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**SURVEY ON THE TRADE IMPLICATIONS OF
INTERNATIONAL STANDARDS
FOR QUALITY AND ENVIRONMENTAL
MANAGEMENT SYSTEMS
(ISO 9000 AND ISO 14000 SERIES)**

Report

undertaken by MORI

for Resource

on behalf of UNIDO

April - August 1997


RESOURCE
(SCIENCE & TECHNOLOGY EXPERTISE) LTD.

MORI

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INTRODUCTION

INTRODUCTION

This document contains an interpretive report of the findings of a survey carried out by MORI (Market & Opinion Research International) for Resource (Science & Technology Expertise) Ltd, on behalf of UNIDO (United Nations Industrial Development Organisation).

The objectives of this survey are to investigate the potential effects of ISO 9000, ISO 14000, and product environmental labelling on the domestic and export trade of developing and emerging economies and, in particular, to assess whether these standards represent a barrier to international trade.

This report is designed to interpret and explain the numeric data displayed in a separate volume of computer analyses. These tables should be referred to for further details.

We have broken down the text into a number of sections to enable ease of access to relevant information. There follows a short summary of the key messages arising from the survey. This summary is interpretative in nature, and does not contain numerical tables or graphic representations.

Following the summary there is a detailed commentary of the question areas and survey themes. The order of the commentary follows the headings given in the table of contents. Where possible, sub-group differences have been referred to, although readers should be aware of the small number of respondents represented in some of these sub-groups, and therefore the lower statistical reliability relating to data from these groups (see overleaf for further details concerning statistical reliability). This note of caution applies particularly to the geographical breakdowns given for some questions.

Where possible graphics and numeric tables are integrated with written text, with the relevant chart following the section of explanatory text.

'Base' Figures

On all tables and graphics the 'base' is marked, both as a figure and as a written explanation. This figure shows the actual number of respondents (out of a maximum of 351) who are represented by the percentages given. Since some questions are only asked of certain groups of respondents, particular attention should be paid to this 'base' explanation to establish which group of respondents are represented.

For several questions requiring technical knowledge, the numeric tables and associated text in this report have been based on **only** those respondents from National Standards bodies. This has been done to ensure as far as possible that an accurate picture of the true situation (rather than of the **perceived** situation) is given. The questions which have been based on this group only are:

Version A Q11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 25, 27, 28, 46, 47, 48 and 49.

Two versions of the questionnaire were used in the survey; although many questions were asked of all respondents, several related either **only** to bodies directly involved in international standards provision or **only** to industry associations and commercial enterprises. Throughout this report the term '**version A**' refers to those respondents answering version A of the questionnaire - these being government (trade) departments, national standards bodies, certification bodies and accreditation bodies. The term '**version B**' is similarly used to refer to all those answering version B of the questionnaire - industry associations, chambers of commerce, service and industrial companies or enterprises.

Throughout this report an asterisk (*) represents a value of more than zero but less than 0.5%. Where percentages do not sum to precisely 100%, this is due to computer rounding of individual figures to the nearest whole number, or to the fact that the question allowed for multiple answers, or the exclusion of certain answer categories such as 'don't know'.

Interpretation of Data

The sample tolerances that apply to the percentage results in this report are given in the table below. This table shows the possible variation that might be anticipated because a sample, rather than the entire population was interviewed. As indicated, sampling tolerances vary with the size of the sample and the size of the percentage results.

For example, on a question where 80% of the people in the full sample of 351 respond with a particular answer, the chances are **95 in 100** that this result would not vary more than 4 percentage points, plus or minus, from a complete coverage of the entire population using the same procedures.

Size of sample on which survey result is based	Approximate sampling tolerances applicable to percentages at or near these levels				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
	±%	±%	±%	±%	±%
351 (All)	3	4	5	5	5
245 (All version B)	4	5	6	6	6

Tolerances are also involved in the comparison of results from different parts of the sample. A difference, in other words, must be of at least a certain size to be considered statistically significant.

Size of Sample Concerned	Differences required for significance at or near these percentages levels				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
	%	%	%	%	%
351 (All) and 245 (version B)	6	8	9	10	10

The sampling tolerances calculated above assume that the population from which the sample was taken is infinite in size. This is effectively the case for the 'private companies' interviewed (questionnaire version B), as the number of these organisations in the companies represented is very large.

When the size of the population from which the sample is taken is smaller in size, the effective accuracy of the sample increases, and the sampling tolerances decrease. The number of the different types of organisation selected in version A of the questionnaire are much smaller than the total number of companies. The following total population sizes are assumed for each type of organisation in the 89 countries which were potentially able to participate in the survey:

Organisation	Approximate Number of organisations in eligible countries	Number represented in survey
--------------	--	---------------------------------

Government (trade) Department	88	33
National Standards Body	88	41
Certification Body	250	13
Accreditation Body	25	10
TOTAL	451	97

The simplest way to calculate the new sampling tolerance figures for all of version A organisations (treated as a whole) is to take the total possible population size and the total number of organisations represented. These are then applied to the Student's t test, with a correlation factor applied to take into account the fact that the population is finite and the sample constitutes a substantial proportion of it.

The formula is:

$$1.96 \sqrt{\frac{P(100-P)}{Fn}}$$

Where: p = the percentage being considered
n = the sample size for any given percentage

F = the correlation factor, calculated as; $\frac{N - 1}{N - n}$, Where N = the universe size (451)
n = 97

The calculation of F in the above formula has been assumed to be 1.27 for all calculations. This is in fact the figure arrived at for a sample size of 97 (the total) and it has been assumed that the sample size would vary in the same ratio to the population for any given calculation.

eg For a finding of 10% among a National Standards Body:

$$1.96 \sqrt{\frac{10(100-10)}{1.27*41}} = 8\%$$

Similarly, the formula used to calculate the comparison of results within version A is:

$$1.96 \sqrt{\frac{p_1(100-p_1)}{n_1} + \frac{p_2(100-p_2)}{n_2}}$$

where p_1, p_2 are the percentages being considered

n_1, n_2 are the respective sample sizes

F is the correlation factor, calculated as: $\frac{N-1}{N-n}$

where n is the total sample size and N the universe size

Once again, F in the above calculation has been taken to be 1.27.

Specific Examples:	Significant Differences for These Percentages				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Sizes of Samples Being Compared:	%	%	%	%	%
Consents Minus Offerers (page 3)	10.5	14.0	16.1	17.2	17.5
97 v 33					
(Total) (Govt. Dept.)					

Publication of Data

As agreed between MORI, UNIDO and Resource, copyright rests with UNIDO. Any utilisation of the data contained in this report must be authorised by UNIDO, and, in the interests of accuracy, be cleared in advance with MORI.

SUMMARY

EXECUTIVE SUMMARY

- ISO 9000 and 14000 Series are said to be increasingly requested in business transactions - particularly by importers from industrialised countries - and the standards are thought set to play an ever bigger role in the future.
- Respondents are confident that they know about international standards in general, but whilst knowledge of quality management standards (ISO 9000 series) is thought to be good, respondents are less sure about **environmental** standards (ISO 14000 series), and confidence is poorer still for the specific area of international environmental labelling (ISO 14020).
- Knowledge is generally better among version A respondents.

ISO 9000 and 14000 Series

- Positively, ISO 9000 is seen to be succeeding in helping to expand international trade, and attaining it is thought important for companies to meet market demands (especially from international customers) and so to remain competitive.
- Problems are recognised for all International Standards however: all types of respondents recognise that the growing demands for international standards might present their own barriers to international trade, and (along with lack of awareness of benefits) the costs associated with the series are an issue affecting uptake of the initiative.
- Although intended to relate to companies generally, both ISO 9000 and 14000 seen as relevatively more important to specific types of company - exporters, larger sized companies and companies dealing with foreign organisations - and it is these same companies which are thought most aware of the standard, and which are most often recommended the series.
- The benefits to smaller organisations are also recognised, however - not least that being certified helps domestic producers to compete on an equal footing with imported goods.
- There are requests for assistance to be provided to all types of organisation in attaining ISO 9000 standards, although the areas which different organisations should assume responsibility for are specific. The legitimate scope for government help is widely thought to be limited to funding the initial stages of introducing the schemes, and the company itself should take responsibility for the main stages of implementation - a view held by companies themselves. It should be noted that the word "funding" was specifically used, rather than assistance.
- Governments which do provide help are thought to be funding the areas which they are expected to cover, although two-fifths report that their government does not provide **funding** for any aspect of the ISO 9000 Series.

Quality issues

- A number of questions were asked about QSAR, the scheme set up to enable certification bodies to obtain international acceptance of their competence and consequently the validity of the ISO 9000 certificates they issue. There is a strong desire for accreditation/certification bodies in developing and emerging economies to be assisted in gaining QSAR recognition, and also a strong belief that such recognition would help international trade.
- Of more concern is the majority who say QSAR recognition will be more difficult for developing and emerging economies to meet.
- Attitudes to QSAR do not differ markedly between commercial and quality standards organisations, or by geographical area (though those in Central and Eastern Europe do foresee more difficulty for developing/emerging economies in meeting the requirement).
- Among companies, half feel quality awareness is promoted by the government to all business, while a third feel it is not promoted at all. In Latin America/Caribbean countries, most say quality awareness is **not** promoted by the government at all.
- Large proportions of quality standards organisations feel the association of the ISO 9000 series with TQM to be very important - both for businesses generally and SMEs particularly. This appears particularly so in Sub-Saharan Africa (though the numbers involved are very small).

Environmental Issues

- Respondents feel less knowledgeable about environmental standards - and environmental labelling especially. One reason may be the narrow focus in business decisions on meeting legislative requirements. Not all governments are said to have an environmental policy, and in those countries that do have a policy, not all follow this through to promoting initiatives in industry.
- In addition, government enforcement of environmental legislation is widely perceived as ineffective, and fewer than half of respondents say there is significant pressure on companies to avoid environmental damage. It appears that many believe environmental legislation is merely paying lip service, and so the importance of environmental standards is diminished.
- The importance of ISO 14020 and environmental labelling is assessed very differently by different groups, those from commercial organisations placing far less value on a unified system of labelling than those administering standards. This area is one where few respondents have an in-depth knowledge of the situation, however, with almost no respondent being aware of what products companies have been applying for environmental labels.

Existing Problems

- The infrastructure needed to implement the different Management standards on a domestic basis is not in place in many developing countries: access to the means of implementing both ISO 9000 and 14000 is thought to be poor, and although four in ten report having a national accreditation body for ISO 9000, only a quarter have the relevant body for ISO 14000.
- An additional problem is that some foreign organisations will not accept certification unless it is issued by its own national body. This does not appear to be a problem which can totally be resolved in the short term - a quarter of respondents report that the bodies in their country neither have mutual recognition agreements currently or that these are pending.
- One way around the problem of non-acceptance of certification is for companies to go to internationally operating certification organisations, although this may not be an entirely satisfactory solution. This method of securing certification is widely thought to be expensive, and may do little to help developing and emerging economies establish their own conformity assessment infrastructure in the longer term.

London
September, 1997
MORI/9816

Michele Corrado
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David Johnston

MAIN FINDINGS

OVERVIEW

Knowledge of International Standards (Q1, version A)

The majority of respondents are confident that they know about international standards, four in ten claiming they know 'a great deal'. Almost none say they know nothing. Unsurprisingly, those most involved in the implementation of standards (version A respondents) feel particularly well informed, although representatives of commercial organisations (version B respondents) are not too far behind.

Those in larger companies are more confident than those in smaller organisations: almost all of the former (94%) say that they know at least 'a fair amount', this proportion falling to two-thirds (65%) of respondents from smaller commercial companies. This may be an indication of which type of organisation has so far been targeted in standards promotions - or which organisations seek out information about standards.

ASKED OF ALL RESPONDENTS

Q1 How much do you feel you know about international standards in general?

Base: All respondents (351)

	All (351)	Central and Eastern Europe (& CIS countries) (106)	Sub- Saharan Africa (31)	Middle East and Mediterranean (44)	South & East Asia (including Oceania) (82)	Latin American and Caribbean (87)
	%	%	%	%	%	%
'A great deal'	42	44	26	50	37	44
'A fair amount'	40	38	58	27	45	38
'Not very much'	15	14	16	11	15	16
'Nothing'	*	0	0	0	0	1
'Not sure' / 'No opinion'	4	4	0	11	4	1
All stating either 'A great deal' or 'A fair amount'	81	82	84	77	82	82
All stating either 'Not very much' or 'Nothing'	15	14	16	11	15	17

Knowledge of National Environmental Standards (Q33, version A)

Respondents are comparatively less knowledgeable about **national** environmental standards. Although six in ten (59%) feel they know 'a fair amount' or more about the regulatory requirements concerning the environment in their country, only one in five (21%) claim they know 'a great deal', and three in ten (30%) admit to knowing 'not very much' or 'nothing'.

