



**CAMPAIGN: BORDERLESS COMMUNICATIONS
SURVEY RESULTS**

22 November, 2007

Executive Summary

- Surveys of 150 senior managers across seven countries were conducted 31st October 07 to 5th November 07
- Respondents were from enterprise-size organizations that trade beyond their own country, and spanned MDs, COOs, CFOs, CEOs, CTOs etc.

Summary of Key Findings

Q1. Which European country do you find the hardest to conduct business with?

- France and Germany were each named by 19% of respondents, closely followed by UK (18%) and Spain (16%)
- Assorted countries were named by 1% of respondents while almost half the total EU countries were not named by any respondents

Q1b. Why?

- Inaccessibility and lack of modern technology were cited as the key reasons (13% and 12% respectively)
- 38% of respondents declined to answer the question, either citing commercial confidentiality, political sensitivity or not being willing to explain why they were declining to answer the question

Q2. Which European country do you find the easiest to do business with or are the most adaptable/flexible?

- UK was named by 14% of respondents, closely followed by Spain (13%), France (12%), Germany (11%), Italy (10%)
- Most other countries were named by between 1% and 3% of respondents, with only a handful of countries not being named by any respondents
- The most notable difference between the respondents of the various countries was that 29% of Polish respondents named Romania or Bulgaria compared to 7% of respondents overall. No respondents from the UK or Germany or The Netherlands named Romania or Bulgaria. Only 2% of respondents from Italy and 4% from France named Romania or Bulgaria

Q3. If you were to select one country that doesn't appear to integrate as well as others in the European Union from a business perspective, which would it be?

- Overall, France, Germany, Spain & Poland were the most frequently named countries – each at 11% of all respondents, followed by UK at 10%
- Most other countries were named by 1% to 6% of respondents

Q4. Which European country have you found to have the most unusual working habits?

- Overall, Spain was the most frequently named country (18%) followed by France (16%), UK (16%) and Germany (15%) and Italy (11%)
- Other countries either were not named at all or were named by less than 10% of respondents. Several countries were named by only 1% or 2% of respondents

Q5. Do you feel that we have created a 'borderless' business culture within Europe, i.e. organisations can communicate seamlessly and efficiently across borders as if they were in the same office?

- Overall 70% of respondents believe that there is a "borderless" business culture within Europe
- 82% of UK respondents believe that there is a "borderless" business culture within Europe, followed by 74% of German respondents
- Only 54% of Polish respondents believe that there is a "borderless" business culture within Europe

Q6. What has been the biggest cultural mistake of your career when doing business with people from outside your own country?

Despite the total anonymity of the survey responses being fully explained to all respondents at the start of the survey and reiterated when appropriate, 43% of respondents declined to answer this question. Overall, the results were fairly evenly spread between responses indicating:

1. Not taking enough time to understand the other country (13%)
2. Not explaining an idea / proposal in a way that made sense to everyone – too much jargon etc that was foreign to them (13%)
3. Not realizing how different the later EU entrants are from the founder members (10%)
4. Being unaware of major festivals / religious occasions for the other country (12%)

5. Underestimating some of the later EU entrants (9%)
6. Not realizing how powerful unions are in other countries (9%)

The generic nature of the responses indicates caution, respondents talking about their company's difficulties in doing business with people from outside their country rather than answering the question as asked – a cultural mistake of their career – this is not surprising given the number of people who wouldn't answer the question at all.

In an era of secretly taped meetings, calls, leaked documents & tapes featuring regularly in the UK press it is not surprising that senior managers will not risk much honesty re disclosure of personal errors when contacted by a research agency they have not previously dealt with.

Q7. How many hours do you work in a typical week?

- Overall, 34% of respondents indicated that they work more than 60 hours in a typical week
- The respondents most likely to work more than 60 hours are in the UK (47%), closely followed by Germany (38%)
- All other countries had averages between 28% and 33% of respondents working more than 60 hours

Q7b. Has this increased since 2000?

