

Introduction:

Scope and purpose of the Guide:

This Guide is for use by both policy makers and those undertaking any study (consultants, economists etc). The Guide provides a framework within which regions can work to satisfy their own requirements whilst helping to build up a more accurate national picture of the sector. Adoption of the Guide will ensure greater consistency of data between regions and help provide a more robust national picture, which will improve regional analysis and will be used by central departments when considering policies affecting the sector.

The Guide explains why there is a need to produce more consistent reporting on the EGS sector, what types of common information are needed, and provides guidance on how to measure this information and enable data to be aggregated nationally. Some examples of different surveys carried out in the UK are included in the Annexes.

The Guide was produced jointly by DTI and UK Forum for Environmental Industries, in consultation with the Devolved Administrations, Regional Development Agencies and sector bodies.

Rationale:

All the UK regions have now undertaken environmental mapping studies, however, the reports have been presented in a number of differing formats, each tailored to the individual needs of the region in question. The differing nature of the studies has resulted in a situation where the national position cannot be robustly determined when aggregating the statistics.

This is a problem for those in central Government and also represents an issue for the regional bodies, as they are unable to credibly compare / benchmark the performance of their regional environmental economy with that of other regions, and their position in the UK as a whole. Benchmarking provides the basis of any analysis; therefore the inability to benchmark has constrained much of the analysis presented in previous studies to being anecdotal, or based on national / global impacts, rather than structured and informed analysis of regional capabilities.

Many companies and trade associations also rely on Government statistics to further develop business strategy, especially in a growing industry such as this. The incomparability of the information generated by the regions could be open to criticism from the business community if it continues to persist.

The Guide:

The Guide is split into 6 sections, covering the following key topics:

1. Business Case for Carrying out a Study
 2. Purposes and Types of Study
 3. Types of Information Required
 4. Sources of Data
 5. Practical Guidance on some of the Common Issues
 6. EGS Sub-sector Definitions
- ANNEX A ~ Examples of Regional Mapping Methods
ANNEX B ~ Examples of Survey Questionnaires

1. Business Case for Carrying Out a Study:

Officials need to carefully consider why a mapping study is required. This should be influenced by the requirement for evidence-based policy making, where data is needed to show that the environmental goods and services (EGS) sector meets the requirements identified by the Regional Development Agency / Devolved Administration (R/DA) for warranting resource allocation.

In the main, regional EGS companies need assistance to take advantage of the market opportunities available at regional, national and also international levels, which will require public support. Such requirements usually involve the need for improved information between supply

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chains (cluster management), technological development (research programmes), or quality of business management within SMEs (support programmes such as DTI's Manufacturing Advisory Service).

Gathering extensive information on the number of companies, employees and turnover can help to give some idea of the size of the sector. However, it is not sufficient in itself to identify company requirements. Of more importance is the analysis of the sub-sectors, which will be useful in identifying regional sub-sector strengths and weaknesses and to identify the possible formation of sub-sector clusters.

The sub-sector analysis will be of greater value if all regions collect data in a standardised manner, so that the analysis can be confidently compared across regions.

Regions should also consider what burdens they are placing on companies. Burdens should always be minimised. Does the data already exist (e.g. from a previous or similar study)? If so, could companies simply be asked to update their information (if necessary)? If the study is to be a regular task, consider this in its design (and also in the design of any contract).

2. Purposes and Types of Mapping Study:

The purpose of mapping the sector varies and therefore the nature of the mapping studies themselves is variable too. Mapping may be carried out to compile an operational database or to update existing data, and in these cases the method chosen will aim to maximise coverage of the data. Alternatively the main aim may be to characterise the sector, for example to provide 'headline' statistics, and in this case a sample survey may be appropriate, but statistical validity is likely to be important. Case studies are also a useful way to demonstrate issues.

3. Types of Information Required:

The focus here is on commercial activity. Regions may also wish to compile data on academic and public activity. Such data should be compiled separately.

When carrying out any survey it must be considered what is reasonable to ask companies. Surveys should not add unreasonable burdens and should follow Government best practice guidance.

There are nationally agreed definitions for the sector (see section 6). These should form the basis for any study (SIC codes do not reflect EGS activities and cannot be used alone to gather data on the sector). In addition, there is some data that is needed at national level. The list below sets out some of the key data requirements:

National:

Essential:

- Annual Turnover in the region
- Number of full-time equivalent employees in the region
- Number of companies in the sector (HQ and non-HQ)

(Each of these to be broken down by sub-sector. Note some companies will operate in more than one sub-sector and their turnover and employment figures will need to be apportioned accordingly. Care needs to be taken with statistics on the numbers of companies, so as to avoid double counting when aggregating a total from the sub-sector figures).