Respondents' knowledge of national **voluntary** agreements is slightly weaker, with similar numbers saying they don't know very much as claim they are knowledgeable (38% and 44% respectively).

Again, version A respondents exhibit somewhat greater knowledge, though in both cases only around a quarter - 26% and 22% - say 'a great deal'.

Regionally, knowledge appears strongest in Latin American/Caribbean countries (29% and 24% reporting 'a great deal' of knowledge), while in South and East Asia just 6% say this in regard to voluntary agreements - by some way the lowest figure.

ASKED OF ALL RESPONDENTS

Q33 How much do you think you know about National environmental ...?

Regulatory Requirements/Voluntary Agreements

Base: All respondents (351)

	Regulatory Requirements	Voluntary Agreements
	%	%
'A great deal'	21	16
'A fair amount'	38	28
'Not very much'	26	29
'Nothing at all'	4	9
'Don't know'	11	18
All stating either 'A great deal' or 'a fair amount'	59	44
All stating either 'Not very much' or 'Nothing at all'	30	38

ISO 9000 MANAGEMENT SYSTEMS STANDARDS

Awareness and Importance of ISO 9000 (Q2, 3, 4, version A)

According to respondents, there are three key factors which influence the relative awareness and importance of ISO 9000: company size, involvement with foreign organisations, and the type of market operated in.

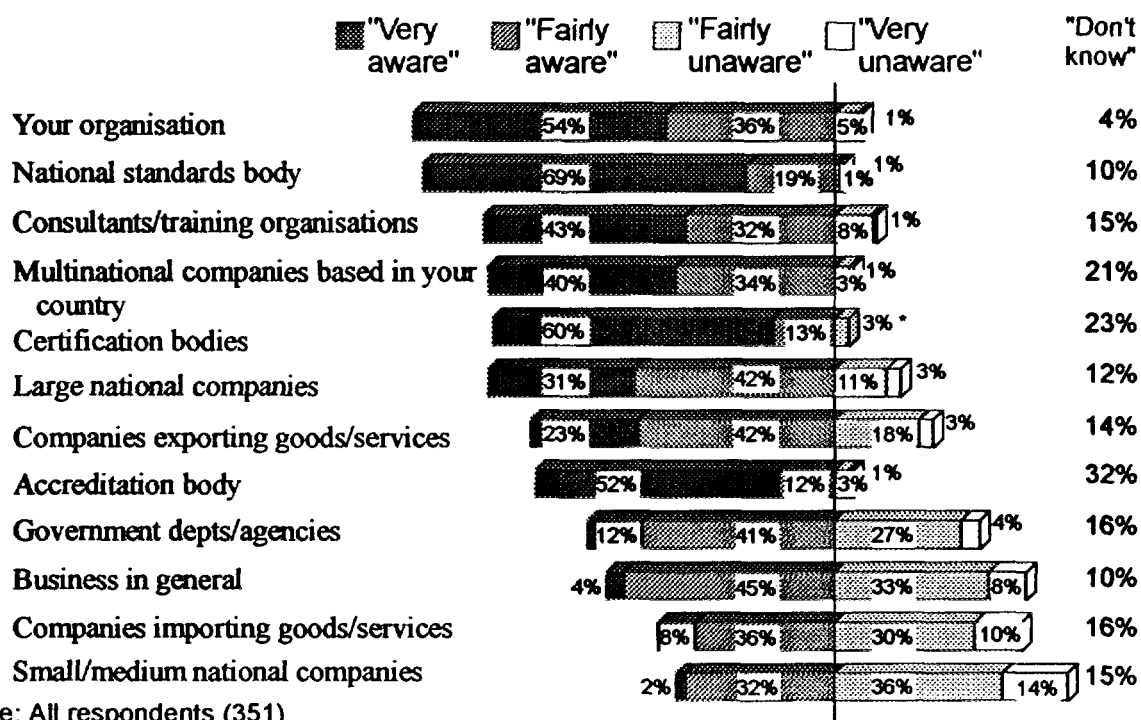
Larger companies are regarded as being more aware of ISO 9000, as they are of international standards generally, and the standard is seen to be of greater importance to them. Around three-quarters say that multinational companies and large national companies are aware of the series (Q2, opposite page), but small/medium companies are seen as the least aware of all organisations, only one-third believing them aware. Similarly, almost nine in ten think that the standard is *important* to multinationals and large national companies, but fewer - 78% - think this for smaller companies (Q3).

ISO 9000 is regarded as more important for **exporting** businesses than for any other type of organisation - and is widely predicted to increase in importance in this area in the future (Q4, page 13). Significantly more respondents feel ISO 9000 is important to exporters specifically than to either private sector or public sector companies generally. Exporters are rated significantly more *aware* of the ISO 9000 series than are importers (more than three-fifths of respondents say exporters are aware, compared with only around two-fifths for importers).

A third factor seen as determining the importance of ISO 9000 is the market an organisation operates in. The standard is thought to be of relatively less importance to companies serving domestic markets, and while more respondents expect the importance of ISO 9000 to increase rather than remain static, somewhat fewer people expect it to increase in importance for public sector companies (59%), smaller companies (67%), importers (66%) and companies serving the domestic market (67%) compared to large national or exporting companies (74% and 84%). This is linked to company size and involvement in exporting: domestic companies and those not exporting inevitably have fewer demands from organisations in industrialised countries (where the standard is more established).

ASKED OF ALL RESPONDENTS

Q2 In your opinion, how aware or unaware is/are... in your country of the ISO 9000 Series?



Base: All respondents (351)

ASKED OF ALL RESPONDENTS

Q2 In your opinion, how aware or unaware is/are . . . in your country of the ISO 9000 Series?

Base: All respondents (351)

	'Very aware' %	'Aware' %	'Unaware' %	'Don't know' %
...your organisation	(54)	90	6	4
...national standards body	(69)	88	2	10
...consultants/training organisations	(43)	76	9	15
...certification bodies	(60)	74	3	23
...multinational companies based in your country	(40)	74	5	21
...large national companies	(31)	74	14	12
...companies exporting goods/services	(23)	65	21	14
...accreditation body	(52)	64	4	32
...Government dept/agencies	(12)	53	31	16
...business in general	(4)	48	41	10
...companies importing goods/services	(8)	44	41	16
...small/medium national companies	(2)	34	50	15

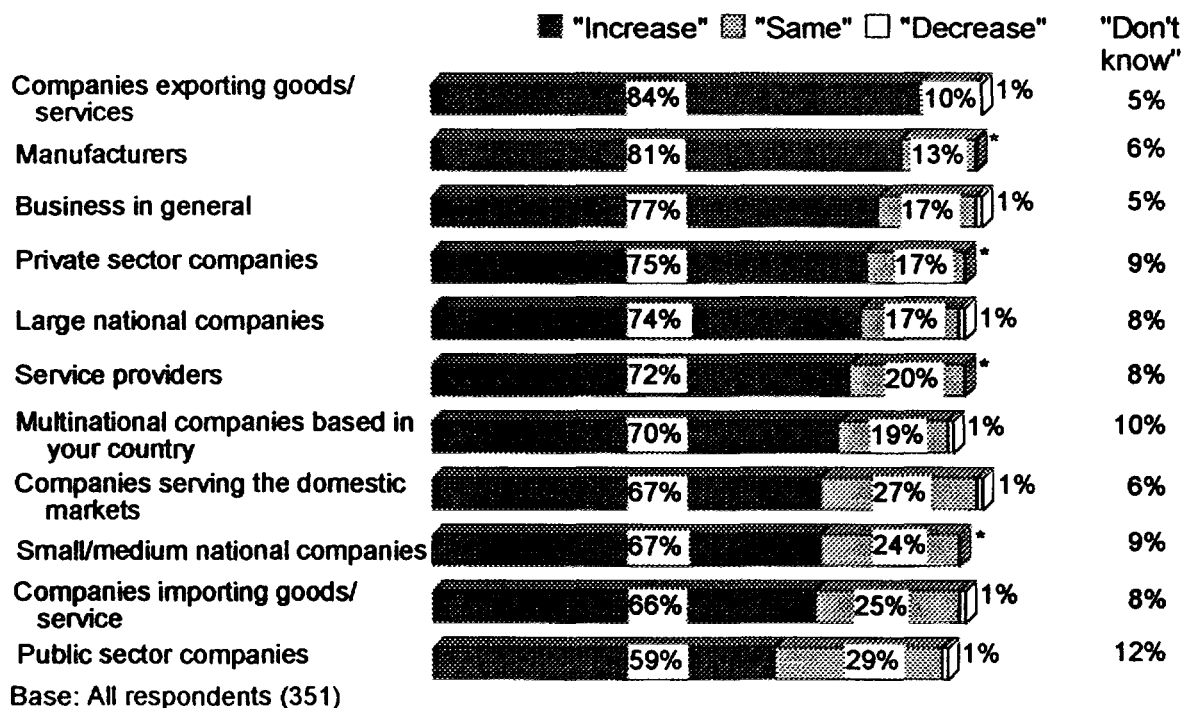
ASKED OF ALL RESPONDENTS

Q3 In your opinion, how important or unimportant is the ISO 9000 Series to the following types of company?

Base: All respondents (351)	'Very important'	'Important'	'Unimportant'	'Don't know'
	%	%	%	%
Companies exporting goods/services	(81)	95	1	4
Large national companies	(59)	87	5	9
Manufacturers	(57)	86	7	7
Business in general	(42)	86	9	5
Multinational companies based in your country	(60)	85	3	11
Companies importing goods/services	(49)	85	8	7
Private sector companies	(45)	79	13	9
Small/medium national companies	(34)	78	13	9
Service providers	(42)	77	15	8
Companies serving the domestic market	(33)	75	18	7
Public sector companies	(37)	74	17	10

ASKED OF ALL RESPONDENTS

Q4 Do you expect the importance of the ISO 9000 Series to the following types of company to increase, decrease or remain the same in the future?



Attitudes Towards ISO 9000 (Q30, 32 version A, Q11, 16 version B)

Attitudes towards ISO 9000 are mixed. Positively, registration is often thought to enable domestic companies to compete with imported products, and there is a common perception that registration will help to expand international trade. On the down side, the cost of certification is clearly an issue, and certification from some bodies is not recognised internationally.

A firm majority *disagrees* that ISO 9000 is doing little to help expand the international trade of developing and emerging economies - many (39% of all respondents) disagree strongly. There is a suggestion that organisations in Central and Eastern Europe are more sceptical towards the benefits of ISO 9000 in this respect (although due to the small number of respondents, regional data should be treated with caution).

ISO 9000 is clearly thought to be more and more important in winning business. A large majority (87%) say that certification is increasingly requested by foreign customers, around half (49%) 'strongly' agreeing that this is the case.

Although certification is increasingly requested, this is often on the terms of the foreign customer. Approximately half of those who express an opinion (43% of all respondents) agree that foreign customers are reluctant to accept ISO 9000 certificates which are not issued by their own national certification body. Version A respondents - who should have the best knowledge of the situation - feel most strongly that this is the case, and this is reinforced by more agreeing than disagreeing that exporters experience problems because ISO registration certificates are not always recognised in foreign countries.

A possible solution is for companies to gain certification from an international body. Only one-third see securing certification from this source as difficult, although it is considered expensive. Almost eight in ten agree that it is costly, with two-fifths agreeing 'strongly'.

Twice as many disagree as agree that ISO 9000 benefits small exporters more than large exporters, possibly because the cost of ISO 9000 is more of an outlay to smaller businesses. However, ISO 9000 is thought by three-quarters of those interviewed to help domestic producers (which may include many smaller companies) compete against imported products.

Although stated by only one in ten, the most frequent additional comment about ISO 9000 is that it is 'a great tool to improve the quality of products/services/functions'. A small but significant number (5%) say that assistance is needed for developing and emerging economies to develop ISO 9000 - with a further 3% thinking that financial support should be supplied from the Government. Similar numbers say that Quality Systems Assessment Recognition should be set up without delay, and that consumers and product providers need to be made aware of what the ISO 9000 series is.

ASKED OF ALL RESPONDENTS

Q30 To what extent do you agree or disagree with each of the following statements?

Base: All respondents (351)

	“Strongly agree” %	“Agree” %	“Disagree” %	“No opinion” %
Foreign customers increasingly request ISO 9000 certification	(49)	87	7	7
It is costly to secure certification from a certification organisation operating internationally	(40)	77	12	10
ISO 9000 registration helps domestic producers to compete against imported products	(28)	73	19	7
Foreign customers are reluctant to accept ISO 9000 certificates issued by bodies other than their own national certification bodies	(8)	43	36	21
Exporters experience problems because ISO 9000 registration certificates are not always recognised in foreign countries	(10)	41	33	26
It is difficult to secure certification from a certification organisation operating internationally	(10)	34	51	15
ISO 9000 registration will do little to expand our international trade	(10)	30	65	5
Small exporters benefit more than large exporters from ISO 9000 registration	(6)	24	50	26

Attitudes to Quality Systems Assessment Recognition (Q29B, version A, Q10, version B)

Quality Systems Assessment Recognition - the scheme which was set up to ensure that nationally-issued ISO 9000 certificates are accepted internationally - is thought to play an important role in ensuring the success of ISO 9000. Around eight in ten agree that Quality Systems Assessment Recognition will facilitate their country's international trade, with most of them (48%) agreeing 'strongly'.

