



The Scottish Government

SCOTLAND'S GLOBAL CONNECTIONS SURVEY 2008

For guidance on completing the questionnaire please refer to Guidance Notes

Please complete as much of the questionnaire as possible before returning it in the pre-paid envelope provided.

Even if you do not export or have no international connections, this information is still valuable to us.

For any assistance, please phone the helpline on 0131 244 2838

Section 1: Company details

1 Please amend any details in the boxes below, if required

Contact name
Company name
Postal Address

Postcode
Tel No.
Email
Website:

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Contact name
Company name
Postal Address

Postcode
Tel No.
Email
Website:

2 Which country are your headquarters based in?

◆ Refer to notes and attached country list for additional guidance

Scotland

Other - please specify:

3 Please describe in words the main business activity of your Scottish branch(es)/operation(s)

4 How many people are employed at the Scottish branch(es)/operation(s) of your company?

◆ Count all those persons who are on the payroll at the end of 2008.
(including part time staff)

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Section 2: Sales and exports

5 Please give the total sales of goods and services from the Scottish branches of your company in 2008, to the nearest £1,000

◆ Please refer to notes on particular service sectors

Goods £ ,000 + Services £ ,000 = Total £ ,000

6 What percentage of your sales in 2008 (as reported in Q5) were to customers in the following locations?

◆ Refer to notes and attached country list for additional guidance

Goods*

Scotland % + Rest of UK % + Rest of EU % + Rest of World % = 100%

Services*

Scotland % + Rest of UK % + Rest of EU % + Rest of World % = 100%

*If you cannot provide a breakdown of goods and services, please provide a total sales breakdown

Total

Scotland % + Rest of UK % + Rest of EU % + Rest of World % = 100%

If you had no sales to customers outside the UK



Go to **8**

7 Please list the countries where most of your non-UK customers are based, and the amount or percentage of your total sales that was accounted for by those customers (exports).

- ◆ Values should exclude VAT and any overseas freight costs and insurance ("free on board basis")
- ◆ If the information cannot be broken down into specific countries please provide the region totals
- ◆ Refer to notes and attached country list for additional guidance

Country	Amount (to nearest £1,000)	Percentage of Total Sales
1.	£ <input type="text"/> ,000	<input type="text"/> %
2.	£ <input type="text"/> ,000	<input type="text"/> %
3.	£ <input type="text"/> ,000	<input type="text"/> %
4.	£ <input type="text"/> ,000	<input type="text"/> %
5.	£ <input type="text"/> ,000	<input type="text"/> %
6.	£ <input type="text"/> ,000	<input type="text"/> %
7.	£ <input type="text"/> ,000	<input type="text"/> %
8.	£ <input type="text"/> ,000	<input type="text"/> %
9.	£ <input type="text"/> ,000	<input type="text"/> %
10.	£ <input type="text"/> ,000	<input type="text"/> %
11.	£ <input type="text"/> ,000	<input type="text"/> %
12.	£ <input type="text"/> ,000	<input type="text"/> %
13.	£ <input type="text"/> ,000	<input type="text"/> %
14.	£ <input type="text"/> ,000	<input type="text"/> %
15.	£ <input type="text"/> ,000	<input type="text"/> %
16.	£ <input type="text"/> ,000	<input type="text"/> %
17.	£ <input type="text"/> ,000	<input type="text"/> %
18.	£ <input type="text"/> ,000	<input type="text"/> %
19.	£ <input type="text"/> ,000	<input type="text"/> %
20.	£ <input type="text"/> ,000	<input type="text"/> %
Total for any remaining countries	£ <input type="text"/> ,000	<input type="text"/> %

Section 3: Barriers to exporting

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

◆ Please tick all that apply

Products/services unsuitable for exports

Lack of resources/managerial time

Lack of market information

High import tariffs in target markets

Language/ cultural differences

Currency/ exchange rates

Export documentation

Legislation and standards

Payment issues

Setting competitive prices

Lack of bank support

No spare production capacity

Lack of trained staff

After sales service

Other (please specify):

