### DESCRIPTION OF THE ACTION ON THE BUSINESS AND CONSUMER SURVEYS

### 1 WORK PROGRAMME, TIMING, TRANSMISSION OF RESULTS

**1.1** The **beneficiary** shall carry out the following surveys according to the timing set out under point 1.2:

Industry survey Investment survey Construction survey Retail trade survey Service survey Consumer survey

The **beneficiary** shall use for these surveys the questionnaires set out in this annex. These questions must precede any other questions which the **beneficiary** may pose on the same occasion.

### 1.2 Timing

- 1.2.1 Industry, Construction, Retail trade, Services and Consumer surveys will be carried out on a monthly basis as follows:
  - The **beneficiary** will do the fieldwork in the first two weeks of the month "t". (t = month during which the data are collected).
  - The **beneficiary** will do the calculations required and will send the results labelled as "results of month t" to the **Commission** in accordance with the following calendar:

The data collected during: Should be sent at the latest by<sup>1</sup>:

The quarterly questions are included in the questionnaire in January, April, July and October.

- **1.2.2** For the **Investment** survey, the beneficiary will carry out:
  - The Autumn survey in October/November and will send the data to the Commission at least 5 working days before the end of November, [i.e.] by midday.
  - The Spring survey in March/April and will send the data to the Commission <u>at least</u> 5 working days before the end of April, [i.e. ] by midday.

### 1.3 Transmission of results

### **1.3.1** For the **Consumer** survey:

<sup>&</sup>lt;sup>1</sup> As a general rule, data should be e-mailed to the Commission at least 5 working days (7 working days in case of consumer survey) before the end of the current month (except for the December results which can be delivered by 3 January).

The **beneficiary** will provide the Commission with one excel file containing two worksheets, via e-mail on a monthly basis:

The first worksheet will contain the summarised results of the survey. The results obtained for each question will be broken down by category of respondents according to the nomenclature attached to the consumer questionnaire in this annex and expressed as percentages of replies (figures with at least 1 decimal).

The second worksheet will contain the complete set of individual answers including the weight for each person.

The **beneficiary** will also provide a detailed description of the sample used. The sample size by category will be communicated in a separate file, together with the individual answers.

1.3.2 For the Industry, Investment, Construction, Retail trade and Services surveys:

The **beneficiary** will provide the Commission, via e-mail, with one excel file for each survey carried out. The results obtained for each question will be broken down according to the nomenclature attached to the questionnaires in this annex and expressed as percentage of replies, except for those numerical questions, i.e. assured months of production, capacity utilisation, percentage change in investment, etc (all figures with at least 1 decimal).

**1.3.3** Files with the exact **layout** of the results are available and should be requested from the **Commission** by e-mail: <u>ECFIN-BCS-MAIL@EC.EUROPA.EU</u>

The results will be sent in an excel format according to the exact layout and specifications set out by the Commission to the following electronic addresses, or to such other addresses as may be notified to the beneficiary from time to time in accordance with Article I.5 of the framework partnership agreement:

Results for surveys in **Consumers**: <u>ECFIN-BCS-CONS@EC.EUROPA.EU</u>

Results for surveys in **Industry**: ECFIN-BCS-INDU@EC.EUROPA.EU

Results for surveys in **Investment**: ECFIN-BCS-INVE@EC.EUROPA.EU

Results for surveys in **Construction**: ECFIN-BCS-BUIL@EC.EUROPA.EU

Results for surveys in **Retail trade**: <u>ECFIN-BCS-RETA@EC.EUROPA.EU</u>

Results for surveys in **Services**: ECFIN-BCS-SERV@EC.EUROPA.EU

### 2 THE JOINT HARMONISED EU INDUSTRY SURVEY

### 2.1 Industry survey - Questionnaire

Answers to all questions should be given by abstracting from seasonal variations.

