

Survey of industrial firms – 2011

Notice. - The purpose of this survey is to collect information on the main economic and financial variables in the industrial sector. Your cooperation is important but not compulsory and refusal to take part will not have any consequences. The information provided will be used for research purposes only and will not be disseminated outside the Bank except in aggregate form. The firms taking part will be sent an extract of the main results of the survey. The data will be processed entirely inside the Bank with procedures that ensure their security and confidentiality. The only people with access to individual data are the Head of the Economic and Financial Statistics Department of the Bank of Italy (Via Nazionale 91, 00184 Rome, Italy) and the staff entrusted with data processing and analysis.

General information

Bank of Italy codes: Branch code Firm code
 (to be entered by BI branch) | Type (sub-group).....

Type (sub-group). See Centrale dei Rischi (National Credit Register), *Nuova classificazione della clientela bancaria, 1991*.

Tax Identification Number ..

Name of firm

Legal status **V282**
 SRL SPA SAPA SCRL SCRI SAS SNC Other

Branch of activity Istat: Ateco 2007

Branch of activity Istat: See ISTAT, *Classificazione delle attività economiche. Metodi e norme, 2007*.

Year founded

Does the firm belong to a group? **V521**

Group of companies: a group of companies is a collection of parent and subsidiary corporations governed directly or indirectly by a common source of control. If the firm belongs to a group of companies, please report the name and the nationality of the group. The **list of countries** is available at the end of the questionnaire.

Is the firm the parent company?
V983 Name of parent company

Name of group

Nationality of group
V564NN Italian Other EU at 31-12-03 Other European Rest of world

If Italian.....
V565NI North-West North-East Centre South and Islands

Was the firm involved in any extraordinary operations in 2011? **P1**

Are you able to provide homogeneous data for 2010 and 2011? **V401N**

Homogeneous data for 2010 and 2011: the homogeneity is ensured either by considering the company's modification occurred in 2011 as it would be happened in the beginning of 2010 or by postponing it at the end of 2012. The economic data should be reconstructed as a consequence of this choice.

Workforce, wages

(number)

2010 Average workforce
 - of which: blue-collar and apprentices

Total workforce	of which:	
	Total fixed-term contracts	Total foreign workforce
V15		V985N
V16		V033N

Workforce at end of year	V205	V800	
Hirings	V22	V802	V986N
Terminations	V23		
2011 Average workforce	V24		V987N
- of which: women	V24D		
- of which: blue-collar and apprentices	V25		V034N
- of which: % obtaining tax relief on overtime or productivity bonuses.....	V026 %		
Workforce at end of year	V206	V801	
Hirings	V31	V803	V988N
Terminations	V32		
2012 Average workforce (projection)	V611M		



Workforce

Temporary job contracts signed with employment agency or other forms of collaborations which do not constitute dependent employment have to be considered only where is specified.

Average workforce in the year. Average number of workers (blue-collars, apprentices, white-collars, managers) in the firms during respectively 2010, 2011 and 2012. Please include in the figures the owner or the partners if they work in the firm. The figures are inclusive of the workers with a fixed-term contracts and the subsidized short-time workers (CIG). For the part time and seasonal workers, please multiply the corresponding number of workers by the fraction of the year in which they work. The subsidized short-time workers should be considered wholly in the figure.

Workforce at end of year. Number of the workers in the firms at the end respectively 2010, 2011 and 2012. Please consider the definition of worker mentioned at the previous item.

Worker that use the tax exemption for extra hours and/or for the productivity's salary (*salario di produttività*). Please report the amount of workers that use this law in terms of the share of the 2011 average workforce. In this year it is still in force (law decree 185/2009) a preferential taxation both for overtime pay, specific firm's incentives and performance-related pay. The tax reduction can involve a maximum of 6 thousand of gross salary. A worker is eligible to this tax incentives if he works in a private sector and if in 2010 he/she earned a gross salary less than 35 thousand.


