YouGov®

B2B Survey on Digital Policy in Germany

Conducted by YouGov Germany

Commissioned by LANCOM Systems

Field time: October 19, 2018 – October 25, 2018

LANCOM
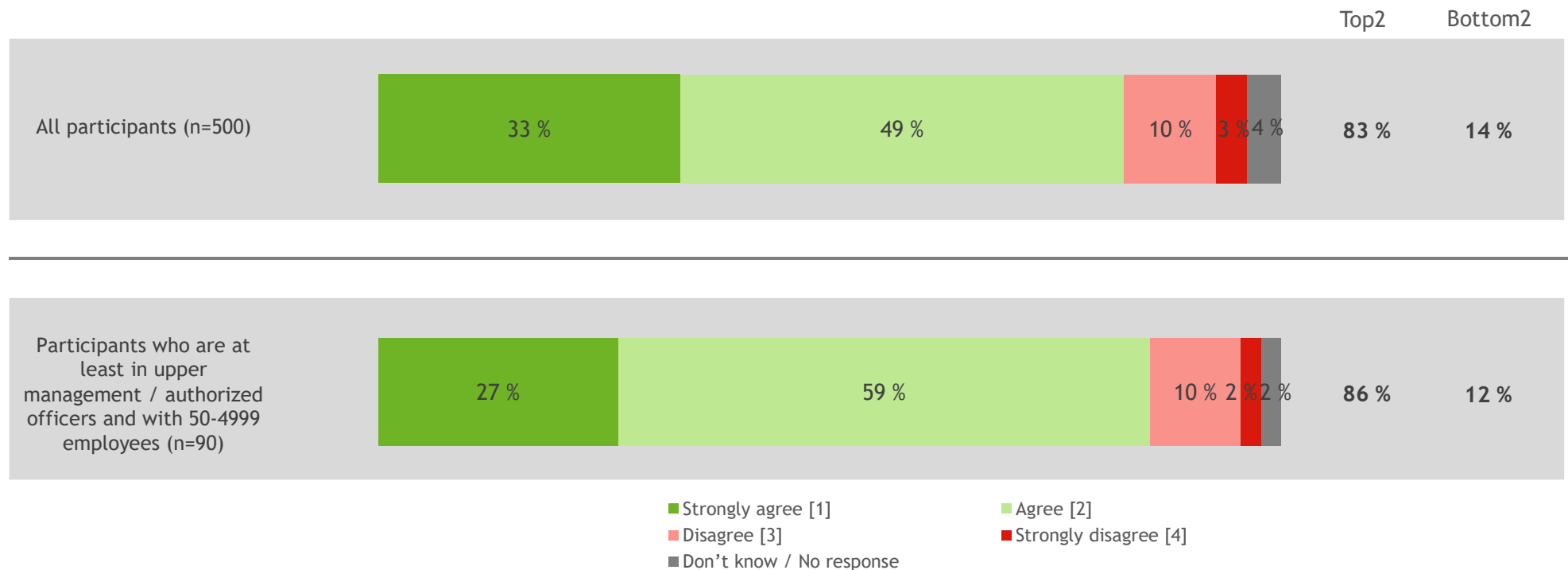## Systems

General – Key information about the survey

➢ **Collection of data:** The data was collected by YouGov Deutschland GmbH

➢ **Target group:** 500 German business decision makers

➢ **Survey technique / recruitment:** The survey is based on online interviews with participants from the YouGov Panel in Germany

➢ **Survey period:** The survey was conducted in the period from October 19 through October 25, 2018

➢ **Note:**
  - For reasons of better readability, percentage values shown in graphical representations are rounded as standard.
  - The percentages in the underlying data have two places after the decimal point. Automatic rounding to integers may result in the sum of the integers for a particular response no longer totaling 100 %, despite representation of all response categories.

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Digitalization & Digital Sovereignty

83 % of the business decision makers surveyed agree that the German government should take industrial policy measures to strengthen the domestic IT sector.

To what extent do you agree with the following statement?
The German government should take industrial policy measures to strengthen the domestic IT sector, e.g. the targeted use of funding.

						Top2	Bottom2
All participants (n=500)	33 %	49 %	10 %	3 %	4 %	83 %	14 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	27 %	59 %	10 %	2 %	2 %	86 %	12 %

■ Strongly agree [1] ■ Agree [2]
■ Disagree [3] ■ Strongly disagree [4]
■ Don't know / No response

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Approximately 5 out of 6 business decision makers are in favor of the German government doing more to guarantee the digital sovereignty of industry and public administration.

To what extent do you agree with the following statement?
The German government must do more to guarantee the digital sovereignty of industry and public administration, e.g. through targeted use of trusted technologies from Germany and Europe.

		Top2	Bottom2
All participants (n=500)	42 % — 43 % — 9 % — 3 % 2 %	85 %	13 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	34 % — 49 % — 12 % — 3 % 1 %	83 %	16 %

- ■ Strongly agree [1]
- ■ Agree [2]
- ■ Disagree [3]
- ■ Strongly disagree [4]
- ■ Don't know / No response

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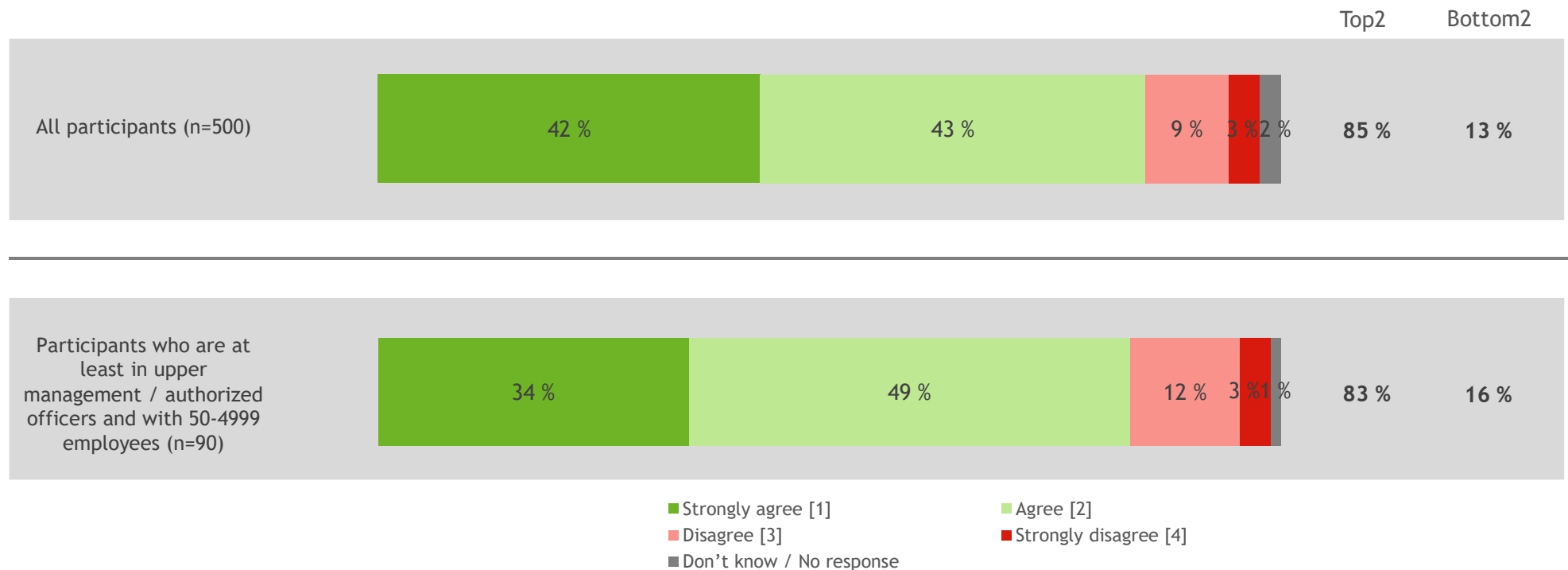
More than 80 % of business decision makers also agree that preference should be given to German or European solutions for public investments.

To what extent do you agree with the following statement?
The German government should give preference to German or European solutions for public investments and, if necessary, call for changes to European public procurement law to do so.