Desirable:

- Growth in Annual Turnover (%)
- Growth in numbers employed (%)
- Growth in company numbers (%)

(Some comparison of growth rates for individual companies may help inform on trends and test previous estimates/hypotheses).

- Overseas market development and intelligence

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Suggestions for additional data to meet regional requirements:

Company information:

- Name, contact details and postal address
- Location (by postcode, county, EU region)
- Date of establishment
- Ownership
- Legal status

EGS sector:

- Type(s) of activity
- Primary/secondary company (see section 6 (B))
- Activities by EGS sub-sector ("main" and "other")

Company characteristics:

- Turnover
- Number of FT equivalent employees (possibly recording sub-contractor personnel separately)

Business issues:

- Barriers to growth
- Business support needs
- Networking activities
- Innovation and R&D issues
- Geographical markets, including international
- Customer profiles
- Skills and Training needs

Other:

- Anecdotal evidence of market performance, (e.g. using SWOT)
- Exporter/Importer data
- Have they been grant supported (details and status)
- SIC code (for reference)
- Future plans/market forecast
- Trade association/professional body involvement/affiliation

4. Sources of Data:

The EGS sector is not adequately covered by UK SIC codes, and these cannot be used for gathering core data. With consensus among the regions and the sector the DTI has revised the definition of those companies that operate in this sector.

Regional databases

These may be used as a starting point (though this may not cover every firm in the sector and additional local sources will need to be considered). If updating previous studies, it is good practice to include the data from existing surveys, asking firms to update where necessary. Yellow Pages and the like may also be a useful source of information. Many national programmes, such as NISP and REMADE, also have regional representatives who will hopefully be able to provide some input.

National databases

Databases such as FAME can also be used to gain company information, but company names need to be known already. This may be a good way to gain additional data without having to ask companies. However, such databases get their information from Companies House, which will exclude smaller companies that do not have filing obligations. Also, company names will need to

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be recorded accurately, which is time consuming, and data can be up to two years out of date (due to filing requirements).

The annual Environmental Expenditure Survey (covering all EU member states) may also be a useful source of information. However, UK figures here are not comprehensive and do underestimate the production value of the sector.

The companies themselves

The best source of up-to-date information, provided the companies can be persuaded to respond, however, they may exaggerate, guess or make mistakes. Surveyors should review information provided by companies and consider over-riding it

5. Practical Guidance on some of the Common Issues:

A) Useful questions to consider

Before commencing any study, consider the following:

- i)* Who is the study for? Who is the audience and how will the study be used?
- ii)* Is the study testing a hypothesis, or fishing for information?
- iii)* Are your local directories up to date? What are the Data Protection issues?
- iv)* Is there a list of local networks/programmes to refer to?
- v)* Are there previous surveys you could refer to?
- vi)* Consider how the survey will impact on businesses:
 - If carrying out a survey, can questionnaires be pre-completed, so that companies only have to update certain key information (e.g. turnover)? You are more likely to get a reply this way.
 - Can you link to other surveys to reduce the number of requests going to businesses?
 - Do you have the right contact in a business? A Sales Director may give a different view to a Finance Director.
- vii)* How realistic is the budget and timeframe? Desk research is often cheaper and quicker than surveys, but can be less robust and may not be very locally focused or up-to-date.
- viii)* Is a Steering Committee needed? Who should be on it?
- ix)* Will tenders and the final study be peer reviewed?

B) What data should be measured?

Only data relating directly to EGS activities should be requested and counted in any survey. See section 3 for suggestions of what data to collect.

Companies' figures should refer to the local contribution (of turnover and number of employees) for that region only. This may also have to be estimated in most cases.

Where figures are not available (many companies may not break down their data in this way), a clear methodology should be set out and agreed which allows apportionment of outputs/employment figures etc.

C) Primary or Secondary Companies

Regions may wish to consider how to define a company as operating in the EGS sector. For instance, each company could be classified as either:

Primary EGS Company:

A company providing more than 50% of its overall turnover into the EGS market, or if less than 50%, the EGS sector is its largest area of focus.

