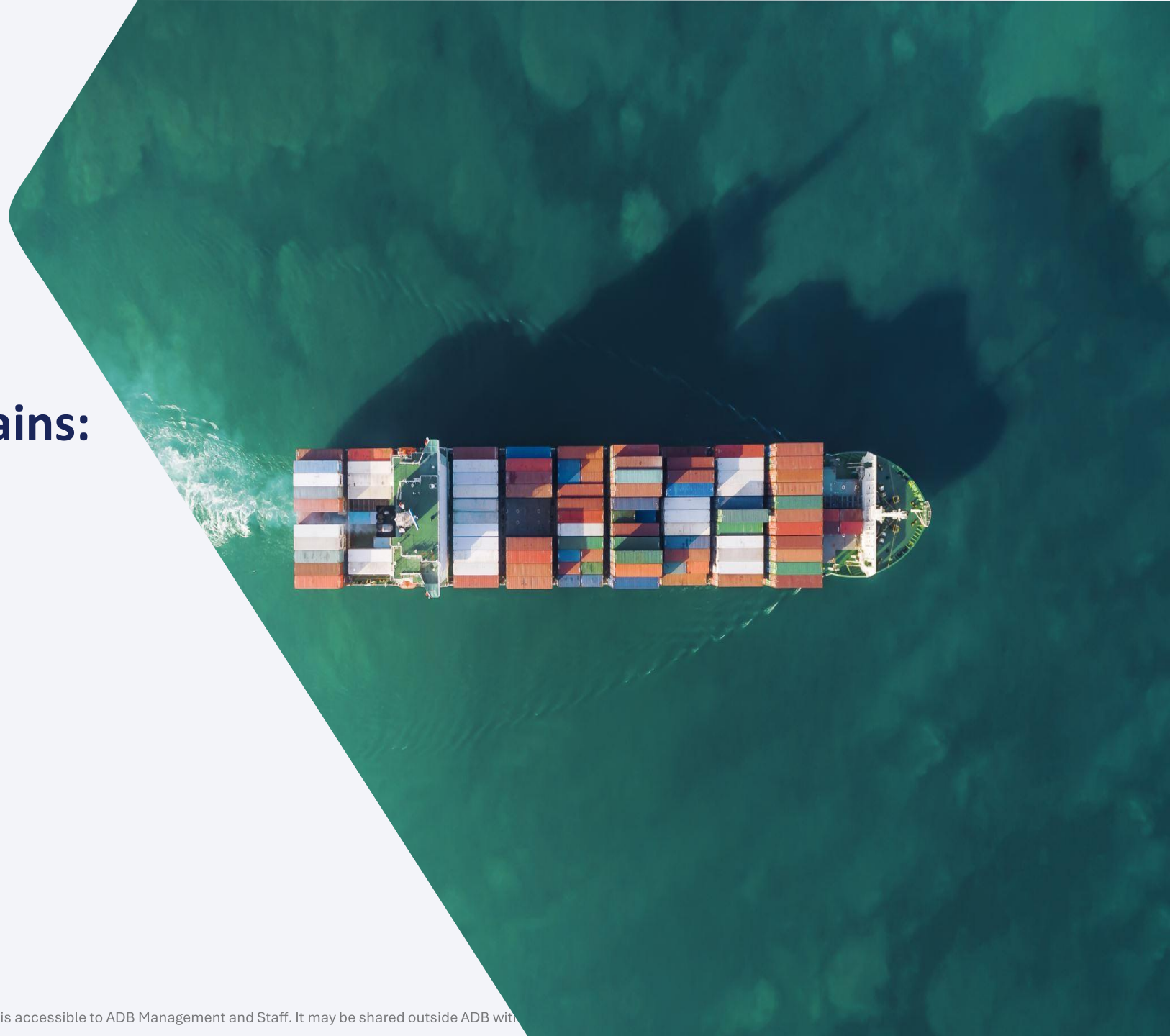
Access Partnership

Investment and Supply Chains: What about the firm?