		Top2	Bottom2
All participants (n=500)	40 % 44 % 10 % 2 % 5 %	83 %	12 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	36 % 50 % 7 % 3 % 4 %	86 %	10 %

■ Strongly agree [1]   ■ Agree [2]
■ Disagree [3]   ■ Strongly disagree [4]
■ Don't know / No response

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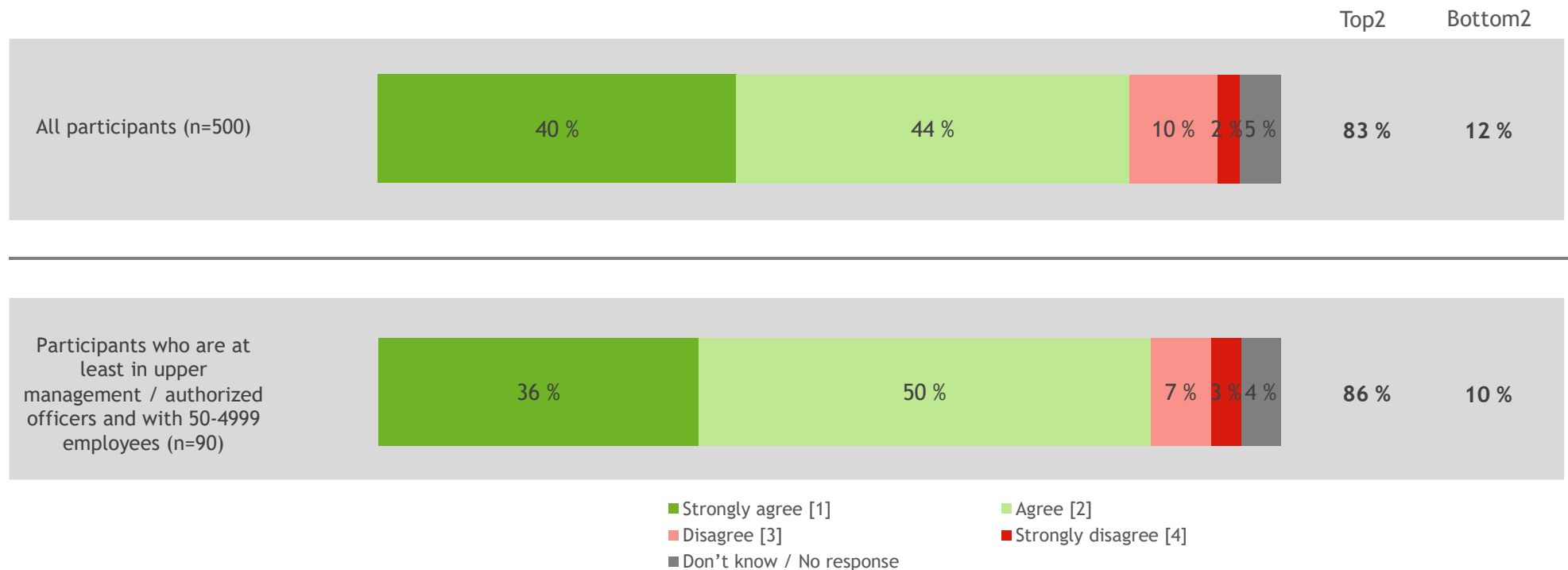
Almost 90 % of those surveyed agree with the statement that the German government must develop a strategy to guarantee the development of key digital technologies.

To what extent do you agree with the following statement?
The German government must develop a strategy to guarantee the development of key digital technologies in Germany and Europe.

	Strongly agree [1]	Agree [2]	Disagree [3]	Strongly disagree [4]	Don't know / No response	Top2	Bottom2
All participants (n=500)	47 %	41 %	7 %	2 %	3 %	88 %	9 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	47 %	40 %	7 %	3 %	3 %	87 %	10 %

■ Strongly agree [1]   ■ Agree [2]
■ Disagree [3]   ■ Strongly disagree [4]
■ Don't know / No response

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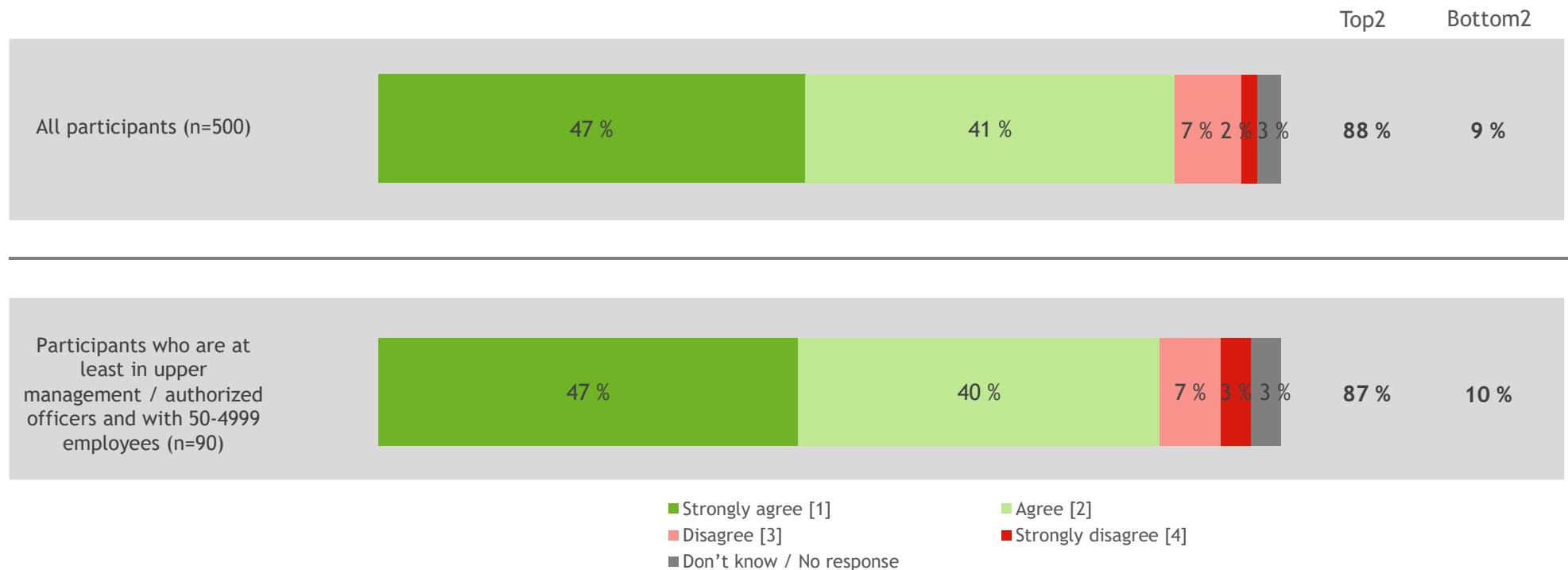
Less than half of those surveyed expect that the newly appointed Digital Council will have a positive impact on the German government's digital policy.

To what extent do you agree with the following statement?
The newly appointed Digital Council will have a positive impact on the German government's digital policy.