Fixed-term contracts. Trainee, seasonal, temporary and substitution contracts fall into this category. Please exclude from this figure all the workers for whom the company does not pay social security taxes or a salary (stages, free traineeship).

Hirings in the year. The total number of workers hired during the year, including temporary workers, and apprenticeship. Each renewal, extension or change (e.g. a modification of a fixed-term in a open-term contract) has to be considered as an hiring. Please exclude from this figure all the workers hired for a merge or an acquisition.

Termination in the year. Total number of workers whose job contacts were terminated during the year for any reason. For each renewal, extension or change (e.g. a modification of a fixed-term in a open-term contract) has to be considered a corresponding termination. Please exclude from this figure all the workers involved in spin-off.


Please note that the difference between the worker at the end of 2011 and the corresponding at the 2010 has to be equal to the balance between hiring and termination.

	2010	2011
Total hours worked by payroll employees	V18A	V27A
Total hours of temporary work	V808	V809
Percentage of overtime in total hours worked	V804, %	V805, %

 **Total hours effectively worked.** Total hours worked, ordinary and extra hours, by the employees.
Extra time hours (expressed as percentage of the total hours effectively worked). Please report the working hours in excess to the number definite in the contract, even if it are not paid.

Wages and salaries in 2011

	Blue-collar/apprentices	Clerks/managers	Overall average
Total gross annual wages per capita (€)	SC5	SC6	SC7
Minimum national contract wage	SC8, %	SC9, %	SC10, %
<i>(approximate per cent of total)</i>			


 **National contract minimum wage.** Please report the percentage of the total wage which derived by the national contract. It includes minimum base salaries, cost-of-living allowance, Christmas bonus, additional month bonuses, the annual increment, lunch tickets, overtime pay and night work bonus.

Wages: it includes the employee social security and fiscal taxes; it does not include all the payments made by the firm on behalf of INPS or of the other national insurance funds.

Gross fixed investment in Italy

(Please express amounts in € thousand; enter 0 for no investment)

	2010	2011	2012 projection
Expenditure on tangible assets			
- property	V291	V292	V294
Total expenditure on tangible assets	V200	V202	V203
Total expenditure on software & databases	V810	V811	V812
Expenditure on R&D; design and test products	V451P	V451AN	V814AN

 **Gross fixed investment** (monetary values expressed in thousand euros).

Gross fixed investment: refers to the acquisition of fixed capital to the firms asset in the reference period. **The fixed capital** consists in **capital goods, software, database and mineral exploitation** that derives from a production process and can be used repeatedly in the production of goods and services for more than one year. In the gross fixed investment is included the depreciation.

The acquisition includes:

- a) **Preventive and proactive maintenance** and the share of the corrective maintenance, invoiced by the suppliers, that could be capitalised by law;
- b) **Production and repair** of own capital goods made by the firm and capitalised it.

Investments for tangible goods includes the acquisition of:

- a) **Real properties** includes the plants under construction and new-built and the expenditure for the renovation of already existed plants; please exclude from the figure grounds and the used *residential* buildings. The investment in plant under construction is equivalent to the sum of the received invoices during the reference period from the contractors and/or the value of the plant construction built directly by the firm.
- b) **Plants, tools and machinery.** For the under construction item, please report only the corresponding value of the sum of the received invoices during the reference period from the contractors and/or the value of the capital good directly set-up by the firm.
- c) **Vehicles.**

Expenditure in investments in the 2011 for physical second-hand assets: this item refers to the purchase of goods, invoiced in 2011, that was before used by other companies in their production process. Please do not include in the expenditure neither the purchase of second-hand land and residential buildings, nor the goods involved in a company's merge or acquisition.

Investments for software and database. This item includes:

- a) **Software:** please include also if the software was realized in house; in this case the development should be valued at an estimated price or, if it is not possible, at its production cost. Please report in the figure also the expenditure for database that was used in the production for more than one year.
- b) **Mineral exploitation:** it includes also the test drilling, survey flights or other survey, transportation cost.

