

Flash Eurobarometer 187
June 2006
Innobarometer
Special target: companies operating in clusters

Basic bilingual questionnaire

The GALLUP Organization

FIRST SCREENER

D1. Commençons par quelques questions essentielles concernant votre société. Combien d'employés compte votre société ?

- Moins de 20 0
- 20-49..... 1
- 50-249..... 2
- 250-499..... 3
- 500 ou plus 4
- [NSP/SR] 9

ENQUETEUR SI MOINS DE 20 REMERCIER ET CLORE

SECOND SCREENER

D2. Quand, en quelle année votre société a-t-elle été fondée?

- avant 1986 1
- entre 1986 et 2001..... 2
- après 2001 3
- [NSP/SR] 9

D3. Entre les deux derniers exercices financiers clôturés, comment votre chiffre d'affaires – c'est à dire, le revenu annuel de votre entreprise – a-t-il changé?

- Il a diminué 1
- Il a augmenté de moins de 5% 2

FIRST SCREENER

D1. Let me start with a few basic questions regarding your company. How many employees do you have in your company?

- Less than 20 0
- 20-49..... 1
- 50-249..... 2
- 250-499..... 3
- 500 or more 4
- [DK/NA] 9

IF LESS THAN 20 THANK AND TERMINATE THANK AND TERMINATE

SECOND SCREENER

D2. When, in which year was your company established?

- before 1986..... 1
- between 1986 and 2001 2
- after 2001 3
- [DK/NA] 9

D3. Between the last two completed financial years, how did your turnover - that is, the annual income of your firm - change?

- It decreased 1
- Increased by less than 5%..... 2

<ul style="list-style-type: none"> - Il a augmenté de 6 à 25%..... 3 - Il a augmenté de plus de 25% 4 - Il n'a pas changé..... 5 - [Il n'y a pas deux exercices financiers cloturés] 6 - [NSP/SR] 9 <p>D4. NE PAS POSER, ENREGISTRER DEPUIS LE FICHER CODE NACE de l'activité principale de la société</p> <p>D5. NE PAS POSER, ENREGISTRER DEPUIS LE FICHER Région NUTS (Nomenclature des Unités Territoriales Statistiques) de la société (niveau NUTS 2)</p>		<ul style="list-style-type: none"> - Increased by 6 to 25% 3 - Increased by more than 25%..... 4 - Did not change..... 5 - [there are no two completed financial years] 6 - [DK/NA] 9 <p>D4. NOT TO BE ASKED, RECORD FROM DATABASE: NACE code of the main activity of company</p> <p>D5. NOT TO BE ASKED, RECORD FROM DATABASE: NUTS region of company (NUTS 2 level)</p>
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<p>Q1. Votre société (son établissement local) a-t-elle des liens nettement plus forts avec des fournisseurs et des prestataires de services qui sont géographiquement proches qu'avec d'autres?</p>	<p>Q1. Does your company (its local establishment) have significantly stronger linkages with suppliers and service providers that are geographically close than with others?</p>
<p>ENQUETEUR : SI CE N'EST PAS CLAIR POUR LE REpondANT PRECISER QUE PAR "ENTREPRISE" OU "SOCIETE" NOUS ENTENDONS LE SITE LOCAL DE LA SOCIETE.</p>	<p>INTERVIEWER: BY "FIRM" OR "COMPANY" WE MEAN THE LOCAL ESTABLISHMENT OF THE COMPANY, IF IT IS NOT CLEAR FOR THE RESPONDENT.</p>
<p>UNE SEULE REponse POSSIBLE</p> <ul style="list-style-type: none"> - Oui 1 - Non 2 - [NSP/SR]..... 9 <p>Q2. Dans votre région, votre société a-t-elle des contacts avec d'autres entreprises, universités et organismes gouvernementaux pour discuter des problèmes courants ou des éventuelles opportunités de partenariat? LIRE – UNE SEULE REponse POSSIBLE</p> <ul style="list-style-type: none"> - Oui fréquemment 1 - Oui, occasionnellement 2 - Seulement rarement 3 - Jamais..... 4 - [NSP/SR] 9 <p>Q3. Votre société est-elle située dans une région où la concentration d'entreprises travaillant dans le même secteur d'activités que le votre est : LIRE– UNE SEULE REponse POSSIBLE</p> <ul style="list-style-type: none"> - Plus élevée qu'ailleurs dans notre pays 1 - Pareille qu'ailleurs dans notre pays 2 - Plus faible qu'ailleurs dans notre pays 3 - [NSP/SR] 9 	<p>ONE ANSWER ONLY</p> <ul style="list-style-type: none"> - Yes 1 - No 2 - [DK/NA]..... 9 <p>Q2. In your region, does your firm have contacts with other firms, universities and administrative bodies to discuss common problems or potential shared opportunities? READ OUT – ONE ANSWER ONLY</p> <ul style="list-style-type: none"> - Yes frequently 1 - Yes occasionally 2 - Only rarely..... 3 - Never 4 - [DK/NA] 9 <p>Q3. Is your firm located in a region where the concentration of firms working in the same business sector as yours is: READ OUT– ONE ANSWER ONLY</p> <ul style="list-style-type: none"> - Higher than elsewhere in the country 1 - Similar as elsewhere in the country 2 - Lower than elsewhere in the country 3 - [DK/NA] 9

Q4. ENQUETEUR LIRE LENTEMENT ET CLAIREMENT
Les économistes parlent souvent de clusters. Les clusters sont des groupes géographiquement proches, composés de sociétés, fournisseurs et prestataires de services interconnectés et institutionnels associés, liés entre eux dans un domaine particulier.

Dans un cluster, tous ces acteurs sont reliés de plusieurs façons. Cela comprend leur situation similaire, par ex. un même secteur d'activité, marché commun, problèmes communs auxquels il faut faire face, et leurs fonctions complémentaires, par ex. les laboratoires d'université peuvent aider les entreprises privées, plusieurs entreprises peuvent développer des nouveaux produits ensemble, ou entrer sur de nouveaux marchés ensemble.

Les clusters travaillent souvent dans une région spécifique, et parfois dans une seule et même ville.

Connaissez-vous ce concept de cluster ?
UNE SEULE REPONSE POSSIBLE

- Oui 1
- Non 2
- [NSP/SR] 9

Q5. Y a-t-il des clusters actifs dans votre région, dans votre secteur d'activité ?
UNE SEULE REPONSE POSSIBLE

- Oui 1
- Non 2
- [NSP/SR] 9

Q4. INTERVIEWER, READ OUT SLOWLY
Economists often talk about so-called clusters. Clusters are geographically close groups of interconnected companies, suppliers, service providers, and associated institutions in a particular field.

In a cluster all these actors are linked in several ways. These include their similar situation (e.g. same working sector, common market, common problems to face) and their complementary functions (e.g. university labs can help private firms; several firms can develop new products together, or enter new markets together).

Clusters are often working in a particular region, and sometimes in a single town.

Were you aware of this concept of cluster?
ONE ANSWER ONLY

- Yes 1
- No 2
- [DK/NA] 9

Q5. Are there clusters active in your region, in your field of activity?
ONE ANSWER ONLY

- Yes 1
- No 2
- [DK/NA] 9

1 point est donné pour chacune des réponses suivantes :

- Q1 – 1
- Q2 – 1 or 2
- Q3 – 1
- Q4 – 1
- Q5 – 1

Le score maximum est de 5 points.
L'entretien sera poursuivi uniquement si les entreprises marquent 3 points ou plus.