- Overall, 55% of respondents indicated that their working hours have increased since 2000
- 72% of respondents in Germany indicated that their working hours have increased since 2000
- Only 39% of respondents in Poland indicated that their working hours have increased since 2000

Q8. Compare the typical business communication tools you used at the turn of the century to those used today:

- Overall, the most significant usage changes between the turn of the century and today are:
 - Instant Messenger – increase from 2% to 56%
 - Mobile phones – increase from 70% to 86%
 - VoIP – increase from 13% to 31%
 - WiFi – increase from 8% to 29%
 - Wireless IT network – increase from 10% to 33%
 - Conference calls – increase from 40% to 63%

- Video conferencing – increase from 37% to 54%
- Remote working (VPN access) – increase from 8% to 16%
- Although Poland and Italy generally use less technology than the other respondent countries, particularly UK and Germany, the various usage increases between 2000 and 2007 don't generally vary significantly between the various countries.

Q9. Do you think changing business communication tools have reduced the amount of in-person time you spend liaising with colleagues, partners and customers?

- Overall, 73% of respondents indicated that changing business communication tools have reduced the amount of in-person time they spend liaising with colleagues, partners and customers
- The most positive responses were from UK (89%), closely followed by Germany (84%)
- The least positive responses were from Poland (58%) and Spain (62%)

Q9b. If yes, is this a good or bad thing?

- Overall, 60% of respondents indicated that this is a good thing (13% said it was not a good thing and 27% were not asked this question as they had responded negatively to the previous question)
- The most positive responses were from UK (76%), closely followed by Germany (70%)
- The least positive responses were from Poland (49%) and Spain (51%) and Italy (52%)

Q10. Has technology helped you reduce your carbon footprint, i.e. less travel?

- Overall, 65% of respondents indicated that technology had helped them reduce their carbon footprint
- The most positive responses were from UK (83%), closely followed by Germany (80%)
- The least positive responses were from Poland (44%) and Spain (54%)

Raw Data

Q1. Which European country do you find the hardest to conduct business with?

Q1 % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. France	19	19	0	21	27	22	18	23
2. Germany	19	23	14	0	14	41	21	19
3. Italy	12	17	11	19	0	14	7	18
4. Spain	16	19	26	18	24	7	0	16
5. UK	18	0	28	23	19	15	23	17
6. Belgium	9	14	9	14	8	0	9	7
7. Luxembourg	0	0	0	2	0	0	0	0
8. Netherlands	1	2	0	2	0	0	3	0
9. Denmark	0	0	1	0	0	0	0	0
10. Ireland	1	1	0	1	0	0	3	0
11. Greece	1	2	2	0	0	0	4	0
12. Portugal	0	3	0	0	0	0	0	0
13. Austria	1	0	2	0	0	1	2	0
14. Finland	0	0	0	0	0	0	0	0
15. Sweden	1	0	2	0	2	0	0	0
16. Cyprus	0	0	0	0	0	0	1	0
17. Czech Republic	0	0	0	0	0	0	0	0
18. Estonia	0	0	0	0	0	0	0	0
19. Hungary	0	0	0	0	0	0	0	0
20. Latvia	0	0	0	0	0	0	0	0
21. Lithuania	0	0	0	0	0	0	0	0
22. Malta	0	0	0	0	0	0	0	0

23. Poland	1	0	3	0	6	0	0	0
24. Slovakia	0	0	0	0	0	0	0	0
25. Slovenia	0	0	0	0	0	0	0	0
26. Romania	2	0	2	0	0	0	9	0
27. Bulgaria	0	0	0	0	0	0	0	0

Q1b. Why?