						Top2	Bottom2
All participants (n=500)	8 %	36 %	30 %	10 %	16 %	45 %	40 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	14 %	30 %	33 %	11 %	11 %	44 %	44 %

■ Strongly agree [1]   ■ Agree [2]
■ Disagree [3]   ■ Strongly disagree [4]
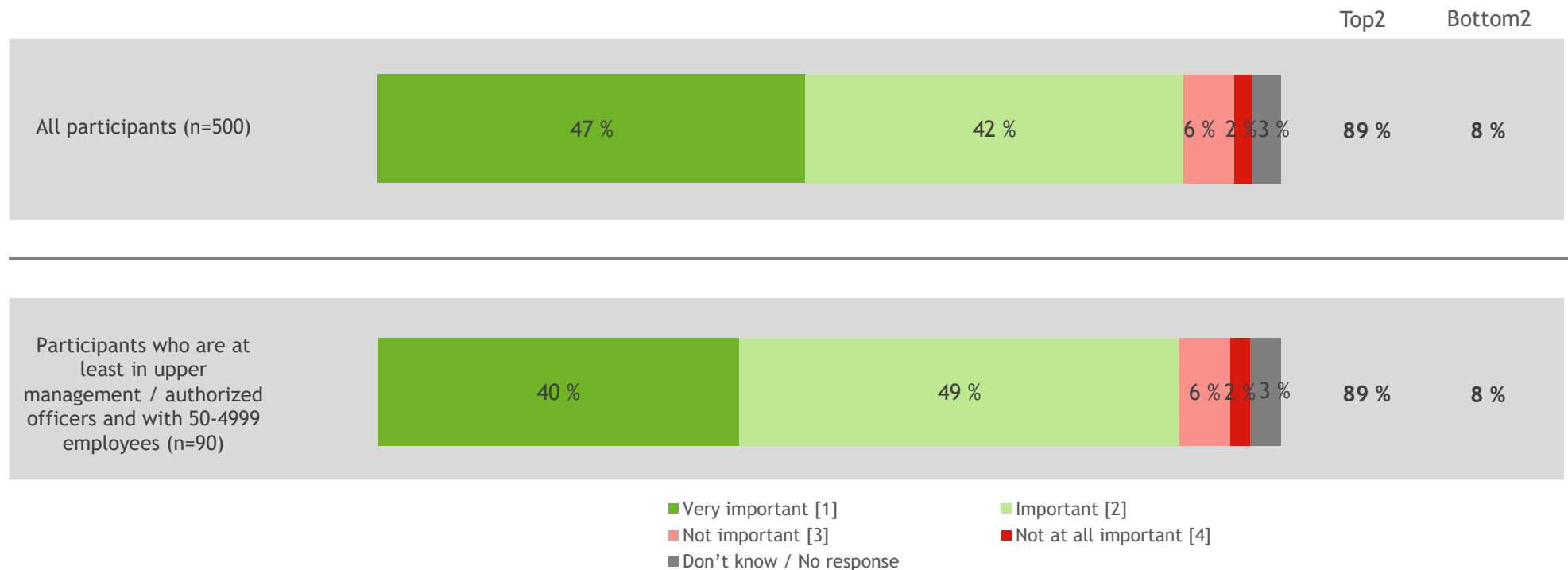■ Don't know / No response

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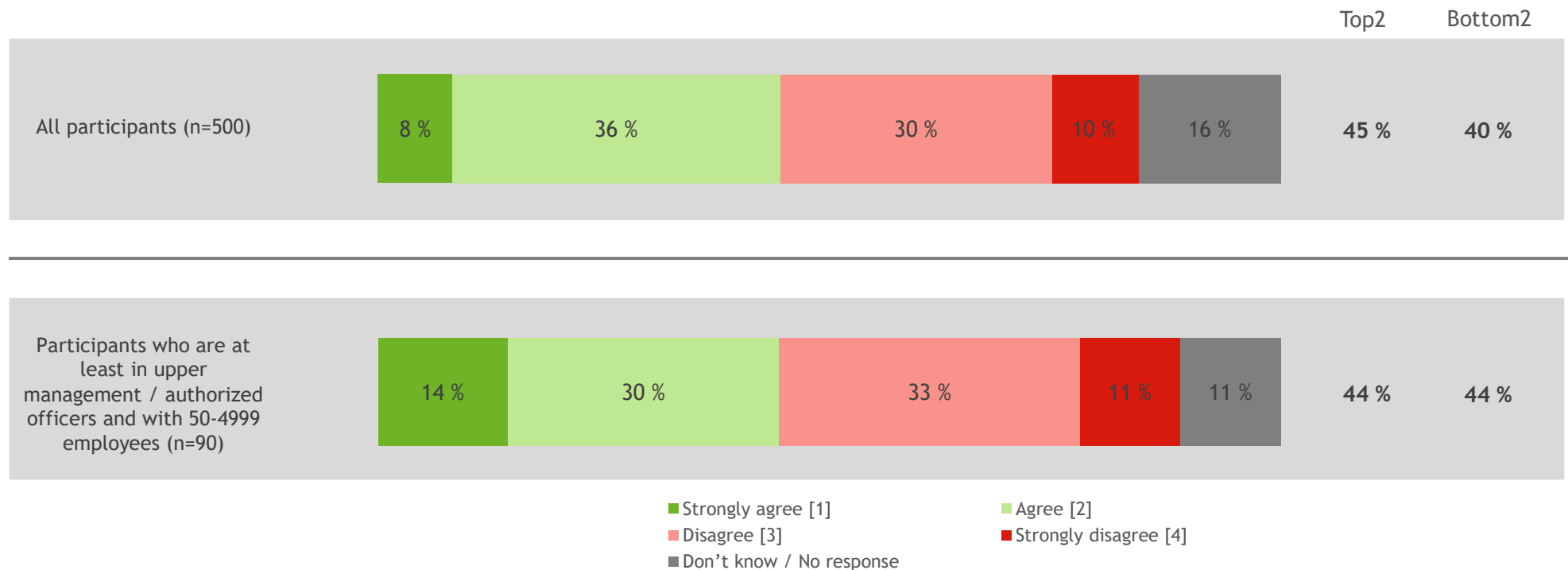
IT Security

The introduction of compulsory baseline security standards for Internet-enabled products at EU level is considered important by almost 90 % of those surveyed.
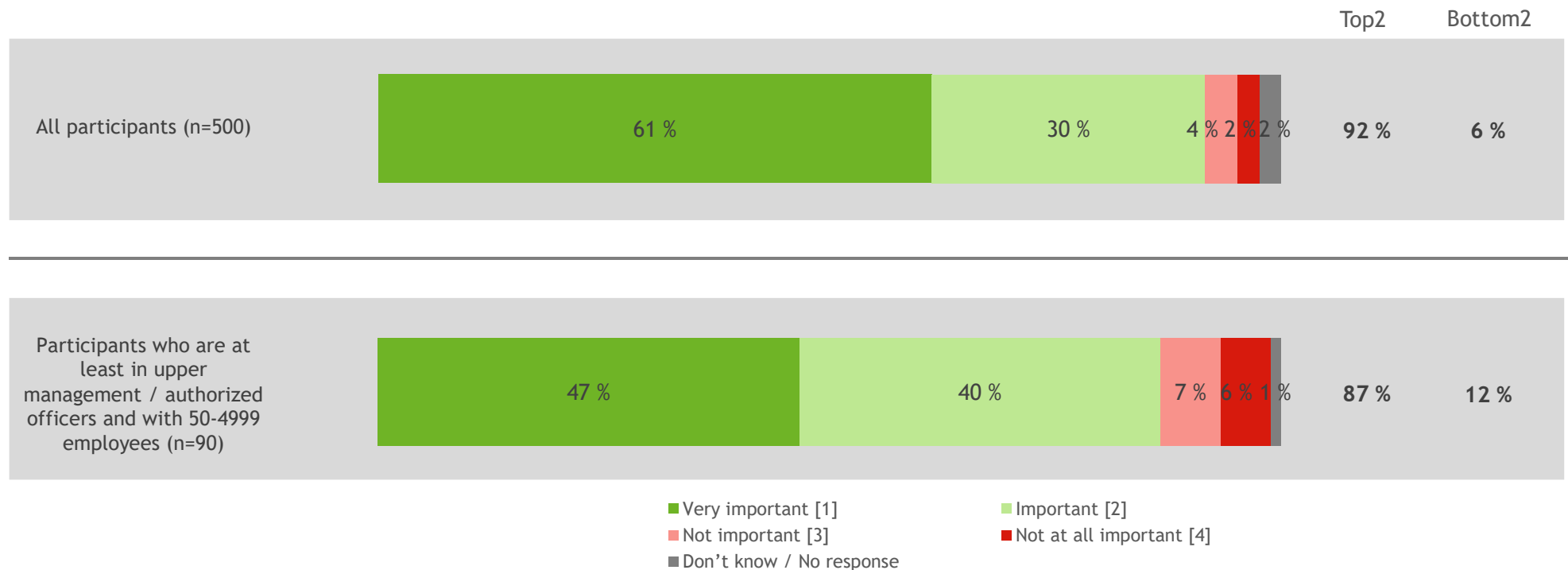
How important is the following measure to you?
The introduction of compulsory baseline security standards for Internet-enabled products at EU level to keep non-secure products out of the market effectively.