MAIN QUESTIONNAIRE

Q7. Considérez-vous que votre société fait partie d'un cluster, ou non ?

UNE SEULE REPONSE POSSIBLE

- Oui 1
- Non 2
- [NSP/SR] 9

SI Q7 = 1, SELECTIONNER [CLUSTER]
DANS TOUTES LES QUESTIONS OU CELA
EST INDIQUE

SI Q7 = 2 OU 9, SELECTIONNER [REGION]
DANS TOUTES LES QUESTIONS OU CELA
EST INDIQUE

Q8 Votre société participe-t-elle **ACTIVEMENT** dans un ou plusieurs réseaux comprenant des entreprises locales (concurrents, fournisseurs, clients) et/ou des administrations publiques impliqués dans le même secteur d'activité ?
LIRE – UNE SEULE REPONSE POSSIBLE

1 point is given for each of the following responses:

- Q1 – 1
- Q2 – 1 or 2
- Q3 – 1
- Q4 – 1
- Q5 – 1

Maximum score is 5 points.
Interview will be carried out only with companies which scored 3 or more.

MAIN QUESTIONNAIRE

Q7. Do you consider that your firm is part of a cluster, or not?
ONE ANSWER ONLY

- Yes 1
- No 2
- [DK/NA] 9

IF Q7 = 1, SELECT [CLUSTER] IN ALL
QUESTIONS WHERE INDICATED

IF Q7 = 2 OR 9, SELECT [REGION] IN ALL
QUESTIONS WHERE INDICATED

Q8 Does your firm **ACTIVELY** participate in one or more networks containing local companies (competitors, suppliers, clients) and/or public administration involved in the same business sector?
READ OUT – ONE ANSWER ONLY

<p style="text-align: right;">- Oui, dans un de ces réseaux..... 1 - Oui, dans deux de ces réseaux ou plus 2 - Non 3 - [NSP/SR] 9</p> <p>Q9. Au cours des deux dernières années, votre société a-t-elle : LIRE – FAIRE UNE ROTATION DE L'ORDRE DES ITEMS – PLUSIEURS REPONSES POSSIBLES</p> <p style="text-align: right;">- Oui 1 - Non 2 - [NSP/SR] 9</p> <p>a) Conduit une étude de marché pour lancer des nouveaux produits ou services..... 1 2 9 b) Lancé des produits ou services nouveaux ou significativement améliorés 1 2 9 c) Lancé une technologie de production nouvelle ou significativement améliorée 1 2 9 d) Fait une demande de dépôt pour un ou plusieurs brevets e) Enregistré une ou plusieurs marques déposées internationales 1 2 9 f) Réalisé des recherches dans vos propres laboratoires 1 2 9 g) Sous-traité des études / recherches à d'autres sociétés, universités ou instituts de recherche. 1 2 9</p> <p>Q10. Dans quel secteur votre société exerce-t-elle ses principales activités ? LIRE – UNE SEULE REPONSE POSSIBLE</p> <p style="text-align: right;">- Technologie d'Information et de Communication et équipements de Communication 1 - Aéronautique et Espace 2</p>		<p style="text-align: right;">- Yes, in one such network..... 1 - Yes, in two or more such networks..... 2 - No 3 - [DK/NA] 9</p> <p>Q9. In the last two years, did your firm: READ OUT – ROTATE – SEVERAL ANSWERS POSSIBLE</p> <p style="text-align: right;">- Yes 1 - No 2 - [DK/NA] 9</p> <p>a) Conduct market research for introducing new products or services..... 1 2 9 b) Introduce new or significantly improved products or services 1 2 9 c) Introduce new or significantly improved production technology 1 2 9 d) Apply for one or more patents 1 2 9 e) Register one or more international trademarks 1 2 9 f) Carry out research in your own laboratories 1 2 9 g) Contract out research to other firms, universities or research institutes. 1 2 9</p> <p>Q10. In which sector does your company carry out its main activities? READ OUT – ONE ANSWER ONLY</p> <p style="text-align: right;">- ICT and Communication equipment 1 - Aeronautics and Space..... 2</p>
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- Pharmaceutique & équipements médicaux...	3
-Construction (matériaux, équipement, construction lourde)	4
- Automobile	5
- Métallurgie	6
- Plastique	7
- Produits chimiques	8
- Textile, cuir et chaussure.....	9
- Energie.....	10
- Equipement de production (machines, électriques)	11
- Alimentaire	12
- Divertissement	13
- Services	14
- Autres.....	15
- [NSP/SR].....	99

Q12. [CLUSTER]: Collaborez-vous avec les partenaires suivants au sein du cluster ?

[REGION]: Collaborez-vous avec les partenaires suivants dans la région ?

PLUSIEURS REPONSES POSSIBLES

- Oui	1
- Non	2
- [NSP/SR]	9

a) Administration publique.....	1 2 9
b) Universités et autres institutions dans l'éducation	1 2 9
c) Laboratoires publics ou centres de recherche	1 2 9
d) Grandes entreprises.....	1 2 9
e) Petites et Moyennes Entreprises	1 2 9
f) Start-up / Entreprises récemment créées	1 2 9
g) Institutions financières.....	1 2 9

- Pharmaceuticals & medical devices	3
- Construction (materials, equipment, heavy construction).....	4
- Automotive	5
- Metal manufacturing	6
- Plastics.....	7
- Chemical products	8
- Textiles, leather, footwear.....	9
- Energy.....	10
- Production equipment (machinery, electrical)	11
- Food	12
- Entertainment.....	13
- Services	14
- Other... ..	15
- [DK/NA].....	99

Q12. [CLUSTER]: Do you cooperate with the following partners in the cluster?

[REGION]: Do you cooperate with the following partners in the region?

SEVERAL ANSWERS POSSIBLE

Yes	1
- No	2
- [DK/NA]	9

a) Public Administration.....	1 2 9
b) University and other education institutions.....	1 2 9
c) Public laboratories or research centres.....	1 2 9
d) Large companies.....	1 2 9
e) Small and Medium Enterprises	1 2 9
f) Start-ups / Newly established companies	1 2 9
g) Financial institutions	1 2 9

Q13. [CLUSTER]: Faire partie du cluster dans lequel vous êtes actif vous donne-t-il un avantage pour être compétitif sur le ...
 [REGION]: Etre présent dans votre région vous donne-t-il un avantage pour être compétitif sur le...
 PLUSIEURS REPONSES POSSIBLES

- Oui 1
- Non 2
- [NSP/SR] 9

- a) Marché local 1 2 9
- b) Marché régional..... 1 2 9
- c) Marché national 1 2 9
- d) Marché européen 1 2 9
- e) Marché mondial..... 1 2 9

Q14. [CLUSTER]: Veuillez me dire pour chacune des activités et chacun des domaines suivants s'ils sont caractéristiques de votre cluster ?
 [REGION]: Veuillez me dire pour chacune des activités et chacun des domaines suivants s'ils ont caractéristiques de votre région ?
 LIRE – FAIRE UNE ROTATION DE L'ORDRE DES ITEMS –
 PLUSIEURS REPONSES POSSIBLES

- Caractéristique 1
- Pas caractéristique 2
- [NSP/SR] 9

- a) Echanger des informations liées aux technologies... 1 2 9
- b) Echanger des informations liées au marché 1 2 9
- c) Echanger sur les meilleures pratiques 1 2 9

