1. Introduction

The European footwear industry has faced many challenges recently, such as increased competition leading to restructuring and modernisation. Risk & Policy Analysts (RPA) has been asked by the European Commission (DG Enterprise and Industry – contact entr-textiles-fashion-and-forest-ind@ec.europa.eu) to carry out an in-depth assessment of the current status of the sector and its future prospects. The goal of the assessment is to better equip stakeholders, as well as regional, national and European authorities, to respond to the challenges.

We set out some questions below which will help us to analyse the current state of the industry. While some questions may be difficult to answer precisely; please provide your best estimate where possible. Please note that responses to this questionnaire will be handled in the strictest confidence and will only be used for the purposes of this study. In preparing our reports for the Commission (which may subsequently be published), care will be taken to ensure that specific responses cannot be linked to individual companies. If you have specific concerns about how your views will be treated, you can contact Eszter Kantor (see email below) and we will be happy to discuss your concerns

your views will be treated, you can contact Eszter Kantor (see email below) and we will be happy to discuss your concerns.
We would be very grateful if you could answer the following questions by 20 May 2011.
If you have difficulties with this on-line questionnaire, you may complete a version off-line and return to eszter.kantor@rpaltd.co.uk or by fax to +44 1508 520758.
Thank you very much for your assistance.

Footwear-Associations 2. About Your Association 1. Please provide the following details: Association's Name: Contact person: Location (Country): Telephone: E-mail Address: 2. How many members do you have in the following categories: Designers Manufacturer Suppliers Retailers Total 3. How many of your members are of the following sizes? Micro (less than 10 staff) Small (11 to 50 staff) Medium (51 to 250 staff) Large (more than 250 staff) 4. In which European countries are your member companies located **All EU-27 Countries** Germany Poland Austria Greece Portugal Belgium Romania Hungary Bulgaria Ireland Spain Italy Slovakia Cyprus Czech Republic Latvia Slovenia Lithuania Sweden Denmark Luxembourg United Kingdom Estonia EEA (Iceland, Norway and Finland Malta

Netherlands

France

Other (please specify)

Liechtenstein)

Macedonia, Turkey)

EU Candidate Countries (Croatia,

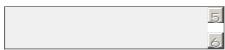
	What types of footwear products are your members involved with by PRICE TEGORY? Please tick all that apply
ē	Super premium segment
€	Premium segment
ē	Medium Segment
ē	Lower Segment
	What types of footwear products are your members involved with by TYPE OF OTWEAR? Please tick all that apply
€	Casual
ē	Formal
€	Evening
€	Sport
€	Safety/protective
	What types of footwear products are your members involved with by END USER? ase tick all that apply
€	Women's
€	Men's
€	Children's
	What types of footwear products are your members involved with by MATERIAL? ase tick all that apply
ē	Leather
€	Textile
€	Plastic/rubber
€	Other

3. Challenges for the European footwear industry

1. How significant have the following challenges been for your members been in the last five years?

	Not applicable	Not challenging	Slightly challenging	Moderately challenging	Very challenging
Access to finance	jn	ja	jn	j n	j n
Finding customers	j m	jn	j m	jn	j m
Competition	jn	j ta	jn	j n	j ro
Availability of skilled staff	j m	jn	j m	jn	j m
Costs of production	jn	j to	jn	jn	jn
Legislative requirements	j m	j m	j m	jm	j m
Counterfeit goods	jn	j to	j n	j n	j n
Patent protection	j m	jn	j m	jn	j m
Access to new markets	jn	j to	j n	j n	j n
Access to raw materials	j m	j n	j m	jn	j m
Development of new products	jn	j ta	j n	j n	jα
Changes in technology	jn	j m	j m	jn	j m
Integration of ICT	jn	j ta	j o	ja	j o
Innovation	jm	j m	j m	jm	j m
Other	j n	j n	j a	j n	j to

If Other, please specify



2. What actions have your members taken in the past 5 years in response to the challenges facing the footwear industry in Europe? Please tick all that apply

