



SCOTLAND'S GLOBAL CONNECTIONS SURVEY 2003

SECTION 5: BARRIERS TO EXPORTING - To be completed by all companies, where applicable

What barriers to future export development exist for the Scottish branch(es)/ operation(s) of your company?

Form with checkboxes for barriers: Currency/exchange rates, Lack of bank support, Legislation and standards, Lack of market information, Lack of trained staff, Setting competitive prices, Language/cultural differences, Lack of resources/managerial time, No spare capacity, Export documentation, High import tariffs in target markets, Warranty of service support, Payment issues, Products/services unsuitable for export.

Other (please specify): [Text box]

Which form(s) of assistance would encourage the Scottish branch(es)/ operation(s) of your company to further develop export performance?

Form with checkboxes for assistance: Market research information, Overseas trade missions, Language training, Finding overseas sales leads, Finding export agents and/or distributors, Finding joint venture partners, Export training, Translation assistance, E-commerce training, Exhibiting at trade fairs, Export documentation.

Other (please specify): [Text box]

SECTION 6: YOUR COMMENTS

In order to help monitor the impact of this questionnaire on your company's resources, please indicate the length of time it took to complete this form.

[] hour(s) [] mins

We would welcome any comments you would like to make regarding this questionnaire. Please use the space provided below.

[Large empty text box for comments]

THANK-YOU FOR TAKING THE TIME TO COMPLETE THIS QUESTIONNAIRE. PLEASE RETURN IT IN THE PRE-PAID ENVELOPE PROVIDED OR ALTERNATIVELY YOU CAN COMPLETE IT ONLINE AT WWW.SCOTLAND.GOV.UK/STATS/EXPORTSURVEY. YOU MAY FIND IT USEFUL TO TAKE A COPY OF THIS FORM FOR FUTURE REFERENCE, OR TO ANSWER ANY QUERIES WHICH MAY ARISE FROM IT.

GENERAL GUIDANCE

- 1. Scotland's Global Connections Survey is an annual Scottish business survey which aims to provide estimates of Scottish exports, sales to the rest of the UK and to assess the international links of Scottish business. It is the official export survey for Scotland and is undertaken in partnership with Scottish Enterprise and Highlands & Islands Enterprise.
2. Figures provided should relate solely to the economic activity of the Scottish branch(es)/ operation(s) of your company...
3. Where your permission is given, the information which you provide will be made available to your Local Enterprise Company (LEC)...
4. The Scottish Executive, Scottish Enterprise and Highlands & Islands Enterprise will treat your data in confidence...
5. Please complete as much of the questionnaire as possible before returning it in the pre-paid envelope provided or returning it on-line...

DEFINITIONS

EXPORTS OF GOODS: the value of sales of products where the first destination is outwith the UK. Exports should be calculated on a "free on board" basis i.e. including packaging and transport to point of departure from UK but excluding overseas freight costs.
EXPORTS OF SERVICES: the provision of services (products that are not tangible goods) to customers not resident in the UK. This should include receipts for the right to use franchises, copyrights, licenses, patents, processes, techniques, designs, manufacturing rights, trademarks etc.
Sales of banking services are defined as net interest received plus charges. Insurance sales relate to the insurance service charges i.e. premiums minus claims. Exports of these refer to the relevant balances with overseas customers.
Construction services are included in exports if they relate to contracts of less than one year which are managed from Scotland.
Where a sale involves a combination of goods and services that cannot be separately valued, please classify as a good or service based on the majority of its value.
OIL & GAS SECTOR: the value of sales of crude petroleum and natural gas should NOT be included on this return as these are classified as sales from the UK as a whole under National Accounting principles.
Sales of goods or services to temporary visitors to Scotland should be included as exports to their country of origin. This includes, for example, all purchases made by tourists in shops, bars, restaurants, hotels, leisure facilities etc., fees received from overseas based students and charges to non-residents for other services such as transport, medical and dental fees, hairdressing etc.

SECTION 1: COMPANY DETAILS - To be completed by all companies

Please check the company address on this form, amending the label if necessary, and provide your own contact details below.

Name: [] Direct telephone number: []
Email: [] Company web-site: []

Please indicate the number of employees currently at the Scottish branch(es)/ operation(s) of your company: []

We are looking for information relating to calendar year January 2003 to December 2003. If you are unable to provide information on a calendar year basis, please indicate which 12 month period is covered by this return.

Twelve months ending: [] (day) [] (month) [] (year)

SECTION 2: TOTAL SALES & THEIR DESTINATION - To be completed by all companies, as applicable

Please indicate the total value of all sales for goods and/or services from the Scottish branch(es)/ operation(s) of your company during the survey period (excluding VAT) and give the proportion of sales at each location. Please enter monetary values to the nearest £1000.

- Rest of UK = England, Wales and Northern Ireland, Channel Islands and Isle of Man, and sales to the Offshore Oil and Gas Industry operating within the UK Continental Shelf.
- EU includes sales to the Republic of Ireland, but since data refer to 2003, does not include new members
- As far as possible please give the value of goods sales based on the consignment address, not invoice address if different.

