



# The Big Tech Demands Behind Trump's Tariff Negotiations

## *List of Policies Targeted by Big Tech*

| Country   | Policy Area          | Specific Policy   | Company               |
|-----------|----------------------|---|-----------------------|
| Australia | Antimonopoly law     | Considering digital competition law   | USCOC, CSI, CCIA, CTA |
|           | Revenue sharing      | Foreign streaming services to fund local content production                                     | USCOC, CSI, CCIA, CTA |
|           | Revenue sharing      | Mandatory media bargaining code   | USCOC, CSI, CCIA      |
|           | DSTs and other taxes | Taxation of royalties, 10% DST on streaming, cloud, and online ads                              | CSI, CTA              |
|           | AI regulation        | AI regulation proposed  | CCIA                  |
| Austria   | DSTs and other taxes | DST of 5% on ad revenues  | CCIA, CTA             |
| Belgium   | DSTs and other taxes | Commitment by government to impose DST of 3% by 2027  | CCIA, CTA             |
|           | Revenue sharing      | Flemish decree for online streaming companies to pay contributions for local content production | CCIA                  |

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| Brazil              | Domestic production and import substitution                                      | Preference for locally produced ICT goods in telecom networks  | TIA, USCOC, CSI       |
|                     | Restrictions on free cross-border data flows + Privacy law/data governance       | Personal data protection law   | TIA, USCOC, CSI       |
|                     | Local testing and certification  | Local testing and certification of telecom equipment   | TIA, USCOC, CSI       |
|                     | Antimonopoly law   | Considering digital competition law  | USCOC, CSI, CCIA, CTA |
|                     | Revenue sharing  | Proposal for video on demand law which will include a tax on streaming companies to fund local content development                             | USCOC, CSI, CCIA      |
|                     | Revenue sharing  | Network usage fee being debated  | CSI, CCIA, CTA        |
|                     | AI regulation  | Proposed AI regulation is not risk based, does not distinguish developer and deployer, copyright requirements will restrict training of models | CSI, CCIA, CTA        |
|                     | Cloud service regulations + restrictions on free cross border data flows         | Cloud providers for public services required to limit free flow of certain data to foreign jurisdictions                                       | CSI                   |
|                     | E-payments   | Regulatory ecosystem around local e-payments solution Pix  | CSI                   |
| DSTs or other taxes | Tax to help local tech development on amounts paid abroad for technical services | CSI  |                       |

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| Bangladesh | Restrictions on free cross border data flows + data governance/privacy | Data protection law  | USCOC, CSI                 |
| Canada     | DST or other taxes   | DST  | USCOC, CSI, DMA, CCIA, CTA |
|            | Revenue sharing  | Contributions to local content production  | USCOC, CSI, DMA, CCIA, CTA |
|            | Revenue sharing  | Online news act requires revenue sharing with publishers   | USCOC, CCIA                |
|            | Privacy / Data governance  | Proposals to strengthen data protection law  | CSI, CTA                   |
|            | AI regulation  | AI Act and Data Act tabled   | CSI, CCIA, CTA             |
|            | Restrictions on free cross-border data flows                           | Data protection law in Quebec  | CSI                        |
| Chile      | Local testing and certification  | Local testing and certification of telecom equipment   | TIA                        |
|            | Restrictions on free cross-border data flows                           | Financial institutions to have local data centers for emergencies, significant or strategic data to be stored domestically | CSI, CCIA, CTA             |
|            | E-Payments regulations   | Electronic payments regulations  | CSI                        |
| Czechia    | DSTs and other taxes   | Proposed DST   | CCIA, CTA                  |
|            | Restrictions on free cross-border data flows                           | Draft cybersecurity act  | CTA                        |

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| Colombia   | DST and other taxation  | VAT taxation on ICT devices, performance requirements for tax preferences in FTZs | TIA                   |
|            | Revenue sharing   | Considering Network Usage Fee   | USCOC, CSI, CTA       |
|            | DST and other taxation  | Taxation based on significant economic presence                                   | CSI, CTA              |
|            | E-payments regulations  | Electronic payment services   | CSI, CCIA             |
| Costa Rica | E-payments regulations  | Electronic payments services  | CSI                   |
| Cyprus     | Restrictions on free cross border data flows                              | Data sovereignty rules for public sector  | CTA                   |
| Egypt      | Domestic production and import substitution                               | Tariffs on import of mobiles  | TIA                   |
| EU         | Cloud service regulations   | Cloud cybersecurity scheme requires local ownership, etc.                         | TIA, USCOC, CCIA, CTA |
|            | Antimonopoly law  | Competition law (DMA)   | USCOC, CCIA, CTA      |
|            | Revenue sharing   | Considering network Usage Fee   | USCOC, CCIA           |
|            | Revenue sharing   | Requirement for payment for news content for online platforms                     | CCIA                  |
|            | AI regulation   | AI Act Codes of Practice  | CCIA, CTA             |
|            | Privacy and data protection + Restrictions on cross-border data transfers | Data Privacy law (GDPR)   | CTA                   |