		Top2	Bottom2
All participants (n=500)	47 %　　42 %　　6 % 2 % 3 %	89 %	8 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	40 %　　49 %　　6 % 2 % 3 %	89 %	8 %

■ Very important [1]　　　　　■ Important [2]
■ Not important [3]　　　　　■ Not at all important [4]
■ Don't know / No response

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92 % of the business decision makers surveyed find it important that manufacturers be legally obliged to close security flaws via updates.

How important is the following measure to you?
A legal obligation for manufacturers to close security flaws via updates.

		Top2	Bottom2
All participants (n=500)	61 % 30 % 4 % 2 % 2 % 2 %	92 %	6 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	47 % 40 % 7 % 6 % 1 %	87 %	12 %

■ Very important [1] ■ Important [2]
■ Not important [3] ■ Not at all important [4]
■ Don't know / No response

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86 % of business decision makers agree with the statement that policymakers should take resolute action against providers / manufacturers of non-secure products.

To what extent do you agree with the following statement?
Policymakers should take resolute action against providers / manufacturers of non-secure products.

			Top2	Bottom2
All participants (n=500)	47 % / 39 % / 7 % / 4 % / 3 %		86 %	11 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	46 % / 40 % / 7 % / 4 % / 3 %		86 %	11 %

■ Strongly agree [1]   ■ Agree [2]
■ Disagree [3]   ■ Strongly disagree [4]
■ Don't know / No response

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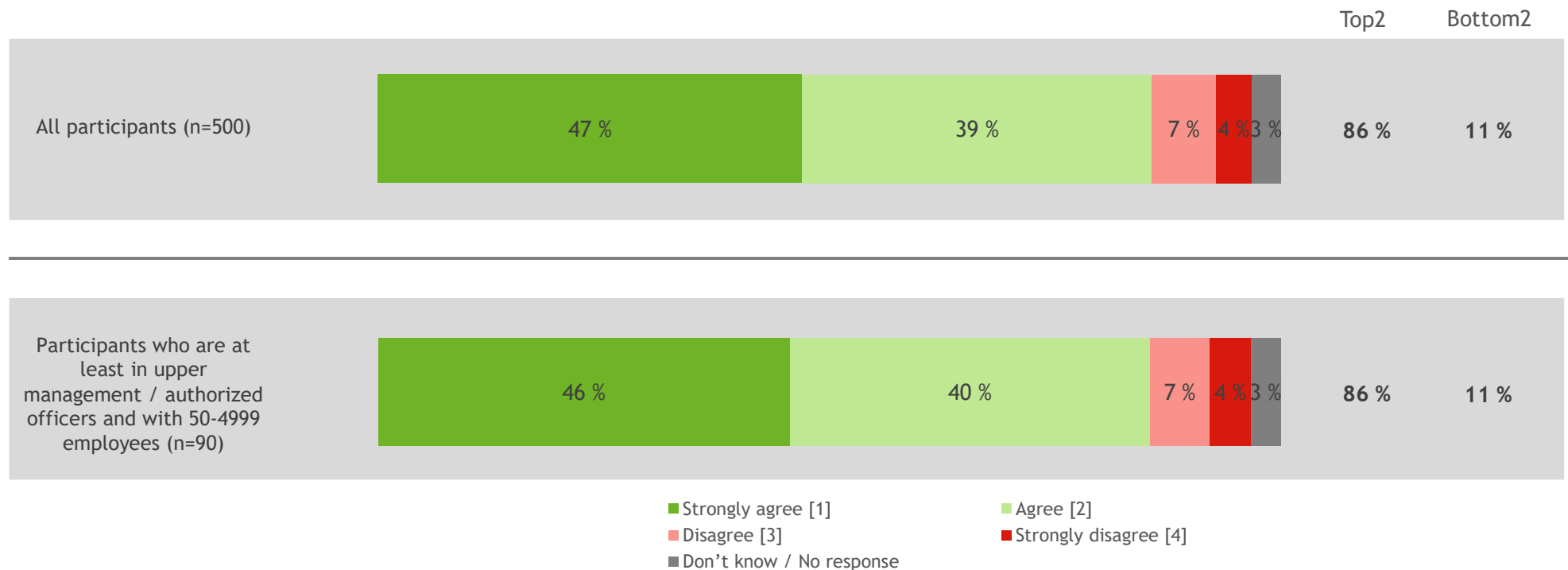
88 % of those surveyed consider obliging manufacturers to provide a transparent indication of how long a product will receive security updates from its date of purchase to be very important or important.
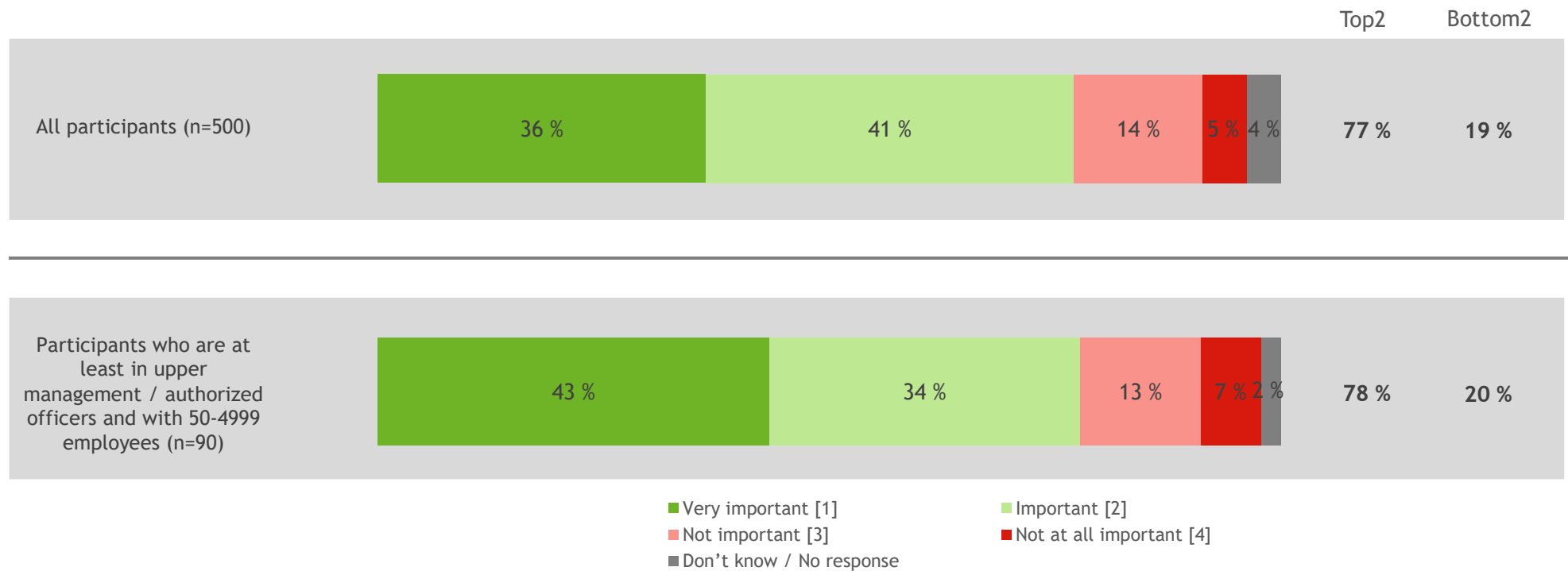
How important is the following measure to you?
Obligation of manufacturers to provide a transparent indication of how long a product will receive security updates from its date of purchase.