Q13. [CLUSTER]: Does being part of the cluster you are active in give you an advantage to compete on the ...
 [REGION]: Does being present in your region give you an advantage to compete on the ...
 SEVERAL ANSWERS POSSIBLE

- Yes 1
- No 2
- [DK/NA] 9

- a) Local market 1 2 9
- b) Regional market 1 2 9
- c) National market 1 2 9
- d) European market 1 2 9
- e) World market 1 2 9

Q14. [CLUSTER]: Please tell me for each of the following activities and areas if they are characteristic for your cluster?
 [REGION]: Please tell me for each of the following activities and areas if they are characteristic for your region?
 READ OUT – ROTATE – SEVERAL ANSWERS
 POSSIBLE

- Characteristic 1
- Not characteristic 2
- [DK/NA] 9

- a) Exchanging information on technology 1 2 9
- b) Exchanging information on market..... 1 2 9
- c) Exchanging best practices..... 1 2 9

<p>d) Développer des partenariats sur des projets professionnels spécifiques..... 1 2 9</p> <p>e) Développer des partenariats pour rivaliser sur le marché européen 1 2 9</p> <p>f) Embaucher des personnes qualifiées 1 2 9</p> <p>g) Stimuler l'esprit d'entreprise..... 1 2 9</p> <p>h) Faciliter l'accès au financement 1 2 9</p> <p>i) Faciliter l'accès au terrain..... 1 2 9</p> <p>j) Faciliter le partage des infrastructures (par ex. les bâtiments, les laboratoires de recherche, les bureaux de formation) 1 2 9</p> <p>k) Accéder aux infrastructures de recherche (laboratoires, universités, etc...)..... 1 2 9</p> <p>l) Réduire le temps d'entrée sur le marché 1 2 9</p>		<p>d) Developing partnerships on specific business projects1 2 9</p> <p>e) Developing partnerships to compete on the European market..... 1 2 9</p> <p>f) Hiring of skilled people 1 2 9</p> <p>g) Stimulating the entrepreneurship spirit..... 1 2 9</p> <p>h) Facilitating access to finance 1 2 9</p> <p>i) Facilitating access to land 1 2 9</p> <p>j) Facilitating sharing of infrastructures (e.g. buildings, research labs, training facilities) 1 2 9</p> <p>k) Accessing to research infrastructures (labs, universities, etc)..... 1 2 9</p> <p>l) Shortening time to enter market 1 2 9</p>
<p>Q15. [CLUSTER]: La demande pour des produits ou des services innovants est-elle plus importante au sein du cluster, comparée à la demande à l'extérieur de celui-ci ? [REGION]: La demande pour des produits ou des services innovants est-elle plus importante dans la région, comparée à la demande à l'extérieur de celle-ci ? LIRE – UNE SEULE REPONSE POSSIBLE</p> <p>- Oui, significativement plus importante..... 1</p> <p>- Oui, légèrement plus haute 2</p> <p>- Non, elle est identique dans les deux cas 3</p> <p>- Non, elle est plus faible..... 4</p> <p>- [NSP/SR] 9</p>		<p>Q15. [CLUSTER]: Is the demand for innovative products or services higher in the cluster, if compared to demand outside of it? [REGION]: Is the demand for innovative products or services higher in your region, if compared to demand outside of it? READ OUT – ONE ANSWER ONLY</p> <p>- Yes significantly higher 1</p> <p>- Yes slightly higher 2</p> <p>- No, it is similar in both cases 3</p> <p>- No, it is lower 4</p> <p>- [DK/NA] 9</p>
<p>Q16. [CLUSTER]: Dans quelle mesure est-il bénéfique pour les différents services de votre société d'appartenir à un cluster? [REGION]: Dans quelle mesure est-il bénéfique pour les différents services de votre société d'être dans votre région ? LIRE – PLUSIEURS REPONSES POSSIBLES</p>		<p>Q16. [CLUSTER]: How beneficial is it for the various departments in your company being in a cluster? [REGION]: How beneficial is it for the various departments in your company being in your region? READ OUT – SEVERAL ANSWERS POSSIBLE</p>

- Nettement bénéfique 1
- Plutôt bénéfique 2
- A peine ou pas bénéfique 3
- [Pas de tel service] 8
- [NSP/SR] 9

- a) Recherche & Développement 1 2 3 8 9
- b) Marketing 1 2 3 8 9
- c) Ventas 1 2 3 8 9
- d) Production 1 2 3 8 9
- e) Ressources Humaines 1 2 3 8 9
- f) Approvisionnement/achat/fourniture 1 2 3 8 9

Q17. Veuillez me dire si vous êtes d'accord ou pas avec chacune des affirmations suivantes :
PLUSIEURS REPONSES POSSIBLES

- D'accord 1
- Pas d'accord 2
- [NSP/SR] 9

a)[CLUSTER]: Comparée aux autres régions, la concurrence est plus intense dans le cluster
[REGION]: Comparée aux autres régions, la concurrence est plus intense dans votre région..... 1 2 9

FILTRE, DEMANDER b. c. et d., UNIQUEMENT SI Q17a = 1

b)[CLUSTER]: Une concurrence plus élevée dans le cluster est positive pour une compétitivité améliorée
[REGION]: Une concurrence plus élevée dans votre région est positive pour une compétitivité améliorée 1 2 9
c)[CLUSTER]: Une concurrence plus élevée fait partie de la réussite du cluster

- Highly beneficial..... 1
- Somewhat beneficial..... 2
- Barely or not beneficial 3
- [No such department] 8
- [DK/NA] 9

- a) Research & Development 1 2 3 8 9
- b) Marketing 1 2 3 8 9
- c) Sales 1 2 3 8 9
- d) Production 1 2 3 8 9
- e) Human resources 1 2 3 8 9
- f) Procurement / acquisition / supply 1 2 3 8 9

Q17. Please tell me if you agree or disagree with each of the following statements:
SEVERAL ANSWERS POSSIBLE

- Agree 1
- Disagree..... 2
- [DK/NA] 9

a)[CLUSTER]: Competition is more intense in the cluster compared to other regions
[REGION]: Competition is more intense in your region compared to other regions..... 1 2 9

FILTER, ASK b. c. and d, ONLY IF Q17a = 1

b)[CLUSTER]: Higher competition in the cluster is positive for improved competitiveness
[REGION]: Higher competition in your region is positive for improved competitiveness 1 2 9
c)[CLUSTER]: A higher competition is part of the success of the cluster