Transport costs

9

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

◆ Please tick all that apply

Not applicable

Translation assistance

Market research information

Export documentation

Export training

Finding joint venture partners

Exhibiting at trade fairs

Developing an international trade strategy

International marketing

Overseas trade missions

Introductions to potential overseas customers

Entering new markets

Language training

Finding export agents and/or distributors

Information on World Aid funded business

E-commerce training for international trade

Other (please specify):

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Section 4: Future export destinations

10 Please list any countries or regions that you see as future export markets

- ◆ Include **only** countries where you do not currently have any customers based
- ◆ Refer to the attached country list for additional guidance

Country

1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

Section 5: Overseas relationships

11 Please list the countries, if any, that your company has existing or planned relationships with, and state the *number* of each.

- ◆ Answer only if your business headquarters are based in Scotland
- ◆ If the information cannot be broken down into specific countries please provide the region totals
- ◆ Refer to notes and attached country list for additional guidance

Country	Subsidiary	Sales Office/ Agency	Joint Venture	Other
Current				

1.				
2.				
3.				
4.				
5.				
6.				
7.				

Planned

1.				
2.				
3.				
4.				
5.				
6.				
7.				

Section 6: Your comments

12

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

Thank you for taking the time to complete this questionnaire

SCOTLAND'S GLOBAL CONNECTIONS SURVEY 2008 - GUIDANCE NOTES**Purpose of the survey**

Scotland's Global Connections Survey is the only international trade survey covering the whole economy in Scotland and is undertaken in partnership with Scottish Enterprise and Highlands & Islands Enterprise. It covers companies with economic activity in Scotland, regardless of the location of the HQ.

Please note, exports include goods and services (see Notes on Q5 and Q6). We are also interested in exports to the rest of the UK as well as outside the UK.

Even if you do not export or have no international connections, this information is still valuable.

Results from the survey provide a reliable indication of trends in sales both within Scotland and also those sales to markets outside Scotland and is an essential part of estimating the size of Scotland's economy. They also provide a useful basis for enabling Scottish Enterprise and Highlands & Islands Enterprise to assess the effectiveness of programmes aimed at assisting companies with their export and trade activities.

Please help us support business in Scotland by providing information on your business.

Confidentiality of data

The information you provide will be shared with Scottish Enterprise, Highlands & Islands Enterprise and selected approved researchers, who will treat your data in strict confidence and not disclose information to any other third parties.

Company-specific details and any data from which it might be possible to identify individual companies will not be published.

General guidance notes for questionnaire completion

Please complete as much of the questionnaire as possible before returning it in the pre-paid envelope provided.

Sales and exports information provided should relate solely to the economic activity of the Scottish branch(es)/operation(s) of your company. If your company has multiple Scottish branches/ operations then the information provided should relate to all those who report to you.

We are interested in all types of organisations including those termed companies, businesses, firms, practices, partnerships, farms, small holdings etc. and all sizes of organisations including sole traders and smaller family run concerns.

Where the exact information is not readily available, please provide your best estimate(s). Where an answer is 0, please indicate this and do not leave the box blank. Please enter all monetary values in £thousands and excluding VAT (eg: for sales of £150,000 please enter **150**)

For further assistance, please phone the helpline on [0131 244 2838](tel:01312442838)

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Guidance notes for specific questions

Q2 If your company is based in Scotland or if the company is based elsewhere but has administrative offices with decision making autonomy relating to the Scottish operations then please tick the box. Otherwise, please tick 'Other' and specify where your company HQ is based.

Q5 Services sales are sales of intangible products. This should include receipts for the right to use franchises, copyrights, licences, patents, processes, techniques, designs, manufacturing rights, trademarks etc. (unless they have already been included in the contract price of goods) and royalties on printed matter and recordings.

Where sales involve a combination of goods and services that cannot be separately valued, please classify as either goods or services based on the majority of the value. If you have no information to provide goods and services separately, please provide a total sales figure only.

Q6 Customers based in the rest of the UK are those that are not normally resident in Scotland. Direct transactions with companies and individuals in the rest of the UK, or sales to residents of another part of the UK while they are visiting Scotland are both counted. If you do not know exactly what proportion of your custom came from the rest of the UK please provide your best estimate.