		Top2	Bottom2
All participants (n=500)	55 %　33 %　8 % 2 %2 %	88 %	10 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	48 %　38 %　11 % 2 %1 %	86 %	13 %

■ Very important [1]　　　　■ Important [2]
■ Not important [3]　　　　■ Not at all important [4]
■ Don't know / No response

YouGov
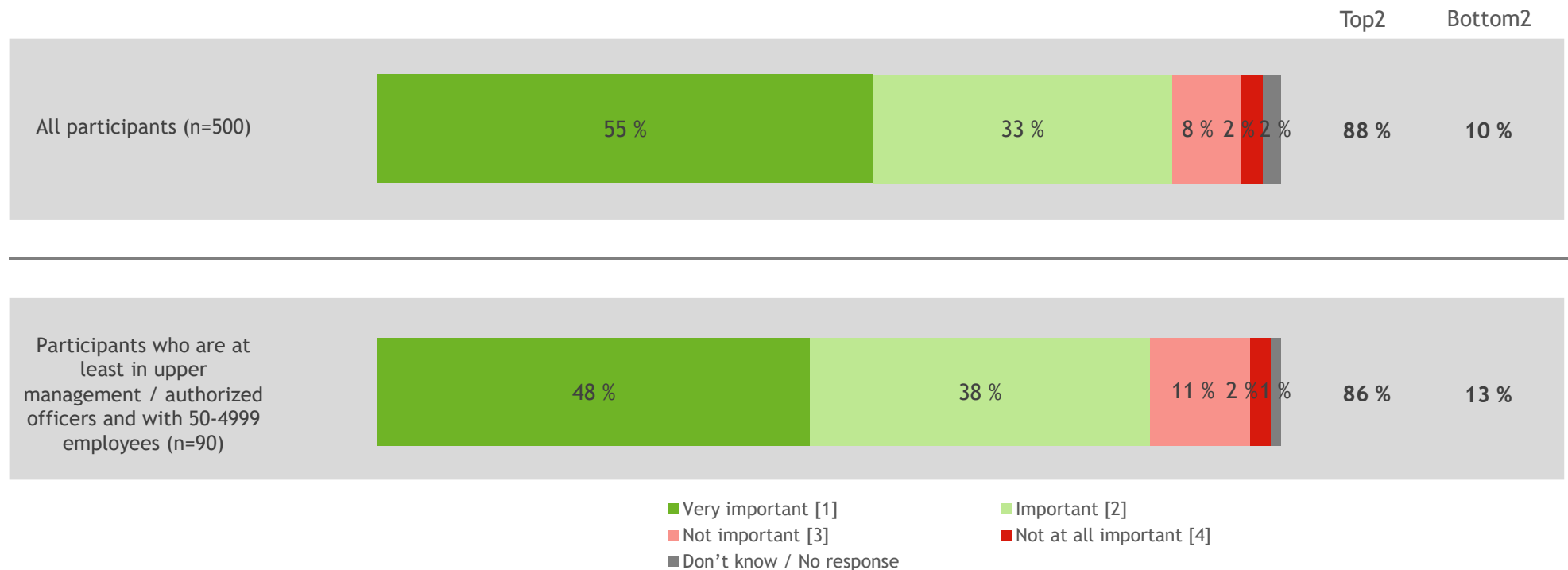
Nearly 80 % of business decision makers think the introduction of a state-certified IT security seal for secure IT products and offerings in the Internet is important.
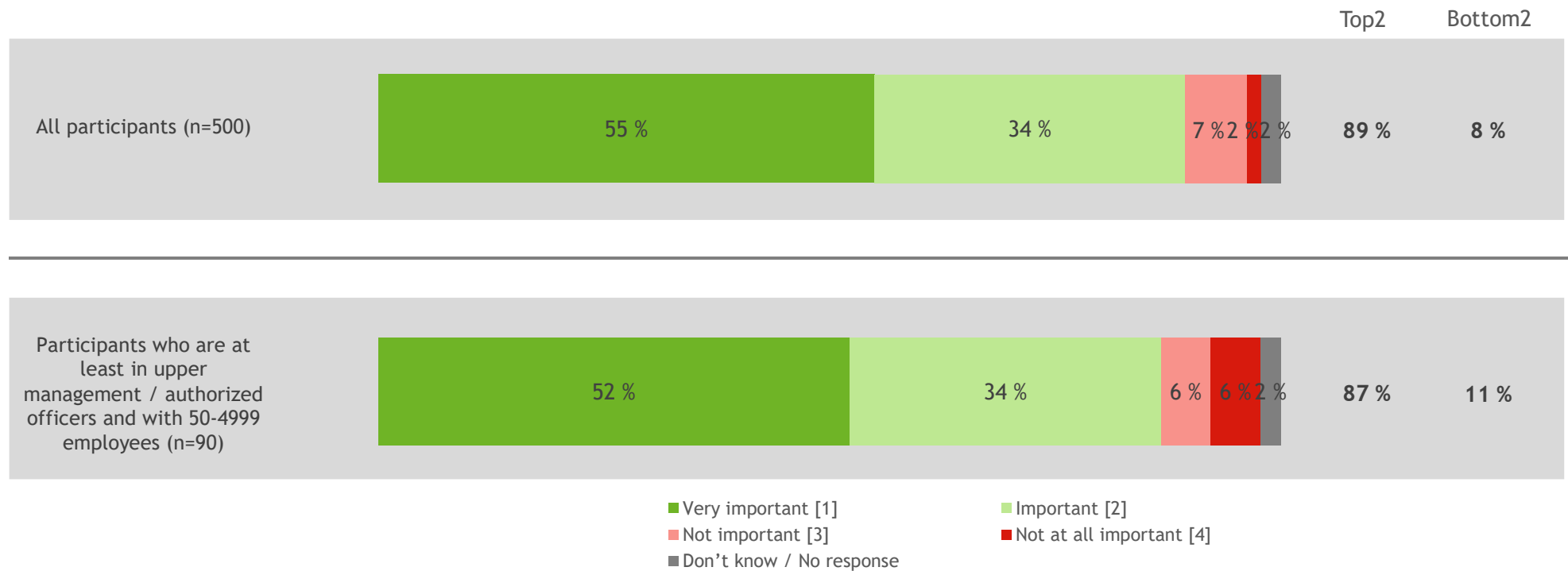
How important is the following measure to you?
The introduction of a state-certified IT security seal for secure IT products and offerings in the Internet.

		Top2	Bottom2
All participants (n=500)	36 % / 41 % / 14 % / 5 % / 4 %	77 %	19 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	43 % / 34 % / 13 % / 7 % / 2 %	78 %	20 %

- ■ Very important [1]
- ■ Important [2]
- ■ Not important [3]
- ■ Not at all important [4]
- ■ Don't know / No response

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89 % of the business decision makers surveyed state that tightening manufacturer liability for damage caused by vulnerabilities is important.
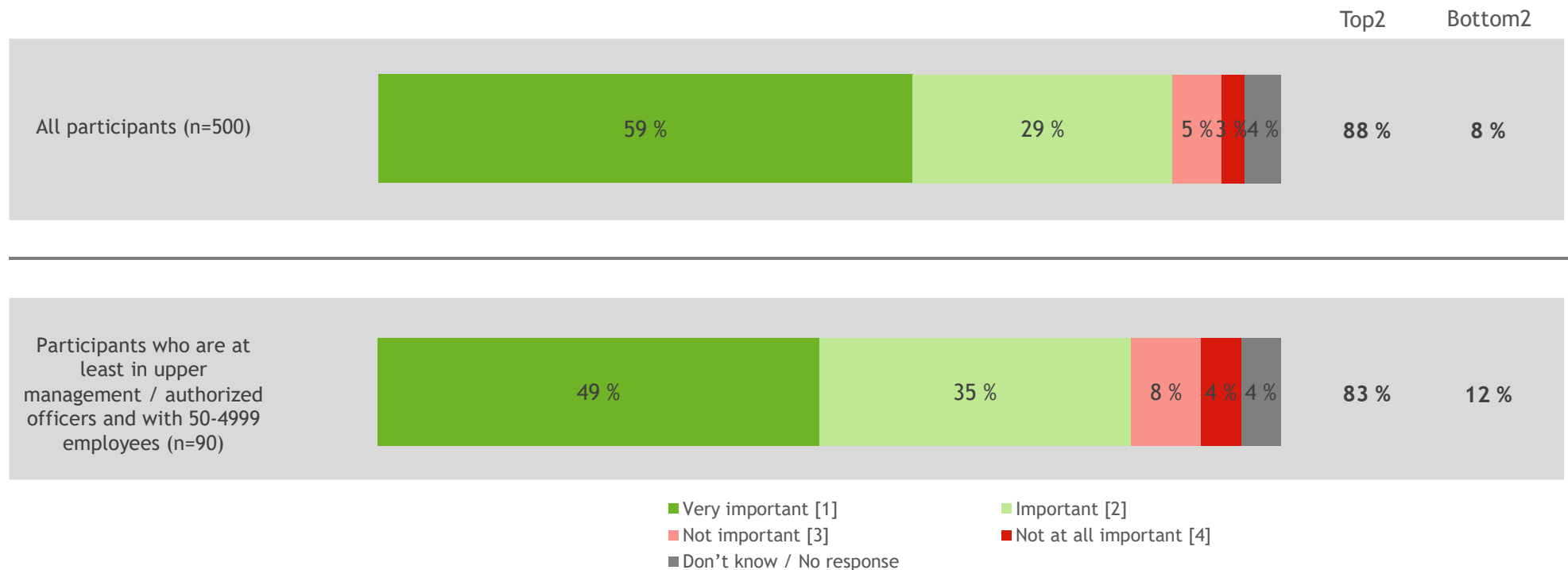
How important is the following measure to you?
Tightening manufacturer liability for damage caused by vulnerabilities.