<p>[REGION]: Une concurrence plus élevée fait partie de la réussite de ma région 1 2 9 d)[CLUSTER]: Une concurrence plus élevée dans le cluster limite la capacité de développement des entreprises [REGION]: Une concurrence plus élevée dans votre région limite la capacité de développement des entreprises ... 1 2 9</p> <p>POSER A TOUS</p> <p>Q18. Avez-vous élargi la gamme de vos activités au cours des 5 dernières années (en proposant par exemple des nouveaux services destinés aux clients) ? LIRE – UNE SEULE REPONSE POSSIBLE</p> <p>[CLUSTER]:- Oui, et faire partie d'un cluster a facilité les choses [REGION]:- Oui, et faire partie de ma région a facilité les choses 1 [CLUSTER]: -Oui, mais faire partie d'un cluster n'a pas spécialement facilité les choses [REGION]: -Oui, mais faire partie de ma région n'a pas spécialement facilité les choses 2 - Non 3 - [NSP/SR] 4</p>	<p>[REGION]: A higher competition is part of the success of my region 1 2 9 d)[CLUSTER]: Higher competition in the cluster limits the development capacity of firms [REGION]: Higher competition in your region limits the development capacity of firms 1 2 9</p> <p>ASK ALL</p> <p>Q18. Did you extend the scope of your activities in the last 5 years (meaning for example by adding new services to your customers)? READ OUT – ONE ANSWER ONLY</p> <p>[CLUSTER]:- Yes, and being in a cluster facilitated it [REGION]:- Yes, and being in my region facilitated it 1 [CLUSTER]: -Yes, but being in a cluster did not especially facilitate it [REGION]: -Yes, but being in my region did not especially facilitate it 2 - No 3 - [DK/NA] 4</p>
<p>FILTRE Q19 : DEMANDER UNIQUEMENT A CEUX QUI CONSIDERENT FAIRE PARTIE D'UN CLUSTER, Q7 = 1.</p>	<p>FILTER Q19: ASK ONLY FROM THOSE WHO CONSIDER THEY ARE IN A CLUSTER, Q7 = 1.</p>
<p>Q19. Concernant la localisation de votre société, avec quelle affirmation êtes-vous d'accord : LIRE – UNE SEULE REPONSE POSSIBLE</p>	<p>Q19. Concerning the location of your firm which statement do you agree with: READ OUT – ONE ANSWER ONLY</p>

<p>- Votre société s'est installée (a été créée ou a déménagé) dans son emplacement géographique actuel pour des raisons autres que le fait de faire partie d'un cluster, ou..... 1</p> <p>- Faire partie d'un cluster a été un facteur significatif dans la localisation de votre société2</p> <p>- [NSP/SR] 9</p> <p>Q20. [CLUSTER]: Pensez-vous que les autorités publiques ont un rôle à jouer pour soutenir votre cluster ? [REGION]: Pensez-vous que les autorités publiques ont un rôle à jouer pour soutenir votre région ? LIRE – UNE SEULE REPONSE POSSIBLE</p> <p>- Oui, leur rôle est fondamental 1</p> <p>- Oui, leur rôle est important 2</p> <p>- Oui, mais leur rôle est limité 3</p> <p>- Non 4</p> <p>- NSP/SR..... 9</p> <p>Q21. Connaissez-vous des plans stratégiques pour faire reconnaître votre région pour ses compétences dans un ou plusieurs secteurs d'activité ? LIRE – UNE SEULE REPONSE POSSIBLE</p> <p>- Oui, dans le secteur dans lequel ma société est active..... 1</p> <p>- Oui, mais dans un secteur dans lequel ma société n'est pas active..... 2</p> <p>- Non 3</p> <p>- NSP/SR..... 9</p>		<p>- Your firm was located (created or moved) at its current location for reasons different than being in a cluster, or..... 1</p> <p>- Being in the cluster was a significant driver in locating your firm..... 2</p> <p>- [DK/NA] 9</p> <p>Q20. [CLUSTER]: Do you consider that public authorities have a role to play to support your cluster? [REGION]: Do you consider that public authorities have a role to play to support your region? READ OUT – ONE ANSWER ONLY</p> <p>- Yes, their role is fundamental 1</p> <p>- Yes, their role is important 2</p> <p>- Yes, but their role is limited..... 3</p> <p>- No 4</p> <p>- DK/NA 9</p> <p>Q21. Are you aware of strategic plans to make your region recognized for its competence in one or several industry sectors? READ OUT – ONE ANSWER ONLY</p> <p>- Yes, in the sector my firm is active in 1</p> <p>- Yes, but in a sector my firm is not active in ... 2</p> <p>- No 3</p> <p>- DK/NA 9</p>
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Q22. [CLUSTER:] A partir de la liste d'instruments suivants, pouvez-vous me dire quels sont ceux qui sont actuellement fournis par les autorités publiques pour soutenir votre cluster ?
 [REGION:] A partir de la liste d'instruments suivants, pouvez-vous me dire quels sont ceux qui sont actuellement fournis par les autorités publiques pour soutenir votre région ?
 PLUSIEURS REPONSES POSSIBLES

- Actuellement fourni 1
 - Pas fourni actuellement 2
 - NSP/SR..... 9

a) Soutien financier direct pour financer des projets spécifiques..... 1 2 9
 b) Faciliter les procédures administratives 1 2 9
 c) Fournir des bâtiments ou d'autres infrastructures..... 1 2 9
 d) Projets de réduction d'impôts / de taxes sur les dépenses liées à la recherche, au développement et à l'innovation 1 2 9
 e) Projets de réduction d'impôts / de taxes sur les dépenses non liées à la recherche, au développement et à l'innovation 1 2 9
 f) Organiser des évènements publics (salons, missions commerciales, ...)..... 1 2 9
 g) Faciliter le travail en réseau avec les universités, les administrations 1 2 9
 h) Faciliter le travail en réseau avec les entreprises 1 2 9
 i) Soutenir le développement de la pépinière d'entreprises 1 2 9
 j) Soutenir l'amélioration de la réputation de la région/du cluster 1 2 9
 k) Faciliter la transmission des informations (besoins du marché, situation du marché, nouvelle réglementation...) 1 2 9
 l) Faciliter les relations intra-nationales avec les autres clusters ou les autres aires géographiques..... 1 2 9

Q22. [CLUSTER:] From the following list of instruments, please tell me which are the ones currently provided by public authorities to support your cluster?
 [REGION:] From the following list of instruments, please tell me which are the ones currently provided by public authorities to support your region?
 SEVERAL ANSWERS POSSIBLE

- Currently provided..... 1
 - Currently not provided 2
 - DK/NA 9

a) Direct financial support to finance specific projects . 1 2 9
 b) Facilitate administrative procedures..... 1 2 9
 c) Provide buildings or other infrastructures..... 1 2 9
 d) Tax reduction schemes on R&D and innovation expenditures 1 2 9
 e) Tax reduction schemes on non-R&D and non-innovation expenditures 1 2 9
 f) Organisation of public events (fairs, trade missions...) 1 2 9
 g) Facilitate networking with universities, administration 1 2 9
 h) Facilitate networking with firms 1 2 9
 i) Support incubator development..... 1 2 9
 j) Support the improvement of the region/cluster reputation 1 2 9
 k) Facilitate transmission of information (market needs, market situation, new regulation...) 1 2 9
 l) Facilitate trans-national relation with other clusters or geographic areas..... 1 2 9

Q23 [CLUSTER:] Selon vous, dans quels domaines les autorités publiques devraient-elles améliorer leurs activités pour mieux soutenir le développement de votre cluster ?
[REGION:] Selon vous, dans quels domaines les autorités publiques devraient-elles améliorer leurs activités pour mieux soutenir le développement de votre région ?