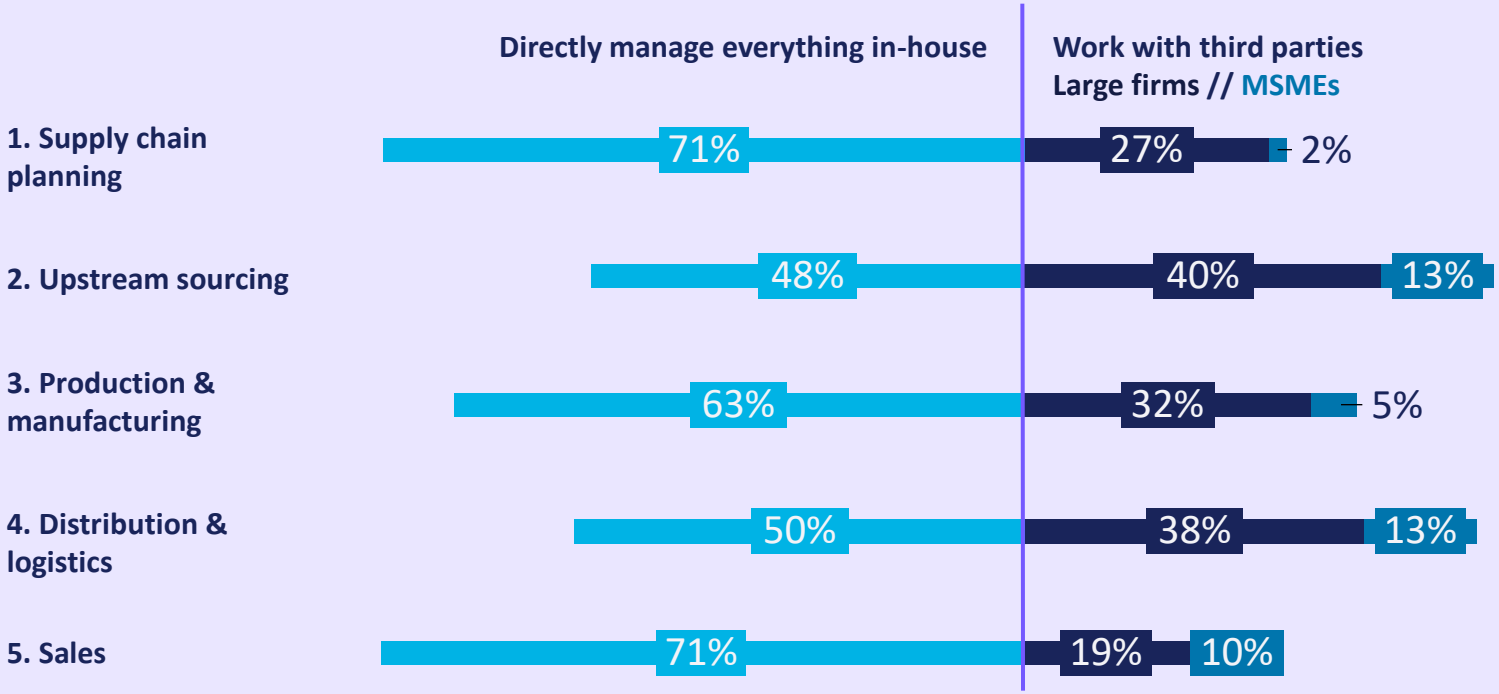
8 October 2026

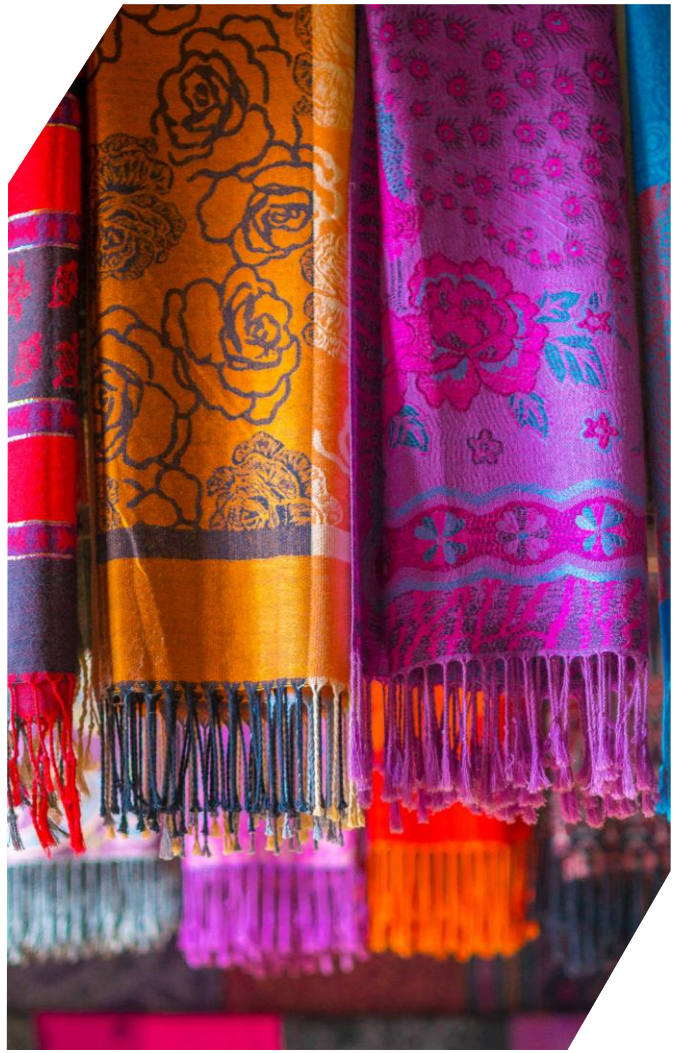
Marcus Ng, Head of APAC & Economics Strategy