- Q1 How has your production developed over the past 3 months? It has...
  - + increased
  - = remained unchanged
  - decreased
- Q2 Do you consider your current overall order books to be...?
  - + more than sufficient (above normal)
  - = sufficient (normal for the season)
  - not sufficient (below normal)
- Q3 Do you consider your current export order books to be...?
  - + more than sufficient (above normal)
  - = sufficient (normal for the season)
  - not sufficient (below normal)
- Q4 Do you consider your current stock of finished products to be...?
  - + too large (above normal)
  - = adequate (normal for the season)
  - too small (below normal)
- Q5 How do you expect your production to develop over the next 3 months? It will...
  - + increase
  - = remain unchanged
  - decrease
- Q6 How do you expect your selling prices to change over the next 3 months? They will...
  - + increase
  - = remain unchanged
  - decrease

Q7 How do you expect your firm's total employment to change over the next 3 months? It will...

+ increase
= remain unchanged
- decrease

# Quarterly questions (January, April, July and October)

- **Q8** What main factors are currently limiting your production?
  - none
  - insufficient demand
  - shortage of labour force
  - shortage of material and/or equipment
  - financial constraints
  - other factors
- Q9 Considering your current order books and the expected change in demand over the coming months, how do you assess your current production capacity?

  The current production capacity is....
  - + more than sufficient
  - = sufficient
  - not sufficient
- **Q10** How many months of production are assured by your current overall order books? Our production is assured for □□.□ months
- Q11 How have your orders developed over the past 3 months? They have...
  - + increased
  - = remained unchanged
  - decreased
- Q12 How do you expect your export orders to develop over the next 3 months? They will...
  - + increase
  - = remain unchanged
  - - decrease
- Q13 At what capacity is your company currently operating (as a percentage of full capacity)?

The company is currently operating at  $\square \square . \square$  % of full capacity.

- Q14 How has your competitive position on the domestic market developed over the past 3 months? It has...
  - + improved
  - = remained unchanged
  - deteriorated
- Q15 How has your competitive position on foreign markets inside the EU developed over the past 3 months? It has...
  - + improved
  - = remained unchanged
  - deteriorated
- Q16 How has your competitive position on foreign markets outside the EU developed over the past 3 months? It has...
  - + improved
  - = remained unchanged
  - deteriorated

# 2.2 Industry survey - Classification of sectors (NACE Rev. 2) and allocation of NACE headings to main industrial groupings

NACE CODE		DESCRIPTION		
10		Manufacture of food products		
	10.1	Processing and preserving of meat and production of meat products	CNDU	
	10.2	Processing and preserving of fish, crustaceans and molluscs	CNDU	
	10.3	Processing and preserving of fruit and vegetables	CNDU	
	10.4	Manufacture of vegetable and animal oils and fats	CNDU	
	10.5	Manufacture of dairy products	CNDU	
	10.6	Manufacture of grain mill products, starches and starch products	INTM	
	10.7	Manufacture of bakery and farinaceous products	CNDU	
	10.8	Manufacture of other food products	CNDU	
	10.9	Manufacture of prepared animal feeds	INTM	
11		Manufacture of beverages	<b>CNDU</b>	
12		Manufacture of tobacco products	<b>CNDU</b>	
13		Manufacture of textiles		
	13.1	Preparation and spinning of textile fibres	<b>INTM</b>	
	13.2	Weaving of textiles	<b>INTM</b>	
	13.3	Finishing of textiles	INTM	
	13.9	Manufacture of other textiles	CNDU	
14		Manufacture of wearing apparel	<b>CNDU</b>	
15		Manufacture of leather and related products	<b>CNDU</b>	
		Manufacture of wood and of products of wood and cork, except		
16		furniture; manufacture of articles of straw and plaiting materials	INTM	
17		Manufacture of paper and paper products	INTM	
18		Printing and reproduction of recorded media	CNDU	
19		Manufacture of coke and refined petroleum products		
20		Manufacture of chemicals and chemical products		
		Manufacture of basic chemicals, fertilisers and nitrogen compounds, plastic		
	20.1	and synthetic rubber in primary forms	INTM	
	20.2	Manufacture of pesticides and other agrochemical products	INTM	
	20.2	Manufacture of paints, varnishes and similar coatings, printing ink and	INTM	
	20.3	mastics  Manufacture of soap and detergents, cleaning and polishing preparations,	11/11/11	
	20.4	perfumes and toilet preparations	CNDU	
	20.4	Manufacture of other chemical products	INTM	
	20.6	Manufacture of man-made fibres	INTM	
	20.0	Manufacture of mari-made noises  Manufacture of basic pharmaceutical products and pharmaceutical	11 ( 11 ) 1	
21		preparations	CNDU	
22		Manufacture of rubber and plastic products	INTM	
23		Manufacture of other non-metallic mineral products	INTM	
24		Manufacture of basic metals	INTM	
		Manufacture of fabricated metal products, except machinery and		
25		equipment		
	25.1	Manufacture of structural metal products	INVE	
	25.2	Manufacture of tanks, reservoirs and containers of metal	INVE	
	25.3	Manufacture of steam generators, except central heating hot water boilers	INVE	
	25.4	Manufacture of weapons and ammunition	INVE	
	25.5	Forging, pressing, stamping and roll-forming of metal; powder metallurgy	INTM	
	25.6	Treatment and coating of metals; machining	MTML	
	25.7	Manufacture of cutlery, tools and general hardware	INTM	
	25.9	Manufacture of other fabricated metal products	INTM	
26		Manufacture of computer, electronic and optical products		
	26.1	Manufacture of electronic components and boards	INTM	
	26.2	Manufacture of computers and peripheral equipment	INVE	
	26.3	Manufacture of communication equipment	INVE	

