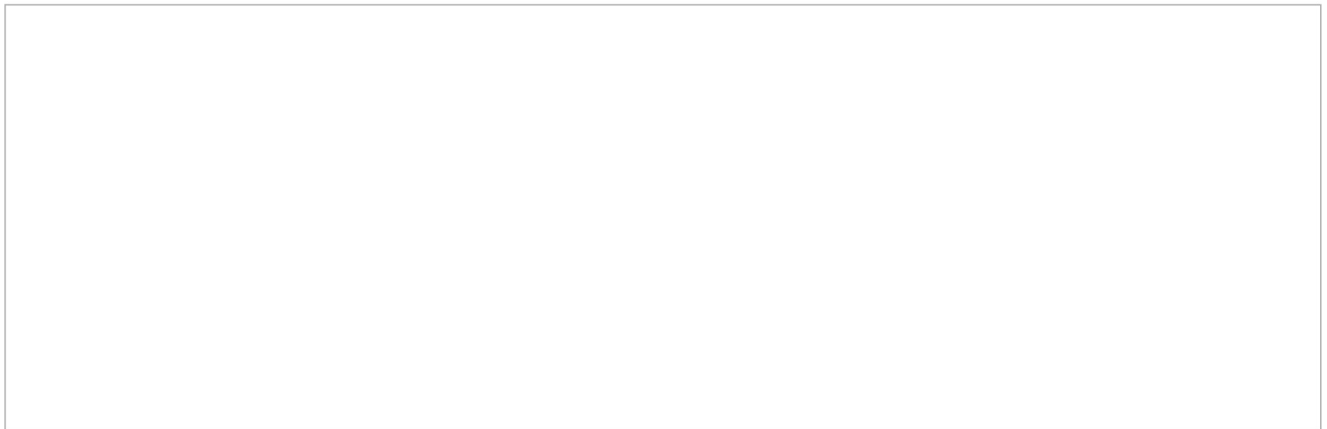   Take-up of internet-enabled digital services (e.g. e-banking)

   Availability of high-speed internet

   Adoption of new and emerging technologies (e.g. IoT)

   Size of the digital economy in ASEAN

   Number/value of ASEAN digital firms

18. How could ASEAN effectively help create an environment that encourages the growth of the digital economy?

Infrastructure

19. In your view, what are the key challenges to the deployment of infrastructure in the ASEAN region? Please mark all which apply.

    ☐ Lack of access to capital

    ☐ Insufficient return on investment

    ☐ Challenge of gaining the necessary access rights and permissions

    ☐ Regulatory restrictions on network deployment

    ☐ Barriers to cross-border trade and investment (inward foreign investment to support infrastructure build) with other ASEAN members

    ☐ Barriers to cross-border trade and investment (inward foreign investment to support infrastructure build) from outside ASEAN

    ☐ [_____]

    Other

20. Are there categories of online services where you think more compelling and user-friendly applications are needed? Please mark all which apply

☐ Financial (banking, payments, digital wallets)

☐ Government services

☐ Social media

☐ Education

☐ Healthcare

☐ Community

☐ [text box]

Other

21. What are the barriers to the availability of more/better online services?

[text box]

22. Do you think some online services should be regulated where they are not currently?

○ Yes

○ No

23. If you think some online services need additional regulation, please rank the following activities in order of greatest need of regulation (5=most needed)

	1	2	3	4	5
Licensing	○	○	○	○	○
Competition	○	○	○	○	○
Privacy	○	○	○	○	○
Online harms (e.g. inappropriate content, digital abuse)	○	○	○	○	○
Taxation	○	○	○	○	○
Sector-specific regulation (e.g. for health apps)	○	○	○	○	○

24. If you think online services should be subject to additional regulation, who should be responsible for that regulation?

○ Existing National Regulatory Authority

○ New National Regulatory Authority

○ Regional ASEAN regulator

○ Global regulator

○ [   ]

Other

25. Do you think more should be done to support the development of local services created in ASEAN?

○ Yes

○ No

26. If so, what should be done to support the development of local services?

27. Leaving aside accessibility, what do you think is the key reason people choose not use digital services?

   ○ Affordability

   ○ Lack of trust/concerns over security

   ○ Don't think there is sufficient benefit from digital services

   ○ Lack of knowledge and skills

   ○ [   ]

      Other

28. In your view, which type of organisation should bear primary responsibility for ensuring adults have the necessary skills to use digital services?

   ○ Schools (for adult learners returning just to learn digital skills)

   ○ Community organisations

   ○ Colleges and universities

   ○ Businesses

   ○ [   ]

      Other

29. Is there a single key barrier that could be removed to significantly assist more people gaining the necessary skills to using digital services?

30. Do you know of one existing program or initiative that you would recommend as a leading example of up-skilling individuals' ability to using digital services?

31. Which of the following best describes your organisation? *

    ○   National regulatory authority

    ○   ICT/Telecommunications Ministry

    ○   Other Government Ministry

    ○   Private sector - telecommunications

    ○   Private sector - ICT (non-telecommunications)

    ○   Private sector - other

32. Please describe the key obstacles in carrying out AIM 2020 project items.

33. What do you think the key priority areas for government/regulators in ASEAN should be? Please mark all which apply.

☐ Encouraging new/emerging technologies

☐ Protecting users' rights (e.g. via data protection frameworks)

☐ Upgrading digital infrastructure

☐ Promoting take-up of communications technologies

☐ Promoting the development of digital skills

☐ Ensuring adequate competition in digital services

☐ Cybersecurity

☐ [   ]

Other

34. Does your organisation operate in more than one ASEAN member state?

○ Yes

○ No

35. If yes, what are the key challenges your organisation encounters in operating across borders? Please mark all which apply.

☐ Different regulatory environment

☐ Different market preferences

☐ Different currency

☐ Language barrier

☐ [   ]

Other

36. If no, what are the key barriers to expansion in another ASEAN member state? Please mark all which apply.

- ☐ Different market preferences

- ☐ Lack of capital

- ☐ Different currency

- ☐ Expansion not part of business plans

- ☐ Language barrier

- ☐ Different regulatory environment

- ☐ [   ]

  Other

37. In general, what in your view are the main barriers to growth for your business?

Opportunity for comment

Section 9/9. This section provides an opportunity to comment on any aspect of the issues raised in the survey.

38. Please add any further comments on ADM 2025