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Supply chain opportunity in supplies, distribution and sales

Supply chain activities that are outsourced by firms*,
% of respondents





* Based on a 2025 survey of 220 firms in Asia-Pacific, focused on 48 firms with over 200 employees and over $100 million in annual revenue.
Source: Access Partnership

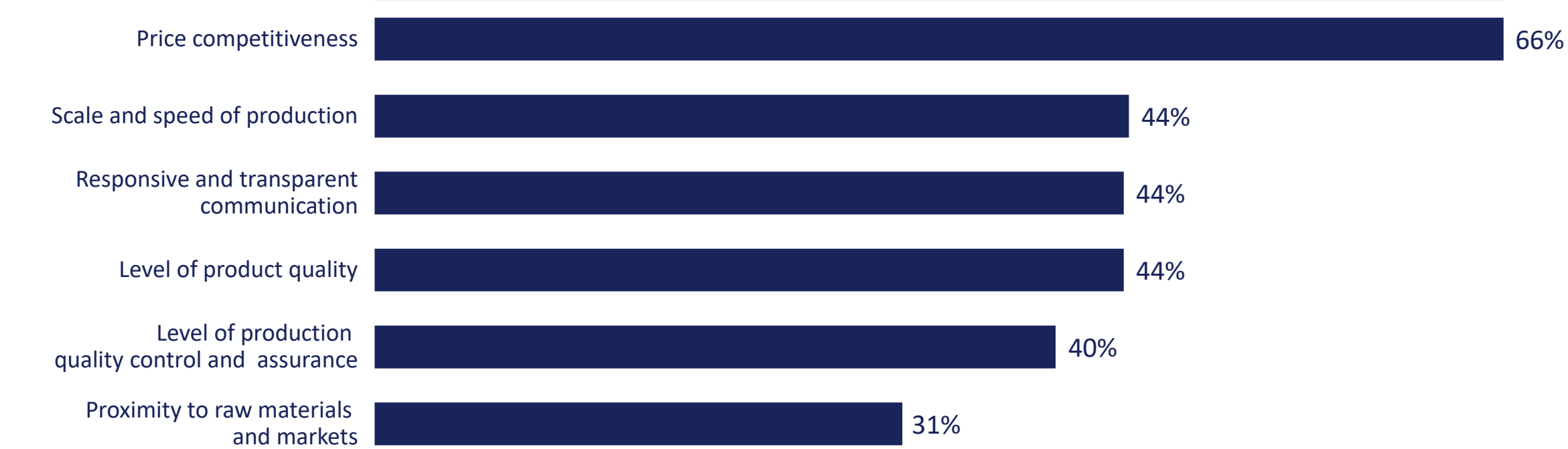
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Cost matters for partnering choices; quality and transparency are increasingly important

Top 3 factors that firms* consider when engaging MSME partners

% of respondents



* Based on a 2025 survey of 220 firms in Asia-Pacific, focused on 48 firms with over 200 employees and over $100 million in annual revenue.