### ANNEX I TO THE SPECIFIC GRANT AGREEMENT

	26.4	Manufacture of consumer electronics	CDUR
		Manufacture of instruments and appliances for measuring, testing and	D.IX.ID
	26.5	navigation; watches and clocks	INVE
	26.6	Manufacture of irradiation, electromedical and electrotherapeutic equipment	
	26.7	Manufacture of optical instruments and photographic equipment	CDUR
	26.8	Manufacture of magnetic and optical media	INTM
27		Manufacture of electrical equipment	
	27.1	Manufacture of electric motors, generators, transformers and electricity	INTM
	27.1	distribution and control apparatus  Manufacture of batteries and accumulators	INTM
	27.2		INTM
		Manufacture of wiring and wiring devices	INTM
	27.4	Manufacture of electric lighting equipment	CDUR
	27.5	Manufacture of domestic appliances	INTM
••	27.9	Manufacture of other electrical equipment	INTM
28		Manufacture of machinery and equipment n.e.c.	
29		Manufacture of motor vehicles, trailers and semi-trailers	INVE
30	20.1	Manufacture of other transport equipment	DIX.
	30.1	Building of ships and boats	INVE
	30.2	Manufacture of railway locomotives and rolling stock	INVE
	30.3	Manufacture of air and spacecraft and related machinery	INVE
	30.4	Manufacture of military fighting vehicles	INVE
	30.9	Manufacture of transport equipment n.e.c.	CDUR
31		Manufacture of furniture	CDUR
32		Other manufacturing	
	32.1	Manufacture of jewellery, bijoutery and related articles	CDUR
	32.2	Manufacture of musical instruments	CDUR
	32.3	Manufacture of sports goods	CNDU
	32.4	Manufacture of games and toys	CNDU
	32.5	Manufacture of medical and dental instruments and supplies	INVE
	32.9	Manufacturing n.e.c.	CNDU
33		Repair and installation of machinery and equipment	INVE
CDUR		Durable consumer goods	
CNDU		Non-durable consumer goods	
FOBE		Food and beverages industry (10.1-10.5, 10.7-10.8, 11, 12)	
CONS		Consumer goods (CDUR+CNDU)	
INTM		Intermediate goods (excluding mining and quarrying)	
INVE		Investment goods	
TOTA		Total manufacturing = CONS + INTM + INVE + 19	

### 3 THE JOINT HARMONISED EU INVESTMENT SURVEY

### 3.1 Investment survey - Questionnaire

March/April survey

### **Investment plans:**

- Q1 State percentage change in investment last year (t-1) on investment two years ago (t-2):
- Q2 State percentage change in investment this year (t) on investment last year (t-1):  $\square\square\square.\square$  %

### October/November survey

### **Investment plans:**

- Q1 State percentage change in investment this year (t) on investment last year (t-1):
- Q2 State percentage change in investment next year (t+1) on investment this year (t):

### **Structure of the investment:**

Investment carried out this year and planned investment for next year is, or will be, of the following kind (choose the appropriate category or categories):

- Replacement of worn-out plant or equipment
- Extension of production capacity
- Investment designed to streamline production
- Other investment objectives (pollution control, safety, etc.)