A clear majority believe that securing Quality Systems Assessment Recognition is more of a challenge to developing and emerging economies than industrialised countries (68% agree that it will be more difficult, 17% disagree), and the need for help to be provided to the relevant bodies in developing and emerging economies is very strongly emphasised - more than half of all respondents 'strongly' agreeing. Only a very small number (3%) disagree that help should be provided.

ASKED OF ALL RESPONDENTS

Q29B The following statements refer to QSAR (Quality Systems Assessment Recognition) - details in accompanying letter. To what extent do you agree or disagree with each of these statements?

Base: All respondents (351)

	"Strongly agree" %	"Agree" %	"Disagree" %	"No opinion" %
Accreditation and certification bodies in developing and emerging economies should be helped to gain QSAR recognition	(54)	81	3	16
QSAR will facilitate my country's international trade if our national accreditation body secures QSAR recognition	(48)	78	4	18
It will be more difficult for developing and emerging economies to meet QSAR requirements than fully industrialised countries	(30)	68	17	16

Access to the Means of Implementing ISO 9000 and Distribution of Costs

(Q6, 7, 8 version B)

Access to **information** on ISO 9000 is thought to be 'adequate' by half (52%) of those answering Version B, with the remaining people split between those saying 'adequate but costly' (20%) and 'inadequate' (25%).

However, access to the **means to implement ISO 9000** (consultancy and training for implementation) is most commonly described as expensive (although adequate). For both 'training' and 'consultancy' those saying that access is simply 'adequate' are outnumbered by those saying that it is 'inadequate'. Reaching trained 'assessors' or auditors is also rated as difficult, the most common comment again being 'adequate but costly' (44%), with a further three-in-ten saying that this is 'inadequate'. In comparison, fewer than one in five describe access as 'adequate'.

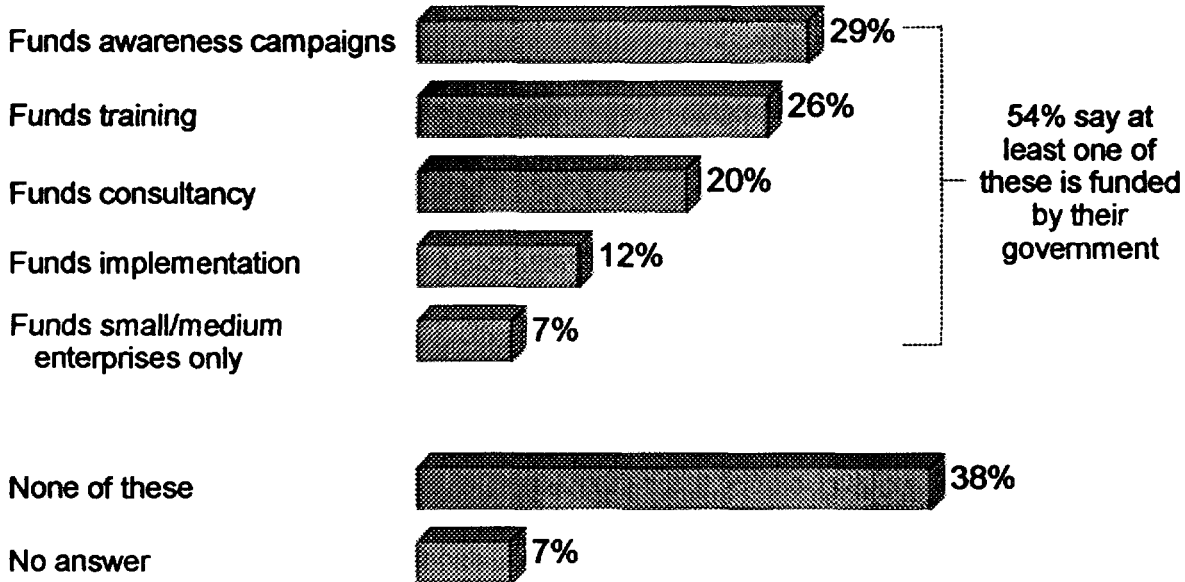
The access to all **certification processes** is viewed on balance negatively (although more say that access is adequate here than for most other processes). Certification for international requirements is thought to be expensive by more respondents than certification for domestic requirements (43% against 24%).

The government is clearly expected - by eight in ten of Version B respondents - to bear the cost of creating awareness of the ISO 9000 series, and also (by 31%) to pay for initial consultancy and training costs. Outside these areas, the responsibility for carrying the cost of implementing ISO 9000 and gaining registration and certification is seen to lie with the company itself. Very few believe that costs should be passed on to the customer.

Currently, what government funding there is is focused in the areas where it is expected - although governments are perhaps not taking as firm a lead in funding awareness as respondents would like. Approximately a quarter report that their government funds awareness campaigns, consultancy, and training. It should be noted however that almost four in ten Version B respondents say there is **no** government funding at all in their country - particularly so in Latin American and Caribbean countries it appears (59%). By contrast, the figure in South and East Asia is 24%, and is also encouragingly lower in the Middle East and Mediterranean (29%).

ASKED OF ALL VERSION B ONLY

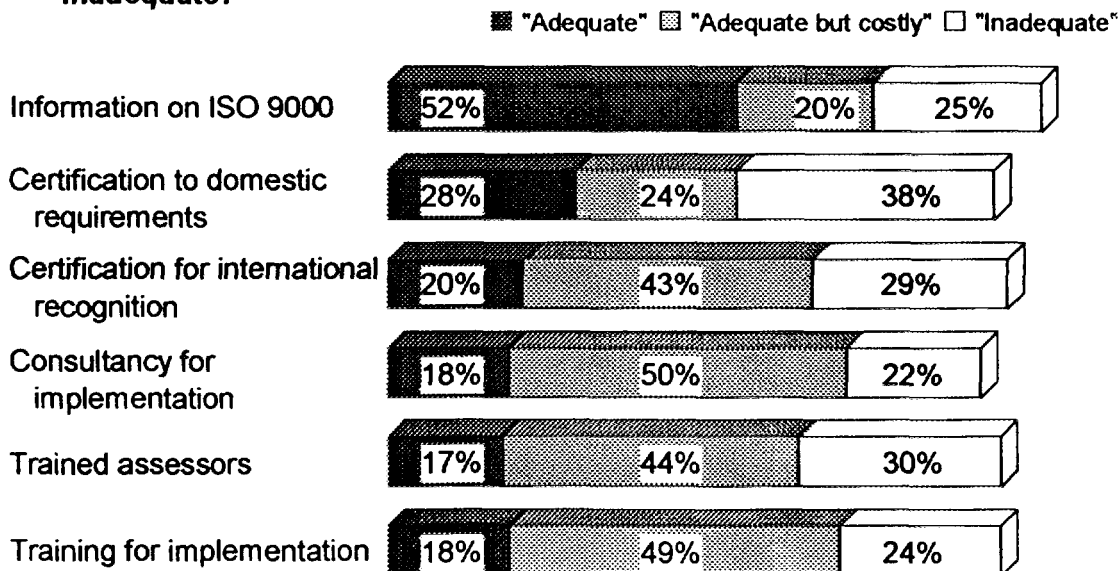
Q6 Please indicate in which, if any, of the following ways the government supports compliance with the ISO 9000 Series? (more than one answer can be given)



Base: All Version B (245)

ASKED OF ALL VERSION B ONLY

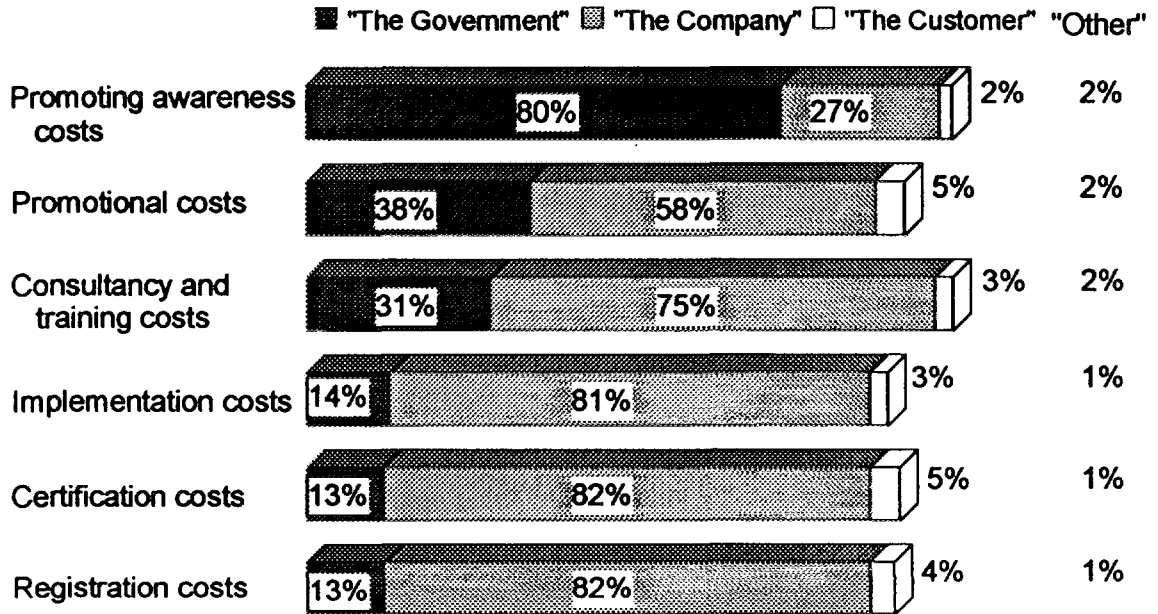
**Q7 Would you describe access to the following in your country as:
adequate?
adequate but costly?
inadequate?**



Base: All Version B (245)

ASKED OF ALL VERSION B ONLY

Q8 In your opinion, who should bear the following costs associated with the adoption of the ISO 9000 Series?



Base: All Version B (245)

Benefits of ISO 9000 (Q8A, 8B, version A)

The key benefits of ISO 9000 for businesses generally are thought by Version A respondents (government departments, national standards bodies and certification and accreditation bodies) to lie in three areas: meeting market demands, strengthening company structure, and freeing up trade.

Most emphasis is given to meeting the demands of **international** consumers (73% of all respondents say it is 'very important'). Meeting **domestic** consumer demand is viewed as slightly less significant, although seven in ten still state this is at least 'fairly' important.

Improving the internal efficiency of businesses is also seen as central, with again more than nine in ten viewing this as at least 'fairly' important. Another key benefit which will directly aid individual businesses is strengthening the market share of the company, mentioned by eight in ten. An important spin-off (although not rated as important as other issues) is that implementation might improve employee relations by improving staff morale and staff retention.

Other benefits are given relatively less weight, however: three-fifths view reinforcing management authority as an important benefit, and fewer still (49%) believe that simply demonstrating conformity to legislation via ISO 9000 implementation is important.

Version A respondents clearly feel that it is important that ISO 9000 ties in with other quality activities: eight in ten see the association of ISO 9000 with Total Quality Management (TQM) as important. Equally, it is felt important that companies attain ISO 9000 to remain competitive: around eight in ten refer to the consideration of companies' competitors having ISO 9000.