		Top2	Bottom2
All participants (n=500)	55 % — 34 % — 7 % 2 % 2 %	**89 %**	**8 %**
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	52 % — 34 % — 6 % 6 % 2 %	**87 %**	**11 %**

■ Very important [1]   ■ Important [2]
■ Not important [3]   ■ Not at all important [4]
■ Don't know / No response

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Almost 90 % of those surveyed feel that a legal regulation for preventing access to the data of German enterprises / citizens in the cloud by third countries is important.
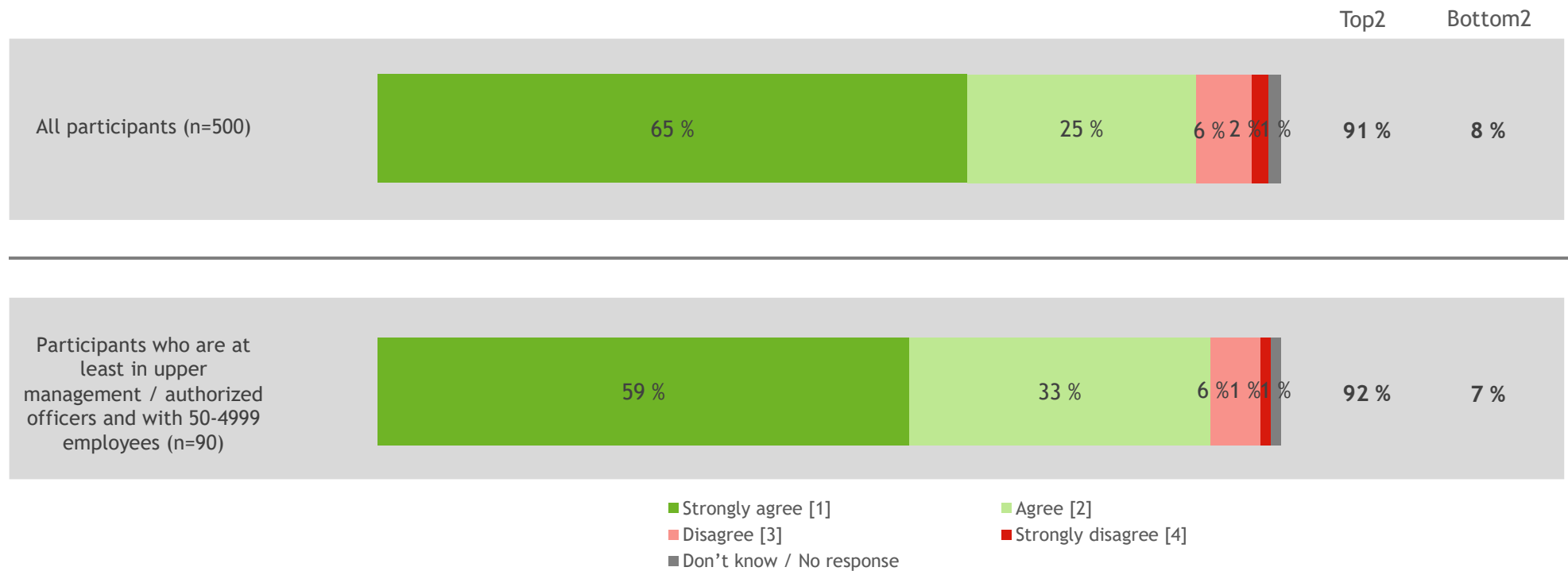
How important is the following measure to you?
A legal regulation for preventing access to the data of German enterprises / citizens in the cloud by third countries (e.g. by US authorities via the new CLOUD Act).

		Top2	Bottom2
All participants (n=500)	59 % — 29 % — 5 % 3 % 4 %	88 %	8 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	49 % — 35 % — 8 % 4 % 4 %	83 %	12 %

■ Very important [1]   ■ Important [2]
■ Not important [3]   ■ Not at all important [4]
■ Don't know / No response

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Digital Infrastructure

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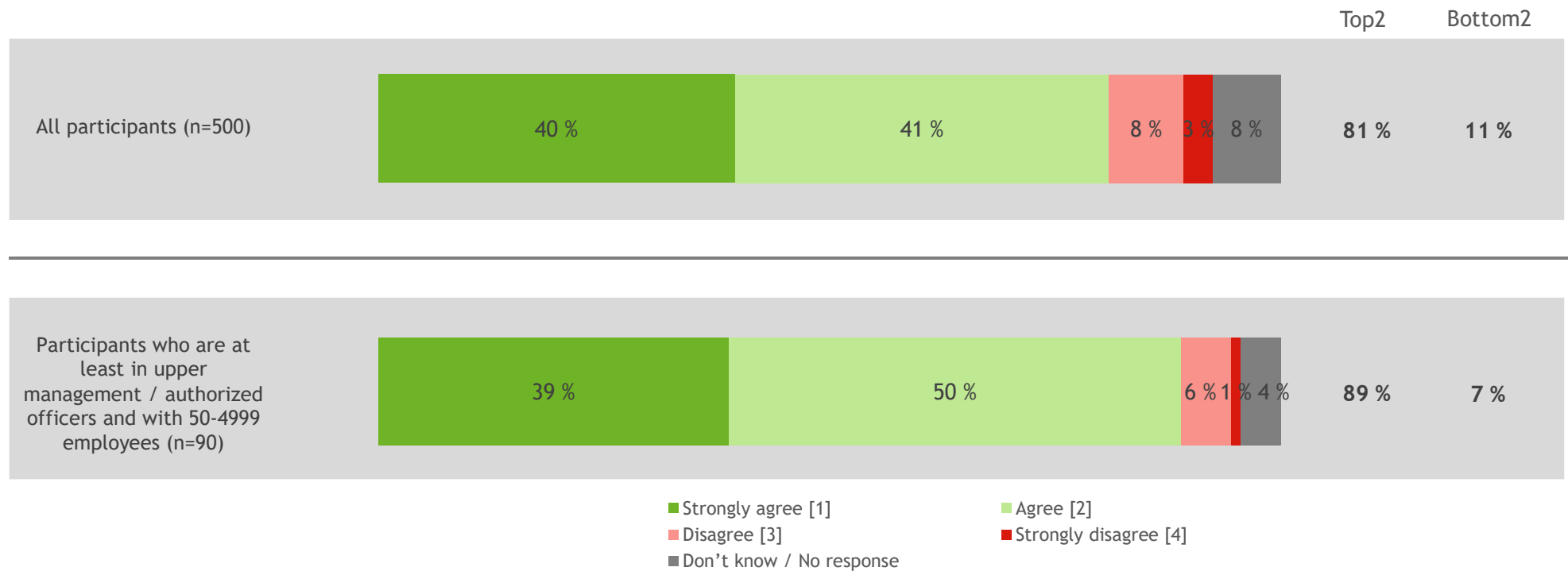# More than 90 % of those surveyed agree that the state must do more to provide "fast Internet for all".