### **Factors influencing investment**: for this year (t) and next year (t + 1)

#### • Demand

This heading covers the capacity utilisation rate and sales prospects. The degree of certainty as to how these variables will change is likely to be as relevant as the change itself.

- ++ very stimulating
- + stimulating
- = no influence
- limiting
- -- very limiting
- N no answer

### • Financial resources or expected profits

This heading covers the availability of resources for investment (and their cost) together with the return on investment and the lack of opportunities for the company to use its resources more profitably than by investment (notably by purely financial operations).

- ++ very stimulating
- + stimulating
- = no influence
- limiting
- -- very limiting
- N no answer

### Technical factors

The main ones are technological developments, the availability of labour and its attitude towards the new technologies, and the technical conditions set by the public authorities before they grant the investment permit.

- ++ very stimulating
- + stimulating
- = no influence
- limiting
- -- very limiting
- N no answer

#### Other factors

This may include the policy of the public authorities, notably with regard to taxation, and whether or not production can be transferred abroad.

- ++ very stimulating
- + stimulating
- = no influence
- limiting
- -- very limiting
- N no answer

# 3.2 Investment survey - Classification by sectors and by size of firms

29	Manufacture of motor vehicles, trailers and semi-trailers		
<b>CDUR</b>	Durable consumer goods		
CNDU	Non-durable consumer goods		
<b>FOBE</b>	Food and beverages industry (10.1-10.5, 10.7-10.8, 11, 12)		
CONS	Consumer goods (CDUR+CNDU)		
INTM	Intermediate goods (excluding mining and quarrying)		
INVE	Investment goods (includes 29)		
SIZ1	Businesses employing fewer than 50 people		
SIZ2	Businesses employing 50-249 people		
SIZ3	Businesses employing 250-499 people		
SIZ4	Businesses employing 500 people or more		
SIZ5	Businesses employing fewer than 250 people		
SIZ6	Businesses employing 250 people or more		
ТОТА	Total manufacturing industry = CONS + INTM + INVE + 19		

### 4 THE JOINT HARMONISED EU CONSTRUCTION SURVEY

### 4.1 Construction survey - Questionnaire

Answers to all questions should be given by abstracting from seasonal variations.

Monthly question
------------------

- Q1 How has your building activity developed over the past 3 months? It has...
  - + increased
  - = remain unchanged
  - decreased
- Q2 What main factors are currently limiting your building activity?
  - none
  - insufficient demand
  - weather conditions
  - shortage of labour force
  - shortage of material and/or equipment
  - financial constraints
  - other factors
- Q3 Do you consider your current overall order books to be...?
  - + more than sufficient (above normal)
  - = sufficient (normal for the season)
  - not sufficient (below normal)
- Q4 How do you expect your firm's total employment to change over the next 3 months? It will...
  - + increase
  - = remain unchanged
  - decrease
- Q5 How do you expect the prices you charge to change over the next 3 months? They will...
  - + increase
  - = remain unchanged
  - decrease

# Quarterly question (January, April, July and October)

Q6 Assuming normal	working hours,	about how man	ny months'	work is accour	nted for by
the work in hand a	and the work alre	eady contracted	l for?		

Number of months: □□.□

# **4.2** Construction survey - Classification of sectors

NACE CODE	DESCRIPTION
41	Construction of buildings
42	Civil engineering
43	Specialised construction activities
TOTF	Total construction

#### 5 THE JOINT HARMONISED EU RETAIL TRADE SURVEY

### 5.1 Retail trade survey - Questionnaire

Answers to all questions should be given by abstracting from seasonal variations.