Please eventually include copyright protected entertainment, literary and artistic originals: movie, audio

record, manuscript, model, etc.

Please do not include patents, marketing and advertising costs in the investment.

Total expenditure for tangible goods, software and database and mineral exploitation in the 2010 and in 2011: in case of capital contribution or merge the investment does not include the value of the fixed capital incorporated for these reasons.

Total expenditure for tangible goods, software and database and mineral exploitation in the 2012: please report the monetary expenditure that the firm plan to spend during the 2012. In case that the firm made a split or a merger on 31-12-2011 and the two firm are separately collected, please the projection for the 2012 has to include also the plants hived-off or acquired. If the firm has planned in the 2012 to acquire new productive units, please do not include its value in the planned investment for this year.

Expenditure on R&D, market research, design and test products: please include in the expenditure R&D and market research both the purchased services from an external company and the one developed in house; please exclude any costs for software development and expenditure on education and training.

Energy Investment (thousand €)

Investments to improve energy efficiency (replacing electric motors, adopting energy saving light bulbs, insulation work, etc.)

2010	2011
V058	V059

Turnover, prices and operating result

Turnover (€ thousand)

Turnover from year's sales of goods/services
- of which: exports

2010	2011	2012 (proj.)	2012/2011 projection
V209	V210	V437	<input type="text"/> <input type="text"/> V539, <input type="text"/> %
V211	V212	V438	(a) Calculate: (turnover 2012/2011-1)*100

Turnover of sales of goods and services during the year. Please include revenues from: the sale of goods and/or services of the company, work performed for third parties, revenues of products sold without further processing by the company, sales of industrial services. The sentence "of which: export" refers to the part of the turnovers in thousands of Euro sold in foreign countries.

2011/2010	2012/2010 projection
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Average annual percentage change in selling prices of goods and services ☞ Italy and abroad V220A, % (b) V440, %

The projected **percentage change 2012/2011** in turnover, adjusted for the percentage change in prices, is approximately (sign and % change): V540, % (calculate (a) - (b))

B

Please give a **range around this figure**, i.e. a forecast of minimum and maximum turnover, adjusted for changes in prices

Min. (sign and % change) V541, % Max. (sign and % change) V542, %

Please describe the firm's **operating result** for 2011? V545 1 Large profit 2 Small profit
 3 Broad balance 4 Small loss 5 Large loss

Financing

Please indicate whether during 2011, at the interest rate and collateral terms applied to your firm, you wanted to increase your debt with banks or other financial intermediaries

F153 yes no

If yes to the previous question, please say whether:

1. you were willing to accept more stringent loan terms (e.g. higher interest rate or more collateral) in order to increase the amount of borrowing F154 no yes
2. in 2011, did you actually apply for new loans from banks or other financial intermediaries F155 no yes

If yes to question 2, indicate whether:

- you received the amount requested F156 no yes
- you were granted only part of the amount requested F157 no yes
- you were given no loan because the financial intermediaries contacted were not willing to grant the loan F158 no yes
- no loan was obtained for other reasons (e.g., cost or collateral considered to be excessive) F159 no yes

If no to 2, indicate why:

- we didn't contact banks or other intermediaries because we were convinced they would reject the application F160 no yes
- other F161 no yes

In 2011 did your creditors ask you for early repayment of loans granted in the past? F162 no yes

Excluding seasonal fluctuations and considering all your funding needs (for fixed investment, working capital, etc.), indicate the trend of your external funding needs (bank loans, leasing, factoring, intra-group loans, contributions of capital, etc.) ⁽¹⁾

2nd half 2011/1 st half 2011	forecast 1 st half 2012/ 2 nd half 2011
F189	F190

Legend: (1) 1=large contraction; 2=moderate contraction; 3=basically no change; 4=moderate increase; 5=large increase; 8=not applicable.