1. Inaccessible / Remote
2. Inflexible
3. Unresponsive
4. Unfriendly
5. Bureaucratic / Legalistic
6. Lacking modern technology
7. *Declined to respond*

Q1b % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. Inaccessible / Remote	12	11	21	11	6	14	12	8
2. Inflexible	8	8	3	6	12	7	15	4
3. Unresponsive	11	12	17	9	11	7	9	12
4. Unfriendly	9	9	4	9	8	5	12	17
5. Bureaucratic / Legalistic	9	14	8	14	9	7	6	6
6. Lacking modern technology	13	12	5	24	15	14	17	4
7. <i>Declined to respond</i>	38	34	42	27	39	46	29	49

Q1b - Inaccessible	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. France	3	0	3	1	2	4	2
2. Germany	4	3	0	1	7	4	2
3. Italy	2	1	2	0	1	0	1
4. Spain	1	8	2	2	1	0	1
5. UK	0	6	2	1	2	3	1
6. Belgium	1	3	1	1	0	0	1
7. Luxembourg	0	0	1	0	0	0	0
8. Netherlands	0	0	0	0	0	1	0
9. Denmark	0	0	0	0	0	0	0
10. Ireland	0	0	0	0	0	0	0
11. Greece	0	0	0	0	0	0	0
12. Portugal	0	0	0	0	0	0	0
13. Austria	0	0	0	0	1	0	0
14. Finland	0	0	0	0	0	0	0
15. Sweden	0	0	0	0	0	0	0
16. Cyprus	0	0	0	0	0	0	0
17. Czech Republic	0	0	0	0	0	0	0
18. Estonia	0	0	0	0	0	0	0
19. Hungary	0	0	0	0	0	0	0
20. Latvia	0	0	0	0	0	0	0
21. Lithuania	0	0	0	0	0	0	0
22. Malta	0	0	0	0	0	0	0

23. Poland	0	0	0	0	0	0	0
24. Slovakia	0	0	0	0	0	0	0
25. Slovenia	0	0	0	0	0	0	0
26. Romania	0	0	0	0	0	0	0
27. Bulgaria	0	0	0	0	0	0	0

Q1b - Inflexible	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. France	1	0	2	2	1	2	1
2. Germany	2	1	0	2	4	3	1
3. Italy	1	0	2	0	1	2	0
4. Spain	2	1	2	4	0	3	1
5. UK	0	1	0	3	1	0	1
6. Belgium	2	0	0	1	0	1	0
7. Luxembourg	0	0	0	0	0	0	0
8. Netherlands	0	0	0	0	0	0	0
9. Denmark	0	0	0	0	0	0	0
10. Ireland	0	0	0	0	0	1	0
11. Greece	0	0	0	0	0	1	0
12. Portugal	0	0	0	0	0	0	0
13. Austria	0	0	0	0	0	0	0
14. Finland	0	0	0	0	0	0	0
15. Sweden	0	0	0	0	0	0	0
16. Cyprus	0	0	0	0	0	0	0
17. Czech Republic	0	0	0	0	0	0	0
18. Estonia	0	0	0	0	0	0	0

19. Hungary	0	0	0	0	0	0	0
20. Latvia	0	0	0	0	0	0	0
21. Lithuania	0	0	0	0	0	0	0
22. Malta	0	0	0	0	0	0	0
23. Poland	0	0	0	0	0	0	0
24. Slovakia	0	0	0	0	0	0	0
25. Slovenia	0	0	0	0	0	0	0
26. Romania	0	0	0	0	0	2	0
27. Bulgaria	0	0	0	0	0	0	0

Q1b - Unresponsive	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. France	3	0	2	2	3	3	3
2. Germany	3	2	0	2	0	2	2
3. Italy	2	3	2	0	1	1	2
4. Spain	2	1	2	3	1	0	3
5. UK	0	1	3	2	2	2	1
6. Belgium	1	1	0	1	0	1	1
7. Luxembourg	0	0	0	0	0	0	0
8. Netherlands	0	0	0	0	0	0	0
9. Denmark	0	1	0	0	0	0	0
10. Ireland	0	0	0	0	0	0	0
11. Greece	1	2	0	0	0	0	0
12. Portugal	0	0	0	0	0	0	0
13. Austria	0	1	0	0	0	0	0
14. Finland	0	0	0	0	0	0	0
15. Sweden	0	2	0	0	0	0	0
16. Cyprus	0	0	0	0	0	0	0