If you cannot provide a breakdown of goods and services separately please provide a total sales breakdown.

Customers based outside the UK are those that are not normally resident in the UK. So, for example, a resident of the USA visiting Scotland and using services would be considered as a customer based outside the UK. As far as possible please allocate sales of goods based on the delivery address, not invoice address if different.

EU includes Republic of Ireland, and countries that joined the EU in 2004 and 2007 - see overleaf for the full list of EU members.

Q7 If you answered that you have customers based outside the UK, you should answer this question. Sales to these customers are counted as exports. Please specify the destination country, rather than the region, if you can.

EXPORTS OF GOODS: the value of sales of products where the first destination is outwith the UK.

EXPORTS OF SERVICES: the provision of services to customers not resident in the UK.

Sales of goods or services to temporary visitors to Scotland should be included as exports. 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. Where exact amounts are not available, your best estimates would be appreciated.

Q9 World Aid Funded Business includes opportunities offered by the various multilateral development agencies including the World Bank Group, European Commission, United Nations agencies and various regional development banks, also known as aid-funding agencies.

Q11 The following descriptions cover the types of overseas relationships/operations we are interested in:

Subsidiary: wholly or partly owned by a parent company, i.e. the parent company would hold a controlling interest (i.e. more than 50% of the stock, shares or other equity).

Sales Office: the representative's or agents working address.

Joint venture: the establishment of a new independent enterprise, with or without equity share. Typically a joint venture has its own distinct identity and separate operation procedures. Strategic Alliances and Franchises should be included in this category.

Other: for example: technology licensing (a contract between independent firms to transfer novel technologies, rights or resources); R&D Alliances (agreements to undertake specific tasks which are generally terminated at the completion of these tasks); Outsourcing (generally involves a firm(s) agreeing that other firm(s) should carry out the production of its innovative goods or services); Value Chain Partnerships (are generally long term contracts, transfer of skills, managerial techniques & joint R&D).

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Service sectors – notes on definitions of sales and exports

Construction services are included in exports if they relate to overseas contracts of less than one year which are managed from Scotland and where the employees carrying out the contract are normally based in Scotland.

Education: Sales by educational institutions refers to income generated from fees, and any income generated from patents, research, copyrights, examinations etc. It should exclude the value of Government grants. Exports of education are fees from overseas students and any other income from outside the UK.

Financial Services: Sales of bank and building society services are defined as net interest received plus charges (including all commissions and fees) and earnings on foreign exchange transactions. Fund management companies should count fees generated through investment management fees and fees generated from advisory and other related functions. Exports are fees from outwith the UK and are net of foreign expenses. Securities dealers should provide spread earnings (dealing profits less holding gains), with earnings from overseas being counted as exports. Insurance sales relate to insurance service charges i.e. premiums minus claims, for direct insurance such as health, property and transport insurance; exports of these refer to the relevant balances with overseas customers. Life insurance sales cover the underwriting services associated with long-term policies, and pension fund services include the service charges associated with pension schemes.

Health and Personal Services: Provision of services such as health, dental or optician treatment, hairdressing, beauty and spa treatments etc. to non-residents count as exports of these services. Total sales include all fees received for provision of treatment. Only private fees and not resources provided by the NHS should be included.

Hotels, restaurants and catering: it would be most helpful if you could estimate the percentage of your sales that come from customers who live outwith Scotland in question 6 if possible, even if you cannot supply the detailed information in question 7.

Oil & Gas: 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. The value of sales of service activities incidental to oil and gas extraction such as test drilling, test hole boring, pumping of wells, cementing of oil and gas well casings etc. should be included.

Retail: Exports from retail include all sales to tourists and other visitors to Scotland, as well as online sales, shipped products and sales with reclaimable VAT. Although it may not be possible to identify all of these precisely, your best estimate of the percentage of sales to each area would be appreciated. Even if you cannot complete question 7, it would be most helpful if you could complete questions 5 and 6.