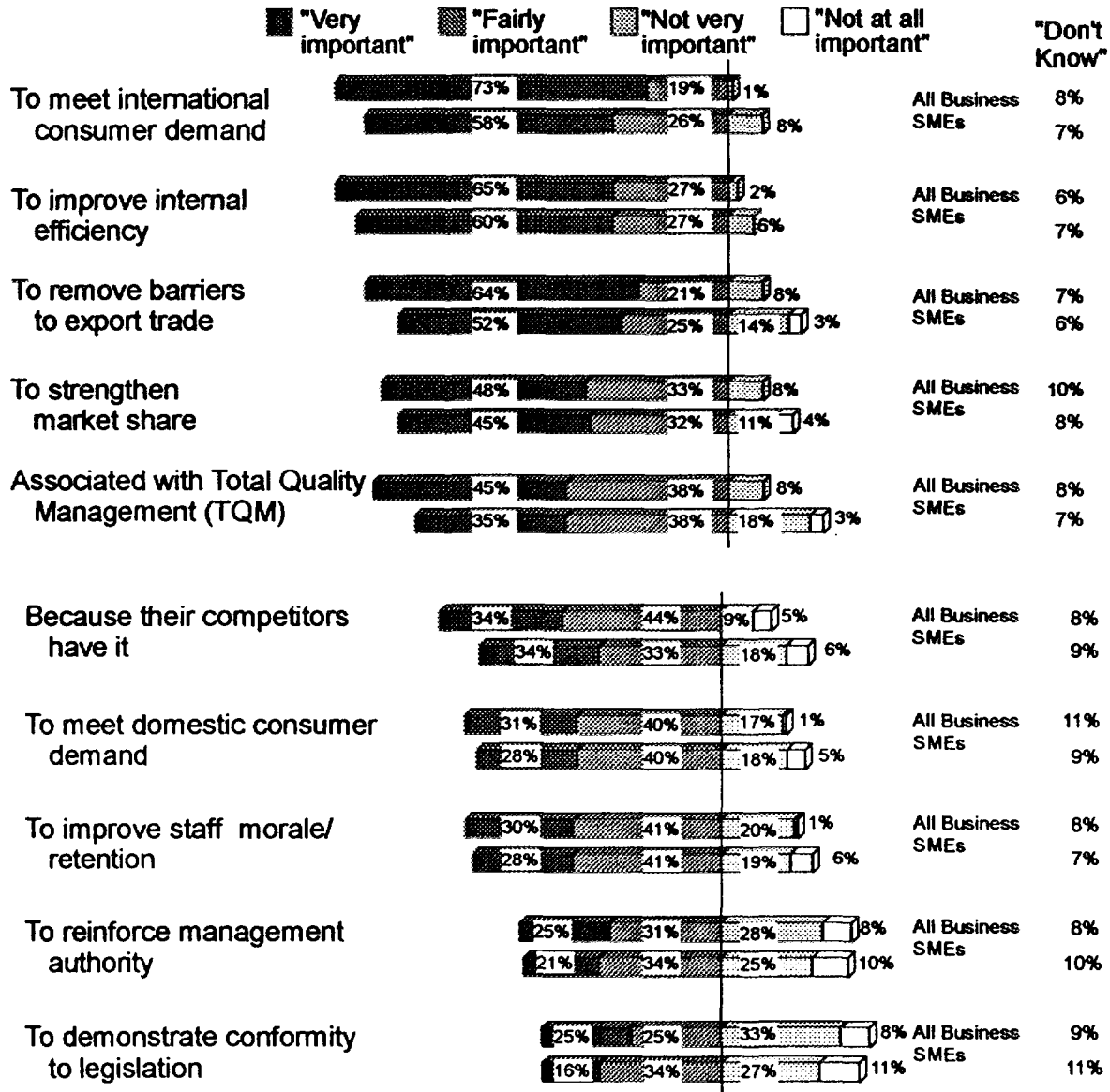
A third key area of importance is the freeing up of international trade. More than four-fifths state that removing barriers to export trade is an important benefit, with a great many (64% of all respondents) saying 'very' rather than 'fairly' important.

For **small companies specifically**, improving the internal efficiency of companies stands out as being thought particularly important, with meeting international consumer demands a second key benefit, and linked to this, strengthening market share. Meeting domestic demand for ISO 9000 is again considered relatively less important. For SMEs, the removal of export trade barriers, and (to a lesser extent) the associations of ISO 9000 with Total Quality Management are again seen as important by Version A respondents. Mirroring business in general, reinforcing management authority and demonstrating conformity to legislation are viewed as less important than the personnel issues of employee morale and staff retention.

ASKED OF ALL VERSION A ONLY

Q8A How important do you believe the following benefits of implementing the ISO 9000 Series in all businesses are?

Q8B How important do you believe the following benefits of implementing the ISO 9000 Series in small/medium enterprises (SMEs) in particular are?



Base: All Version A (106)

Deterrents to Adopting ISO 9000 (Q9, version A, Q9, version B)

Business in General

The two central deterrents to adopting ISO 9000 are lack of awareness and the perceived costs.

Even though the majority of respondents (from both questionnaire versions) report that access to information on ISO 9000 is 'adequate' (Q7 version B), a frequently mentioned deterrent is 'lack of awareness of benefits', believed to be the most important stumbling block by a quarter.

The cost of adopting ISO 9000 is a similarly strong deterrent, just less than half mentioning this. The constituent parts of this cost are given different significance, consultancy costs being slightly more of a deterrent than registration/certification costs. A further financial barrier is the low commercial return believed to result from adopting the standard.

Linked to these points, and compounding the problem, is the reported lack of management commitment to the series, three in ten believing this to be one of the most important deterrents. A small number see additional barriers to ISO 9000 existing within companies: A fifth mention lack of competence and experience (this appearing to be an issue for Sub-Saharan Africa and South and East Asia especially), and one in ten mention a lack of technical equipment.

As might be expected, while a quarter see a lack of **local** demand as a reason against investing in the series, far fewer (12%) see a lack of **foreign** pressure as a deterrent. This acknowledgement of where pressures to attain the standard arise again indicates which companies are most likely to adopt the standard - exporting businesses and those in most contact with foreign organisations.

There is little evidence that ISO 9000 is avoided for legislative reasons: very few respondents believe that adopting quality standards will expose a company's non-compliance to legislation, or will generate more legislation.

Small and Medium Size Enterprises

The same issues which act as deterrents to business in general also apply to smaller enterprises specifically, although financial issues are given a greater relative emphasis. Two-fifths believe that the set-up costs of ISO 9000 are a barrier for smaller companies (a third of all respondents saying that this is either the biggest or second biggest deterrent), and the constituent costs of consultancy and registration/certification charges are mentioned marginally more often than for business in general, three in ten and one in five mentioning these in respect to SMEs. Lack of awareness of the benefits of ISO 9000 is again viewed as a key deterrent (though, at 35%, it is mentioned less in relation to SMEs than to companies generally), with the associated issue of management commitment mentioned by one in five.

ASKED OF ALL RESPONDENTS

Q9 Which of these factors, if any, might deter business in general and small/medium enterprises (SMEs) most from adopting the ISO 9000 series?

PLEASE RANK THE **THREE** MOST DETERRING FACTORS, WRITING IN 1. FOR THE MOST DETERRING FACTOR, 2. FOR THE SECOND MOST DETERRING FACTOR, ETC.

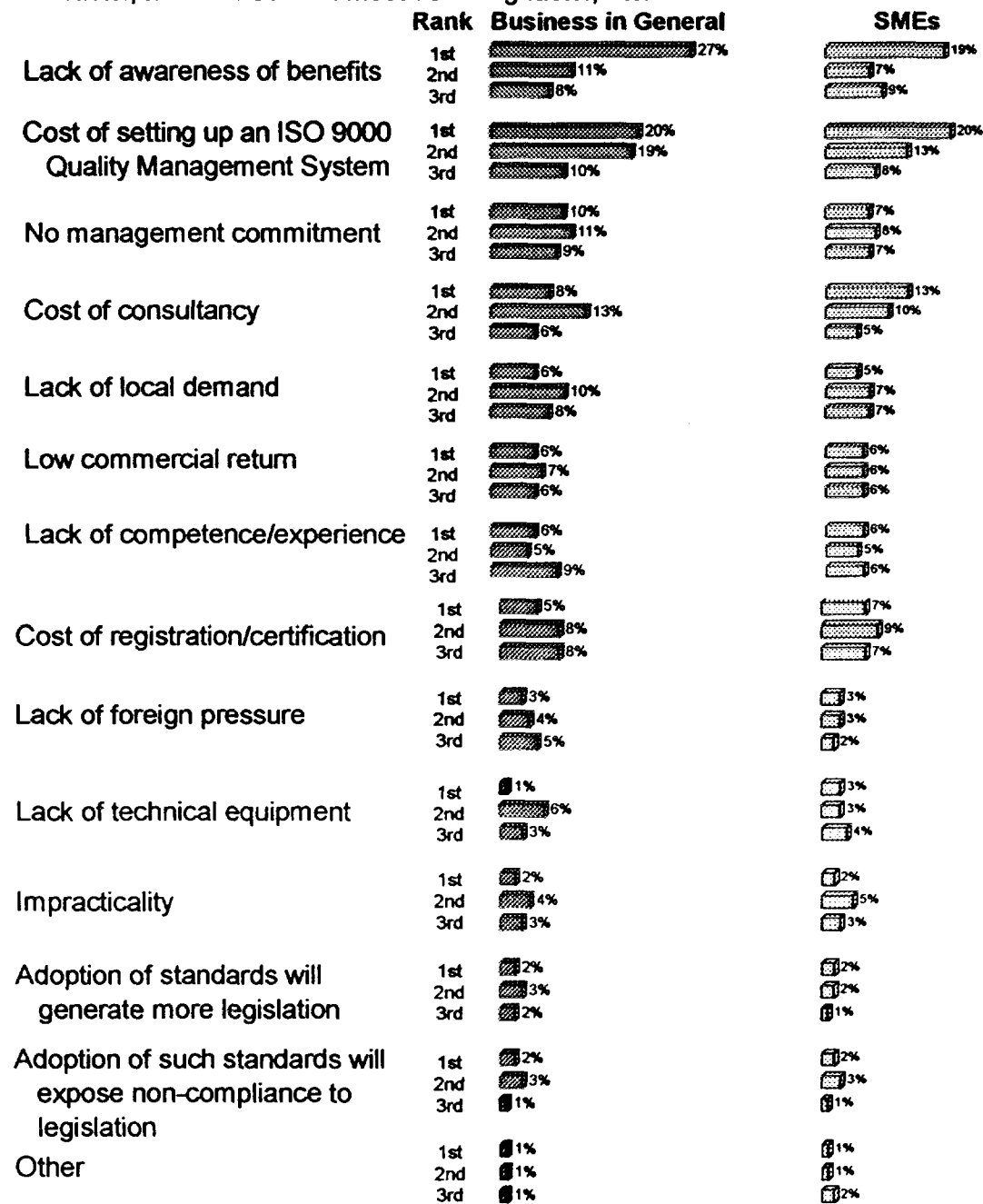
Base: All respondents (351)

(All assigning 1,2 or 3 to each item)	Business	SMEs
	in general	
	%	%
Cost of setting up an ISO 9000 Quality Management System	48	41
Lack of awareness of benefits	46	35
No management commitment	30	22
Cost of consultancy	26	29
Lack of local demand	23	19
Cost of registration/certification	21	23
Lack of competence/experience	20	17
Low commercial return	19	18
Lack of foreign pressure	12	8
Lack of technical equipment	10	11
Impracticality	9	10
Adoption of such standards will expose non-compliance to legislation	6	6
Adoption of standards will generate more legislation	6	5
Others	3	4

ASKED OF ALL RESPONDENTS

Q9 Which of these factors, if any, might deter business in general and small/medium enterprises (SMEs) most from adopting the ISO 9000 series?

Please rank the **three** most deterring factors, writing in 1 for the most deterring factor, 2 for the second most deterring factor, etc.



Base: All respondents (351)

Companies Recommended for ISO 9000 (Q5, 6a, 6b, 7, 10, version A)

The majority (63%) of Version A respondents report that they recommend ISO 9000 to 'business in general', although it is clearly considered more relevant to some types of organisation - most notably exporters, who are recommended the standard almost twice as often as importing companies (75% compared with 45% respectively). ISO 9000 is recommended to private sector companies more often than those in the public sector (62% and 48% respectively), manufacturers more often than service providers (70% to 58%), and large national companies slightly more than SMEs (65% and 58%).

More than half (56%) of these respondents (Version A) do recommend ISO 9000 to companies serving their domestic market. This may be so because possession of the standard is thought to help national producers compete with imported goods (see Q30h, version A).

ASKED OF ALL VERSION A ONLY

Q5 For which, if any, of the following types of company is the ISO 9000 Series recommended by your organisation?

Base: Version A only (106)

	%
Companies exporting goods/services	75
Manufacturers	70
Large national companies	65
Business in general	63
Private sector companies	62
Small/Medium national companies	58
Service providers	58
Companies serving the domestic market	56
Multinational companies based in your country	53
Public sector companies	48
Companies importing goods/services	45
None of these	5
No answer given	7

Although not statistically significant due to the small number of respondents in each geographic region, the data suggests that, per country, few companies are registered in Latin American and the Caribbean, and Central and Eastern European countries.

ASKED OF ALL VERSION A ONLY

Q6a How many companies in your country have achieved registration to an ISO 9000 system?
Base: All Version A (106)

Number of companies	%
1-3	7
4-5	7
6-10	8
11-50	10
51-100	9
101-250	6
251+	25
'Don't know'	6
'None'	24
Average No. of Registrations	284

(The number of companies reported to have achieved registration have been grouped for analysis purposes).