Adjusted for normal seasonal variations, please indicate your demand for bank credit compared with the previous half-year and give your forecast for the next half-year (consider the total amount of bank debt desired, regardless of the amount actually granted by intermediaries) ⁽¹⁾

2nd half 2011/1 st half 2011	forecast 1 st half 2012/ 2 nd half 2011
F171	F172
┌───┐	┌───┐

Legend: (1) 1=sharp contraction; 2=moderate contraction; 3=broadly unchanged; 4=moderate increase; 5=sharp increase; 8=not applicable.

(for each half-year, indicate at most two factors as most important) ⁽¹⁾

- a - change in funding requirement for fixed investment
- b - change in funding requirement for stocks and working capital.....
- c - change in funding requirement for debt restructuring
- d - change in self-financing capacity
- e - change in other forms of borrowing (non-bank credit, bond issues, etc.)
- f - other factors

	2 nd half 2011	forecast 1 st half 2012
a	FI73 <input type="text"/>	FI79 <input type="text"/>
b	FI74 <input type="text"/>	FI80 <input type="text"/>
c	FI75 <input type="text"/>	FI81 <input type="text"/>
d	FI76 <input type="text"/>	FI82 <input type="text"/>
e	FI77 <input type="text"/>	FI83 <input type="text"/>
f	FI78 <input type="text"/>	FI84 <input type="text"/>

Legenda: (1) 1=*per nulla rilevante*; 2=*poco rilevante*; 3=*abbastanza rilevante*; 4=*molto rilevante*.

How did the firm's overall borrowing conditions change? ⁽¹⁾

- a - general conditions
- b – specifical aspects:
 - b.1 - interest rates.....
 - b.2 - other costs (banking fees, etc....)
 - b.3 - amount of collateral required
 - b.4 - access to new financing
 - b.5 - time necessary to obtain new funds.....
 - b.6 - complexity of information needed to obtain new funds
 - b.7 - requests of reimburing previously granted loans beforehand

	2nd half 2011/1 st half 2011	forecast 1 st half 2012/ 2 nd half 2011
a	FI63	FI63V
b.1	FI64	FI64V
b.2	FI65	FI65V
b.3	FI66	FI66V
b.4	FI67	FI67V
b.5	FI68	FI68V
b.6	FI69	FI69V
b.7	FI70	FI70V

Legend: (1) 1=*they became worse*; 2=*no change*; 3=*they became better*; 8=*not applicable*.

If in the previous section you indicated that your firm's overall borrowing conditions "became worse" between the first and second half of 2011, which of the following measures did you take to limit the effects of this? (*indicate the degree to which you used them*) ⁽¹⁾

- use of liquid assets (*e.g. reduction of bank balances, sale of government securities*)..... **FI91**
- disposal of other financial assets (*e.g. equity interests, claims*)..... **FI92**
- changes in trade credit policies (*vis-à-vis customers*)
- reduction of debt level
- equity capital contributions.....
- reduction of planned investment
- curbing staff costs or other operating costs.....
- other

Legend: (1) 1=*nil*; 2=*a little*; 3=*some*; 4=*high*; 5=*preponderant*.

In 2011, did you try to restructure the **bank debt**? **FI41** yes no


If yes, please report if (*choose only one item between a1, a2, a3*):

- a1 - a debt restructuring plan was agreed **FI42**..... yes no
- a2 - a debt restructuring plan is currently under negotiation **FI43**..... yes no
- a3 - attempt to reach an agreement with the banks did not succeed **FI44**..... yes no

and, moreover, if:

Trade Credit

Trade credit	Total of Italy		Of which: general government		Total of foreign countries	
	2010	2011	2010	2011	2010	2011
Amount at the end of year (thousand euros)	C1P	C1N	C1PA	C1NA	C1PE	C1NE
of which: assigned to financial intermediaries						
with recourse (%)	C123P, %	C123, %	C123PA, %	C123A, %		
	<i>Please refer to the average in the year</i>					
Contract term (in days)	C2P	C2	C2PA	C2A	C2PE	C2E
Share collected with deferment (%) ...	C6P, %	C6, %	C6PA, %	C6A, %	C6PE, %	C6E, %
Average length (in days)	C7P	C7	C7PA	C7A	C7PE	C7E

 **Year-end amount of trade receivables:** to be stated gross of the allowance for doubtful accounts. Claims assigned to financial intermediaries with recourse are to be included. Claims assigned without recourse (where the financial intermediary assumes the risk of default by the debtor) are not to be included.

Assignment of trade receivables with recourse. This occurs if the risk of default continues to be borne by the firm that assigned the claim.

If the total for Italy is 100, please report the distribution in percentages of:


	Turnover		End of year trade credit	
	2011		2010	2011
Firms and households	C105, %		C110, %	C115, %
General government				
National department	C106, %		C111, %	C116, %
Regions	C120, %		C121, %	C122, %
Municipalities	C107, %		C112, %	C117, %
Local health departments and hospitals	C108, %		C113, %	C118, %
Other government agencies	C109, %		C114, %	C119, %
Total for Italy	100 %		100 %	100 %

Total trade debts

Amount of the residual debts on 31 December (thousand euros)

Average length (in days)

	2010	2011
Amount of the residual debts on 31 December (thousand euros)	C103	C33
Average length (in days)	C104	C34

 **Average length of trade debts:** report the average length of payment deferrals according to contractual agreements with suppliers and delays.

A Research and Development

Did you engage in R&D in **2009-2011**? **RS1** yes no

How was your R&D spending financed in 2009-2011, by percentage?

- self-financed or intragroup % **RS9,**
 - banks and other financial intermediaries..... % **RS10,**
 - equity, venture capital % **RS11,**
 - public funding..... % **RS12,**
 - other..... % **RS13,**
 Total %

(for firms that received public funding)


If you had not received the public funding, would your R&D spending have been: ⁽¹⁾ **RS14**

Legend: (1) 1=the same or more; 2=less; 3=nil.

With reference to European programmes (for example, specific projects of the 7th Framework Programme), **national programmes** (for example, initiatives benefiting from the Fund for Technological Innovation, initiatives included in the National Operational Programme, programme contracts, Law 296/06 on the "click day", etc.) and **regional programmes** (for example, initiatives included in the Regional Operational Programme, "Made in Lombardy", LEAD ERA of the Veneto Region, etc.):

Indicate which of the supported funding programmes you benefited from in 2009-11: **RS15** (specify)

Indicate the supported funding programmes to which you applied in 2009-11 but which did not grant you funding: **RS16** (specify)

 LEAD ERA=Lead Market European Research Area network.

In 2011, did your firm engage in any of the following?:

- production process innovation..... **BRM2** yes no
 - organizational and operational innovation **BRM3** yes no
 - product innovation **BRM4** yes no

B Administrative costs deriving from relations with general government entities

1. With reference to 2011, indicate the annual cost sustained by the firm for compliance with administrative requirements in the following fields: environment, labour and social security, tax law, health, construction and urban planning. Consider **only the cost of outside consultants** (for example: accountants, engineers, architects, labour consultants) (in **thousands of euros**) ... **OA1**

2. **At the end of 2011** was your firm **waiting for** authorizations to be issued for plant construction, expansion, transformation, restructuring or reconversion?
 (consider final authorizations only) **OA2** yes no

If the answer to the previous question was yes:

A - Consider the most important **authorization measure** and indicate the month and year the application for it was filed:

month (January, ..., December)	year
OA3	OA4

B - Try to estimate the probability that the procedure in question will conclude within the following dates on a scale from 0 to 100 (the higher the number you indicate, the greater is the probability that the event will occur)

in 2012	in 2013	after 2013	total
<u>OA5.</u>	<u>OA6.</u>	<u>OA7.</u>	<u>1 0 0</u>

C - On a scale from 0 to 100, give your estimate of the probability that the authorization procedure will have a favourable outcome

..... OA8.

