

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.

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@rpald.co.uk or by fax to +44 1508 520758.

Thank you very much for your assistance.

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

- | | | |
|-------------------------------------------------|--------------------------------------|------------------------------------------------------------------------------|
| <input type="checkbox"/> All EU-27 Countries | <input type="checkbox"/> Germany | <input type="checkbox"/> Poland |
| <input type="checkbox"/> Austria | <input type="checkbox"/> Greece | <input type="checkbox"/> Portugal |
| <input type="checkbox"/> Belgium | <input type="checkbox"/> Hungary | <input type="checkbox"/> Romania |
| <input type="checkbox"/> Bulgaria | <input type="checkbox"/> Ireland | <input type="checkbox"/> Spain |
| <input type="checkbox"/> Cyprus | <input type="checkbox"/> Italy | <input type="checkbox"/> Slovakia |
| <input type="checkbox"/> Czech Republic | <input type="checkbox"/> Latvia | <input type="checkbox"/> Slovenia |
| <input type="checkbox"/> Denmark | <input type="checkbox"/> Lithuania | <input type="checkbox"/> Sweden |
| <input type="checkbox"/> Estonia | <input type="checkbox"/> Luxembourg | <input type="checkbox"/> United Kingdom |
| <input type="checkbox"/> Finland | <input type="checkbox"/> Malta | <input type="checkbox"/> EEA (Iceland, Norway and Liechtenstein) |
| <input type="checkbox"/> France | <input type="checkbox"/> Netherlands | <input type="checkbox"/> EU Candidate Countries (Croatia, Macedonia, Turkey) |
| <input type="checkbox"/> Other (please specify) | | |
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5. What types of footwear products are your members involved with by PRICE CATEGORY? Please tick all that apply

- Super premium segment
- Premium segment
- Medium Segment
- Lower Segment

6. What types of footwear products are your members involved with by TYPE OF FOOTWEAR? Please tick all that apply

- Casual
- Formal
- Evening
- Sport
- Safety/protective

7. What types of footwear products are your members involved with by END USER? Please tick all that apply

- Women's
- Men's
- Children's

8. What types of footwear products are your members involved with by MATERIAL? Please tick all that apply

- 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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finding customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of skilled staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Costs of production	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legislative requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Counterfeit goods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Patent protection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to new markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to raw materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Development of new products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Changes in technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Integration of ICT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Innovation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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
- Improved product design
- Reduced costs through cheaper sourcing of raw materials
- Improved service
- Reduced costs through increased productivity
- Product customisation
- Outsourced activities within the EU
- Improved image and communication
- Outsourced of activities outside the EU
- Changed method of distribution
- Improved product quality
- Changed market sector
- Other, please specify

Footwear-Associations

3. Which challenges will your member companies face in the next 5 years? Please tick the appropriate box(es):

- Access to finance
- Finding customers
- Competition
- Availability of skilled staff
- Costs of production
- Other (please specify)
- Legislative requirements
- Counterfeit goods
- Patent protection
- Access to new markets
- Access to raw materials
- Development of new products
- Changes in technology
- Integration of ICT
- Innovation

4. Are you aware of the support services available to the footwear industry? Please tick all that you are aware of

- Technology centres
- IPR support centres
- Training centres
- Other, please specify
- Financial advisory centres
- Market access networks
- Export promotional services

5. Please rate the importance of the following ways in which European footwear manufacturers could be helped to address the challenges they face.

	Not Important at all	Slightly important	Important	Very Important	Do not know
Support for research and development (technology, design, etc.)	jñ	jñ	jñ	jñ	jñ
Support the financial strengthening (loans, credits, etc.)	jñ	jñ	jñ	jñ	jñ
Support human resource development (training, etc.)	jñ	jñ	jñ	jñ	jñ
Reduce taxes	jñ	jñ	jñ	jñ	jñ
Reduce employment (e.g. welfare) costs	jñ	jñ	jñ	jñ	jñ
Support for market research	jñ	jñ	jñ	jñ	jñ
Support for implementation of innovation	jñ	jñ	jñ	jñ	jñ
Other	jñ	jñ	jñ	jñ	jñ

If Other, please specify

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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.

No

Yes, please specify:

	5
	6

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

No

Yes, please specify:

	5
	6

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

No

Yes, please specify:

	5
	6

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	jñ	jñ	jñ	jñ
Access to finance	jñ	jñ	jñ	jñ
Tightening of environmental regulation	jñ	jñ	jñ	jñ
Access to public procurement	jñ	jñ	jñ	jñ
Access to raw materials	jñ	jñ	jñ	jñ
Market regulation (Internal market)	jñ	jñ	jñ	jñ
Health and safety standards	jñ	jñ	jñ	jñ
EU Trade policy (i.e. Bilateral / multilateral agreements)	jñ	jñ	jñ	jñ
Rules of origin	jñ	jñ	jñ	jñ
Trade facilitation	jñ	jñ	jñ	jñ
Other	jñ	jñ	jñ	jñ

If Other (please specify)