Reduced prices of products

Reduced costs through cheaper sourcing of raw materials

Reduced costs through increased productivity

Reduced costs through increased productivity

Product customisation

Improved image and communication

Outsourced of activities outside the EU

Changed method of distribution

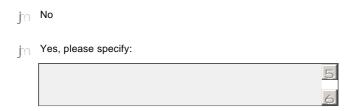
Improved product quality

Changed market sector

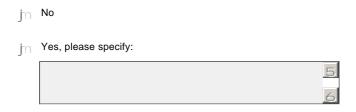
Other, please specify

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n of skilled staff oduction	Patent p	orotection to new markets	é		gy		
of skilled staff	€ Access t	to new markets		Integration of ICT			
oduction	<u> </u>		€				
	€ Access	to raw materials		Innovation			
se specify)							
		5					
		es available t	to the footy	vear industry	? Please		
centres		€ Financ	cial advisory cent	res			
centres		Marke	t access networks				
ntres		Export promotional services					
se specify							
		5					
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r	you are awar centres centres	you are aware of centres centres	you are aware of centres centres Marke htres Expor	you are aware of centres Financial advisory cent centres Market access networks et specify Export promotional serv se specify	centres		

6. For national/regional associations only. Are you aware of any regional or national strategies or programmes to support the footwear industry in your country? If yes, please list these below.



7. Do these strategies or programmes make special provisions for SMEs in the footwear sector? If yes, please indicate which.



8. Have these national strategies and programmes been helpful in assisting the footwear sector to deal with the challenges it faces?



9. What has been the impact of the following competitive elements on the footwear sector in your region within the period 2006 to 2010?

	Positive	Positive but expected to deteriorate	Negative	Negative but expected to improve
Increase in the cost of energy and utilities	j n	jα	jn	j o
Access to finance	jm	j m	j m	j m
Tightening of environmental regulation	jn	jα	j n	j ra
Access to public procurement	jm	j m	j m	j m
Access to raw materials	jn	jα	j n	j ra
Market regulation (Internal market)	jm	j m	j m	j m
Health and safety standards	j m	jα	j m	ja
EU Trade policy (i.e. Bilateral / multilateral agreements)	j m	j m	j m	j m
Rules of origin	j n	jn	jn	j o
Trade facilitation	jm	j m	j m	j m
Other	jn	jα	j n	j ra

If Other (please specify)

4.

Costs and Financin	g						
1. Have your member years?	's' costs of production	n changed sign	ificantly over the last 5				
j Costs have increased by over	er 50%	∱∩ No change					
jn Costs have increased by 25	-50%	Costs have reduce	ced				
jn Costs have increased by les	s than 25%						
2. How difficult is it for your members to gain access to finance?							
jn Very difficult	jn Quite difficult	j Quite easy	j⁻∩ Very easy				
3. Has gaining access years?	s to finance become e	asier or more d	ifficult over the last 5				
jn More difficult	jn About the same		j _n Easier				

5. Competition within the Footwear Sector

1. How has v	your members'	market r	osition o	changed	during th	e past 5	vears?
11 110 11 11ac	your momboro	111011101		,,,a,,goa	aaiiig u	io paci o	y care.

	Increased	Unchanged	Reduced	Do not know
Market share	j ta	j ra	jn	jta
Number of new products launched	j m	jn	j n	j m
Number of products sold	j ta	j ro	j o	j to
Value of products sold	h	h	i m	h

2. How do you expect your members' market position to change in the next 5 year

m	Become stronger	m	Stay the same	m	Become weaker
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3. For national associations only! How many footwear companies have closed and how many new companies have been established in your country in the past 5 years?