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| France  | DST or other taxes  | DST  | USCOC, CCIA, CTA |
|         | Revenue sharing   | Taxes on cross-border streaming of video, music.   | CCIA             |
|         | Cloud services regulation   | Labelling and cybersecurity certification for government contracts   | CCIA, CTA        |
| Germany | Antimonopoly law  | Competition law  | USCOC, CCIA, CTA |
| Hungary | Restrictions on free cross-border flows of data                           | restrictions on cross-border data transfers for state/local government bodies, and essential service providers | CCIA             |
| India   | Domestic production and import substitution                               | Import duties on ICT products  | TIA, CSI         |
|         | Source code disclosure  | Source code disclosure for telecom equipment   | TIA              |
|         | Domestic production and import substitution                               | Preferential procurement for domestic equipment  | TIA, CIS, CCIA   |
|         | Local testing and certification   | Local security certification requirements  | TIA              |
|         | Restrictions on free cross border flows of data + privacy/data governance | Personal data protection law   | USCOC            |
|         | Antimonopoly law  | Considering digital competition law  | USCOC, CSI, CCIA |
|         | E-payments regulations  | Regulatory framework for Universal Payments Interface (UPI)  | CSI              |
|         | DST and other taxes   | Equalisation levy  | CSI, CCIA        |
|         | Revenue sharing   | Proposal for internet enabled comms to pay into infrastructure fund  | CCIA             |
|         | Cloud service regulations   | Local certification requirements for cloud service adoption in financial sector                                | CCIA             |

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| Indonesia            | Domestic production and import substitution  | Domestic production and import substitution, import licensing regs, local content requirements, customs duties on ICT imports | TIA, USCOC, CSI, CTA |
|                      | Restrictions on free cross border data flows+ data governance/privacy  | Restrictions on free cross-border flows of data for operators of public services, financial services + data protection law    | TIA, USCOC, CSI, CTA |
|                      | DST and other taxes  | Reporting requirement for import of certain digital goods (ecommerce moratorium)  | TIA, CSI, CCIA, CTA  |
|                      | Domestic production and import substitution  | High customs duties for tech goods  | TIA                  |
|                      | Revenue sharing  | Considering Network Usage Fee   | USCOC                |
|                      | Privacy/data governance  | Data protection law   | CSI                  |
|                      | DST or other taxes   | Electronic transaction tax  | CSI                  |
|                      | E-payments regulations   | Electronic payments regulations   | CSI                  |
|                      | Revenue sharing  | Proposal for payments by platforms to news publishers   | CCIA                 |
|                      | Restrictions on free cross border flows of data + cloud service regulations  | Restrictions on free flow of data for cloud services in the financial sector  | CCIA, CTA            |
| DSTs and other taxes | 11% VAT on digital services (including ads, data) by foreign company to a local through digital platforms, applies to large companies. | CTA   |                      |

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| Italy    | DST or other taxes  | DST   | USCOC, CCIA, CTA |
|          | Revenue sharing   | Online streaming platforms to pay for local content production  | CCIA             |
| Japan    | Antimonopoly law  | Competition law for smartphone software   | USCOC, CCIA      |
|          | Antimonopoly law  | Digital competition regulation for large platforms  | CSI, CTA         |
|          | Cloud regulations   | Subsidies to local cloud services   | CSI              |
| Kenya    | Restrictions on free cross border flows of data + data governance/privacy + cloud service regulations | Restrictions on free cross-border flows of data for critical infra and certain other data sets including cloud for financial institutions, data protection regs | CSI, CCIA, CTA   |
|          | DST and other taxes   | DST   | CSI, CCIA CTA    |
| Malaysia | Cloud service regulations   | USO contributions by cloud service providers planned  | CSI              |
|          | Cloud service regulations   | Licensing of cloud and data centers   | CSI              |
| Mexico   | Local testing and certification   | Local testing, labelling and certification  | TIA              |
|          | Restrictions on e-payment services  | Restrictions on electronic payments, regulatory system around RedMX   | USCOC, CIS       |
|          | DSTs and other taxes  | Taxes on MNCs   | CIS              |
|          | Cloud service regulations + restrictions on free cross border flows of data                           | restrictions on cross-border data transfers for cloud services  | CIS              |