Internationalization

1 Between 2007 and 2011 was your firm present abroad (in the form of ownership/control of foreign companies, ownership of not legally-separate local units, including units engaged exclusively in marketing)

..... INT54 yes no

If the answer to question 1 was yes

1A For the two countries with the highest turnover recorded in 2007-11 by firms owned/controlled by your firm or by foreign units, indicate:

Name of country ⁽¹⁾	Year of establishment	Main activity ⁽²⁾	Still present in the country in 2011?	Employees abroad at end-2011 (number)	Turnover abroad in 2011 (thousands of euros)
1 <u>INT55</u>	<u>INT56</u>	<u>INT57</u> <u>INT58</u> →	<input type="checkbox"/> no <input checked="" type="checkbox"/> yes	<u>INT59</u>	<u>INT60</u>
2 <u>INT61</u>	<u>INT62</u>	<u>INT63</u> <u>INT64</u> →	<input type="checkbox"/> no <input checked="" type="checkbox"/> yes	<u>INT65</u>	<u>INT66</u>

Legend: (1) To indicate that the firm is present in a single country abroad, enter "9999" in the space for the name of the second country. (2) 1=production; 2=designing and planning, research and the like; 3=marketing, technical assistance and the like.

year of establishment – Refer to the year in which the owned/controlled firm or the local unit began to operate.
Employees abroad – Employees of whatsoever nationality of the owned/controlled firm or the local unit.

1C Name the most important factor in the decision to internationalize your business ⁽¹⁾:

INT88

Legend: (1) 1=more favourable environmental or tax law; 2=lower labour costs; 3=lower cost of raw materials or intermediate products; 4=high demand in the local market or neighbouring markets; 5=proximity to customers or suppliers; 6=acquisition of competitor firms/sharing of technologies or patents; 7=other.

If the answer to question 1 was no

1D Did your firm's top management consider the possibility of producing goods or services abroad in 2007-11?

..... INT76 no yes

2 If in the period 2007-11 you produced goods or services abroad (answer yes to question 1) or even if you only considered the possibility of doing so (answer no to question 1 and yes to the previous question 1D), what impact did the following factors have on the decisions taken in this regard? (indicate "very" for no more than three factors) ⁽¹⁾

- institutional and legislative framework of the foreign countries..... INT77
- your organizational structure or size INT78
- possibility of financing in Italy or in the foreign countries INT79
- little or opaque information on the foreign countries or on legal requirements to be met on the spot INT80
- other (for example: trust in foreign counterparties/cultural affinities or differences) INT81

Legend: (1) 1=very negative; 2=negative; 3=no significant impact; 4=positive; 5=very positive.

If the firm produced goods or services abroad, the assessment "very negative" or "negative" should be used for the factors perceived as having been impediments to activity abroad, while the assessment "positive" or "very positive" should be used for the factors that favoured it.

If instead the firm considered the possibility of operating abroad but did not do so, the assessment “very negative” or “negative” should be used for the factors that determined the decision not to operate abroad, while the assessment “positive” or “very positive” should be used for the factors that weighed in favour of internationalization.

3 If in the period 2007-11 you produced goods or services abroad (**answer yes to question 1**) or even if you only considered the possibility of doing so (**answer no to question 1 and yes to question 1D**):

A) did you request information assistance from Italian public institutions? **INT82** yes no

if yes, did you get the information assistance you requested? **INT83** no yes

B) did you request financial assistance from Italian public institutions? **INT84** yes no

if yes, did you get the financial assistance you requested? **INT85** no yes

C) did you request financial assistance from banks or other financial institutions? yes no

INT86 no yes

if yes, did you get the financial assistance you requested? **INT87** no yes

Public institutions.