17. Czech Republic	0	0	0	0	0	0	0
18. Estonia	0	0	0	0	0	0	0
19. Hungary	0	0	0	0	0	0	0
20. Latvia	0	0	0	0	0	0	0
21. Lithuania	0	0	0	0	0	0	0
22. Malta	0	0	0	0	0	0	0
23. Poland	0	2	0	1	0	0	0
24. Slovakia	0	0	0	0	0	0	0
25. Slovenia	0	0	0	0	0	0	0
26. Romania	0	1	0	0	0	0	0
27. Bulgaria	0	0	0	0	0	0	0

Q1b - Unfriendly	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. France	1	0	2	2	2	2	4
2. Germany	2	1	0	1	1	3	3
3. Italy	1	1	2	0	1	1	5
4. Spain	3	1	2	2	0	0	2
5. UK	0	1	1	1	1	2	2
6. Belgium	2	0	1	1	0	1	1
7. Luxembourg	0	0	0	0	0	0	0
8. Netherlands	0	0	1	0	0	0	0
9. Denmark	0	0	0	0	0	0	0
10. Ireland	0	0	0	0	0	0	0
11. Greece	0	0	0	0	0	1	0
12. Portugal	0	0	0	0	0	0	0

13. Austria	0	0	0	0	0	0	0
14. Finland	0	0	0	0	0	0	0
15. Sweden	0	0	0	0	0	0	0
16. Cyprus	0	0	0	0	0	0	0
17. Czech Republic	0	0	0	0	0	0	0
18. Estonia	0	0	0	0	0	0	0
19. Hungary	0	0	0	0	0	0	0
20. Latvia	0	0	0	0	0	0	0
21. Lithuania	0	0	0	0	0	0	0
22. Malta	0	0	0	0	0	0	0
23. Poland	0	0	0	1	0	0	0
24. Slovakia	0	0	0	0	0	0	0
25. Slovenia	0	0	0	0	0	0	0
26. Romania	0	0	0	0	0	2	0
27. Bulgaria	0	0	0	0	0	0	0

Q1b - Bureaucratic / Legalistic	UK	France	Germany	Italy	Poland	Spain	The Netherlan ds
1. France	3	0	3	2	1	2	2
2. Germany	3	2	0	1	2	2	0
3. Italy	2	2	3	0	2	0	1
4. Spain	3	2	2	3	1	0	0
5. UK	0	1	3	1	1	1	2
6. Belgium	2	1	3	1	0	1	1
7. Luxembourg	0	0	0	0	0	0	0
8. Netherlands	0	0	0	0	0	0	0
9. Denmark	0	0	0	0	0	0	0

10. Ireland	0	0	0	0	0	0	0
11. Greece	0	0	0	0	0	0	0
12. Portugal	1	0	0	0	0	0	0
13. Austria	0	0	0	0	0	0	0
14. Finland	0	0	0	0	0	0	0
15. Sweden	0	0	0	0	0	0	0
16. Cyprus	0	0	0	0	0	0	0
17. Czech Republic	0	0	0	0	0	0	0
18. Estonia	0	0	0	0	0	0	0
19. Hungary	0	0	0	0	0	0	0
20. Latvia	0	0	0	0	0	0	0
21. Lithuania	0	0	0	0	0	0	0
22. Malta	0	0	0	0	0	0	0
23. Poland	0	0	0	1	0	0	0
24. Slovakia	0	0	0	0	0	0	0
25. Slovenia	0	0	0	0	0	0	0
26. Romania	0	0	0	0	0	0	0
27. Bulgaria	0	0	0	0	0	0	0

Q1b - Lacking modern technology	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. France	3	0	4	2	2	2	2
2. Germany	4	1	0	2	7	3	1
3. Italy	2	1	4	0	1	1	0
4. Spain	1	1	4	5	1	0	0
5. UK	0	1	7	3	3	3	0
6. Belgium	2	1	4	2	0	2	1
7. Luxembourg	0	0	1	0	0	0	0