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Or;

Secondary EGS Company:

A company whose largest area of focus is not the EGS sector.

Data collected for either primary or secondary companies should only relate to their EGS activities.

Companies can move in and out of the EGS sector. Movement (in and out) on the secondary category would be expected, but less so on the primary. Mapping studies should consider the reasons for changes in overall data between survey periods.

The wording used when publicising statistics needs to be carefully chosen. The following wording will avoid over estimates of the number of companies in the sector if the definition is wide enough. Suggested wording: "There are (x) companies active in the EGS sector in the region" is accurate for describing all the primary and secondary companies (described above). Whereas, "There are (x) EGS companies in the region" should only be used for primary companies (whose main focus is EGS). This will be more consistent with other industries.

D) HQ or non-HQ companies,

Current systems to estimate the national size of the EGS industry assume that there is no double counting. However, the larger companies will have been double counted as they are present in several or even most regions (therefore could be counted up to 12 times).

Companies should only be included in the figures if they have an office / manufacturing facility / depot in the region. Companies working in the region, but based outside should be considered as exporters to the region.

To ensure meaningful national figures it would be helpful if all companies were identified as either HQ, or non-HQ companies. HQ companies are those with the national HQ located in the region. Non-HQ companies have the national HQ located in another region, but also have a satellite base in the reporting region. The national number of businesses is calculated by adding only HQ lists, which avoids double counting. A company's HQ is defined as the place where its CEO / Directors are located (not its registered address).

E) Apportioning Sub-sector Activity

Companies operating in more than one sub-sector should have their turnover and number of employees apportioned to each sub-sector according to actual information available. If information is not available it is suggested that a rough split is achieved using turnover as a guide (e.g. turnover split of company 'A' between Renewable Energy and Air Pollution Control is 40-60%). Therefore employees will also be split 40-60%, unless more accurate information is available to suggest otherwise.

F) Turnover vs GVA ?

Turnover is the easiest figure to obtain from companies, and we would recommend its use, rather than GVA (Gross Value Added). If GVA is used, you should also ask for the original turnover figures for national use.

The calculation of GVA is sales less the cost of bought-in materials, components and services. It can be calculated for each company as: Operating profit + Employee costs + Depreciation + Amortisation (amortisation is the depreciation of goodwill). It is used by The Office of National Statistics to calculate national output (GDP) and avoids the double counting that turnover generates (if you added all the turnover of UK companies it would be about three times larger than GDP). It should also be noted that there is no industry standard (for the EGS sector) for converting turnover to GVA by a simple multiple.

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However, it is unreasonable to expect that companies, especially smaller ones, will divulge all the necessary information so that an accurate GVA calculation can be made. Therefore, whilst turnover is not as useful, it is much more readily available.

For this reason, turnover should be used as the primary metric for measuring the size of the industry.

G) Employees: full-time equivalent – how to define/calculate?

It is recommended to use full-time equivalents. However, some sub-sectors, especially those where companies are involved in project based work, such as land remediation, may sub-contract from agencies or specialist companies and there is a risk those sub contractors may be counted more than once. To avoid this, if companies report the use of sub-contractors, employment figures should be calculated as full-time equivalents. Regions may wish to identify such employment separately from permanent staff.

6. EGS Sub-sector Definitions

A separate document has been developed by Government that defines the EGS sector. Regions should adopt these definitions so that like for like comparisons can be made across regions. However, it is recognised that regions may, for their own purposes, combine or sub-divide EGS sub-sectors, may exclude specific sub-sectors or even add extra ones. In order to gain the benefits of robust national figures, regions are encouraged to map the EGS sector in such a way that these variations can be allowed for in national aggregation, and that regional figures can be supplied in the national format.

ANNEX A

Examples of Regional Mapping Methods

Example 1

Environmental Industries Federation (EIF):

- Yellow pages, Trade Directories etc. are good sources of company details.
- Questionnaires should be designed with the respondent in mind as much as the information you are trying to gather. Use tick boxes as much as possible, and keep the length to a maximum of 2 sides of A4. If the respondent can fill the questionnaire in easily they will do it immediately. If they can't they will put it to one side and you are unlikely to get a response.
- If you have information on the company, add that to the questionnaire where possible. This allows them to change information that is incorrect but again gives them less to do.
- Enclose a prepaid addressed envelope with the questionnaire.
- The EIF Methodology and Assumptions are as follows:

Methodology

The EIF definition of the environmental sector has been developed using the DTI definitions and those adopted as standard by other regional sector initiatives. The EIF has broken the sector into 13 sub sectors.