Transport services: Where your business provides transport of freight, the charges for this service are considered as your sales (the value of freight should not be included). If you are transporting exports from the UK overseas, the money earned from this service is considered as an export. Likewise, if you are transporting goods from Scotland to the rest of the UK, this counts as a sale of your service to the rest of the UK. Passenger transport services covers revenue from passenger tickets and expenditure in transit, and purchases of these by non-residents are exports. Please estimate these as best you can. Also included are transport charters with crew to non-residents. All payments received by Scottish airports, port authorities and other service companies from overseas airlines, ships or others are counted as exports. Rental of cars and other transport equipment to non-residents are exports.

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Countries by region

The following lists show which countries belong to each region grouping (for question 7)

Rest of UK
England
Wales
Northern Ireland

Rest of EU
Austria
Belgium
Bulgaria
Cyprus
Czech Republic
Denmark
Estonia
Finland
France
Germany
Greece
Hungary
Ireland
Italy
Latvia
Lithuania
Luxembourg
Malta
Netherlands
Poland
Portugal
Romania
Slovak Republic
Slovenia
Spain
Sweden

Rest of Europe	North America	Rest of World	Africa	Asia
Albania	Canada	Middle East	Algeria	Bangladesh
Andorra	Greenland	Bahrain	Angola	Brunei
Armenia	USA	Egypt	Botswana	China
Azerbaijan	Central/ South America	Iran	Equatorial Guinea	Hong Kong
Belarus	Argentina	Iraq	Ghana	India
Bosnia-Herzegovina	Brazil	Israel / Pal. areas	Kenya	Indonesia
Channel Islands	Caribbean Islands (1)	Jordan	Malawi	Japan
Croatia	Chile	Kuwait	Mauritius	Kazakhstan
Faroe Islands	Colombia	Lebanon	Morocco	Malaysia
FYR Macedonia	Mexico	Libya	Nigeria	Pakistan
Georgia	Peru	Oman	South Africa	Philippines
Gibraltar	Uruguay	Qatar	Tunisia	Singapore
Iceland	Venezuela	Saudi Arabia	Zimbabwe	South Korea
Isle of Man	Other Central America (2)	Sudan	Other Africa (6)	Sri Lanka
Liechtenstein	Other South America (3)	Syria		Taiwan
Moldova	Australasia	UAE (5)		Thailand
Monaco	Australia	Yemen		Vietnam
Montenegro	New Zealand	Other Middle East		Other Central Asia (7)
Norway	Pacific Islands (4)			Other South Asia (8)
Russia				Other Southeast Asia (9)
Serbia				
Switzerland				
Turkey				
Ukraine				

1. Incl Anguilla, Antigua & Barbuda, Aruba, Bahamas, Barbados, Bermuda, Caymans, Cuba, Dominica, Dominican Rep., Dutch Antilles, Grenada, Haiti, Jamaica, Montserrat, Puerto Rico, St Kitts & Nevis, St Lucia, St Vincent & Grenadines, Trinidad & Tobago, Turks & Caicos, Virgin Is.

2. Belize, Costa Rica, El Salvador, Guatemala, Honduras, Panama, Nicaragua

3. Bolivia, Ecuador, Falklands, French Guiana, Guyana, Paraguay, Suriname

4. Incl. Fiji, Tonga, Samoa, New Caledonia, Cook Islands, Vanuato, Papua New Guinea etc.

5. Abu Dhabi, Dubai, Fujairah, Sharjah, Ajman, Umm Al-Qaiwain, Ras Al-Khaimah

6. Benin, Burkina Faso, Burundi, Cameroon, Cape Verde Islands, Central African Rep. Ceuta, Comoros, Congo, Dem Rep Congo, Djibouti, Eritrea, Ethiopia, Gabon, Gambia, Guinea, Guinea-Bissau, Ivory Coast, Lesotho, Liberia, Madagascar, Mali, Mauritania, Mayotte, Mellilla, Mozambique, Namibia, Niger, Rwanda, Sao Tome and Principe Senegal, Seychelles, Sierra Leone, Somalia, St Helena, Sudan, Swaziland, Tanzania, Togo, Uganda, Zambia

7. Turkmenistan, Uzbekistan, Kyrgyzstan, Tajikistan, Afghanistan, Mongolia

8. Maldives, Nepal, Bhutan

9. Cambodia, Laos, Myanmar (Burma), North Korea