Ministries, embassies, chambers of commerce, regions, provinces, ICE (Istituto Nazionale per il Commercio Estero, an Italian public institution for the promotion of foreign trade, now merged into the Ministry for Economic Development and the Ministry for Foreign Affairs for the matters within their respective spheres of competence), **SACE** (Sezione speciale per l'Assicurazione del Credito all'Esportazione, the export credit agency that insures against the risks to which Italian companies are exposed in their international transactions and investments abroad), **SIMEST** (Società Italiana per le Imprese Miste all'ESTero, a financial company that promotes the internationalization of Italian firms and assists entrepreneurs in their activities abroad), **FINEST** (Finanziaria per gli Imprenditori del Nord EST, which assists the development of economic activities and international cooperation in the North-East of Italy. Under Law 19/1991 its services are available to firms with a stable and prevalent organization in the regions of Friuli-Venezia Giulia, Trentino-Alto Adige and Veneto).

A

Competition

- 1 In your view, how did competition develop in your main product line in the last five years? ⁽¹⁾
- in Italy **CONC1**
 - abroad **CONC2**

Legend: (1) 1=diminished; 2=basically unchanged; 3=increased; 8=not applicable.

if the answer to question 1 for Italy was “increased”:

- 2 With regard to the Italian market, which production strategies or characteristics of the products of **your competitors** prompted you to express this assessment and with what degree of importance?⁽¹⁾
(indicate “very” for no more than two factors)
- reduction in prices **CONC3**
 - increase in quality (including expansion of product range and introduction of new products) **CONC4**
 - more aggressive marketing strategies or improvement in the distribution and sales network **CONC5**
 - other **CONC6**

Legend: (1) 1=no importance; 2=some importance; 3=fairly important; 4=very important; 8=not applicable.

- 3 Where are your main competitors? (indicate the two main locations) ⁽¹⁾ **CONC7** | **CONC8**
1 loc. 2 loc.

Legend: (1) 1=same region of Italy; 2=other regions; 3=euro-area countries; 4=other European countries; 5=USA - Canada; 6=China; 7=India; 8=Korea; 9=other Asian countries; 10=rest of the world.

A

Logistics and transport

In your view, how did each of the following factors affect the functioning of logistics services in Italy in the three years 2009-11? (provide an answer for each item) ⁽¹⁾

- a - availability, quality and efficiency of road and rail infrastructure **LOGT1**
- b - functionality of intermodal links (links between the different modes of transport) **LOGT2**
- c - accessibility to urban centres **LOGT3**
- d - availability and geographical distribution of logistics centres **LOGT4**
- e - transport costs (rates) **LOGT5**
- f - length and foreseeability of transport time **LOGT6**
- g - traceability (including computerized traceability) of the flow of goods **LOGT7**
- h - functioning of customs **LOGT8**
- i – other **LOGT9**

Legend: (1) 1=very negatively; 2=negatively; 3=in no way; 4=positively; 5=very positively; 8=not applicable.

In 2011, roughly what share of your firm's total costs consisted of logistics costs?

..... **LOGT10** %

Logistics costs: costs incurred for obtaining supplies and distributing goods. They include such items as transport and storage costs (for example, for administration, packing, other value-added services, and inventory), counting both direct costs for logistics activities performed within the firm and amounts paid to outside logistics operators (shippers, intermediaries, storage centres, etc.).

Did your firm have any relationship with outside logistics operators in 2011? **LOGT11** yes no


What share of your total logistics costs in 2011 was for logistics services performed by outside operators?
..... **LOGT12** %

How do you expect this ratio to evolve up to 2014?

LOGT13 it will diminish It will remain stable it will increase

How would you rate the effort involved in completing the questionnaire? ..	modest	average	large	excessive
V980N				

Comments:

 **V981**.....
.....
.....
.....

We thank you for your cooperation