4. Costs and Financing

1. Have your members' costs of production changed significantly over the last 5 years?

Costs have increased by over 50%

No change

Costs have increased by 25-50%

Costs have reduced

Costs have increased by less than 25%

2. How difficult is it for your members to gain access to finance?

Very difficult

Quite difficult

Quite easy

Very easy

3. Has gaining access to finance become easier or more difficult over the last 5 years?

More difficult

About the same

Easier

5. Competition within the Footwear Sector

1. How has your members' market position changed during the past 5 years?

	Increased	Unchanged	Reduced	Do not know
Market share	jn	jn	jn	jn
Number of new products launched	jn	jn	jn	jn
Number of products sold	jn	jn	jn	jn
Value of products sold	jn	jn	jn	jn

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

jn Become stronger jn Stay the same jn Become weaker

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	jn	jn	jn	jn
Number of new companies established	jn	jn	jn	jn

Please elaborate:

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	jn	jn	jn	jn	jn
Price	jn	jn	jn	jn	jn
Price/quality ratio	jn	jn	jn	jn	jn
Customisation	jn	jn	jn	jn	jn
Flexibility to adapt to changing conditions	jn	jn	jn	jn	jn
Product range	jn	jn	jn	jn	jn
Services	jn	jn	jn	jn	jn
Other	jn	jn	jn	jn	jn

If Other, please specify

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

jn Increased jn Stayed the same jn Reduced

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6. How do you expect the extent of competition from non-EU companies to change over the next 5 years?

Become stronger

Stay the same

Become weaker

7. In your view, what are the key advantages and disadvantages of the EU footwear industry in comparison to its competitors?

	Advantages	Disadvantages
Availability of labour	<input type="radio"/>	<input type="radio"/>
Access to finance	<input type="radio"/>	<input type="radio"/>
Availability of technological innovation	<input type="radio"/>	<input type="radio"/>
Cooperation within the supply chain	<input type="radio"/>	<input type="radio"/>
Trade regulations of the internal market	<input type="radio"/>	<input type="radio"/>
Proximity to market	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>

If Other, please specify

8. What are the most important geographical sources of leather for footwear manufacturing?

Do not know

Russia

EU27

NAFTA (USA, Mexico, Canada)

EFTA (Iceland, Norway, Switzerland, and Liechtenstein)

Asia (incl. China, India, Japan)

Non-EU Mediterranean countries

Central/South America

Other (please specify)

9. How have the geographical sources of leather changed over the period 2000 to 2010?

	Increasing importance	Stable	Decreasing importance
EU27	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
EFTA (Iceland, Norway, Switzerland, and Liechtenstein)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-EU Mediterranean countries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Russia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NAFTA (USA, Mexico, Canada)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Asia (incl. China, India, Japan)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Central/South America	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If Other (please specify)

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10. Which competitor countries pose the greatest threat to companies in your region? Please tick all that apply.

- | | | |
|-------------------------------------------------|-----------------------------------|---------------------------------------------|
| <input type="checkbox"/> Your own country | <input type="checkbox"/> China | <input type="checkbox"/> India |
| <input type="checkbox"/> Brazil | <input type="checkbox"/> Thailand | <input type="checkbox"/> Bosnia-Herzegovina |
| <input type="checkbox"/> Other EU 27 | <input type="checkbox"/> Vietnam | <input type="checkbox"/> Indonesia |
| <input type="checkbox"/> Tunisia | <input type="checkbox"/> Morocco | <input type="checkbox"/> Croatia |
| <input type="checkbox"/> 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

- Technology innovation
 Service innovation
 Product innovation
 None
 Production/process innovation
 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	jn	jn	jn	jn	jn
Cooperation with national business networks	jn	jn	jn	jn	jn
Cooperation with international business networks	jn	jn	jn	jn	jn
Cooperation with research institutes	jn	jn	jn	jn	jn
Cooperation with universities	jn	jn	jn	jn	jn

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

- No
 Do not know
 Yes (please specify)

5

6

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4. What types of patents are used by your member companies? Please tick all that apply.

- Own patents
- Patents developed by local technology institutes
- Patents developed by others within your country
- Patents developed elsewhere in EU
- 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Designs/models registration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patents granted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Employment and Training in the European Footwear Sector

1. Has the number of people your members employ changed in the last 5 years?

- Reduced significantly (more than 25%)
 Increased a little (by 10 to 25%)
- Reduced a little (by 10 to 25%)
 Increased significantly (more than 25%)
- Stayed about the same (within 10%)

2. How do you expect the number of people your members employ to change in the next 5 years?

- Reduce
 Stay the same
 Increase

3. What sort of training is available in your country for those who wish to be employed in the footwear sector? Please tick all that apply

- Apprenticeships
 Degree courses
- Vocational courses
 Specialist training courses
- Other (please specify)

4. Has the availability of training in your country for those who wish to be employed in the footwear sector changed in the last 5 years?

	Reduced	Stayed the same	Increased	Do not know
Apprenticeships	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vocational courses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Degree courses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Specialist courses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If Other, please specify

5. Are your members experiencing skill shortages?

- No
- Yes (please specify)

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.

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.

Yes, I would be happy to take part in follow-up interviews

No, I do not wish to take part in follow-up interviews