PLUSIEURS REPONSES POSSIBLES

- Devrait améliorer 1
- N'a pas besoin d'améliorer 2
- NSP/SR..... 9

- a) Soutien financier direct pour financer des projets spécifiques..... 1 2 9
- b) Faciliter les procédures administratives..... 1 2 9
- c) Fournir des bâtiments ou d'autres infrastructures..... 1 2 9
- d) Projets de réduction d'impôts / de taxes sur les dépenses liées à la recherche, au développement et à l'innovation1 2 9
- e) Projets de réduction d'impôts / de taxes sur les dépenses non liées à la recherche, au développement et à l'innovation 1 2 9
- f) Organiser des événements publics (salons, missions commerciales, ...)..... 1 2 9
- g) Faciliter le travail en réseau avec les universités, les administrations 1 2 9
- h) Faciliter le travail en réseau avec les entreprises..... 1 2 9
- i) Soutenir le développement de la pépinière d'entreprises 1 2 9
- j) Soutenir l'amélioration de la réputation de la région/du cluster 1 2 9
- k) Faciliter la transmission des informations (besoins du marché, situation du marché, nouvelle réglementation...)1 2 9
- l) Faciliter les relations intra-nationales avec les autres clusters ou les autres aires géographiques..... 1 2 9

Q23 [CLUSTER:] In your opinion, in which areas should public authorities improve their activities to better support your cluster's development:
[REGION:] In your opinion, in which areas should public authorities improve their activities to better support your region's development:

SEVERAL ANSWERS POSSIBLE

- Should improve 1
- Don't need to be improved 2
- DK/NA 9

- a) Direct financial support to finance specific projects .. 1 2 9
- b) Facilitate administrative procedures..... 1 2 9
- c) Provide buildings or other infrastructures..... 1 2 9
- d) Tax reduction schemes on Research&Development and innovation expenditures..... 1 2 9
- e) Tax reduction schemes on non-Research&Development and non-innovation expenditures 1 2 9
- f) Organisation of public events (fairs, trade missions...) 1 2 9
- g) Facilitate networking with universities, administration1 2 9
- h) Facilitate networking with firms 1 2 9
- i) Support incubator development..... 1 2 9
- j) Support the improvement of the region/cluster reputation..... 1 2 9
- k) Facilitate transmission of information (market needs, market situation, new regulation...) 1 2 9
- l) Facilitate trans-national relation with other clusters or geographic areas..... 1 2 9

<p>Q24. [CLUSTER:] Considérez-vous que développer les relations avec d'autres clusters européens, actifs dans le même secteur d'activités, est :</p> <p>[REGION:] Considérez-vous que développer les relations avec d'autres régions européennes, actives dans le même secteur d'activités, est :</p> <p>LIRE – UNE SEULE REPONSE POSSIBLE</p> <ul style="list-style-type: none"> - une menace, ou 1 - une opportunité 2 - NSP/SR..... 9 <p>D6. Pour terminer, j'aimerais vous demander si la Commission Européenne pourrait ou non vous recontacter à l'avenir afin de vous informer sur les opportunités qu'elle offre aux sociétés qui participent à des clusters. Si vous êtes d'accord, nous communiquerons le nom de votre entreprise à la Commission Européenne, si vous n'êtes pas d'accord, votre entreprise restera entièrement anonyme.</p> <p>LIRE – UNE SEULE REPONSE POSSIBLE</p> <ul style="list-style-type: none"> - D'accord pour être recontacté ultérieurement 1 - Pas d'accord pour être recontacté ultérieurement 2 	<p>Q24. [CLUSTER:] Do you consider that developing relationships with other European clusters active in the same business area is:</p> <p>[REGION:] Do you consider that developing relationships with other European regions active in the same business area is:</p> <p>READ OUT – ONE ANSWER ONLY</p> <ul style="list-style-type: none"> - a threat, or..... 1 - an opportunity 2 - DK/NA 9 <p>D6. Finally, I would like to ask you whether or not the European Commission could re-contact you in the future in order to inform you about opportunities it offers for firms participating in clusters. If you agree, we will share the name of your company with the European Commission, if you don't, you're company will remain completely anonymous.</p> <p>READ OUT – ONE ANSWER ONLY</p> <ul style="list-style-type: none"> - Agrees to be recontacted later..... 1 - Does not agree to be recontacted later 2
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SELECTION OF THE ELIGIBLE RESPONDENT

SC0.

Hello / Good afternoon / Good evening, my name is _____ and I am from [AGENCY]. We are conducting an opinion poll on the European Commission among business decision-makers. The survey takes about 5-8 minutes to complete.

FIRST SCREENER

D1. Let me start with a few basic questions regarding your company. How many employees do you have in your company?

- Less than 20 0
- 20-49..... 1
- 50-249..... 2
- 250-499..... 3
- 500 or more 4
- [DK/NA]..... 9

IF LESS THAN 20 THANK AND TERMINATE THANK AND TERMINATE

SECOND SCREENER

D2. When, in which year was your company established?

- before 1986..... 1
- between 1986 and 2001 2
- after 2001..... 3
- [DK/NA]..... 9

D3. Between the last two completed financial years, how did your turnover - that is, the annual income of your firm - change?

- It decreased 1
- Increased by less than 5%..... 2
- Increased by 6 to 25%..... 3
- Increased by more than 25%..... 4
- Did not change 5
- [there are no two completed financial years] 6
- [DK/NA]..... 9

D4. NOT TO BE ASKED, RECORD FROM DATABASE:
NACE code of the main activity of company

D5. NOT TO BE ASKED, RECORD FROM DATABASE:
NUTS region of company (NUTS 2 level)

Q1. Does your company (its local establishment) have significantly stronger linkages with suppliers and service providers that are geographically close than with others?

INTERVIEWER: BY "FIRM" OR "COMPANY" WE MEAN THE LOCAL ESTABLISHMENT OF THE COMPANY, IF IT IS NOT CLEAR FOR THE RESPONDENT.

ONE ANSWER ONLY

- Yes 1
- No 2
- [DK/NA]..... 9

Q2. In your region, does your firm have contacts with other firms, universities and administrative bodies to discuss common problems or potential shared opportunities?

READ OUT – ONE ANSWER ONLY

- Yes frequently 1
- Yes occasionally 2
- Only rarely 3
- Never 4
- [DK/NA]..... 9

Q3. Is your firm located in a region where the concentration of firms working in the same business sector as yours is:

READ OUT– ONE ANSWER ONLY

- Higher than elsewhere in the country 1
- Similar as elsewhere in the country 2
- Lower than elsewhere in the country 3
- [DK/NA]..... 9

Q4. INTERVIEWER, READ OUT SLOWLY

Economists often talk about so-called clusters. Clusters are geographically close groups of interconnected companies, suppliers, service providers, and associated institutions in a particular field.

In a cluster all these actors are linked in several ways. These include their similar situation (e.g. same working sector, common market, common problems to face) and their complementary functions (e.g. university labs can help private firms; several firms can develop new products together, or enter new markets together).

Clusters are often working in a particular region, and sometimes in a single town.

Were you aware of this concept of cluster?

ONE ANSWER ONLY

- Yes..... 1
- No 2
- [DK/NA]..... 9

Q5. Are there clusters active in your region, in your field of activity?

ONE ANSWER ONLY

- Yes..... 1
- No 2
- [DK/NA]..... 9

1 point is given for each of the following responses:

- Q1 – 1
- Q2 – 1
- Q3 – 1
- Q4 – 1
- Q5 – 1

Maximum score is 5 points.

Interview will be carried out only with companies which scored 4 or more.