Table with 6 columns: Category, Total Value of Sales From Scottish Branches/ Operations (£000's), Percentage of Sales From Scottish Branches/Operations to Customers in: Scotland, Rest of UK, Rest of World i.e. Exports (EU, Non-EU), Total.

SECTION 3: DESTINATION AND VALUE OF EXPORTS

Please indicate the destination and value (in £'000) of any exports of goods and/ or services to the countries listed below, from the **Scottish branch(es)/ operation(s) of your company**. If the information is not available for individual countries please give the value for the trading area as a whole if possible. If actual figures are not available please provide your best estimates.

Trade Area	Export Destination (Tick)	Value of Exports (£000's)	Trade Area	Export Destination (Tick)	Value of Exports (£000's)
European Union			Middle East		
Austria	<input type="checkbox"/>		Bahrain	<input type="checkbox"/>	
Belgium	<input type="checkbox"/>		Egypt	<input type="checkbox"/>	
Denmark	<input type="checkbox"/>		Iran	<input type="checkbox"/>	
Eire	<input type="checkbox"/>		Iraq	<input type="checkbox"/>	
Finland	<input type="checkbox"/>		Israel	<input type="checkbox"/>	
France	<input type="checkbox"/>		Jordan	<input type="checkbox"/>	
Germany	<input type="checkbox"/>		Kuwait	<input type="checkbox"/>	
Greece	<input type="checkbox"/>		Lebanon	<input type="checkbox"/>	
Italy	<input type="checkbox"/>		Libya	<input type="checkbox"/>	
Luxembourg	<input type="checkbox"/>		Oman	<input type="checkbox"/>	
Netherlands	<input type="checkbox"/>		Qatar	<input type="checkbox"/>	
Portugal	<input type="checkbox"/>		Saudi Arabia	<input type="checkbox"/>	
Spain	<input type="checkbox"/>		Syria	<input type="checkbox"/>	
Sweden	<input type="checkbox"/>		UAE (7)	<input type="checkbox"/>	
			Yemen	<input type="checkbox"/>	
			Other Middle East	<input type="checkbox"/>	
EU Accession Countries			Asia		
Cyprus	<input type="checkbox"/>		Bangladesh	<input type="checkbox"/>	
Czech Republic	<input type="checkbox"/>		Brunei	<input type="checkbox"/>	
Estonia	<input type="checkbox"/>		China	<input type="checkbox"/>	
Hungary	<input type="checkbox"/>		Hong Kong	<input type="checkbox"/>	
Latvia	<input type="checkbox"/>		India	<input type="checkbox"/>	
Lithuania	<input type="checkbox"/>		Indonesia	<input type="checkbox"/>	
Malta	<input type="checkbox"/>		Japan	<input type="checkbox"/>	
Poland	<input type="checkbox"/>		Kazakhstan	<input type="checkbox"/>	
Slovak Republic	<input type="checkbox"/>		Korea	<input type="checkbox"/>	
Slovenia	<input type="checkbox"/>		Malaysia	<input type="checkbox"/>	
			Pakistan	<input type="checkbox"/>	
Rest of Europe			Philippines	<input type="checkbox"/>	
Azerbaijan	<input type="checkbox"/>		Singapore	<input type="checkbox"/>	
Bulgaria	<input type="checkbox"/>		Sri Lanka	<input type="checkbox"/>	
Canary Islands	<input type="checkbox"/>		Taiwan	<input type="checkbox"/>	
Faroe Islands	<input type="checkbox"/>		Thailand	<input type="checkbox"/>	
Gibraltar	<input type="checkbox"/>		Vietnam	<input type="checkbox"/>	
Iceland	<input type="checkbox"/>		Other Central Asia (8)	<input type="checkbox"/>	
Norway	<input type="checkbox"/>		Other South Asia (9)	<input type="checkbox"/>	
Romania	<input type="checkbox"/>		Other Southeast Asia (10)	<input type="checkbox"/>	
Russia	<input type="checkbox"/>				
Switzerland	<input type="checkbox"/>		Australasia		
Turkey	<input type="checkbox"/>		Australia	<input type="checkbox"/>	
Ukraine	<input type="checkbox"/>		New Zealand	<input type="checkbox"/>	
Former Yugoslavia (1)	<input type="checkbox"/>		Pacific Islands (11)	<input type="checkbox"/>	
Other Eastern Europe (2)	<input type="checkbox"/>				
Other Western Europe (3)	<input type="checkbox"/>		Africa		
			Algeria	<input type="checkbox"/>	
North America			Angola	<input type="checkbox"/>	
Canada	<input type="checkbox"/>		Ghana	<input type="checkbox"/>	
USA	<input type="checkbox"/>		Kenya	<input type="checkbox"/>	
			Mauritius	<input type="checkbox"/>	
Central/ South America			Morocco	<input type="checkbox"/>	
Argentina	<input type="checkbox"/>		Nigeria	<input type="checkbox"/>	
Brazil	<input type="checkbox"/>		South Africa	<input type="checkbox"/>	
Caribbean Islands (4)	<input type="checkbox"/>		Tunisia	<input type="checkbox"/>	
Chile	<input type="checkbox"/>		Zimbabwe	<input type="checkbox"/>	
Mexico	<input type="checkbox"/>		Other Africa (12)	<input type="checkbox"/>	
Uruguay	<input type="checkbox"/>				
Venezuela	<input type="checkbox"/>				
Other Central America (5)	<input type="checkbox"/>				
Other South America (6)	<input type="checkbox"/>				