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| Nigeria      | Restrictions on free cross border data flows + privacy/data governance    | Data protection law  | USCOC, CIS, CTA |
|              | DST or other taxes  | DST  | CIS, CTA        |
| New Zealand  | E-payments regulations  | Cap on interchange fee for payment transactions  | CIS             |
|              | Revenue sharing   | Proposed requirement for payments to local media companies   | CCIA            |
| Norway       | Cloud services regulations + restrictions on free cross-border data flows | Plans to create national cloud solution for critical sectors, public sector required to store 60% of data domestically                                   | CTA             |
| Pakistan     | Restrictions on free cross border data flows + privacy/data governance    | Data protection law, financial services require domestic data processing   | USCoC, CIS, CTA |
|              | Cloud service regulations + restrictions on cross border data transfers   | Cloud policy framework   | CIS, CTA        |
| Philippines  | DST or other taxes  | Taxes, 12% DST on domestic and foreign services consumed locally   | CIS, CTA        |
|              | Cloud service regulations   | Cloud service providers regulations applicable to public contracts   | CIS             |
|              | Restrictions on free cross-border data flows                              | Proposal to insert restrictions on data transfers in Open Access in Data Transmission Bill, proposal to restrict foreign transfers of public sector data | CIS, CTA        |
| Saudi Arabia | Restrictions on free cross-border data flows + privacy/data governance    | Restrictions on foreign data transfers under privacy law, and pertaining to public sector data   | CIS, CTA        |

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| South Africa | <p>Revenue sharing</p> <p>Restrictions on free cross-border data flows + cloud services regulations</p> <p>Restrictions on free cross-border data flows</p>   | <p>Competition commission recommendations to pay news publishers</p> <p>Cloud and data policies have data sovereignty provisions</p> <p>Electronic payments clearing and transactions to occur locally, data to be stored domestically</p>  | <p>USCOC, CCIA</p> <p>CIS, CTA</p> <p>CIS</p>   |
| South Korea  | <p>Cloud service regulations</p> <p>Antimonopoly law</p> <p>Revenue sharing</p> <p>Restrictions on free cross-border data flows</p> <p>Cloud services regulations</p> <p>Local testing and certification</p> <p>AI Regulation</p> | <p>Cloud certification requirements</p> <p>Considering digital competition law</p> <p>Network fees being considered</p> <p>Restrictions on cross-border transfer of geospatial data, reinsurers to retain operational data domestically</p> <p>Foreign cloud providers blocked from government procurement</p> <p>Local testing of telecom equipment</p> <p>In the process of implementing AI Basic Act</p> | <p>USCOC, CCIA</p> <p>USCOC, CSI, CCIA, CTA</p> <p>USCOC, CSI</p> <p>CSI</p> <p>CSI</p> <p>CSI</p> <p>CCIA, CTA</p> |

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| Spain    | DST or other taxes   | DST   | USCOC, CCIA, CTA           |
|          | Revenue sharing  | Online streaming platforms to invest 5% in local productions or pay a national fund   | CCIA                       |
|          | AI regulation  | Proposed collective licensing regime would require compensation to rights holders for AI training                                       | CCIA                       |
| Thailand | Antimonopoly law   | Draft platform economy act  | CIS, CTA                   |
| Turkiye  | Domestic production and Import substitution  | Use of local equipment  | USCOC                      |
|          | DST or other taxes   | Tax on ecommerce transactions, DST, broadcaster fee on music streaming services   | USCOC, CIS, DMA, CCIA, CTA |
|          | Antimonopoly law   | Proposed digital competition law  | USCOC, CIS, CCIA, CTA      |
|          | Restrictions on free cross-border data flows + privacy/data governance + cloud service regulations | Restrictions on free flow of data under personal data protection law, financial services and cloud services by central bank regulations | CIS, CCIA, CTA             |
| UAE      | Privacy/ data governance   | Data privacy  | CIS                        |
|          | AI Regulation  | AI regulation   | CIS                        |
|          | Restrictions on free cross-border data flows + cloud service regulations                           | Cloud services to be located domestically, public sector cloud to be subject solely to UAE law  | CCIA                       |

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| UK      | <p>Antimonopoly law</p> <p>Restrictions on free cross border data flows + privacy/data governance</p> <p>DSTs or other taxes</p> | <p>Competition law, Digital markets competition and consumer act (not yet in force)</p> <p>Personal data protection law</p> <p>DST</p>                 | <p>USCOC, CIS, CCIA, CTA</p> <p>USCOC</p> <p>CIS, CCIA, CTA</p> |
| Vietnam | <p>Restrictions on free cross border data flows + privacy/data governance</p> <p>Source code disclosure</p>                      | <p>Personal data protection law and cybersecurity law restrict cross border data transfers, local data centers</p> <p>Mandatory source code review</p> | <p>USCOC</p> <p>USCOC</p>                                       |