MAIN QUESTIONNAIRE

Q7. Do you consider that your firm is part of a cluster, or not?
ONE ANSWER ONLY

- Yes..... 1
- No 2
- [DK/NA]..... 9

IF Q7 = 1, SELECT [CLUSTER] IN ALL QUESTIONS WHERE INDICATED

IF Q7 = 2 OR 9, SELECT [REGION] IN ALL QUESTIONS WHERE INDICATED

Q8 Does your firm ACTIVELY participate in one or more networks containing local companies (competitors, suppliers, clients) and/or public administration involved in the same business sector?
READ OUT – ONE ANSWER ONLY

- Yes, in one such network..... 1
- Yes, in two or more such networks..... 2
- No 3
- [DK/NA]..... 9

Q9. In the last two years, did your firm:
READ OUT – ROTATE – SEVERAL ANSWERS POSSIBLE

- Yes..... 1
- No 2
- [DK/NA]..... 9

- a) Conduct market research for introducing new products or services 1 2 9
- b) Introduce new or significantly improved products or services 1 2 9
- c) Introduce new or significantly improved production technology 1 2 9
- d) Apply for one or more patents 1 2 9
- e) Register one or more international trademarks 1 2 9
- f) Carry out research in your own laboratories 1 2 9
- g) Contract out research to other firms, universities or research institutes. 1 2 9

Q10. In which sector does your company carry out its main activities?
READ OUT – ONE ANSWER ONLY

- ICT and Communication equipment 1
- Aeronautics and Space 2
- Pharmaceuticals & medical devices 3
- Construction (materials, equipment, heavy construction)..... 4
- Automotive..... 5
- Metal manufacturing 6
- Plastics 7
- Chemical products 8
- Textiles, leather, footwear..... 9
- Energy 10
- Production equipment (machinery, electrical) 11
- Food 12
- Entertainment 13
- Services 14
- Other... 15
- [DK/NA]..... 99

Q12. [CLUSTER]: Do you cooperate with the following partners in the cluster?
[REGION]: Do you cooperate with the following partners in the region?
SEVERAL ANSWERS POSSIBLE

- Yes..... 1

- No 2
- [DK/NA]..... 9
- a) Public Administration 1 2 9
b) University and other education institutions 1 2 9
c) Public laboratories or research centres..... 1 2 9
d) Large companies 1 2 9
e) Small and Medium Enterprises 1 2 9
f) Start-ups / Newly established companies 1 2 9
g) Financial institutions..... 1 2 9
- Q13. [CLUSTER]: Does being part of the cluster you are active in give you an advantage to compete on the ...
[REGION]: Does being present in your region give you an advantage to compete on the ...
SEVERAL ANSWERS POSSIBLE
- Yes..... 1
- No 2
- [DK/NA]..... 9
- a) Local market 1 2 9
b) Regional market..... 1 2 9
c) National market 1 2 9
d) European market 1 2 9
e) World market..... 1 2 9
- Q14. [CLUSTER]: Please tell me for each of the following activities and areas if they are characteristic for your cluster?
[REGION]: Please tell me for each of the following activities and areas if they are characteristic for your region?
READ OUT – ROTATE – SEVERAL ANSWERS POSSIBLE
- Characteristic 1
Not characteristic 2
- [DK/NA]..... 9
- a) Exchanging information on technology 1 2 9
b) Exchanging information on market 1 2 9
c) Exchanging best practices 1 2 9
d) Developing partnerships on specific business projects 1 2 9
e) Developing partnerships to compete on the European market..... 1 2 9
f) Hiring of skilled people..... 1 2 9
g) Stimulating the entrepreneurship spirit 1 2 9
h) Facilitating access to finance 1 2 9
i) Facilitating access to land..... 1 2 9
j) Facilitating sharing of infrastructures (e.g. buildings, research labs, training facilities) 1 2 9
k) Accessing to research infrastructures (labs, universities, etc) 1 2 9
l) Shortening time to enter market..... 1 2 9
- Q15. [CLUSTER]: Is the demand for innovative products or services higher in the cluster, if compared to demand outside of it?
[REGION]: Is the demand for innovative products or services higher in your region, if compared to demand outside of it?
READ OUT – ONE ANSWER ONLY
- Yes significantly higher 1
- Yes slightly higher..... 2
- No, it is similar in both cases 3
- No, it is lower 4
- [DK/NA]..... 9
- Q16. [CLUSTER]: How beneficial is it for the various departments in your company being in a cluster?
[REGION]: How beneficial is it for the various departments in your company being in your region?
READ OUT – SEVERAL ANSWERS POSSIBLE

- Highly beneficial 1
- Somewhat beneficial 2
- Barely or not beneficial 3
- [No such department] 8
- [DK/NA]..... 9

- a) Research & Development 1 2 3 8 9
- b) Marketing 1 2 3 8 9
- c) Sales 1 2 3 8 9
- d) Production..... 1 2 3 8 9
- e) Human resources..... 1 2 3 8 9
- f) Procurement / acquisition / supply 1 2 3 8 9

Q17. Please tell me if you agree or disagree with each of the following statements:
SEVERAL ANSWERS POSSIBLE

- Agree 1
- Disagree 2
- [DK/NA]..... 9

- a)[CLUSTER]: Competition is more intense in the cluster compared to other regions
- [REGION]: Competition is more intense in your region compared to other regions..... 1 2 9

FILTER, ASK b. c. and d, ONLY IF Q17a = 1

- b)[CLUSTER]: Higher competition in the cluster is positive for improved competitiveness
- [REGION]: Higher competition in your region is positive for improved competitiveness 1 2 9
- c) A higher competition is part of the success of the cluster or of my region 1 2 9
- d)[CLUSTER]: Higher competition in the cluster limits the development capacity of firms
- [REGION]: Higher competition in your region limits the development capacity of firms 1 2 9

ASK ALL

Q18. Did you extend the scope of your activities in the last 5 years (meaning for example by adding new services to your customers)?
READ OUT – ONE ANSWER ONLY

- [CLUSTER]:- Yes, and being in a cluster facilitated it
- [REGION]:- Yes, and being in my region facilitated it..... 1
- [CLUSTER]: -Yes, but being in a cluster did not especially facilitate it
- [REGION]: -Yes, but being in my region did not especially facilitate it .. 2
- No 3
- [DK/NA]..... 4

FILTER Q19: ASK ONLY FROM THOSE WHO CONSIDER THEY ARE IN A CLUSTER, Q7 = 1.

Q19. Concerning the location of your firm which statement do you agree with:
READ OUT – ONE ANSWER ONLY

- Your firm was located (created or moved) at its current location for reasons different than being in a cluster, or 1
- Being in the cluster was a significant driver in locating your firm 2
- [DK/NA]..... 9

Q20. [CLUSTER]: Do you consider that public authorities have a role to play to support your cluster?
 [REGION]: Do you consider that public authorities have a role to play to support your region?
 READ OUT – ONE ANSWER ONLY

- Yes, their role is fundamental 1
- Yes, their role is important 2
- Yes, but their role is limited 3
- No 4
- DK/NA..... 9

Q21. Are you aware of strategic plans to make your region recognized for its competence in one or several industry sectors?
 READ OUT – ONE ANSWER ONLY

- Yes, in the sector my firm is active in 1
- Yes, but in a sector my firm is not active in 2
- No 3
- DK/NA..... 9

Q22. [CLUSTER:] From the following list of instruments, please tell me which are the ones currently provided by public authorities to support your cluster?
 [REGION:] From the following list of instruments, please tell me which are the ones currently provided by public authorities to support your region?
 SEVERAL ANSWERS POSSIBLE

- Currently provided 1
- Currently not provided 2
- DK/NA..... 9

- a) Direct financial support to finance specific projects 1 2 9
- b) Facilitate administrative procedures 1 2 9
- c) Provide buildings or other infrastructures..... 1 2 9
- d) Tax reduction schemes on R&D and innovation expenditures 1 2 9
- e) Tax reduction schemes on non-R&D and non-innovation expenditures 1 2 9
- f) Organisation of public events (fairs, trade missions...)..... 1 2 9
- g) Facilitate networking with universities, administration 1 2 9
- h) Facilitate networking with firms 1 2 9
- i) Support incubator development 1 2 9
- j) Support the improvement of the region/cluster reputation 1 2 9
- k) Facilitate transmission of information (market needs, market situation, new regulation...) 1 2 9
- l) Facilitate trans-national relation with other clusters or geographic areas 1 2 9

