

## Manufacturing questionnaire

We invite you to take part in Deloitte CIS survey dedicated to current issues faced by companies in the Manufacturing sector. Your responses will help us to define the most important areas for your company and the challenges that your business may face.

### 1. Select the three key factors that you feel are most necessary to increase Russia's competitiveness in the global Manufacturing sector:

- Professionalism and availability of personnel (researchers, scientists, engineers, manual workers)
- Transparency and stability of regulatory, tax and economic policy
- Removal of administrative barriers
- Availability of finance raising tools
- Cost and availability of raw materials
- Logistics (timely procurement to increase the quality of production and streamline the production process)
- Stability and clarity of labour legislation and regulatory policy
- Quality and efficiency of the infrastructure (grids, IT, roads, airports, ports and railways)
- Energy costs (amount of investment into improvement and modernisation of the energy infrastructure)
- Market attractiveness (size of and ease of access to the local market, local competition)
- Healthcare system (cost of qualified medical aid for employees, healthcare regulation policy)
- Government investment in manufacturing and innovation

### 2. How satisfied are you with the level of qualification of manufacturing employees? (Select one option per category)

#### Manual workers:

- Satisfied
- Somewhat satisfied
- Dissatisfied

#### Researchers, scientists, engineers:

- Satisfied
- Somewhat satisfied
- Dissatisfied

#### Management:

- Satisfied
- Somewhat satisfied
- Dissatisfied

### 3. How important is the refinancing of loans to your business now? (Please select one option)

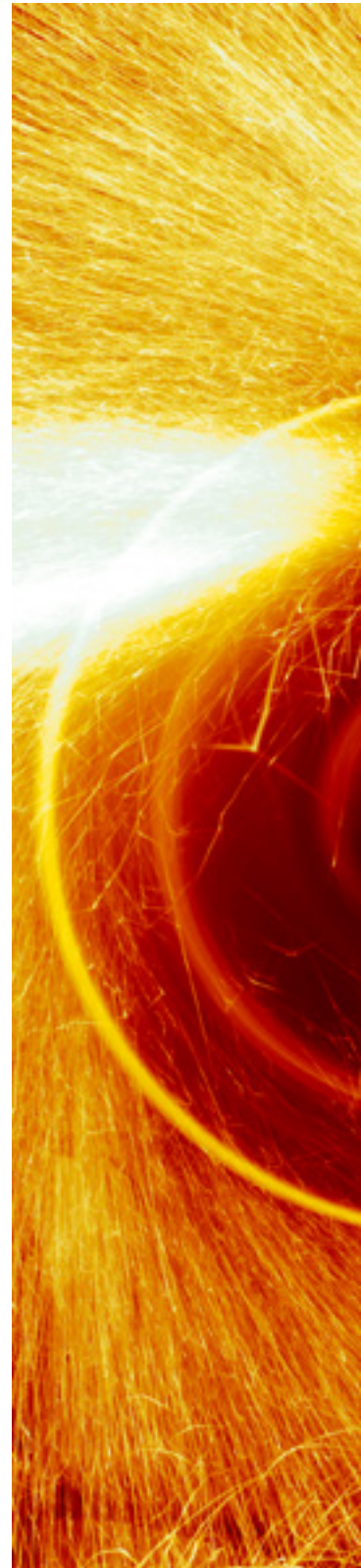
- Highly important
- Somewhat important
- Not important

### 4. If you selected "Somewhat important" or "Highly important" for the previous question, what share of your loans has been refinanced over the last year or will be refinanced in the near future? (Please select one option)

- <20%
- 20–50%
- 51–99%
- 100%

### 5. What are the principal directions of your business development strategy? (Select all that apply)

- Construction of new production facilities in the Russian Federation
- Acquisition of a company or merger with a company operating in the same market segment
- Spin-off and/or disposal of non-core (non-priority) business
- Establishment of a new joint venture with a Russian/foreign manufacturer, including contract manufacturing