8.	Netherlands	0	0	0	0	0	1	0
9.	Denmark	0	0	0	0	0	0	0
10.	Ireland	0	0	0	0	0	1	0
11.	Greece	0	0	0	0	0	1	0
12.	Portugal	0	0	0	0	0	0	0
13.	Austria	0	0	0	0	0	1	0
14.	Finland	0	0	0	0	0	0	0
15.	Sweden	0	0	0	1	0	0	0
16.	Cyprus	0	0	0	0	0	0	0
17.	Czech Republic	0	0	0	0	0	0	0
18.	Estonia	0	0	0	0	0	0	0
19.	Hungary	0	0	0	0	0	0	0
20.	Latvia	0	0	0	0	0	0	0
21.	Lithuania	0	0	0	0	0	0	0
22.	Malta	0	0	0	0	0	0	0
23.	Poland	0	0	0	0	0	0	0
24.	Slovakia	0	0	0	0	0	0	0
25.	Slovenia	0	0	0	0	0	0	0
26.	Romania	0	0	0	0	0	2	0
27.	Bulgaria	0	0	0	0	0	0	0

Q1b - Declined to respond	UK	France	Germany	Italy	Poland	Spain	The Netherlands	
1.	France	5	0	5	16	11	3	9
2.	Germany	5	4	0	5	20	4	10
3.	Italy	7	3	4	0	7	2	9
4.	Spain	7	12	4	5	3	0	9
5.	UK	0	17	7	8	5	9	10
6.	Belgium	4	3	5	1	0	3	2

7. Luxembourg	0	0	0	0	0	0	0
8. Netherlands	2	0	1	0	0	1	0
9. Denmark	0	0	0	0	0	0	0
10. Ireland	1	0	1	0	0	1	0
11. Greece	1	0	0	0	0	1	0
12. Portugal	2	0	0	0	0	0	0
13. Austria	0	1	0	0	0	1	0
14. Finland	0	0	0	0	0	0	0
15. Sweden	0	0	0	1	0	0	0
16. Cyprus	0	0	0	0	0	1	0
17. Czech Republic	0	0	0	0	0	0	0
18. Estonia	0	0	0	0	0	0	0
19. Hungary	0	0	0	0	0	0	0
20. Latvia	0	0	0	0	0	0	0
21. Lithuania	0	0	0	0	0	0	0
22. Malta	0	0	0	0	0	0	0
23. Poland	0	1	0	3	0	0	0
24. Slovakia	0	0	0	0	0	0	0
25. Slovenia	0	0	0	0	0	0	0
26. Romania	0	1	0	0	0	3	0
27. Bulgaria	0	0	0	0	0	0	0

Q2. Which European country do you find the easiest to do business with or are the most adaptable/flexible?

Q2 % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. France	12	14	0	14	22	9	12	16
2. Germany	11	26	12	0	9	4	16	12
3. Italy	10	21	9	16	0	8	3	14
4. Spain	13	14	23	19	17	7	0	9
5. UK	14	0	22	17	14	11	18	13
6. Belgium	7	5	7	12	12	4	7	4
7. Luxembourg	2	2	2	4	0	0	3	6
8. Netherlands	2	2	2	3	3	3	2	0
9. Denmark	3	4	3	0	0	2	6	3
10. Ireland	2	4	0	3	0	0	2	4
11. Greece	3	3	3	3	4	0	3	5
12. Portugal	4	5	2	2	6	0	8	2
13. Austria	1	0	2	1	0	1	1	0
14. Finland	1	0	0	0	0	0	4	0
15. Sweden	3	0	1	2	4	0	5	10
16. Cyprus	0	0	2	0	0	0	1	0
17. Czech Republic	0	0	0	0	0	0	0	0
18. Estonia	0	0	0	0	0	0	0	0
19. Hungary	0	0	0	0	0	0	0	0
20. Latvia	1	0	0	0	0	6	0	0
21. Lithuania	1	0	0	0	0	9	0	0
22. Malta	0	0	2	0	0	0	0	0
23. Poland	2	0	4	4	7	0	0	2
24. Slovakia	0	0	0	0	0	3	0	0
25. Slovenia	1	0	0	0	0	4	0	0

26. Romania	5	0	4	0	2	17	9	0
27. Bulgaria	2	0	0	0	0	12	0	0

Q3. If you were to select one country that doesn't appear to integrate as well as others in the European Union from a business perspective, which would it be?