Q23 [CLUSTER:] In your opinion, in which areas should public authorities improve their activities to better support your cluster's development:
 [REGION:] In your opinion, in which areas should public authorities improve their activities to better support your region's development:

SEVERAL ANSWERS POSSIBLE

- Should improve 1
- Don't need to be improved 2
- DK/NA..... 9

- a) Direct financial support to finance specific projects 1 2 9
- b) Facilitate administrative procedures 1 2 9
- c) Provide buildings or other infrastructures..... 1 2 9
- d) Tax reduction schemes on Research&Development and innovation expenditures..... 1 2 9
- e) Tax reduction schemes on non-Research&Development and non-innovation expenditures 1 2 9
- f) Organisation of public events (fairs, trade missions...)..... 1 2 9
- g) Facilitate networking with universities, administration 1 2 9
- h) Facilitate networking with firms 1 2 9
- i) Support incubator development 1 2 9
- j) Support the improvement of the region/cluster reputation 1 2 9
- k) Facilitate transmission of information (market needs, market situation, new regulation...) 1 2 9

I) Facilitate trans-national relation with other clusters or geographic areas 1 2 9

Q24. [CLUSTER:] Do you consider that developing relationships with other European clusters active in the same business area is:
[REGION:] Do you consider that developing relationships with other European regions active in the same business area is:
READ OUT – ONE ANSWER ONLY

- a threat, or 1
- an opportunity 2
- DK/NA..... 9

D6. Finally, I would like to ask you whether or not the European Commission could re-contact you in the future in order to inform you about opportunities it offers for firms participating in clusters. If you agree, we will share the name of your company with the European Commission, if you don't, your company will remain completely anonymous.
READ OUT – ONE ANSWER ONLY

- Agrees to be recontacted later 1
- Does not agree to be recontacted later 2

Survey details

This Flash Eurobarometer 187: “Innobarometer among enterprises in the EU and other European countries” telephone survey was conducted on behalf of the DG Enterprise and Industry of the European Commission, Unit D-1. The objective of the survey was to explore the various attributes of European companies operating in clusters, and the managers’ views on the opportunities and challenges of this situation. Another important aim of the survey was to estimate the proportion of firms operating in a cluster-like environment in the various European countries.

The current special target group Flash Eurobarometer survey was organised and managed by the Eurobarometer Team of the European Commission (Directorate-General Communication, Unit A-4).

The interviews were conducted between the 29th of May and the 5th of July 2006 by partner institutes of The Gallup Organization Hungary / Europe:

Belgium	BE	Gallup Europe	(Interviews : 13/06/2006 – 19/06/2006)
Czech Republic	CZ	Focus Agency	(Interviews : 12/06/2006 – 28/06/2006)
Denmark	DK	Hermelin	(Interviews : 08/06/2006 – 05/07/2006)
Germany	DE	IFAK	(Interviews : 02/06/2006 – 05/07/2006)
Estonia	EE	Saar Poll	(Interviews : 06/06/2006 – 16/06/2006)
Greece	EL	Metroanalysis	(Interviews : 06/06/2006 – 03/07/2006)
Spain	ES	Gallup Spain	(Interviews : 16/06/2006 – 05/07/2006)
France	FR	Efficience3	(Interviews : 02/06/2006 – 04/07/2006)
Ireland	IE	Gallup UK	(Interviews : 06/06/2006 – 21/06/2006)
Italy	IT	Demoskopoea	(Interviews : 06/06/2006 – 23/06/2006)
Cyprus	CY	CYMAR	(Interviews : 02/06/2006 – 06/06/2006)
Latvia	LV	Latvian Facts	(Interviews : 07/06/2006 – 19/06/2006)
Lithuania	LT	Baltic Survey	(Interviews : 05/06/2006 – 15/06/2006)
Luxembourg	LU	Gallup Europe	(Interviews : 08/06/2006 – 05/07/2006)
Hungary	HU	Gallup Hungary	(Interviews : 29/05/2006 – 07/06/2006)
Malta	MT	MISCO	(Interviews : 02/06/2006 – 30/06/2006)
Netherlands	NL	Telder	(Interviews : 09/06/2006 – 05/07/2006)
Austria	AT	Spectra	(Interviews : 07/06/2006 – 04/07/2006)
Poland	PL	Gallup Poland	(Interviews : 05/06/2006 – 28/06/2006)
Portugal	PT	Consulmark	(Interviews : 05/06/2006 – 27/06/2006)
Slovenia	SI	Cati d.o.o.	(Interviews : 02/06/2006 – 27/06/2006)
Slovakia	SK	Focus Agency	(Interviews : 01/06/2006 – 30/06/2006)
Finland	FI	Hermelin	(Interviews : 05/06/2006 – 14/06/2006)
Sweden	SE	Hermelin	(Interviews : 07/06/2006 – 14/06/2006)
United Kingdom	UK	Gallup UK	(Interviews : 13/06/2006 – 29/06/2006)
Bulgaria	BG	Vitosha Research	(Interviews : 01/06/2006 – 08/06/2006)
Croatia	HR	Gallup Croatia	(Interviews : 05/06/2006 – 05/07/2006)
Romania	RO	Gallup Romania	(Interviews : 05/06/2006 – 15/06/2006)
Turkey	TR	Konsensus	(Interviews : 02/06/2006 – 27/06/2006)
Norway	NO	Fieldwork Scandinavia	(Interviews : 07/06/2006 – 27/06/2006)
Switzerland	CH	M.I.S. Trend S.A	(Interviews : 07/06/2006 – 23/06/2006)
Iceland	IS	IMG Gallup	(Interviews : 12/06/2006 – 29/06/2006)

(Dates corrected by the Data Archive)

Representativeness of the results

The target group for this Flash Eurobarometer was defined as companies employing 20 or more persons, operating in the 25 Member States of the European Union, the accession countries (Bulgaria and Romania), and the candidate countries (Turkey and Croatia), as well as in Switzerland, Norway and Iceland.

The lists of companies qualified to be interviewed were developed by Dun and Bradstreet. Where the D&B database had a poor coverage (especially in the New Member States and candidate countries) the sample lists were developed by national institutes using local statistical data sources. Sampling in each country was made according to two stratification criteria: the size of the company (3 categories: 20 - 49, 50 - 249 and 250 or more employees), and the activity sectors, randomly.

The target activities were: Information technology, Medical devices, Production technology, Communications equipment, Biopharmaceuticals, Automotive, Analytical Industry, Construction Equipment, Metal Manufacturing, Lighting and electrical Equipment, Aerospace Vehicles, Defence, Plastics, Construction Materials, Entertainment, Transportation and Logistics, Furniture, Processed Food, Business services, Aerospace Engines, Chemical Products, Heavy machinery, Power Generation and transmission, Building Fixtures, Equipment, Services, Hospitality and tourism, Publishing and Printing, Textiles, Financial services, Oil and gas products and services, Apparel, Distribution services, Fishing and fishing products, Heavy construction services, Footwear, Jewellery and precious metals, Sporting and children Goods, Leather.