Source: Access Partnership

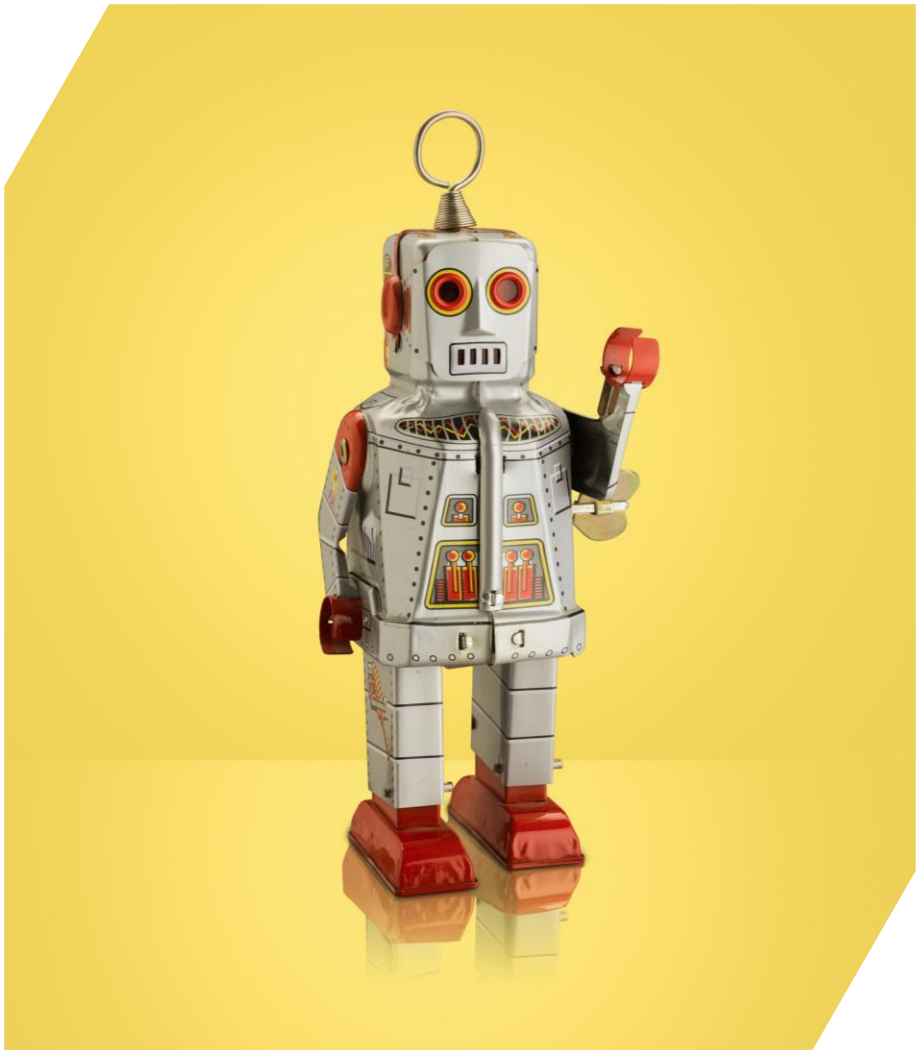
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Digitalisation of firms can lead to greater trade participation

Digitalisation relies on:

- **Policy and governance:** Conducive regulatory environment to support digital adoption.
- **Digital infrastructure:** Facilitate integration of digital inputs into production processes.
- **Digitally skilled workforce:** Necessary to incorporate technology into production.



1 percentage point increase in digitalisation* correlates with…

2.5%

increase

in digitally deliverable services exports.

2.3%

increase

in ICT services exports.

1.7%

increase

in financial and professional services exports.

* Digitalisation is defined as digital intensity, a measure of the share of inputs from digital sectors across all intermediate and capital inputs.
Source: Access Partnership

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Trade policy can move the needle

Impact of digital trade provisions on digital trade flows in the long-run*,

as a % of total trade volume

Mechanism of impact | General | Increase consumer trust | Lower market entry barriers | Reduce business transaction cost | Reduce business trade cost

Provision	Digitally ordered	Digitally delivered	Provision	Digitally ordered	Digitally delivered
Cybersecurity	X	25.0%	E-authentication and e-signatures	18.8%	21.3%
Privacy protection	11.2%	X	Domestic electronic transactions framework	X	✓
Online consumer protection	21.4%	✓	E-invoicing	X	44.0%
Measures against unsolicited commercial communications	32.5%	X	Prohibition of data localisation	X	✓
Participation in digital trade for small businesses	24.6%	✓	Cross-border transfer of information	X	✓
Market access and national treatment for ICT services	19.9%	29.1%	Paperless trading	X	17.0%

* The long-run impact is defined as the total impact of each trade provision on flows in each digital trade component in the next 2 years (for digitally ordered trade) or next 3 years (for digitally delivered trade) and is expressed as a percentage of digital trade flows in the year in which the provision comes into force.

Source: Access Partnership

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