



Please fill in the questionnaire and return it to AEB employees or send it to AEBSurvey2019@aebrus.ru by April 25, 2019

The questionnaire can be also completed online by following the link https://web70.gfk.com/projects/RUS081_209_00013_1/addrandom.asp

The survey is conducted with the support of the International Institute of Marketing and Social Research "GfK Rus" which will ensure confidentiality of all answers.

There will be a lottery conducted among the companies that participated in the survey.

AEB Survey 2019 Strategies and Prospects for European Companies in Russia

Basic data

Company name:	
Headquarters:	

Part I: General company information

1. Please indicate your company's market sector

1	Automotive	
2	Engineering & Construction	
3	Energy & Natural Resources	
4	Chemicals & Pharmaceuticals	
5	IT & Telecommunications	
6	FMCG & Retail	
7	Financial Services (banking, insurance, etc.)	
8	Professional Services (audit, legal, consulting, etc.)	
9	Media & Entertainment	
10	Transport & Logistics	
11	Hospitality Industry	
12	Other	

2. What is the size of your company in Russia?

		2017	2018
1	Total no. of employees		
2	No. of Russian employees		
3	Market share, %		

3. How did the company turnover in 2018 compare to 2017?

1	Increase	
2	No change	
3	Decrease	

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Part II: Market entry

4. How important were the following reasons for your entry into the Russian market?
(please indicate all reasons)

		very important	important	not important
1	Market size			
2	Large potential of Russian market/ good forecasts			
3	Positive market dynamics			
4	Lucrative raw material costs			
5	Skilled personnel			
6	Low personnel costs			
7	Russian government support/ incentives			
8	Low competition/ highly fragmented market			
9	Other			

5. How important are the selected "very important" reasons in the current market?
(please answer for all reasons indicated as "very important" in question #5)

		still very important	relatively important	not important
1	Market size			
2	Large potential of Russian market/ good forecasts			
3	Positive market dynamics			
4	Lucrative raw material costs			
5	Skilled personnel			
6	Low personnel costs			
7	Russian government support/ incentives			
8	Low competition/ highly fragmented market			
9	Other			

Part III: Business culture

6. How would you evaluate the level of business interaction in Russia?
(please rank all applicable)

		positively	neutrally	negatively
1	Contractors			
2	Clients/customers			
3	Customs authorities			
4	Tax authorities			
5	Legislative bodies			
6	Other government officials			
7	Suppliers			

Part IV: Production/services

7. What are the most significant barriers to business (production operations/ service provision)? (please choose a maximum of 3 barriers)

1	Cuts in public utility services (electricity, water, etc.)	
2	Unavailability of developed land plots	
3	Regulatory restrictions	
4	Lack of qualified personnel	
5	Lack of state-of-the-art production facilities	
6	Insufficient quality of input materials	
7	Insufficient reliability of supply chain	
8	Other	

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Part V: Financing

8. Have you ever resorted to court action to recover debts?

1	No, we have never suffered bad debts	
2	No, we did not think that the courts would resolve the problem	
3	Yes, we went to court and we were successful	
4	Yes, we went to court but were not successful	

9. How do you expect your investments to change in 2019 vs. 2018?

1	Increase	
2	No change	
3	Decrease	

10. What do you expect to be the most significant barriers to financing in 2019?

(please choose a maximum of 3 barriers)

1	High interest rates	
2	Restricted access to bank credits	
3	Limited number of financial instruments offered by Russian banks	
4	Regulatory restrictions by the Central Bank minimizing the flexibility of banks to re-structure existing loans	
5	Difficulty in raising capital on stock market	
6	Unwillingness of institutional investors to provide loans	
7	Unwillingness of shareholders to provide loans	
8	Insufficient cash flow/auto financing capacity	
9	None of above	
10	Other	

Part VI: Business environment

11. How has the overall state of the economy developed over the first 3 months compared to your expectations at the start of the year?

1	Better	
2	As expected	
3	Worse	

12. How would you evaluate the economic outlook for Russia?

(please indicate for all categories)

		fast growth	slow growth	stagnation	slow decline	fast decline
1	Short term (1-2 years)					
2	Medium term (3-5 years)					
3	Long term (6-10 years)					

13. How do you think investment by foreign companies in Russia will develop over the next 2-3 years? *(please indicate for all applicable)*

		increase	no change	decrease
1	in your industry			
2	in Russia as whole			

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14. What degree of improvement do you expect for each of the following operational challenges over the next two years? *(please indicate for all items)*

		significant	moderate	not at all
1	Customs regulations			
2	Taxes and duties			
3	Bureaucracy			
4	Labour force capabilities			
5	Infrastructure			
6	Corruption			
7	Rising labour costs			
8	Reliability of supply chain partners			
9	Legal constraints on activities			

Part VII: Company strategy and prospects

15. In 2019, how do business results in the first 3 months compare to targets?

1	Better results	
2	Forecast results	
3	Worse results	

16. What is your 3-year forecast for your company's business in Russia?

		growth	no change	decrease
1	Turnover			
2	Profit			

Part VIII: Current economic and political situation

17. How did Russia's WTO accession affect your business in Russia?

1	Positively	
2	Somewhat positively	
3	Did not affect	
4	Somewhat negatively	
5	Negatively	

18. What is the impact of the following factors on your company?

(please indicate for all items)

		Positive	No effect / impact	Negative
1	Import substitution / localization			
2	US policy towards Russia			
3	Oil price			
4	Rouble volatility			
5	Sanctions towards Russia			
6	Russian counter sanctions towards the EU and US			
7	Russian economic policy			
8	Relations between Russia and Ukraine			

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19. What is the impact of the following factors on the Russian economy?

(please indicate for all items)

		Positive	No effect / impact	Negative
1	Import substitution / localization			
2	US policy towards Russia			
3	Oil price			
4	Rouble volatility			
5	Sanctions towards Russia			
6	Russian counter sanctions towards the EU and US			
7	Russian economic policy			
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Part IX. Conclusion

20. If you are interested in meeting with our experts to discuss the "AEB Survey 2019" in detail, please indicate your contact details below.

21. If you wish to comment on this survey, the economy, politics or other topics please do so below. Some comments will be included in the survey report.

Thank you for your participation!

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