Within the employment size the categories were defined (20-49 employees: 50% ; 50-249 employees: 30% ; 250+ employees: 20%), but the selection of companies by the activity categories was made at random.

The total sample was distributed between these sampling "cells" in a way that does not follow the actual distribution of businesses within the coverage zone: larger businesses were intentionally "over-sampled" in order to get enough cases in these low incidence cells as well, for meaningful results in each sample segment.

During data processing, each cell in the cross distribution of the sample was re-weighted up or down according to its actual, empirically verified known weight within the survey region. Thus, the total results presented are not affected by over- and under-sampling, and are representative of the total universe examined – both for country-level as well as global (e.g. EU-25, NMS10, etc.) estimations. Country weights for global cluster company estimations were developed on the basis of the size of the universe in each country and the proportion of firms working in a cluster-like environment (see below).

The person interviewed in each company was a top-level executive responsible for strategic decision making (typically General Manager, Financial Director, or significant owner). The interviewers checked the identity of this person as well as the accuracy of the enterprise sampling characteristics, as delivered by sample list, namely: the number of employees.

Sizes of the samples

The survey design used a two-step sampling approach. In the first step, we screened from the randomly selected companies those that work in a cluster-like environment (i.e. have strong local linkages, work in close relationship with other local market players, higher industry density in the region, cluster in the respective industry exists, awareness of cluster concept) regardless of a declared cluster membership. As a second step, we have conducted a longer interview with decision makers of firms operating in cluster-like environment.

The sampling procedure was designed on the initial hypothesis that approximately 10% of the companies in the selected industry sectors will be members of a cluster on the average in Europe. As we have had no available statistics for the individual countries we generally targeted ten times as many short interviews (to estimate the proportion of clustered businesses) as the number of the desired main interviews we wanted to achieve among companies active in a cluster.

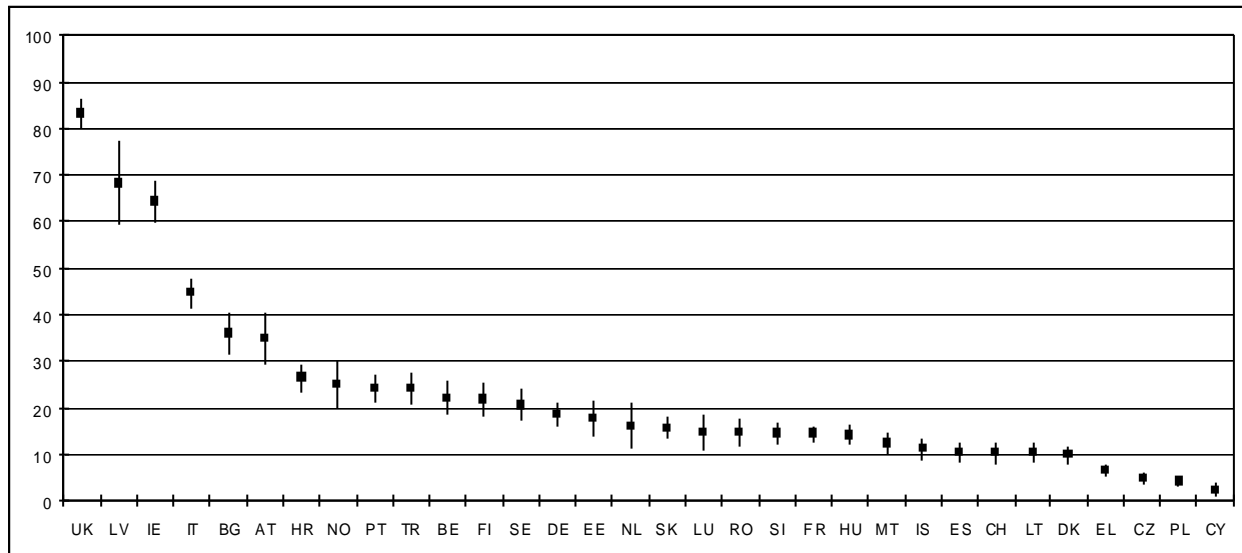
The targeted number of main interviews varied somewhat by the size of the country; however, the default desired sample size was 100 in an average-sized country covered by the survey. In Germany, Spain, France, Italy, Poland and the UK the target main sample size was 200. In Iceland and Malta, the target number of the main interviews was 40; in other smaller countries it was 66 (Estonia, Cyprus, Latvia, Lithuania, and Luxembourg). Also, in the non-EU countries the target sample size was 66 (Bulgaria, Croatia, Romania, Turkey, Switzerland and Norway)

	Total interviews conducted	Main interviews conducted		Total interviews conducted	Main interviews conducted
TOTAL	20994	3528			
Belgium	490	102	Netherlands	220	34
Czech Republic	1058	45	Austria	295	102
Denmark	942	71	Poland	2084	84
Germany	821	151	Portugal	814	153
Estonia	375	66	Slovenia	638	90
Greece	1073	70	Slovakia	808	125
Spain	807	83	Finland	462	100
France	1676	230	Sweden	512	104
Ireland	398	228	UK	493	408
Italy	913	362	Bulgaria	389	95
Cyprus	255	6	Croatia	638	126
Latvia	101	66	Romania	574	81
Lithuania	683	66	Turkey	612	115
Luxembourg	270	39	Norway	273	67
Hungary	980	111	Switzerland	637	66
Malta	343	42	Iceland	360	40

Reliability of cluster-membership estimations in each country:

	Estimated size of the universe	N of screener interviews	Cluster-like environment Score 4+5	% operating in CLE	Margin of error (at 95% confidence)
BE	13879	490	108	22.04	3.6
CZ	21848	1058	51	4.82	1.28
DK	21248	942	93	9.87	1.87
DE	140249	821	151	18.39	2.62
EE	6432	375	66	17.6	3.77
EL	7163	1073	71	6.62	1.41
ES	70692	807	84	10.41	2.06
FR	81922	1676	241	14.38	1.64
IE	6414	398	256	64.32	4.57
IT	77230	913	407	44.58	3.21
CY	1166	255	6	2.35	1.52
LV	8596	101	69	68.32	9.04
LT	6727	683	70	10.25	2.13
LU	1417	270	40	14.82	3.83
HU	13727	980	138	14.08	2.09
MT	777	343	42	12.25	2.57
NL	66568	220	35	15.91	4.84
AT	13310	295	103	34.92	5.38
PL	111658	2084	85	4.08	0.83
PT	21018	814	196	24.08	2.88
SI	2916	638	92	14.42	2.38
SK	6490	808	126	15.59	2.37
FI	7743	462	100	21.65	3.66
SE	11887	512	106	20.70	3.45
UK	74956	493	410	83.16	3.3
BG	8805	389	140	35.99	4.66
HR	4764	638	168	26.33	3.17
RO	23484	574	84	14.63	2.89
TR	26453	612	147	24.02	3.34
NO	7499	273	68	24.91	5.04
CH	19579	637	66	10.36	2.29
IS	766	360	40	11.11	2.35

Proportion of enterprises operating in cluster-like environment and the confidence intervals (in %):



Questionnaires

The questionnaire prepared for this survey contained two parts: the screener questionnaire with 5 questions to determine the score whether the company can be interviewed, and the main questionnaire.

The institutes listed above translated the questionnaire to their respective national language(s) using a centralized process of back-translation procedure, involving two initial local translations, independent back-translation and central verification of the localised questionnaires.

Further details

For further details you may contact Gallup or The European Commission. The relevant contacts are:

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