	Less than 5	6-10	11-20	More than 20
Number of companies closed	j n	j m	jm	j to
Number of new companies established	j n	j m	j n	jm
Please elaborate:				
		5		
		6		

4. Please indicate how important the following competitive factors are to your members:

	Not Important at all	Slightly important	Important	Very Important	Do not know
Quality	j sa	ja	j ta	j ta	j n
Price	j n	jn	j m	j n	J m
Price/quality ratio	j m	ja	j a	j ta	j tn
Customisation	j n	j m	j m	j m	j m
Flexibility to adapt to changing conditions	j a	jα	j n	ja	ja
Product range	j n	jn	j m	j n	j m
Services	j m	ja	j a	j ta	j tn
Other	j n	jn	j m	j m	j m
If Other, please specify					
			5		
			6		

5. Has the extent of competition from non-EU companies changed over the	ne last 5
years?	

jn Increased jn	Stayed the same	j m	Reduced
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Become stronger	∱∩ Stay the same	j_{\cap} Become weaker
. In your view, what are	the key advantages and d	isadvantages of the EU footwea
ndustry in comparison t	o its competitors?	
	Advantages	Disadvantages
vailability of labour	j n	j n
ccess to finance	j m	j u
vailability of technological innovation	ja ja	j n
ooperation within the supply chain	j m	j u
rade regulations of the internal marke	t ja	j m
roximity to market	jn	j m
ther	j∕n	ţa
Other, please specify		
	5	
What are the most imp	oortant geographical sourc	es of leather for footwear
anufacturing?		
Do not know	€ Russi	a
EU27	€ NAFT	A (USA, Mexico, Canada)
S. FETA (Isoland Namus) Ovites	<u> </u>	TA (USA, Mexico, Canada) (incl. China, India, Japan)
EFTA (Iceland, Norway, Switzerl	and, and Liechtenstein) E Asia	
EFTA (Iceland, Norway, Switzerl Non-EU Mediterranean countries	and, and Liechtenstein) Asia	incl. China, India, Japan)
EFTA (Iceland, Norway, Switzerl	and, and Liechtenstein) Asia	incl. China, India, Japan)
EFTA (Iceland, Norway, Switzerl Non-EU Mediterranean countries Other (please specify) How have the geograp	and, and Liechtenstein) Asia	incl. China, India, Japan)
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EFTA (Iceland, Norway, Switzerl Non-EU Mediterranean countries Other (please specify) How have the geograp 010? J27 TA (Iceland, Norway, Switzerland, a	Asia and, and Liechtenstein) Centre Chical sources of leather chical importance	incl. China, India, Japan) al/South America hanged over the period 2000 to Stable Decreasing importan
EFTA (Iceland, Norway, Switzerl Non-EU Mediterranean countries Other (please specify) How have the geograp 010? J27 TTA (Iceland, Norway, Switzerland, a echtenstein)	Asia control of the c	rincl. China, India, Japan) al/South America hanged over the period 2000 to Stable Decreasing important jo jo
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EFTA (Iceland, Norway, Switzerl Non-EU Mediterranean countries Other (please specify) How have the geograp 010? J27 FTA (Iceland, Norway, Switzerland, a echtenstein) on-EU Mediterranean countries ussia	Asia control of the c	hanged over the period 2000 to Stable Decreasing importar jo jo jo jo jo
EFTA (Iceland, Norway, Switzerl Non-EU Mediterranean countries Other (please specify) How have the geograp 010? TA (Iceland, Norway, Switzerland, a echtenstein) on-EU Mediterranean countries ussia AFTA (USA, Mexico, Canada)	Asia and, and Liechtenstein) Centre Chical sources of leather continuous importance Increasing importance in in in	hanged over the period 2000 to Stable Decreasing importar jo jo jo jo jo jo jo
EFTA (Iceland, Norway, Switzerl Non-EU Mediterranean countries Other (please specify) How have the geograp 010? TTA (Iceland, Norway, Switzerland, a echtenstein) on-EU Mediterranean countries ussia AFTA (USA, Mexico, Canada) sia (incl. China, India, Japan)	Asia and, and Liechtenstein) Asia and Centre Centre Centre Increasing importance	hanged over the period 2000 to Stable Decreasing importar jo j
EFTA (Iceland, Norway, Switzerl Non-EU Mediterranean countries Other (please specify)	Asia and, and Liechtenstein) Asia and Centre Centre Centre Increasing importance	hanged over the period 2000 to Stable Decreasing importar jo jo jo jo jo jo jo jo jo jo