GEOGRAPHIC BREAKDOWN

ASKED OF ALL VERSION A ONLY

Q6A How many companies in your country have achieved registration to an ISO 9000 system?

Base: All Version A (106)

	Central and Eastern Europe (and CIS countries)	Sub-Saharan Africa	Middle East and Mediterranean	South and East Asia	Latin America and Caribbean
	(38)	(9)	(13)	(24)	(21)
<u>Number of Companies</u>	%	%	%	%	%
1-3	3	11	0	4	14
4-5	11	11	0	8	0
6-10	13	0	8	0	10
11-50	5	11	46	4	5
51-100	16	0	15	4	5
101-250	8	0	0	4	10
251+	21	0	15	50	19
'Don't know'	24	67	15	33	10
'None'	18	67	15	17	29
Average No. Of Registration	133	5	105	675	385

(The number of companies reported to have achieved registration have been grouped for analysis purposes)

The companies which are currently ISO 9000 registered reflect those which the series is recommended to, and the type of company ISO 9000 is considered most relevant to. By looking at the breakdown of registered companies by **company size**, the organisations with the smallest estimated number of registered companies are multinationals (13 per country), followed by SMEs (27 companies), with the most frequently registered company type being large national companies (29 per country).

ASKED OF ALL VERSION A ONLY

Q6b How does the number of company registrations break down by company size?

Base: All Version A (106)

	Multinational company registration	Large national company registration	Small/Medium national company registration
<u>Number of Companies</u>	%	%	%
1-3	14	8	8
4-10	8	13	2
11-50	5	8	16
51+	2	8	7
‘Don’t know’	28	22	25
‘None’	43	41	42
Average No. of Registrations	13	29	27

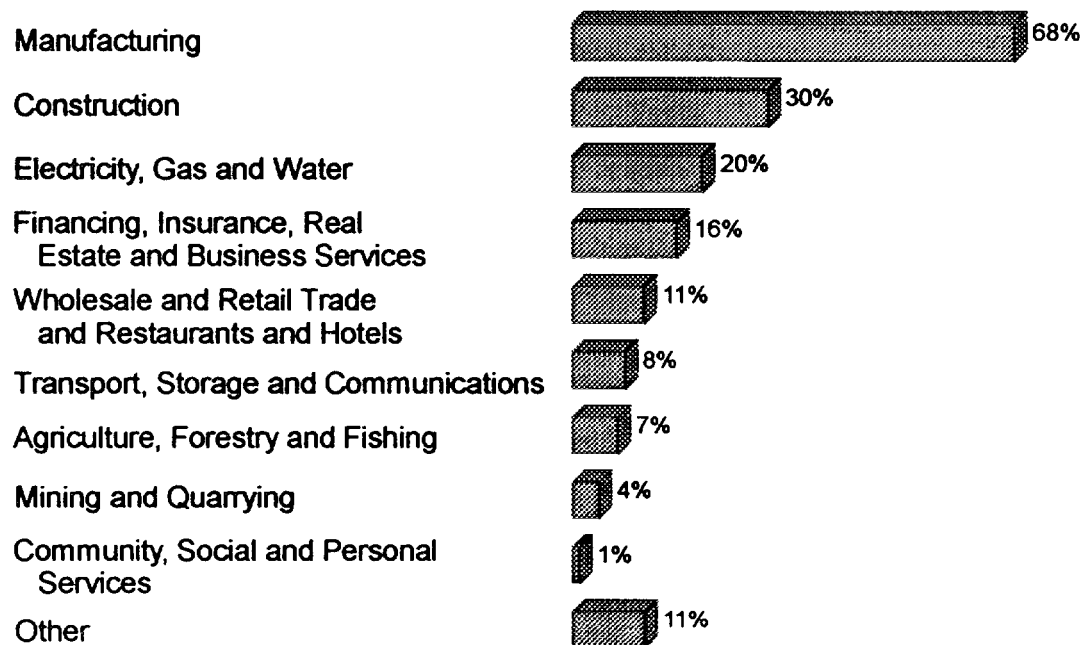
(The number of companies reported to be registered have been grouped for analysis purposes)

The reported breakdown of registrations by **industrial sector** again highlights the type of organisation which ISO 9000 is appropriate for. The manufacturing sector stands out as that thought to have the most registrations, seven-in-ten saying that this sector ranks among the top three in terms of number of registrations. The construction industry is also reported to have a relatively large number of registered companies, three in ten mentioning this sector. The utilities companies - electricity, gas and water - are perceived as the third most represented sector, followed by financing, insurance, real estate and business services.

ASKED OF VERSION A ONLY

Q7 Which sectors have the most registrations?

(Total figures for those rating each 1, 2 or 3)



Base: Version A only (64)

Conformity with ISO 9000 is not generally part of manufacturing legislation: only one in ten (11%) say this is the case. Nor does there appear to be a trend towards manufacturing legislation incorporating ISO 9000 standards in the immediate future - only 4% say that such a move is pending. A significant number (23%) of version A respondents are currently un-informed of the legislative situation, however - especially so in South and East Asia (including Oceania), where almost four in ten (38%) appear to be un-informed.

ASKED OF ALL VERSION A ONLY

Q10 Is there legislation which makes conformity with the ISO 9000 Series mandatory for certain manufacturers?

Base: Version A only (106)

	%
'Yes'	11
'Pending'	4
'No'	62
'Don't know' / No answer	23
All stating either 'Yes' or 'Pending'	15

GEOGRAPHIC BREAKDOWN

ASKED OF ALL VERSION A ONLY

Q10 Is there legislation which makes conforming with the ISO 9000 Series mandatory for certain manufacturers?

Base: Version A only (106)

	Central and Eastern Europe (and CIS countries)	Sub-Saharan Africa	Middle East and Mediterranean	South and East Asia	Latin America and Caribbean
	(38)	(9)	(13)	(24)	(21)
	%	%	%	%	%
'Yes'	8	22	23	0	19
'Pending'	5	0	8	4	0
'No'	58	56	62	58	76
'Don't know' / no answer	29	22	8	38	5
All stating either 'Yes' or 'Pending'	13	22	31	4	19

Government Promotion of Quality Awareness (Q5, version B)

Two-thirds of version B respondents believe that their government is actively promoting quality awareness in business, although one in ten (11%) say that this activity is limited to only large companies, and 2% that it is focused only on small companies. A significant minority of one-third (32%) feel, however, that the government is not promoting quality awareness at all.

ASKED OF ALL VERSION B ONLY

Q5 In your opinion, quality awareness in business is . . .

Base: All Version B (245)

	All Version B (245) %	SME Organisations only (91) %	Non-SME Organisations only (70) %
“promoted by the government to all businesses”	52	47	53
“promoted by the government to large companies only”	11	12	9
“promoted by the government to small/medium companies only”	2	2	3
“not promoted by the government”	32	34	34
No answer given	3	4	1
All giving any mention of “promoted by the government”	65	62	65

(More than one answer may be given)

Geographically, it appears (although the data are not conclusive) that governments in South and East Asia are taking the lead (71% say that quality awareness is promoted to all businesses), especially when compared with Latin America and Caribbean countries (27%).

GEOGRAPHIC BREAKDOWN

ASKED OF ALL VERSION B ONLY

Q5 In your opinion, quality awareness in business is . . .

Base: All Version B (245)

	Central & East Europe (68) %	Sub- Saharan Africa (22) %	Middle East & Mediterranean (31) %	South & East Asia (58) %	Latin America & Caribbean (66) %
“promoted by the government to all businesses”	53	64	61	71	27
“promoted by the government to large companies only”	13	5	10	14	8
“promoted by the government to small/medium companies only”	0	0	0	0	6
“not promoted by the government”	32	32	23	10	56
No answer given	1	0	6	5	3
All giving any mention of 'promoted by the government'	67	68	71	85	41

(More than one answer may be given)

ACCREDITATION AND CERTIFICATION FOR ISO 9000

National Accreditation Bodies (Q11, 12, 13, 14, 15, 16, version A)

Based on returns from the (41) national standards bodies interviewed, four in ten countries have a national accreditation scheme, with a further 20% saying one is pending. A third (32%) have no such scheme, while one in ten did not know, or did not respond.

THIS QUESTION BASED ON RESPONDENTS FROM NATIONAL STANDARDS BODIES ONLY

Q11 Does your country have a National accreditation scheme?

Base: All respondents from National Standards Bodies (41)

	National Accreditation scheme
	(41)
	%
'Yes'	39
'Pending'	20
'No'	32
"Don't know"/no answer given	10
All those stating either 'Yes' or 'Pending'	59

There does not appear to be a standard national name for national accreditation bodies, although, 'National Accreditation Board' and 'National Council for Quality and Accreditation' were mentioned by 8% of Version A representatives.

THIS QUESTION BASED ON RESPONDENTS FROM NATIONAL STANDARDS BODIES ONLY

Q12 Name of National Accreditation Body?

Base: All those from National Standards Bodies who state that their country has a National Accreditation scheme/has a scheme pending (24)

	(24)
	%
National Accreditation Board	8
National Council for Quality and Accreditation	8
State Office for Standardisation and Metrology	4
National Accreditation Service	4
Lithuanian National Accreditation Bureau	4
INMETRO	4
Quality Council of India	4
Others	50
"Don't know"/No answer given	17

Most national accreditation bodies (79%) either currently are, or will in the near future be, associated with the Government. Only one-sixth (17%) of accreditation bodies are independent of the government.

THIS QUESTION BASED ON RESPONDENTS FROM NATIONAL STANDARDS BODIES ONLY

Q13 Is the National accreditation body associated with the government?

Base: All respondents from National Standards Bodies who state that their country has a National Accreditation Scheme/ has a scheme pending (24)

	Associated with Government
	(24)
	%
'Yes'	67
'Pending'	13
'No'	17
Don't know	4
All those stating either 'Yes' or 'Pending'	79

National accreditation bodies are seen to be playing a role in facilitating international trade. A quarter (25%) of these bodies are said to have mutual recognition agreements with other countries - but this proportion is set to increase dramatically: more than a third (38%) of those who report having a national accreditation scheme report that mutual recognition agreements are pending. A significant proportion of respondents (13%) are unclear about the situation, however.

THIS QUESTION BASED ON RESPONDENTS FROM NATIONAL STANDARDS BODIES ONLY

Q14 Does your National accreditation body have mutual recognition agreements with other countries?

Base: All respondents from National Standards Bodies who state that their country has a National Accreditation Scheme/has a scheme pending (24)

	Mutual Recognition Agreements
	(24)
	%
'Yes'	25
'Pending'	38
'No'	25
Don't know	13
All those stating either 'Yes' or 'Pending'	63

Three reasons are mentioned by a small number of respondents for mutual recognition agreements: to ensure that certificates and test results are accepted internationally, to promote the use of accredited laboratories, and (to a lesser extent), to pool information and experiences.

ASKED OF VERSION A ONLY

Q15c What is the purpose of these agreements?

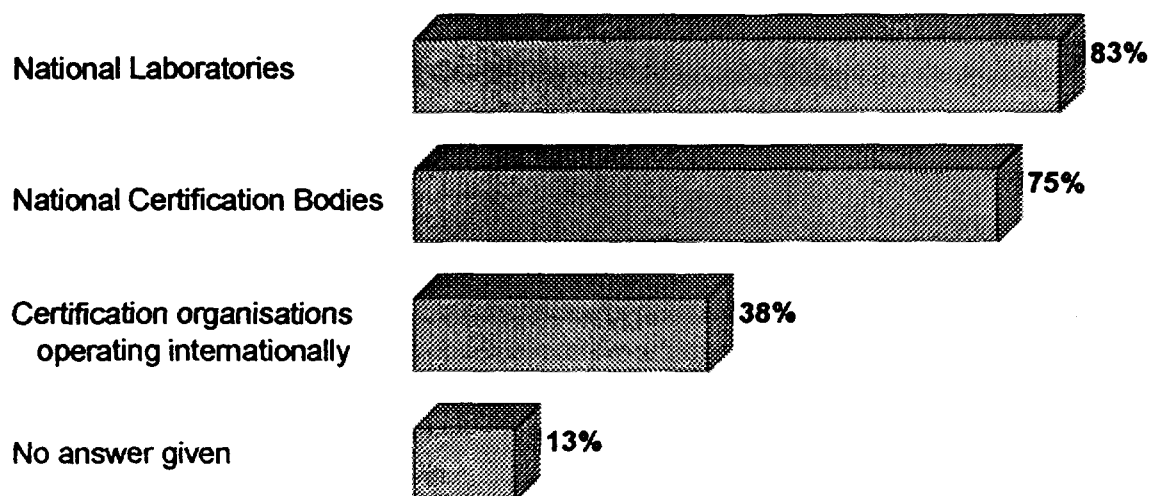
Base: All Version A who state their country has a National Accreditation scheme which has a mutual recognition agreement with other countries (17)

	All asked	National Standards Bodies only
	(17)	(6)
	%	%
“Acceptance of test results and certificates”	47	17
“International recognition of testing laboratories/ promote use of accreditation laboratories”	24	17
“To create active partnership/ exchange of information and experience”	18	33
Others	12	-
“Don’t know”/No answer given	24	50

Most national accreditation bodies accredit national laboratories, with slightly fewer accrediting national certification bodies. Markedly fewer again accredit certification organisations operating internationally.