To what extent do you agree with the following statement?
The state must do more to provide "fast Internet for all".

		Top2	Bottom2
All participants (n=500)	65 % 25 % 6 % 2 %1 %	91 %	8 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	59 % 33 % 6 %1 %1 %	92 %	7 %

■ Strongly agree [1]   ■ Agree [2]
■ Disagree [3]   ■ Strongly disagree [4]
■ Don't know / No response

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81 % of those surveyed agree that the state should also focus on developing transitional technologies to connect areas to broadband Internet quickly.

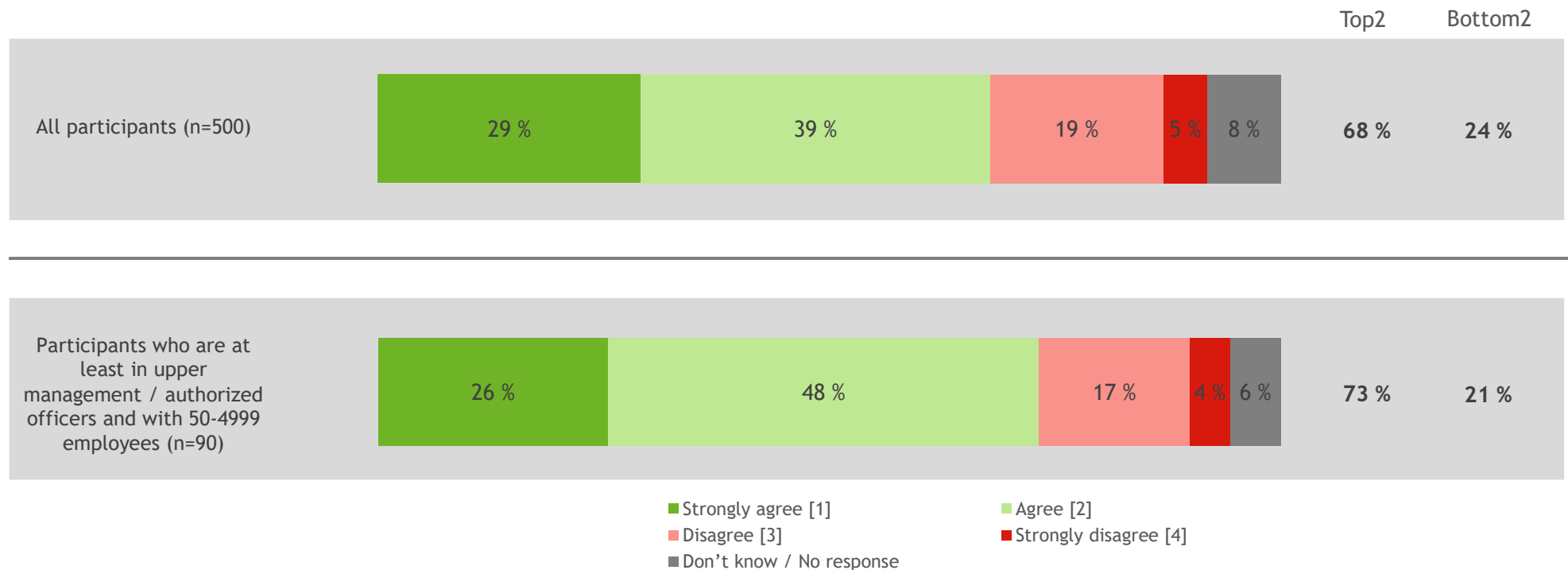To what extent do you agree with the following statement?
The state should also focus on developing transitional technologies, such as super vectoring, to connect under-serviced areas to broadband Internet quickly.

		Top2	Bottom2
All participants (n=500)	40 % 41 % 8 % 3 % 8 %	**81 %**	**11 %**
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	39 % 50 % 6 % 1 % 4 %	**89 %**	**7 %**

■ Strongly agree [1]   ■ Agree [2]
■ Disagree [3]   ■ Strongly disagree [4]
■ Don't know / No response

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More than two thirds of those surveyed say that the state should focus exclusively on providing fiber optics instead of transitional technologies.

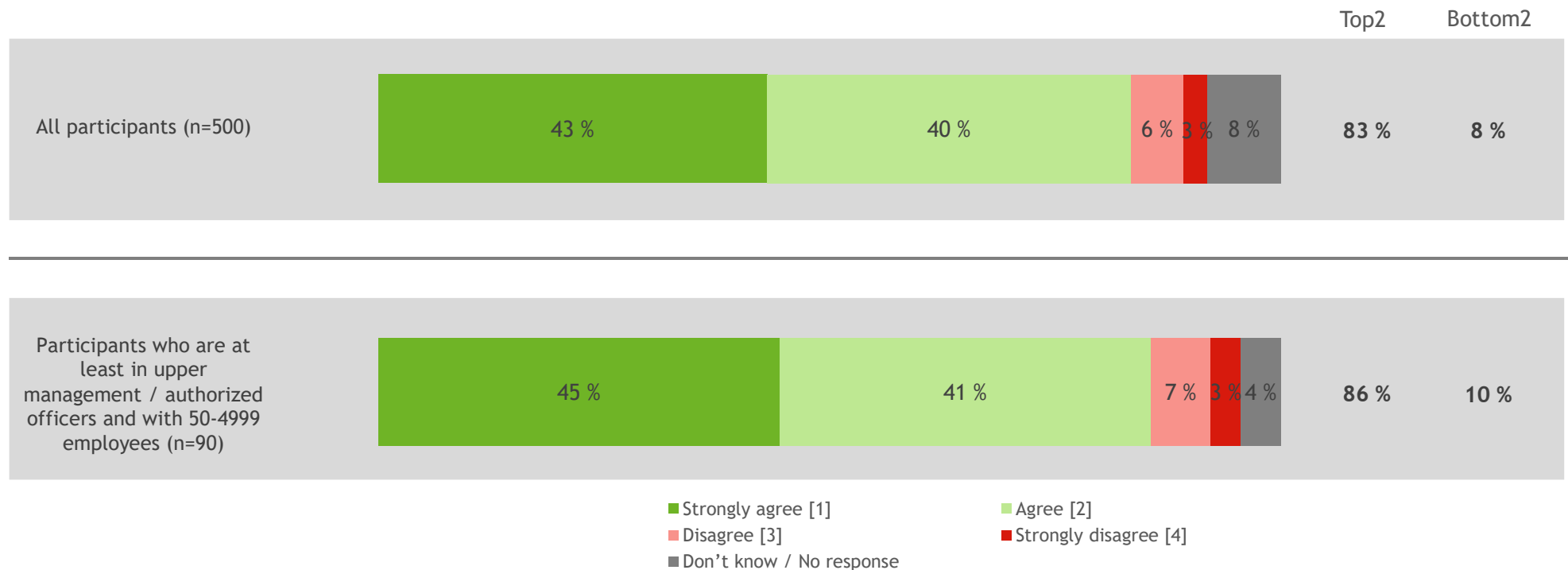To what extent do you agree with the following statement?
Instead of transitional technologies, the state should focus exclusively on providing fiber optics as a future-proof technology, even if this will take longer.

	Top2	Bottom2
All participants (n=500) — 29% / 39% / 19% / 5% / 8%	68 %	24 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90) — 26% / 48% / 17% / 4% / 6%	73 %	21 %

Legend:
- ■ Strongly agree [1]
- ■ Agree [2]
- ■ Disagree [3]
- ■ Strongly disagree [4]
- ■ Don't know / No response

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83 % of those surveyed agree with the statement that the 5G spectrum in Germany must be released / auctioned sooner to secure a technological advantage internationally.