tw	ear-Association	IS				
	Which competitor of			test threat to	CC	ompanies in your
	ion? Please tick all to Your own country	ınaı appıy €	China		Ē	India
	Brazil	ē	Thailand		Ē	Bosnia-Herzegovina
	Other EU 27	€	Vietnam		Ē	Indonesia
	Tunisia	€	Morocco		Ē	Croatia
	Other (please specify)			`		
€	Other (please specify)					

6. Innovation within the European Footwear Sector

1. What types of innovation are your members currently undertaking? Please tick all that apply

Ē	Technology innovation	ê	Service innovation
ê	Product innovation	ē	None
É	Production/process innovation		
ê	Other (please specify)		
			5
			6

2. How important are the following activities for innovation in your member companies?

	Not important at all	Slightly important	Important	Very important	Do not know
Cooperation with local/regional business networks	j o	j a	ja	j ta	ja
Cooperation with national business networks	j m	j n	j tn	j n	j n
Cooperation with international business networks	j o	j ro	jm	jα	j ta
Cooperation with research institutes	j n	j m	Jn	j n	j m
Cooperation with universities	j o	j o	j sa	j ra	j n

3. Have your member companies been granted patents in the past 5 years?

jn	No
jn	Do not know
jm	Yes (please specify)
	5
	6

4.	What types of patents are used	by your member	companies?	Please tick al	l that
ap	pply.				

Ē	Own patents
€	Patents developed by local technology institutes
€	Patents developed by others within your country
é	Patents developed elsewhere in EU
É	Patents developed outside the EU
€	Other, please specify

5. How do your member companies protect their Intellectual Property? Please tick all that apply

	In your country	In the EU	In 3rd countries	No protection
Trade marks registration	ê	€	€	€
Designs/models registration	ê	é	€	6
Patents granted	É	€	€	€

	pie your membe	ers employ chan	ged in the las	t 5 years?
Reduced significantly (more than 2	25%)	jn Increased a little	e (by 10 to 25%)	
jn Reduced a little (by 10 to 25%)		jn Increased signif	icantly (more than 25%	%)
jn Stayed about the same (within 10	%)			
2. How do you expect the next 5 years?	number of peop	ole your membe	rs employ to (change in the
jn Reduce	jn Stay the same	е	jn Increase	
employed in the footwear Apprenticeships	sector? Please	tick all that appl Degree courses	у	
€ Vocational courses		Specialist trainir	ng courses	
Other (please specify)				
		5		
		6		
4. Has the availability of t n the footwear sector ch		-	Increased	Do not know
Apprenticeships	jα	j a	j a	jn
	j m	j m	j m	j m
Vocational courses	,	j a	j n	jn
	j n			
Degree courses	jn	j m	j m	j m
Degree courses Specialist courses	,	jn ja	jn jn	jn ja
Vocational courses Degree courses Specialist courses Other If Other, please specify	jn	_	,	
Degree courses Specialist courses Other	jn	_	,	
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Degree courses Specialist courses Other If Other, please specify	jn jn	ja 5	,	
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Degree courses Specialist courses Other	jn jn	ja 5	,	
Degree courses Specialist courses Other If Other, please specify 5. Are your members exp	jn jn	ja 5	,	

Footwear-Associations
8. Conclusion
Thank you very much for completing this questionnaire and finally:
1. Have we missed any important aspects of your members' position or future prospects? Please let us know in the box below.
6
2. We would like to hold interviews with a small number of associations to assist us in evaluating the current situation and prospects of the EU footwear industry in more detail. If you would be willing for us to contact you, please indicate below.
jn Yes, I would be happy to take part in follow-up interviews
j _m No, I do not wish to take part in follow-up interviews