Q3 % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. France	11	8	0	9	16	17	14	11
2. Germany	11	14	8	0	8	23	6	16
3. Italy	9	9	6	24	0	6	9	9
4. Spain	11	11	9	27	18	3	0	8
5. UK	10	0	17	11	14	12	9	5
6. Belgium	6	8	9	8	6	0	7	3
7. Luxembourg	1	0	0	2	0	2	0	0
8. Netherlands	2	2	0	2	0	4	4	0
9. Denmark	1	0	1	0	6	0	0	0
10. Ireland	3	6	0	1	8	0	6	0
11. Greece	5	4	2	5	11	5	5	0
12. Portugal	5	7	0	7	5	7	9	0
13. Austria	1	0	2	0	0	1	4	0
14. Finland	0	0	0	0	0	0	0	0
15. Sweden	1	0	2	0	2	0	0	0
16. Cyprus	0	0	0	0	0	0	1	0
17. Czech Republic	2	11	0	0	0	0	0	0
18. Estonia	0	3	0	0	0	0	0	0
19. Hungary	1	0	0	0	0	0	0	9
20. Latvia	1	0	0	0	0	0	0	8
21. Lithuania	1	0	4	0	0	0	0	0
22. Malta	0	0	0	0	0	0	0	0
23. Poland	11	14	17	4	6	5	17	14
24. Slovakia	1	0	0	0	0	0	0	4
25. Slovenia	0	0	0	0	0	0	0	0

26. Romania	6	3	12	0	0	6	9	11
27. Bulgaria	3	0	11	0	0	9	0	2

Q4. Which European country have you found to have the most unusual working habits?

Q4 % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. France	16	17	0	18	24	19	16	18
2. Germany	15	19	12	0	16	17	22	17
3. Italy	11	15	16	17	0	6	9	16
4. Spain	18	24	23	21	22	21	0	14
5. UK	16	0	25	17	17	27	16	11
6. Belgium	8	12	9	16	6	0	9	4
7. Luxembourg	1	0	0	4	0	0	0	2
8. Netherlands	2	4	0	1	0	2	5	0
9. Denmark	1	0	2	0	1	0	0	2
10. Ireland	2	3	0	1	2	0	4	2
11. Greece	2	1	4	0	2	0	6	3
12. Portugal	2	2	0	3	2	1	0	4
13. Austria	1	0	2	0	1	3	3	0
14. Finland	1	1	0	0	0	2	0	3
15. Sweden	1	0	2	0	4	0	0	0
16. Cyprus	0	0	0	0	0	0	1	0
17. Czech Republic	0	0	0	0	0	0	0	0
18. Estonia	0	0	0	0	0	0	0	0
19. Hungary	0	0	0	0	0	0	0	0
20. Latvia	0	0	0	0	0	0	0	0
21. Lithuania	0	0	0	0	0	0	0	0
22. Malta	0	0	0	0	0	0	0	0
23. Poland	2	2	3	2	3	2	0	2
24. Slovakia	0	0	0	0	0	0	0	0
25. Slovenia	0	0	0	0	0	0	0	0

26. Romania	2	0	2	0	0	0	9	2
27. Bulgaria	0	0	0	0	0	0	0	0

Q5. Do you feel that we have created a 'borderless' business culture within Europe, i.e. organisations can communicate seamlessly and efficiently across borders as if they were in the same office?

1. Yes
2. No

Q5 % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. Yes	70	82	69	74	66	54	73	69
2. No	30	18	31	26	34	46	27	31

Q6. What has been the biggest cultural mistake of your career when doing business with people from outside your own country?