The new 5G cellular standard is of considerable importance for many time-critical applications, e.g. autonomous driving and in industry. To what extent do you agree with the following statement?
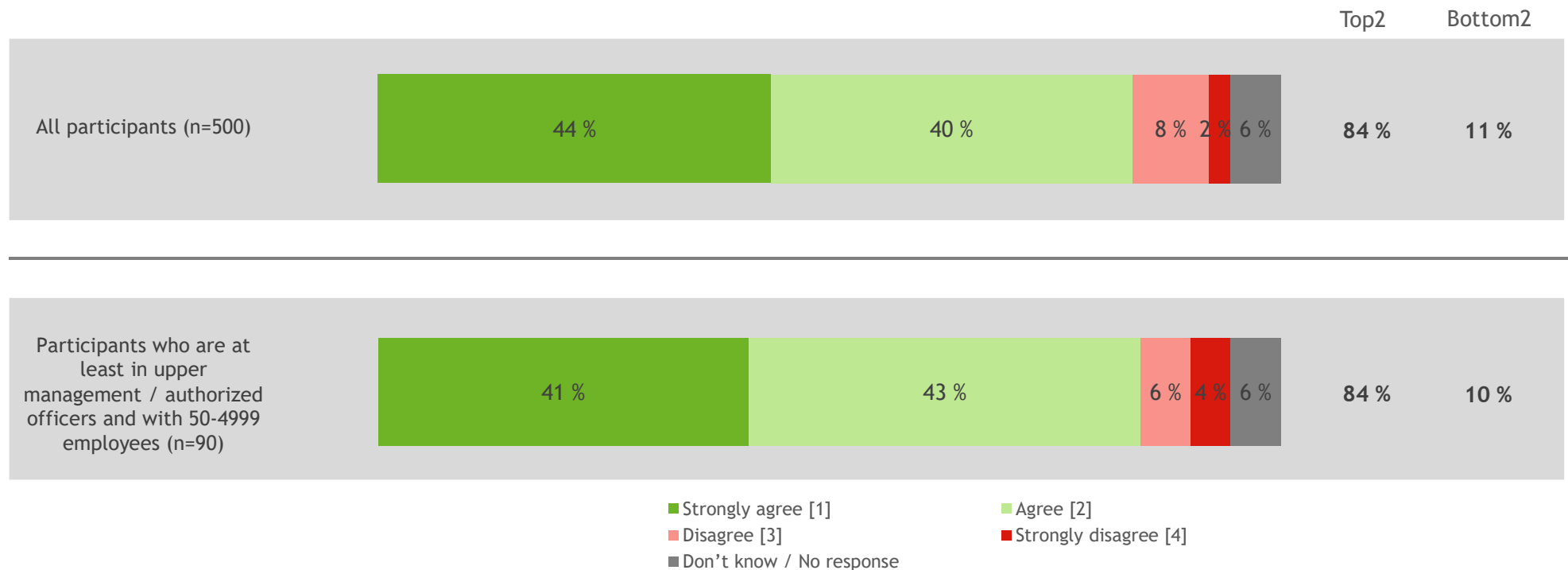To secure a technological advantage internationally, the necessary spectrum in Germany must be released / auctioned sooner.

		Top2	Bottom2
All participants (n=500)	43 % 40 % 6 % 3 % 8 %	83 %	8 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	45 % 41 % 7 % 3 % 4 %	86 %	10 %

- Strongly agree [1]
- Agree [2]
- Disagree [3]
- Strongly disagree [4]
- Don't know / No response

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84 % of those surveyed stated that Wi-Fi in private households and enterprises, as well as public hotspots, must be treated with the same importance by policymakers as cellular networks.

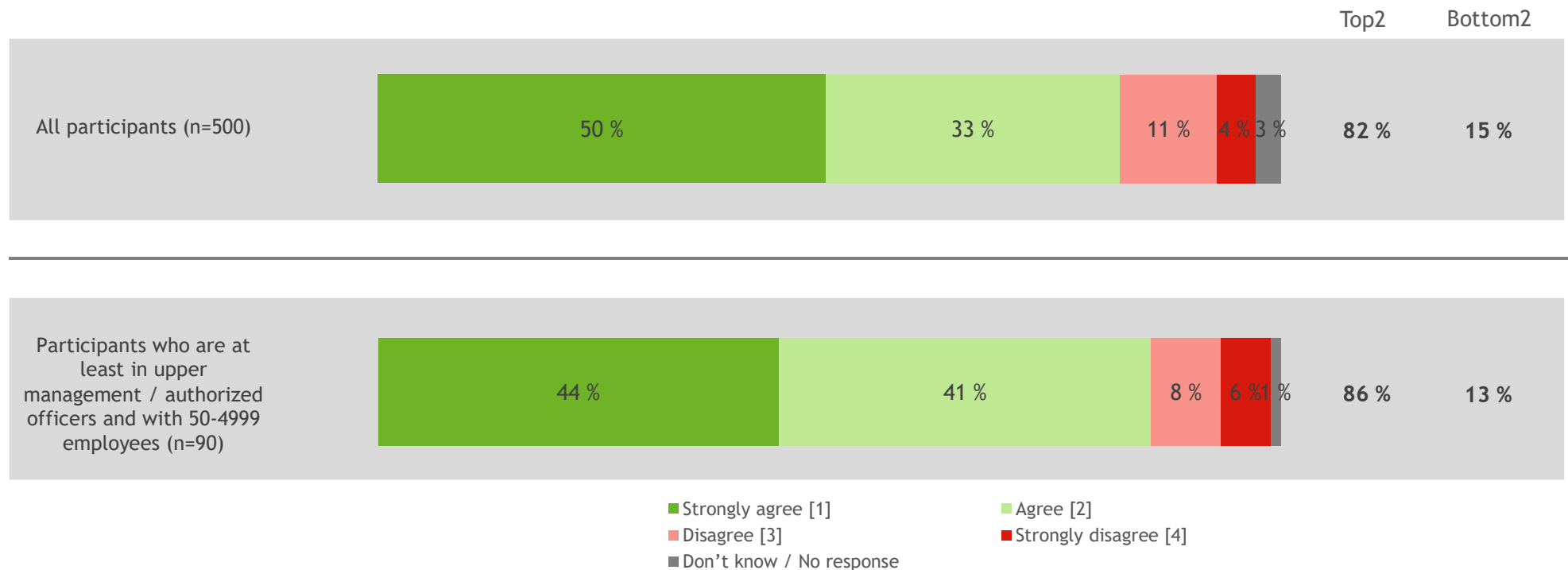To what extent do you agree with the following statement?
Wi-Fi in private households and enterprises, as well as public hotspots, must be treated with the same importance by policymakers as cellular networks, e.g. when allocating frequencies. New frequencies should not only be made available for cellular communication, but also for Wi-Fi.

		Top2	Bottom2
All participants (n=500)	44 % 40 % 8 % 2 % 6 %	84 %	11 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	41 % 43 % 6 % 4 % 6 %	84 %	10 %

■ Strongly agree [1]　　　　■ Agree [2]
■ Disagree [3]　　　　■ Strongly disagree [4]
■ Don't know / No response

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82 % of those surveyed are in favor of digitalization in education by equipping all schools with broadband Internet and Wi-Fi as soon as possible.

To what extent do you agree with the following statement?
All schools in Germany should be equipped with broadband Internet and Wi-Fi as quickly as possible, to drive digitalization in education ahead. If necessary, this must be financed by federal funding.

		Top2	Bottom2
All participants (n=500)	50 % 33 % 11 % 4 % 3 %	82 %	15 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	44 % 41 % 8 % 6 % 1 %	86 %	13 %

- Strongly agree [1]
- Agree [2]
- Disagree [3]
- Strongly disagree [4]
- Don't know / No response

YouGov

More than 80 % of those surveyed agree that policymakers should work to ensure that inner-European data traffic is routed solely within the EU.

To what extent do you agree with the following statement?
Policymakers should work to ensure that inner-European data traffic is routed solely within the EU. This "Schengen Routing" ensures that data is not transported unnecessarily via non-European lines, where it can be easily monitored by third parties.

			Top2	Bottom2
All participants (n=500)	47 % / 36 % / 8 % / 4 % / 5 %		83 %	12 %
Participants who are at least in upper management / authorized officers and with 50-4999 employees (n=90)	41 % / 42 % / 13 % / 1 % / 2 %		83 %	14 %

- Strongly agree [1]
- Agree [2]
- Disagree [3]
- Strongly disagree [4]
- Don't know / No response

YouGov