The environmental sector cannot be defined by Standard Industry Classification Codes (SIC) as many don't exist for our various sub-sectors.

Contact details for the companies included in the survey were obtained through a variety of sources, including regional support agencies, local and national trade directories, regional telephone directories, word of mouth and relevant companies contacting the EIF direct.

It is possible that companies relevant to the survey have not been included. To limit sample bias and minimise the risk of exclusion, the most current editions of directories were used to collect company details. Companies, which do not have an entry in a trade directory, are usually included in publications such as the Yellow Pages. Consequently, the telephone directories used were vital in ensuring that as many businesses as possible were included in the survey. Details for those companies held in directories from previous years will have been collected and validated during the previous exercises.

As with previous mapping surveys, those companies failing to respond to an initial questionnaire were contacted by telephone and/or email. If a response remained outstanding, it was included in the research according to the guidelines set in the section marked "Assumptions".

In some cases, businesses are reluctant to reveal potentially sensitive details regarding staffing levels and annual turnover. They often prefer to categorise their business within certain bands i.e. 1 - 5 employees and £250,000 - £500,000 annual turnover.

To encourage companies to complete and return the questionnaire, the option to record staff numbers and turnover by selecting the appropriate bands was made available.

Assumptions

For the purpose of this exercise it is assumed that companies indicating that they employ over 500 people will be categorised as having 600 employees, and those indicating that they have an annual turnover of over £15 million, will be categorised as having an annual turnover of £16 million.

Assumptions have also been made for companies not responding to the 2005 survey. It is assumed that those companies who have not responded to this year's survey, but have responded in the previous year will maintain the previous years data, as long as we are satisfied they are still trading.

Those companies who have not responded to either the current or a previous year's survey are allocated into the lowest band for turnover and employee numbers. These companies will therefore be classed as employers of between 1 and 5 people and have a turnover of less than £250,000. No other assumptions are made about these companies.

The questionnaire used by EIF is reproduced in Annex B.

Example 2

Welsh Assembly Government (WAG):

Overview

- The 2006 mapping exercise involved an update of a comprehensive database of EGS firms which was based on internal and external sources of information;
- Survey methodology was based on draft UKFEI Guidelines;
- The questionnaire was designed for ease of completion with company details provided where available to reduce time to complete;
- Postal, email and web versions of the questionnaire were provided to give options for the response mode;
- Extensive follow-up by telephone and email was carried out to encourage responses, with a call log to track progress and continuously monitor responses to identify areas for more focussed chasing;

Database

The database of companies was based on WAG's client management system which contains information on EGS firms compiled from a range of sources over a period of 6 to 8 years. This was supplemented by data from a number of EGS sub-sector initiatives (e.g. clusters covering geosciences, water, micro-generation and international trade) to provide a comprehensive listing of companies with contact details.

Survey Methodology

This was based on the latest UKFEI Guidelines in terms of sub-sector definitions and the recommendations on issues such as primary versus secondary companies, turnover, employment and location of HQ.

This was a one-off survey. Regular surveys have not been undertaken in Wales in the past, so as not to bother the companies - but every opportunity is taken to maintain the database through other sources, day-to-day contact, etc.

The questionnaire was designed to be delivered in a variety of ways to maximise the response i.e. by post, email and through the web. It covered all the main headings suggested in the Guidelines as well as a section to obtain feedback on the EGS Programme to provide additional information for an evaluation study which was being carried out in parallel with the mapping project.

The questions were mainly multiple choice with tick boxes for ease of completion and, where available, information on companies from the database was merged onto the questionnaires to avoid companies having to repeat information already provided and to reduce the time for firms to complete the questionnaires.

The questionnaire was pilot tested and the survey methodology was approved by the Survey Control Department at the Welsh Assembly Government before going live. Although the questionnaire was lengthy (six pages), the pilot testing showed that it could be completed within about 15 minutes with no problems.

Designers of mapping surveys need to weigh up whether maximizing the response rate by having a short/simple questionnaire is more important than collating more information from a smaller sample of respondents.

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The questionnaire was dispatched by post to the full database of EGS companies with a letter from the EGS Programme Manager explaining the purpose of the survey and the benefits of participation. A freepost envelope was provided for the replies. It was decided to use the post for the first contact with the companies since the database contained full postal address details but less than half the firms had email contact details.