THIS QUESTION BASED ON RESPONDENTS FROM NATIONAL STANDARDS BODIES ONLY

Q16A Please indicate which of the following your National Accreditation Body accredits. (more than one answer can be given)



Base: All respondents from National Standards bodies who state that their country has a National Accreditation scheme/has a scheme pending (24)

National Certification Schemes (Q17, 18, 19, 20, 21, version A)

National certification schemes are at a similar stage of development to national accreditation schemes for ISO 9000: just under half of developing and emerging economies are reported to have a national certification scheme, one-sixth having a scheme pending. As before, the infrastructure for implementing ISO 9000 appears to be less developed in Latin American and Caribbean countries than elsewhere.

THIS QUESTION BASED ON RESPONDENTS FROM NATIONAL STANDARDS BODIES ONLY

Q17 Does your country have a national certification scheme for registration to ISO 9000?

Base: All respondents from National Standards Bodies (41)

	(41)
	%
'Yes'	41
'Pending'	15
'No'	37
'Don't know'/ no answer	7
All stating either 'Yes' or 'Pending'	56

In most of the countries which have a national certification body there are more **international** than **national** certification organisations. The majority of countries have only one national certification body in their country, compared to almost half of these countries having between 2 and 10 internationally operating certification bodies issuing certification in their country.

THIS QUESTION BASED ON RESPONDENTS FROM NATIONAL STANDARDS BODIES ONLY

Q18 Please indicate how many of the following bodies exist in your country

Base: All respondents from National Standards Bodies who state their country has a National Certification scheme for registration to ISO 9000 (17)

	National Certification Bodies (17) %	Certification Organisations Operating Internationally (issuing certificates in your country) (17) %	Certification Organisations Operating Internationally (with an office in your country) (17) %
1	65	6	12
2-5	29	24	24
6-10	0	18	18
11+	6	12	18
Average No. of Bodies	2.76	3.53	4.65

(The number of bodies reported to exist have been grouped for analysis purposes)

Half of respondents state that certification from their national certification body is recognised by **most** of their trading partners, although almost as many are less sure of the authority of this certification: A third say it is recognised by only **some** of their trading partners. In addition, a third report that certification is only recognised by certain sectors (probably the manufacturing sector)

THIS QUESTION BASED ON RESPONDENTS FROM NATIONAL STANDARDS BODIES ONLY

Q19 Is certification from your national certification bodies recognised by . . .

Base: All respondents from National Standards Bodies who state that their country has a National Certification scheme for registration to ISO 9000 (17)

	(17)
	%
“most of your trading partners”	53
“some of your trading partners”	35
“your main trading partners only”	6
No answer given	6

THIS QUESTION BASED ON RESPONDENTS FROM NATIONAL STANDARDS BODIES ONLY

Q20 Is certification from your national certification bodies recognised for certain sectors only?

Base: All respondents from National Standards Bodies who state that their country has a National Certification scheme for registration to ISO 9000 (17)

	(17)
	%
“Yes”	35
“No”	53
“Don’t know” / No answer given	12

The Role of National Certification Bodies (Q25, 27, 28, version A)

Three quarters of national certification schemes also test products, and of those that do, over eight in ten insist on conformity with ISO 9000 and relevant product standards.

THESE QUESTIONS BASED ON RESPONDENTS FROM NATIONAL STANDARD BODIES ONLY

Q27 Does your main national certification body also test products?

Base: All respondents from National Standards Bodies who state that their country has a National Certification scheme for registration to ISO 9000 (17)

Q28 Does your main national certification body insist on conformity with ISO 9000 as well as compliance with the appropriate product standard?

Base: All respondents from National Standards Bodies who state that their country has a National Certification scheme for registration to ISO 9000, and that this body also tests products (13)

	Q27	Q28
	Test products	Insists on conformity
	(17)	(13)
	%	%
'Yes'	76	85
'No'	18	15
'Don't know' / No answer given	6	0

Somewhat more national certification bodies do have mutual recognition agreements with their foreign counterparts than do not (53% and 35% respectively)

THIS QUESTION BASED ON RESPONDENTS FROM NATIONAL STANDARDS BODIES ONLY

Q25 Do National Certification Bodies have mutual recognition agreements with foreign certification bodies?

Base: All respondents from National Standards Bodies who state that their country has a National Certification scheme for registration to ISO 9000 (17)

	(17)
	%
'Yes'	53
'No'	35
'Don't know' / No answer given	12

The Perceived Importance of Certification (Q29a, 31, version A, Q12, 13, 14, 15, version B)

ISO 9000 registration is generally seen as a positive initiative which could expand international trade, although the dangers associated with the system are recognised. Almost two-thirds of those answering Version A believe that the certification requirements of importers in industrialised countries could strengthen non-tariff barriers to international trade, and almost one-quarter say they could do so a 'great deal'. Indeed, fewer than one in five are confident that importer demands will have little or no effect.

ASKED OF ALL VERSION A ONLY

Q31 To what extent, if at all, could certification requirements of importers in industrialised countries strengthen non-tariff barriers to international trade?

Base: All Version A (106)

	%
"A great deal"	21
"A fair amount"	39
"Not very much"	12
"Not at all"	4
"Don't know" / No answer given	25
All stating either "A great deal" or "fair amount"	59
All stating either "Not very much" or "Not at all"	16

It appears that certification for products is widely seen as more important than certification of management systems - a view held by all types of respondent, probably because the demonstrated conformity of a product is seen as more likely to satisfy requirements than the management system assurance.

ASKED OF ALL VERSION A ONLY

Q29A How important, if at all, do you consider product certification, and its assurances to be, in comparison to quality management systems certification?

Base: All Version A (106)

ASKED OF ALL VERSION B ONLY

Q14 How important, if at all, do you consider product certification, and its assurances to be, in comparison to quality management systems certification?

Base: All Version B (245)

	Q29A (Version A) (106) %	Q14 (Version B) (245) %
“Very important”	44	45
“Fairly important”	35	33
“Not very important”	8	9
“Not at all important”	0	4
“Don’t know” / No answer given	13	8
All stating either “very important” or “fairly important”	79	79
All stating either “not very important” or “not at all important”	8	13

When weighing up consultancy and internal assessment against global accreditation of certification arrangements, Version B respondents (companies) appear to place far greater value on the former - by a ratio of 8:1 (79% compared with 9%).

ASKED OF ALL VERSION B ONLY

Q15 And how important, if at all, do you consider consultancy and internal assessment to be in comparison to global accreditation of certification arrangements?

Base: All Version B (245)

	Q15
	(245)
	%
“Very important”	34
“Fairly important”	45
“Not very important”	7
“Not at all important”	2
“Don’t know” / No answer given	11
All stating either “Very important or “fairly important”	79
All stating either “Not very important” or “Not at all important”	9

Although the majority of Version B respondents have not experienced quality systems certification demands being imposed by **importers** from industrialised countries (only 20% have), a greater proportion have **purchasers** who require ISO 9000 registration. More international than domestic purchasers demand ISO 9000 registration, although the difference between the two sorts of purchasers is not as great as might be expected (21% say that half or more of their international purchasers require registration, this figure falling to only 8% of domestic purchasers).

Correspondingly, half of Version B respondents report that **none** of their **domestic** purchasers require ISO 9000, although this is far less frequently the case when considering **international** purchasers - fewer than three in ten say none of their international purchasers require ISO 9000 registration.

ASKED OF ALL VERSION B ONLY

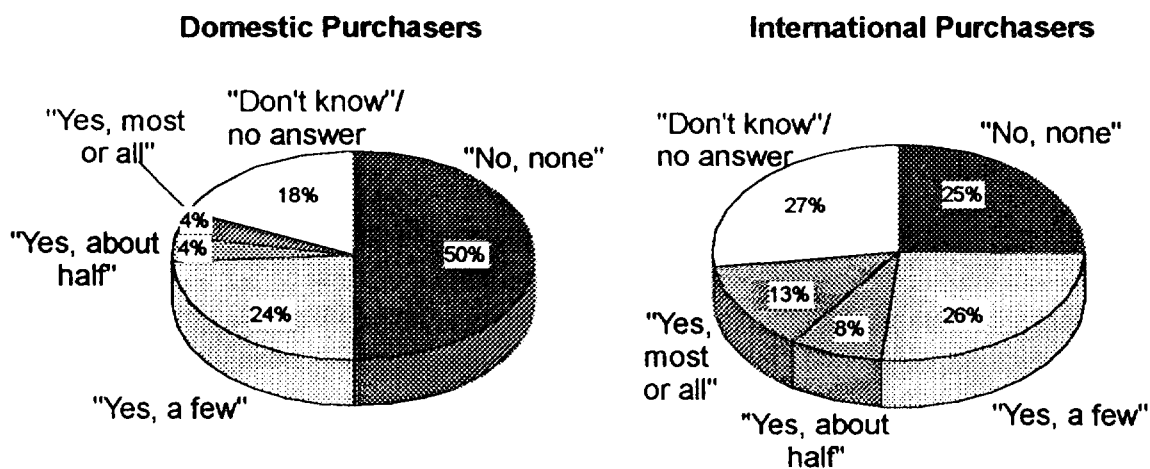
Q12 Do you have any specific experience with quality systems certification demands being imposed by importers in industrialised countries?

Base: All Version B (245)

	%
"Yes"	20
"No"	74
No answer given	5

ASKED OF ALL VERSION B ONLY

Q13 Do any of your purchasers require registration to an ISO 9000 system, or not?



Base: All Version B (245)

Accreditation of Certification Bodies (Q23, 24, version A)

Customer demands are pressurising certification organisations to be accredited, which is helping to ensure that the levels of ISO 9000 certification remains high: just more than half (52%) of Version A respondents report pressures on certification bodies to be accredited - fewer than one-fifth (27%) think that there are no pressures.

Those who believe there are pressures to be accredited say that these are primarily market pressures, being required equally from foreign customers (64%) and domestic customers (64%). Two-fifths (40%) report that it is a legislative requirement for certification bodies to be accredited in their country.

ASKED OF ALL VERSION A ONLY

Q23 Is there any pressure on certification bodies operating in your country to be accredited?

Base: All Version A who state that their country has a National Certification scheme for registration to ISO 9000 (48)

	%
“Yes”	52
“No”	27
“Don’t know” / No answer given	21

ASKED OF ALL VERSION A ONLY

Q24 From where does this pressure come?

Base: All Version A who state that their National Certification scheme for registration to ISO 9000 is under pressure to be accredited (25)

	%
“Foreign customer requirement”	64
“Domestic customer requirement”	64
“Legislation requirement”	40
No answer given	4

(More than one answer may be given)

NATIONAL ENVIRONMENTAL REQUIREMENTS AND ENFORCEMENT AND ISO 14000 AND 14001

Government Environmental Policies (Q34, 39A, 39B, version A, Q18, 19, 25, version B)

Although the majority (76%) of governments are reported to have a declared environmental policy, not all of these policies are wide-reaching. A surprisingly large number (12%) 'don't know' if there is an official policy, however, and a significant minority (12%) say that their country does not have one.

ASKED OF ALL RESPONDENTS

Q34 Does your Government have a declared policy on environmental issues, or not?

Base: All respondents (351)

	National Standards Bodies (41) %	All (351) %	Version A only (106) %	Version B only (245) %
'Yes'	76	72	77	69
'No'	12	10	8	11
'Don't know'/No answer given	12	19	15	20

Only half of all respondents think their government carries the environmental policy through to actively promoting environmental awareness in industry (although governments in the Middle East and Mediterranean countries and in South and East Asia appear to be leading the field). One in six report that their government does not have an active policy to promote environmental awareness in industry, a disproportionate number being from Latin American and Caribbean countries.

ASKED OF ALL RESPONDENTS

Q39A Does the government have an active policy to promote environmental awareness in industry?

Base: All respondents (351)

	National Standards Bodies (41) %	All (351) %	Version A only (106) %	Version B only (245) %
'Yes'	61	56	65	53
'No'	17	24	15	28
'Don't know'/No answer given	22	20	20	20

GEOGRAPHIC BREAKDOWN

ASKED OF ALL RESPONDENTS

Q39a Does the government have an active policy to promote environmental awareness in industry?