- Q1 How has (have) your business activity (sales) developed over the past 3 months? It has... (They have...)
  - + improved (increased)
  - = remained unchanged
  - deteriorated (decreased)
- Q2 Do you consider the volume of stock you currently hold to be...?
  - + too large (above normal)
  - = adequate (normal for the season)
  - too small (below normal)
- Q3 How do you expect your orders placed with suppliers to change over the next 3 months? They will...
  - + increase
  - = remain unchanged
  - decrease
- Q4 How do you expect your business activity (sales) to change over the next 3 months? It (They) will...
  - + improve (increase)
  - remain unchanged
  - deteriorate (decrease)
- Q5 How do you expect your firm's total employment to change over the next 3 months? It will...
  - + increase
  - = remain unchanged
  - decrease
- **Q6** How do you expect the prices you charge to change over the next 3 months? They will...
  - + increase
  - = remain unchanged
  - decrease

# **5.2 Retail trade survey - Classification of sectors**

NACE CODE	Grouping	DESCRIPTION
45		Wholesale and retail trade and repair of motor vehicles and motorcycles
	MVS	Sale of motor vehicles (45.1)
	MVRM	Maintenance of motor vehicles and sale of accessories (45.2 - 45.4)
47		Retail trade, except of motor vehicles and motorcycles
	FBT	Retail sale of Food, Beverages, Tobacco (47.1, 47.2, 47.8)
	FUEL	Retail sale of automotive fuel (47.3)
	OTHERS	Retail sale of other goods (47.4 - 47.7, 47.9)
TOTR		45 + 47

### 6 THE JOINT HARMONISED EU SERVICES SURVEY

### 6.1 Services survey - Questionnaire

Answers to all questions should be given by abstracting from seasonal variations.

- Q1 How has your business situation developed over the past 3 months? It has...
  - + improved
  - = remained unchanged
  - deteriorated
- Q2 How has demand (turnover) for your company's services changed over the past 3 months? It has...
  - + increased
  - = remained unchanged
  - decreased
- Q3 How do you expect the demand (turnover) for your company's services to change over the next 3 months? It will...
  - + increase
  - = remain unchanged
  - decrease
- Q4 How has your firm's total employment changed over the past 3 months? It has...
  - + increased
  - = remained unchanged
  - decreased
- Q5 How do you expect your firm's total employment to change over the next 3 months? It will...
  - + increase
  - = remain unchanged
  - decrease
- Q6 How do you expect the prices you charge to change over the next 3 months? They will...
  - + increase
  - = remain unchanged
  - decrease

# Quarterly question (January, April, July and October)

- Q7 What main factors are currently limiting your business?
  - none
  - insufficient demand
  - shortage of labour force
  - shortage of space and/or equipment
  - financial constraints
  - other factors
- Q8 If the demand expanded, could you increase your volume of activity with your present resources? Yes –No

If so, by how much? ...%

# **6.2 Services survey - Classification of sectors**

NACE CODE	DESCRPTION
	Transportation and storage
49	Land transport and transport via pipelines
50	Water transport
51	Air transport
52	Warehousing and support activities for transportation
53	Postal and courier activities
	Accommodation and food service activities
55	Accommodation
56	Food and beverage service activities
	Information and communication
58	Publishing activities
50	Motion picture, video and television programme production, sound
59	recording and music publishing activities
60	Programming and broadcasting activities
61	Telecommunication
62	Computer programming, consultancy and related activities
63	Information service activities
<i>C</i> 4	Financial and insurance activities
64	Financial service activities, except insurance and pension funding
65	Insurance, reinsurance and pension funding, except compulsory social security
66	Activities auxiliary to financial services and insurance activities
68	Real estate activities
00.	Professional, scientific and technical activities
69	Legal and accounting activities
70	Activities of head offices; management consultancy activities
, •	Architectural and engineering activities; technical testing and
71	analysis
72	Scientific research and development
73	Advertising and market research
74	Other professional, scientific and technical activities
75	Veterinary activities
	Administrative and support service activities
77	Rental and leasing activities
78	Employment activities
	Travel agency, tour operator and other reservation service and
79	related activities
80	Security and investigation activities
81	Services to buildings and landscape activities
82	Office administrative, office support and other business support activities
04	Arts, entertainment and recreation
90	Creative, arts and entertainment activities
91	Libraries, archives, museums and other cultural activities
92	Gambling and betting activities
93	Sports activities and amusement and recreation activities
	Other service activities
94	Activities of membership organisations
95	Repair of computers and personal and household goods
96	Other personal service activities
TOTS	Total