Follow-up to encourage a response was by a combination of telephone and email. A full call log was maintained to track replies and to identify reasons for non-response. The responses were analysed by location, size and sub-sector and compared with the full database and previous surveys to identify areas where the response was weak. This helped to direct the follow-up which also focused on the leading and/or larger EGS companies in Wales.

Analysis of Results

The questionnaire results were transferred to a spreadsheet which covered all the survey questions and enabled a detailed analysis of the results to be undertaken.

At the time of writing, the follow-up and analysis is still in progress and hence it is too early to report on the overall response and quality of information. However, the results to-date are encouraging with a strong response from both the leading EGS companies and those which have had little interface with the EGS Programme in the past.

The data gathered is being used to provide an up-to-date characterisation of the sector in Wales. Extrapolating data from the sample that responded is possible and should provide an adequately accurate picture. If the main purpose of the data was to populate/update an operational database, then a higher response rate (as complete as possible in fact) would be more important.

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ANNEX B Examples of Survey Questionnaires

Attached are survey forms used recently by Environmental Industries Federation and Welsh Assembly Government.

Example 1: Environmental Industries Federation (EIF)

All data supplied in this questionnaire are kept strictly confidential, held on a secure database and is not disclosed to any party without your permission. (Data Protection Act 1998)

ENVIRONMENTAL INDUSTRIES SURVEY 2005

1. Please complete the following contact details.

Organisation Name:	
Address:	
Postcode:	
E-mail:	
Contact Name:	
Position:	
Telephone:	
Web Site:	
Fax:	

2. How does your organisation trade as (Please tick appropriate box)

Limited Company	Partnership	Sole Trader	Public or other
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Previous response:

(Please state if different from previous response) _____

3. How long has your business been trading?

Previous response:

(Please tick appropriate box if different from previous response)

0 - 12 months	1 - 2 years	2 - 3 years	3 - 4 years	4 - 5 years	5 - 7 years	7 - 10 years	10 - 15 years	15 + years
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. How many employees do you have working in the North East region?

For multidiscipline organisations only include an estimate for the environmental section.

Previous response:

(Please tick appropriate box if different from previous response)

1 - 5	6 - 10	11 - 50	51 - 100	101 - 250	251 - 500	500 +
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Please give an indication of your annual turnover.

For subsidiaries of large organisations only indicate an estimate for turnover in the North East relevant to the environmental section of the organisation. (Please note new turnover bands have been added since the last survey)

Previous response:

(Please tick appropriate box if different from previous response)

Under £250,000	£250,000 - £500,000	£500,000 - £750,000	£750,000 - £1m	£1m - £5m	£5m - £10m	£10m - £15m	£15m +
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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6. Does your organisation have a parent company? If subsidiary, please state name of parent organisation, and the postcode (or country if overseas).

YES	NO

Previous response:
(Please state if different from previous response) _____

7. Where do you sell your goods and / or services?

Previous response:
(Please tick all that apply if different from previous response)

Regionally	Nationally	Europe	Rest of the world

8. Please indicate your core business with the letter 'C' and tick other boxes that apply.

	Air pollution control	Contaminated land remediation	Energy management	Environmental monitoring & instrumentation	Environmental services	Laboratory / Analysis	Marine pollution control	Noise & vibration control	Waste management & recycling	Water & wastewater treatment	Landscape industries	Renewable Energy	Biomass
Manufacturer													
Supplier													
Agent / Distributor													
Consultant													
Service Provider													

9. Please give a brief description of the products/services you offer:

(Please edit if different from previous response given below)

The EIF receives requests from individuals and organisations that may need to use your goods and / or services. If you do not wish to have your contact details passed on to such parties please tick the box

The EIF would like to send you information and invitations to events that are relevant to your organisation. If you do not wish us to use your details to forward this kind of information please tick the box

SURVEY COMPLETED BY:

(Please print)

POSITION:

DATE:

Thank you for your time in completing this questionnaire.

Example 2: Welsh Assembly Government (WAG)

**SURVEY OF THE ENVIRONMENTAL
GOODS AND SERVICES (EGS) SECTOR**

ALL INFORMATION PROVIDED WILL BE TREATED AS STRICTLY CONFIDENTIAL

Company Name	
Address	Postcode
	Telephone
Contact Name	Position
Contact e-mail	
Company e-mail	
Company website	

1. Company Overview

1.1 Company Status Please tick the box which best describes your organisation:

PLC Limited Company Partnership Sole Trader

Not for profit organisation Other (please give details)

1.2 Is your company's head office located in Wales? Yes No

If no, where is the head office?