Base: All respondents (351)

	Central and Eastern Europe (and CIS countries) (106) %	Sub-Saharan Africa (31) %	Middle East and Mediterranean (44) %	South and East Asia (82) %	Latin America and Caribbean (87) %
'Yes'	54	52	70	70	41
'No'	20	32	20	13	38
'Don't know' / No answer given	26	16	9	17	21

Those governments which are thought to have an active policy to promote general environmental awareness are thought by most respondents to involve all businesses, although a significant number (24%) feel only large companies are targeted (the data suggest that those saying this are more likely to be from large rather than small companies).

Compared to promoting awareness of general environmental issues, governments are seen as performing less well at promoting awareness of ISO 14000 specifically, and although they are still perceived to be reaching a large number of companies, the efforts which are made are more targeted. A half (48%) who say their government is working with industry are seen as promoting ISO 14000 to all businesses - a further fifth promoting to large companies only. A minority (one-quarter) say that their government is not promoting ISO 14000 at all.

ASKED OF ALL WHO STATE THAT THEIR GOVERNMENT HAS A POLICY TO PROMOTE ENVIRONMENTAL AWARENESS

Q39B To which, if any, of the following types of company does the government actively promote . . .

Base: All (both Versions) who state that their Government has an active policy to promote environmental awareness in industry (198)

(Figures in Brackets are for National Standards Bodies only)

	General environmental awareness		ISO 14000 series awareness	
	(198)		(198)	
	%		%	
'All Businesses'	76	(72)	34	(48)
'Large Companies only'	20	(24)	24	(20)
'Small/Medium Companies only'	2	(0)	4	(0)
'None of these'	1	(4)	25	(24)
No answer given	1	(0)	14	(8)

Governments in developing and emerging economies are thought to be **failing** to follow up initiatives and policies with credible enforcement. The majority of those who are subject to government enforcement (Version B respondents) feel that enforcement is **not** effective. Only three in ten state that environmental regulations are enforced effectively. The regional breakdown suggests that enforcement is relatively most effective in the Middle East/Mediterranean.

ASKED OF ALL VERSION B ONLY

Q19 In your opinion, how effectively, if at all, does your government enforce environmental regulations?

Base: All Version B (245)

	All Version B (245) %	Central and Eastern Europe (and CIS countries) (68) %	Sub- Saharan Africa (22) %	Middle East and Mediterranean (31) %	South and East Asia (58) %	Latin America and Caribbean (66) %
“Very effectively”	3	1	5	10	2	2
“Fairly effectively”	30	32	18	29	31	30
“Not very effectively”	48	47	45	42	53	48
“Not at all effectively”	13	9	27	10	12	15
“Don’t know”/ No answer given	6	10	5	10	2	5
All stating either “Very effectively” or “Fairly effectively”	33	34	23	39	33	32
All stating either “Not very effectively” or “Not at all effectively”	61	56	73	52	66	64

Pressures on Companies to Avoid Environmental Damage (Q35, 36, 37A, 37B, version A, Q20, 21, 22, 23, version B)

Half of all respondents believe there is significant pressure on companies to avoid environmental damage, with almost two-fifths (37%) saying that there is no pressure. Version B respondents (those from private companies) are less likely to perceive pressure than Version A respondents (48% compared with 61%). Although not conclusive, the data suggest that large companies feel environmental pressures more than SMEs, possibly reflecting market demands and the focus of government and international environmental organisations' enforcement efforts.

ASKED OF ALL RESPONDENTS

Q35 Are companies in your country under significant pressure to avoid environmental damage?

Base: All respondents (351)

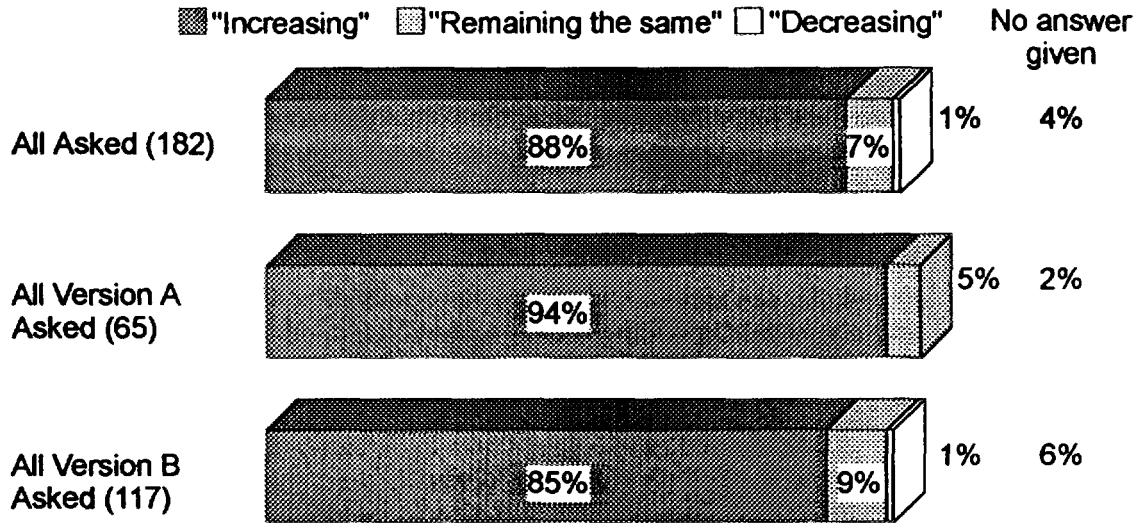
	All respondents (351) %	Central and Eastern Europe (and CIS countries) (106) %	Sub-Saharan Africa (31) %	Middle East and Mediterranean (44) %	South and East Asia (82) %	Latin America and Caribbean (87) %
"Yes"	52	52	45	64	55	45
"No"	37	29	45	27	35	52
"Don't know"/No answer given	11	19	10	9	10	3

What pressures there are are thought to come from three sources: the Government (mentioned by 89%), environmental organisations (79%), and from the general public (54%), followed by consumer organisations (26%). As seen previously, foreign customers assert far more pressure than domestic ones. (25% versus 8%), but in absolute terms are relatively little mentioned

The pressure to avoid environmental damage is increasing, and ISO 14000 is clearly thought to be a factor which could contribute to this increase. Of those who feel there is significant pressure on companies, almost nine in ten believe that this pressure is increasing.

ASKED OF ALL WHO STATE THAT COMPANIES IN THEIR COUNTRY ARE UNDER SIGNIFICANT PRESSURE TO AVOID ENVIRONMENTAL DAMAGE

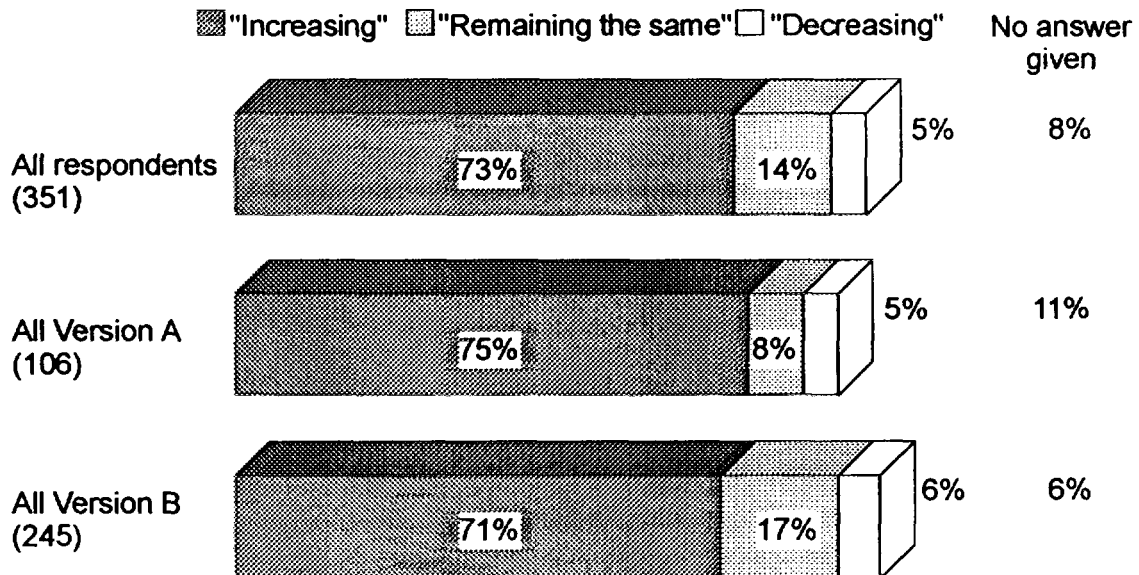
Q37A *In your opinion, is the pressure placed on companies in your country to avoid environmental damage...*



Base All (both versions) who state that companies in their country are under significant pressure to avoid environmental damage (182)

ASKED OF ALL RESPONDENTS

Q37B *Do you think that compliance with the ISO 14000 series would lead to pressure on companies to avoid environmental damage*



Base All respondents (351)

Awareness and Understanding of ISO 14000 (Q38, 40, version A, Q24, version B)

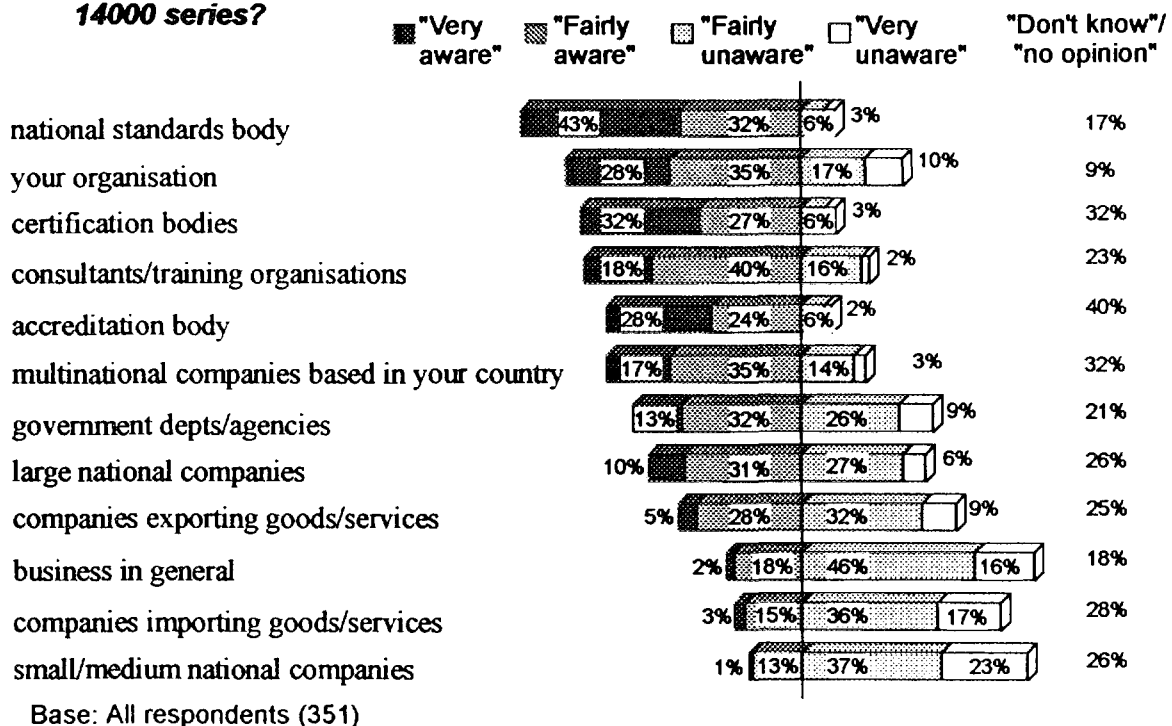
ISO 14000 is slightly less well-known by all parties than ISO 9000, but the difference in knowledge between Version A and Version B respondents is more marked for ISO 14000. National standards bodies are perceived to be the most aware (75%), with certification bodies thought to rank second in terms of awareness (59%), followed by consultants/training organisations and accreditation bodies.

Awareness among 'business in general' is perceived as significantly poorer - one in five are believed to be aware. This low overall rating (as with ISO 9000) again hides significant differences between specific types of organisation, however: company size is seen as particularly important (40% say that large national companies are at least 'fairly' aware, compared with only 14% for small/medium national companies), and exporters are believed to be more aware than importers (34% compared with 19%).

Government departments are viewed as less aware than other official bodies (45% state that they are at least fairly aware), but are on a similar footing to multinational companies (52%).

ASKED OF ALL RESPONDENTS

Q38 In your opinion, how aware or unaware is/are.... in your country of the ISO 14000 series?