### 7 THE JOINT HARMONISED EU CONSUMER SURVEY

### 7.1 Consumer survey - Questionnaire

- Q1 How has the financial situation of your household changed over the last 12 months? It has...
  - ++ got a lot better
  - + got a little better
  - = stayed the same
  - got a little worse
  - -- got a lot worse
  - N don't know.
- Q2 How do you expect the financial position of your household to change over the next 12 months? It will...
  - ++ get a lot better
  - + get a little better
  - = stay the same
  - get a little worse
  - -- get a lot worse
  - N don't know.
- Q3 How do you think the general economic situation in the country has changed over the past 12 months? It has...
  - ++ got a lot better
  - + got a little better
  - = stayed the same
  - got a little worse
  - -- got a lot worse
  - N don't know.
- Q4 How do you expect the general economic situation in this country to develop over the next 12 months? It will...
  - ++ get a lot better
  - + get a little better
  - = stay the same
  - get a little worse
  - -- get a lot worse
  - N don't know.

Q5	How do you think that consumer prices have developed over the last 12 months? They have				
	++ + = -  N	risen a lot risen moderately risen slightly stayed about the same fallen don't know.			
		If question 5 was answered by 1, 2, 3 or 5: w many per cent do you think that consumer prices have gone up/down over st 12 months? (Please give a single figure estimate).			
	Consu	mer prices have increased by $\Box\Box\Box,\Box\%$ / decreased by $\Box\Box\Box,\Box\%$ .			
Q6	•	parison with the past 12 months, how do you expect that consumer prices will in the next 12 months? They will			
	++ + = -  N	increase more rapidly increase at the same rate increase at a slower rate stay about the same fall don't know.			
		If question 6 was answered by 1, 2, 3 or 5: w many per cent do you expect consumer prices to go up/down change in the 2 months? (Please give a single figure estimate).			
	Consu	mer prices will increase by □□□,□ % / decreased by □□□,□ %.			
<b>Q</b> 7		How do you expect the number of people unemployed in this country to change over the next 12 months? The number will			
	+ = -	increase sharply increase slightly remain the same fall slightly fall sharply don't know.			
Q8		of the general economic situation, do you think that now it is the right t for people to make major purchases such as furniture, electrical/electronic, etc.?			
	++	yes, it is the right moment now			

it is neither the right moment nor the wrong moment

no, it is not the right moment now

don't know.

N

- Q9 Compared to the past 12 months, do you expect to spend more or less money on major purchases (furniture, electrical/electronic devices, etc.) over the next 12 months? I will spend...
  - ++ much more
  - + a little more
  - = about the same
  - a little less
  - -- much less
  - N don't know.
- Q10 In view of the general economic situation, do you think that now is...?
  - ++ a very good moment to save
  - + a fairly good moment to save
  - not a good moment to save
  - -- a very bad moment to save
  - N don't know.
- Q11 Over the next 12 months, how likely is it that you save any money?
  - ++ very likely
  - + fairly likely
  - not likely
  - -- not at all likely
  - N don't know.
- Q12 Which of these statements best describes the current financial situation of your household?
  - ++ we are saving a lot
  - + we are saving a little
  - = we are just managing to make ends meet on our income
  - we are having to draw on our savings
  - -- we are running into debt
  - N don't know.

### Quarterly questions (January, April, July and October)

- Q13 How likely are you to buy a car over the next 12 months?
  - ++ very likely
  - + fairly likely
  - not likely
  - -- not at all likely
  - N don't know.
- Q14 Are you planning to buy or build a home over the next 12 months (to live in yourself, for a member of your family, as a holiday home, to let etc.)?
  - ++ yes, definitely
  - + possibly
  - probably not
  - -- no
  - N don't know.
- Q15 How likely are you to spend any large sums of money on home improvements or renovations over the next 12 months?
  - ++ very likely
  - + fairly likely
  - not likely
  - -- not at all likely
  - N don't know.

## 7.2 Consumer survey - Categories

### A. Income of the household

1st Quartile

2nd Quartile

3rd Quartile

4th Quartile

## B. Occupation of respondent

Self-employed and professional Self-employed farmers Clerical and office employees Skilled manual workers Other manual workers Total workers Other occupations Unemployed

### C. Working regime of respondent

Work full-time Work part-time

### D. Education of respondent

**Primary** 

Secondary

Further

### E. Age of respondent

16-29

30-49

50-64

65+

# F. Sex of respondent

Male

Female

### Total of the sample

TOTAL (aggregated file)