1.3 When was the company established in Wales? Year:

1.4 Has your company achieved any of the following standards, accreditations or awards? Please tick the appropriate boxes:

ISO 9000 ISO 14001 EMAS Green Dragon

Investors in people Other (please specify)

1.5 How many people (full time equivalents) does the company employ? Please tick the appropriate boxes for employment **in Wales** and in total if part of a group:

Employment	1 to 5	6 to 10	11 to 50	51 to 249	250 to 499	500+
Wales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1.6 What is the approximate turnover of your operating unit **in Wales**? Please tick the appropriate box:

under £250K £250k to £500k over £500k to £1m over £1m to £5m

over £5m to £15m over £15m to £50m over £50m

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2. Environmental Goods and Services (EGS) Sector Information

2.1 Which of the following EGS sub-sectors best describe your environmental activities? Please tick one box for your primary activity and other boxes for any other activities:

	Primary Activities (tick one box only)	Other Activities (tick more than one box if needed)
Air Pollution Control	<input type="checkbox"/>	<input type="checkbox"/>
Cleaner Technologies & Processes	<input type="checkbox"/>	<input type="checkbox"/>
Environmental Consultancy	<input type="checkbox"/>	<input type="checkbox"/>
Environmental Monitoring, Instrumentation & Analysis	<input type="checkbox"/>	<input type="checkbox"/>
Energy Management/Efficiency	<input type="checkbox"/>	<input type="checkbox"/>
Landscape Design, Creation & Management	<input type="checkbox"/>	<input type="checkbox"/>
Marine Pollution Control	<input type="checkbox"/>	<input type="checkbox"/>
Noise & Vibration Control	<input type="checkbox"/>	<input type="checkbox"/>
Recovery & Recycling	<input type="checkbox"/>	<input type="checkbox"/>
Remediation & Reclamation of Land	<input type="checkbox"/>	<input type="checkbox"/>
Renewable Energy	<input type="checkbox"/>	<input type="checkbox"/>
Waste Management	<input type="checkbox"/>	<input type="checkbox"/>
Water Supply & Waste Water Treatment	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>

2.2 Please give a brief description of your company's EGS activities:

2.3 Do your EGS activities form the largest part of your business? Yes No

2.4 How much of your turnover relates to the supply of environmental goods and services? Please tick the appropriate box:

100% 75 to 99% 50 to 74% 25 to 49% Below 25%

2.5 What type of operation does your company have in Wales? Please tick the appropriate box or boxes:

Manufacturer Agent/Distributor Services Operation of a facility
 Research & Development Other (please specify)

2.6 How has the company performance relating to the EGS sector changed over the **past three years**? Please tick the appropriate boxes:

	High Growth (ie. >20% p.a.)	Growth	Static	Reduced
Turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Profits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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3. Markets

3.1 What are the main customer sectors for your EGS activities? Please tick the appropriate boxes:

Sector	Sector	Sector
<input type="checkbox"/> Agriculture & Forestry	<input type="checkbox"/> Marine (incl. offshore oil/gas)	<input type="checkbox"/> Tourism
<input type="checkbox"/> Central/local government	<input type="checkbox"/> Mining & Quarrying	<input type="checkbox"/> Waste Management Companies
<input type="checkbox"/> Construction	<input type="checkbox"/> Nature Conservation	<input type="checkbox"/> Water Companies
<input type="checkbox"/> Energy Supply & Distribution	<input type="checkbox"/> Regulators	<input type="checkbox"/> Other
<input type="checkbox"/> Manufacturing industry	<input type="checkbox"/> Service Industry	<input type="checkbox"/> Other

3.2 Please indicate the estimated geographical breakdown of your EGS sales below:

Geographical Market:	% of sales of environmental goods and services
Wales	
Rest of the UK	
Overseas	
Total	=100%

3.3 If you trade internationally, with which world regions do you currently trade and with which are you planning to trade? Please tick the appropriate boxes:

World Region	Current export markets	Planned export markets
Western Europe	<input type="checkbox"/>	<input type="checkbox"/>
Central/Eastern Europe	<input type="checkbox"/>	<input type="checkbox"/>
Middle East/Africa	<input type="checkbox"/>	<input type="checkbox"/>
Asia	<input type="checkbox"/>	<input type="checkbox"/>
Far East /Australasia	<input type="checkbox"/>	<input type="checkbox"/>
North America	<input type="checkbox"/>	<input type="checkbox"/>
South America	<input type="checkbox"/>	<input type="checkbox"/>
Others (please specify)	<input type="checkbox"/>	<input type="checkbox"/>

3.4 Do you have any specific support needs in relation to international trade? Yes No
If yes, please describe below:

4. Innovation and Research & Development

4.1 How many staff (full time equivalents) are dedicated to research and development (R&D)? Please tick the appropriate box:

0 1 to 5 6 to 20 Over 20

4.2 Roughly what percentage of company's turnover is invested in R&D? Please mark the appropriate box:

Less than 1% 1 to 5% 6 to 10% 11 to 20% Over 20%

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4.3. Have you launched any new products or services over the past three years? Yes No

If yes, how many have you launched?

4.4 Do you own or license any intellectual property? Yes No

If yes, please indicate the type(s) of intellectual property in the following boxes:

Patent Trademark Design Registration Copyright protected

Exclusive rights Others (please specify)

4.5 Has your company had any links to academic or commercial R&D organisations over the past three years? Yes No

If yes, which organisations?

4.6 Are you interested in any overseas collaborative opportunities in the field of R&D and/or technology transfer? Yes No

If yes, please indicate your areas of interest in the boxes below:

Technology licensing Joint venture Technical co-operation Manufacture

R&D Other (please specify)

4.7 Has your company received external funding for innovation or R&D over the past three years?

Yes No

If yes, please indicate the sources of funding below:

SMART Cymru EGS Programme DTI Carbon Trust

EU Framework EU Life Other (please specify)

5. Future Developments

5.1 How do you expect your environmental business to grow in the **next three years** – turnover, employment and profit margins? Please tick the appropriate boxes:

	High Growth (ie. >20% p.a.)	Growth	Static	Reduced
Turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Profits margins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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5.2 What are the most significant barriers to growth in your organisation? Please tick the 5 most significant barriers from the following list:

Lack of suitable sites and premises	<input type="checkbox"/>	Market conditions	<input type="checkbox"/>
Difficulties in recruiting staff with scientific/technical skills	<input type="checkbox"/>	Limited marketing resources	<input type="checkbox"/>
Other staff/recruitment issues	<input type="checkbox"/>	Lack of market intelligence	<input type="checkbox"/>
Need to develop business management skills	<input type="checkbox"/>	Competition	<input type="checkbox"/>
Lack of suitable training providers available locally	<input type="checkbox"/>	Export costs	<input type="checkbox"/>
Lack of finance for business growth	<input type="checkbox"/>	Standards & Regulations	<input type="checkbox"/>
Lack of new products or services	<input type="checkbox"/>	Location/Distance from markets	<input type="checkbox"/>
Lack of resources for R&D	<input type="checkbox"/>	Other (please specify)	<input type="checkbox"/>

5.3 Thinking about your future business support needs, please rate the importance of the following types of support for your company:

	High	Medium	Low
Developing collaborative partnerships and agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financing the business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding for projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General business advice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Innovation and R&D	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International trade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Advice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resource efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sites & premises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Skills & Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5.4 Please identify any specific business support needs below:

6. Environmental Goods & Services (EGS) Programme Feedback

6.1 Were you aware of the EGS Programme before receiving the letter and questionnaire?

Yes No

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6.2 Have you received any support from the EGS Programme? Yes No

If yes, in which of the following areas have you received support and how useful was this support to your business? Please tick the appropriate boxes:

	Very useful 5	4	3	2	Not useful 1
Grants for advice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grants for project implementation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Events and networking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International trade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Directory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General enquiry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Signposting to other business support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6.3 Please provide any specific comments on the quality or effectiveness of the EGS support received below:

6.4 Would you like to use the EGS Programme again in the future? Yes No

If yes, what types of support?

If not, why not?

6.5 What changes, if any, would you like to see in the EGS Programme? Please tick the appropriate box and add any comments:

No change

Changes to the existing support provided by the EGS Programme. Please indicate which areas:

New types of support to be provided by the EGS Programme. Please indicate which areas:

6.6 Please add any other comments relating to the EGS Programme below:

Thank you very much for your co-operation.

Please e-mail the completed questionnaire to: richard.pearce@quantumst.co.uk