1. Not taking enough time to understand the other country
2. Not explaining an idea / proposal in a way that made sense to everyone – too much jargon etc that was foreign to them
3. Not realizing how different the later EU entrants are from the founder members
4. Being unaware of major festivals / religious occasions for the other country
5. Underestimating some of the later EU entrants
6. Not realizing how powerful unions are in other countries
7. *Declined to answer*

Q6 % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. Not taking enough time to understand the other country	13	11	16	12	9	21	7	14
2. Not explaining an idea / proposal in a way that made sense to everyone – too much jargon etc that was foreign to them	13	14	21	16	8	7	16	7
3. Not realizing how different the later EU entrants are from the founder members	10	6	9	12	7	16	11	12
4. Being unaware of major festivals / religious occasions for the other country	12	14	15	9	11	4	17	11
5. Underestimating some of the later EU entrants	9	7	11	5	17	7	5	8
6. Not realizing how powerful unions are in other countries	9	5	6	8	21	8	8	7

7. Declined to answer	35	43	22	38	27	39	36	41
-----------------------	----	----	----	----	----	----	----	----

Q7. How many hours do you work in a typical week?

1. Less than 40 hours
2. 40 - 50
3. 50 - 60
4. 60 - 70
5. 70+

Q7 % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. Less than 40 hours	16	6	21	9	27	16	16	17
2. 40 - 50	16	11	14	11	15	18	19	23
3. 50 - 60	34	36	34	42	29	33	37	29
4. 60 - 70	17	24	16	18	14	16	12	17
5. 70+	17	23	15	20	15	17	16	14

Q7b. Has this increased since 2000?

1. Yes
2. No

Q7b % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. Yes	55	58	46	72	63	39	48	57
2. No	45	42	54	28	37	61	52	43

Q8. Compare the typical business communication tools you used at the turn of the century to those used today:

Q8 % Response	Overall		UK		France		Germany		Italy		Poland		Spain		The Netherlands	
	2000	2007	2000	2007	2000	2007	2000	2007	2000	2007	2000	2007	2000	2007	2000	2007
1. Email	72	80	86	94	74	83	91	95	78	82	32	41	69	78	71	84
2. Fax	81	89	92	97	83	89	94	96	91	94	41	65	82	91	84	92
3. Telex	12	21	23	37	11	24	14	27	9	14	2	7	14	19	12	16
4. Letter	98	96	98	94	96	99	97	94	99	96	99	99	97	96	97	93
5. Instant Messenger	2	56	4	73	2	51	3	68	1	68	1	34	2	52	2	46
6. Mobile phones	70	86	78	96	62	87	83	94	72	86	54	72	69	81	73	86
7. Landline	96	95	99	95	98	96	99	99	96	93	89	94	96	97	94	92
8. VoIP	13	31	23	47	8	28	19	53	12	31	2	9	14	26	11	23
9. FMC	4	8	7	16	2	4	6	11	3	7	1	2	4	7	6	9
10. WiFi	8	29	11	38	9	23	14	46	7	23	2	21	6	22	8	31
11. Fixed IT network	60	75	76	89	58	71	63	78	54	72	43	64	64	72	61	79
12. Wireless IT network	10	33	14	43	6	29	12	52	6	32	2	14	13	32	15	32
13. Conference calls	40	63	65	84	32	47	47	73	36	71	21	34	42	69	37	61
14. Video conferencing	37	54	54	73	37	41	41	62	32	54	14	32	39	51	42	67
15. Post ('snail mail')	98	94	98	83	99	97	99	94	95	98	99	99	97	93	96	94
16. Remote working (VPN access)	8	16	16	34	2	9	12	27	6	14	2	4	7	11	8	16

Q9. Do you think changing business communication tools have reduced the amount of in-person time you spend liaising with colleagues, partners and customers?

1. Yes
2. No

Q9 % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. Yes	73	89	76	84	69	58	62	71
2. No	27	11	24	16	31	42	38	29

Q9b. If yes, is this a good or bad thing?

1. Good
2. Bad

Q9b % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. Good	60	76	61	70	52	49	51	62
2. Bad	13	13	15	14	17	9	11	9

Q10. Has technology helped you reduce your carbon footprint, i.e. less travel?

- 1. Yes
- 2. No

Q10 % Response	Overall	UK	France	Germany	Italy	Poland	Spain	The Netherlands
1. Yes	65	83	72	80	61	44	54	62
2. No	35	17	28	20	39	56	46	38