- Launch of a new product line on the Russian market
- No significant changes
- Searching for new sources of finance
- Other: \_\_\_\_\_

**6. What is your strategy horizon?**

- 1–2 years
- 3–5 years
- >5 years

**7. What factors may increase the competitiveness of your organisation on the Russian market? (Select all that apply)**

- Launch of new facilities
- Labour cost reduction
- Marketing
- Increase in enterprise production efficiency and optimisation of management structure
- Modernisation of existing technology
- Reduction in energy and raw material costs (energy and technology audit)
- “Shadow” import limitation
- Parallel import legalisation
- Vertical integration
- Product line extension
- Decrease of profitability
- Other: \_\_\_\_\_

**8. What three principal measures is your company planning to implement in the near future to reduce energy costs and expenses on the acquisition of energy resources?**

- Enhancement of technological processes and implementation of cutting-edge energy-saving technology
- Reduction of standard production energy costs in all divisions of the enterprise
- Prevention of direct energy losses through equipment and networks
- Use of waste energy
- Reduction in operational time of primary equipment
- Reduction in the acceptable rate of defective products
- Reduction in time and capacity of machinery running with no load
- Installation of electric power generator

**9. How have the U.S./EU sanctions affected your business? (Please select one option)**

- Direct negative effect
- Indirect effect, but your company is aware of possible negative consequences in the near future
- Your company expects to benefit from the current political situation

**10. Assess the overall effect of currency exchange rate fluctuation on your company (please select one option)**

- Positive
- Negative
- No effect

**11. Was your company negatively affected by restricted access to external investment sources resulting from the introduction of sanctions?**

- Yes
- No

**12. What kind of government incentive would be the best for your company? (Please select one option)**

- Qualified personnel training
- Support for innovation
- Investment into infrastructure, grants and subsidies
- Tax and other financial incentives (interest rate subsidy on borrowings from commercial banks, state guarantees on commercial borrowings, subsidised costs)
- Government orders for the company’s products
- Customs duties and quota regulation

**Professional services area**

**13. What professional services does your company use, or has it used in the past? (Select all that apply)**

- Professional education
- Audit
- Consulting
- Corporate governance
- Financial advisory
- Tax and legal advisory
- Enterprise risk management
- IPO services
- Other: \_\_\_\_\_

14. Has your company ever engaged Deloitte to render professional services?

- Yes
- No

15. If you answered "Yes" to the previous question, please specify what services Deloitte rendered to your company.

\_\_\_\_\_

\_\_\_\_\_

16. Do your company's employees apply predictive analytics tools? (Select all that apply)

- Yes, they use forecasting methodologies
- Yes, they use data analysis methodologies to identify discrepancies
- Yes, they use data visualisation and interactive report preparation methodologies
- No, but we plan to introduce them in the future
- No, and we have no plans to introduce them in the future

17. If your company's employees apply predictive analytics in their day-to-day work, which solutions does your company use? (Select all that apply)

- SAP
- Oracle
- 1C
- SAS
- SPSS
- Matlab
- R
- In-house software
- Other: \_\_\_\_\_

18. If your company's employees apply predictive analytics in their day-to-day work, what are the main advantages and disadvantages of the software used?

- Advantages: \_\_\_\_\_
- Disadvantage: \_\_\_\_\_

19. If your company's employees do not apply predictive analytics, what are the principal reasons for this? (Select all that apply)

- No need
- No time to get to know the software
- The software does not perform accurate analysis
- Other: \_\_\_\_\_

#### Information about respondents

20. What is the main activity of your company? (Please select one option)

- Metal products
- Automotive industry
- Chemical industry
- Industrial equipment production
- Other: \_\_\_\_\_

21. Which of the following best describes your company? (Please select one option)

- Russian company
- Foreign company without localised manufacturing
- Foreign company with localised manufacturing (i.e. its own production capacity and/or contract manufacturing)

22. How many employees does your company have? (Please select one option)

- < 100
- 100–500
- 501–1000
- 1001–5000
- > 5000

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