- Notes**
- Bosnia and Herzegovina, Croatia, Macedonia, Serbia and Montenegro
 - Albania, Armenia, Belarus, Georgia, Moldova
 - Andorra, Monaco, Liechtenstein
 - Anguilla, Antigua & Barbuda, Aruba, Bahamas, Barbados, Bermuda, Caymans, Cuba, Dominica, Dominican Rep., Dutch Antilles, Grenada, Jamaica, Montserrat, Puerto Rico, St Kitts & Nevis, St Lucia, St Vincent & Grenadines, Trinidad & Tobago, Turks & Caicos, Virgin Is., Haiti
 - Belize, Costa Rica, El Salvador, Guatemala, Honduras, Panama, Nicaragua
 - Bolivia, Colombia, Ecuador, Falklands, French Guiana, Guyana, Paraguay, Peru, Suriname
 - Abu Dhabi, Dubai, Fujairah, Sharjah, Ajman, Umm Al-Qaiwain, Ras Al-Khaimah
 - Turkmenistan, Uzbekistan, Kyrgystan, Tajikistan, Afghanistan, Mongolia
 - Maldives, Nepal, Bhutan
 - Cambodia, Laos, Myanmar (Burma), Vietnam
 - Incl. Fiji, Tonga, New Caledonia, Cook Islands, Vanuato, Papua New Guinea etc.
 - Benin, Burkina Faso, Burundi, Cameroon, Cape Verde Islands, Central African Rep, Ceuta, Comoros, Congo, Congo Dem Rep, Djibouti, Eq Guinea, Eritrea, Ethiopia, Gabon, Gambia, Guinea, Ivory Coast, Liberia, Madagascar, Malawi, Mali, Mauritania, Mayotte, Melilla, Mozambique, Namibia, Niger, Rwanda, Seychelles, Sierra Leone, St Helena, Swaziland, Tanzania, Togo, Uganda, Zambia

SECTION 4: OVERSEAS RELATIONSHIPS - To be completed by all companies, as applicable

This section aims to characterise the wider commercial relationships of Scottish business with overseas companies.

1. Is your company headquartered in Scotland? (please tick) Yes go to Q2 No go to Q9

2. What is the country of ultimate ownership of the company? Scotland Other (please specify)

3. Does your company have any overseas branches or overseas relationships? Yes go to Q4 No go to Q7

4. Please state the number of any of each type of overseas operations/ relationships you have using the options below, and the number in each trading area.

	Number	EU	Rest of Europe	North America	Central / S America	Middle East	Asia	Australasia	Africa
Overseas manufacturing subsidiary	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other overseas subsidiary	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Representative office/ agency (incl. sales offices etc.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Joint venture (formal, legally contracted, jointly owned)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Franchise or licensing agreement	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Strategic alliance (less formal relationships, e.g. joint marketing initiatives)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Research collaboration	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Import partners (direct contacts with companies overseas)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Staff secondments/ exchanges (not included above)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

5. Please provide the numbers of employees of your company in each trading area

6. Please indicate the overall importance of the above overseas interests, in terms of their approximate contribution to your worldwide turnover;

less than 5% 5% - 15% 15% - 25% 25% - 40% 40% - 60% over 60%

7. Is your company currently planning to increase its presence overseas? Yes go to Q8 No go to SECT 5 overleaf

8. Please tick the method(s) below by which you intend to increase your overseas presence, showing the trading area in which you intend to do this.

	EU	Rest of Europe	North America	Central / S America	Middle East	Asia	Australasia	Africa
Planned overseas manufacturing subsidiary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other planned overseas subsidiary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planned representative office/ agency (incl. sales offices etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Future joint venture (formal, legally contracted, jointly owned)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planned franchise or licensing agreement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planned strategic alliance (less formal relationships, e.g. joint marketing initiatives)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planned research collaboration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Future import partners (direct contacts with companies overseas)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planned staff secondments/ exchanges (not included above)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. If your company is not based in Scotland, please describe the relationship between the **Scottish branch(es)/ operation(s) of your company** and the owner/ global HQ of the company using the options provided below (tick as many as necessary).

The Scottish branch(es)/ operation(s) of your company:

Is a manufacturing subsidiary Is a representative office/ agency

Is an other subsidiary Is a franchise