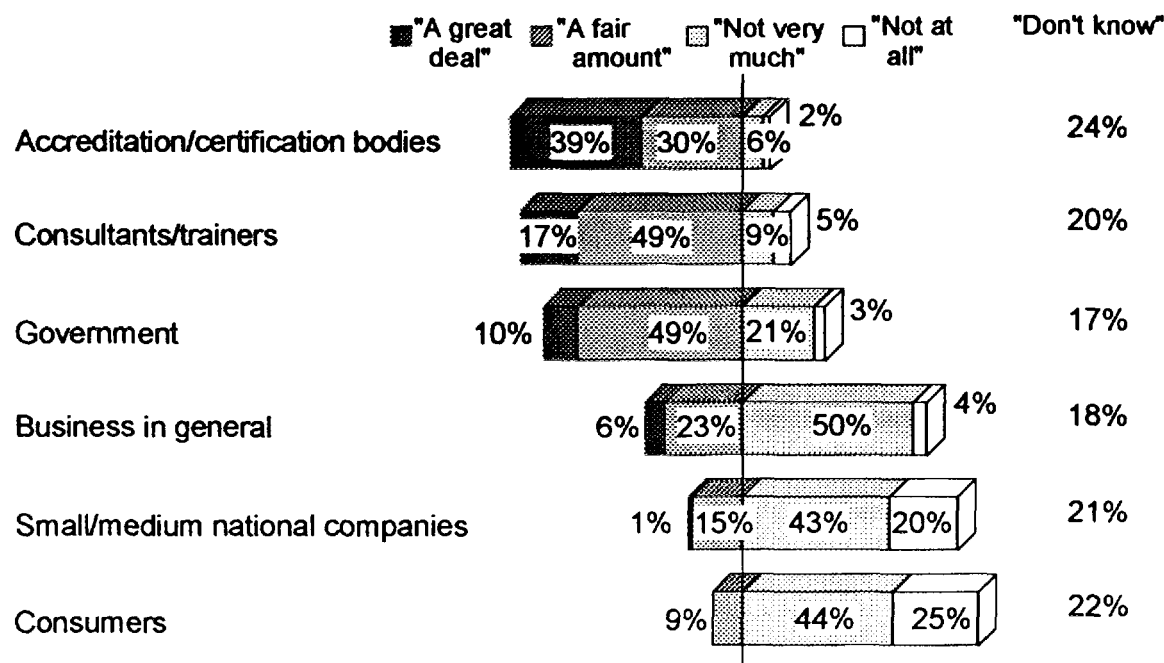


The levels of **understanding** of the objectives of ISO 14000 within the different types of organisation (this question is asked of only Version A respondents) mirrors the **awareness** levels reported by all respondents. Understanding is reported by Version A respondents as poor for business in general, and is viewed as particularly so among SMEs, but is thought far better among bodies involved in standards provision.

Understanding among consumers is thought to be very poor: those saying that consumers do understand the objectives of ISO 14000 are outnumbered by those saying they do not by a ratio of more than seven to one.

ASKED OF VERSION A ONLY

Q40 In your opinion, to what extent do the following understand the objectives of the ISO 14000 series standards?



Base: All Version A (106)

THE ISO 14001 ENVIRONMENTAL MANAGEMENT SYSTEMS STANDARD

Companies Appropriate for ISO 14001 (Q44, version A)

ISO 14001 is thought by half of Version A respondents to be appropriate for 'business in general', although when this group is broken down further, ISO 14001 is clearly thought to be most appropriate for the same types of company as is ISO 9000.

Exporters are again thought more suited to the standard than are importers (51% and 21% respectively), as are large national companies rather than SMEs (57% and 27% respectively). The reason for this difference may again be related to the amount of contact the companies have with foreign organisations (in particular from industrialised nations, where the standard may be more established). Indeed the standard is considered far more appropriate for companies serving international markets than the domestic market.

ISO 14001 is certainly seen as being targeted at manufacturing companies much more than service providers (57% compared with 16%), although whether the companies operate in the private or public sector is of less apparent significance .

ASKED OF ALL VERSION A ONLY

Q44 In your organisation, for which, if any, of the following types of company are ISO 14001 management systems considered appropriate?

Base: All Version A (106)

	%
Manufacturers	57
Large national companies	57
Multinational companies based in your country	57
Companies exporting goods/services	51
Business in general	50
Public sector companies	29
Private sector companies	28
Companies serving the domestic market	28
Small/Medium national companies	27
Companies importing goods/services	21
Service providers	16
"None of these"	2
No answer given	9

The Effect of ISO 14001 on the Free Movement of International Trade and Reasons for Adopting ISO 14001 (Q42, 51A, 52, 51B version A, Q31, 32 version B)

The two main types of organisation interviewed - represented by Version A and Version B respondents - view ISO 14001 somewhat differently: while industry associations and companies see the standard as a positive initiative, the advantages gained by companies are less clear cut to Version A respondents.

The majority of respondents from organisations which could potentially achieve the standard (Version B) assess ISO 14001 positively, believing that it will fulfil its role of opening up new markets and helping companies strengthen their position. Although the data is not conclusive, larger companies (as might be expected) appear to endorse the standard particularly positively. (80% of non-SME organisations agree that compliance with ISO 14001 will help them access new markets, this figure dropping to 66% of those from SME organisations).

ASKED OF ALL VERSION B ONLY

Q31 To what extent do you agree or disagree that compliance with ISO 14001 will/would help you to access new markets and strengthen your market position?

Base: All Version B (245)

	All Version B (245) %	SME Organisations (91) %	Non-SME Organisations (70) %
'Strongly agree'	22	15	30
'Tend to agree'	50	51	50
'Tend to disagree'	13	14	13
'Strongly disagree'	3	5	1
'No opinion'	7	8	3
No answer given	6	7	3
All those stating either 'Strongly agree' or 'Tend to agree'	71	66	80
All those stating either 'Tend to disagree' or 'Strongly disagree'	16	20	14

This positive assessment of ISO 14001 is, however, tempered by a recognition that environmental demands can be a problem. Half of respondents from commercial organisations report that foreign environmental standards are currently an obstruction to exporting, although a quarter disagree with this. Respondents from Latin American and Caribbean countries - and larger companies - appear more likely to find foreign demands hindering their exports than their counterparts.

ASKED OF ALL VERSION B ONLY

Q32 To what extent do you agree or disagree that foreign environmental standards already hinder export opportunities?

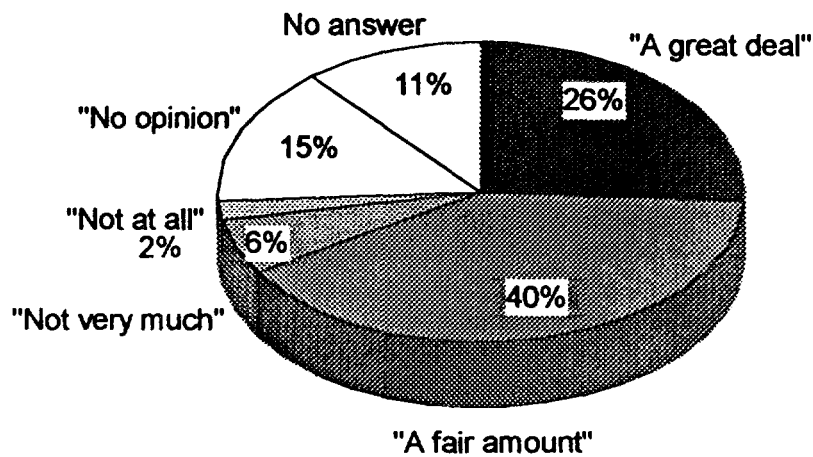
Base: All Version B (245)

	All Version B (245) %	Central and Eastern Europe (and CIS countries) (68) %	Sub- Saharan Africa (22) %	Middle East and Mediterranean (31) %	South and East Asia (58) %	Latin America and Caribbean (66) %
“Strongly agree”	11	7	14	3	12	17
“Tend to agree”	42	38	45	35	41	50
“Tend to disagree”	19	22	27	35	14	11
“Strongly disagree”	6	7	0	6	5	6
“No opinion”	15	21	9	10	17	11
“No answer given”	7	4	5	10	10	6
All stating either “strongly agree” or “tend to agree”	53	46	59	39	53	67
All stating either “tend to disagree” or “strongly disagree”	25	29	27	42	19	17

Version A respondents are also aware that environmental demands might hinder rather than assist free trade, and that ISO 14001 could be part of these complications. Re-inforcing the importance of market demands to exporters, a majority say environmental demands of importers from industrialised countries could strengthen trade barriers.

ASKED OF ALL VERSION A ONLY

Q52 To what extent, if at all, could the environmental demands/supply chain requirements of importers in industrialised countries strengthen non-tariff barriers to international trade?

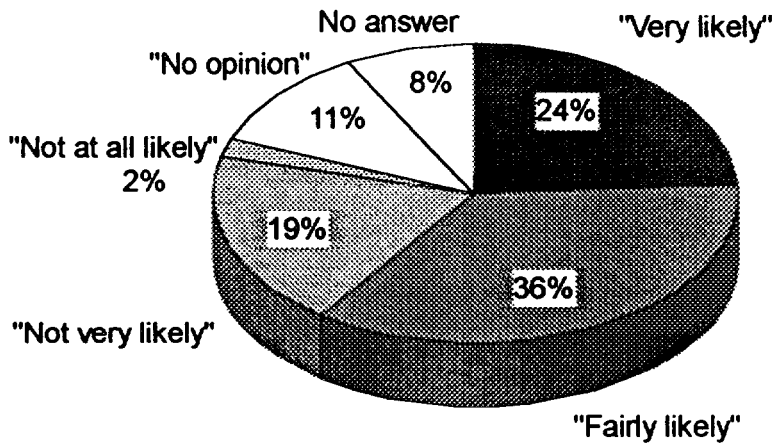


Base: All Version A (106)

Version A respondents from standards administration bodies believe strongly that specifically ISO 14001 (rather than environmental demands generally) could strengthen non-tariff trade barriers, outnumbering those who think it unlikely by three to one (59% against 21%).

ASKED OF ALL VERSION A ONLY

Q51A How likely is it that the introduction of ISO 14001 could strengthen non-tariff barriers to international trade?

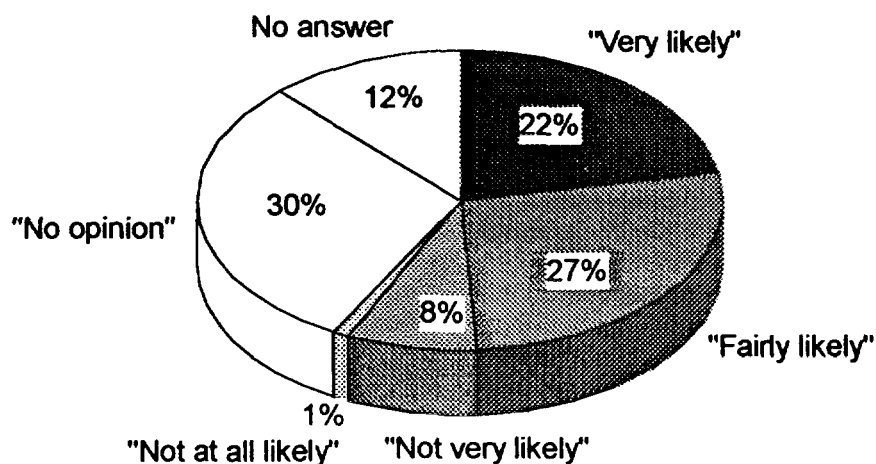


Base: All Version A (106)

Fewer respondents (49%) from any type of organisation say that EMAS will strengthen barriers to trade - although this may be due to a lack of awareness of the European Union scheme among business people in developing and emerging economies (42% say they have 'no opinion' or do not give an answer, rising to 52% in South and East Asia). Among only those who commit themselves to a positive or negative answer, 84% say that it is likely that it could strengthen barriers - a far less positive result.

ASKED OF ALL RESPONDENTS

Q51B How likely is it that the introduction of European Union Eco-Management and Audit Scheme (EMAS) could strengthen non-tariff barriers to international trade?



Base: All respondents (351)

The key motivations cited by Version A respondents for companies to adopt ISO 14001 are legislative ones (unlike ISO 9000, where those factors which actively benefit the company, such as improving internal efficiency, are considered to be of greater importance).

Market forces still play a major role in encouraging adoption of ISO 14001, although for environmental issues international demands play a much greater role than domestic factors (though this is less of a factor for SMEs). Whereas improving a company's internal efficiency is the most important perceived benefit of ISO 9000, this is given a far lower priority with ISO 14001. For ISO 14001, further spin-off benefits to the operating of business, such as improving staff morale and retention and reinforcing management authority are mentioned by few respondents.

ASKED OF ALL VERSION A ONLY

Q42 In your opinion, which of these factors, if any, are likely to influence business in general and small/medium enterprises (SMEs) most in favour of adopting the ISO 14001 specification?

PLEASE RANK THE THREE MOST DETERRING FACTORS, WRITING IN 1. FOR THE MOST DETERRING FACTOR, 2. FOR THE SECOND MOST DETERRING FACTOR, ETC.

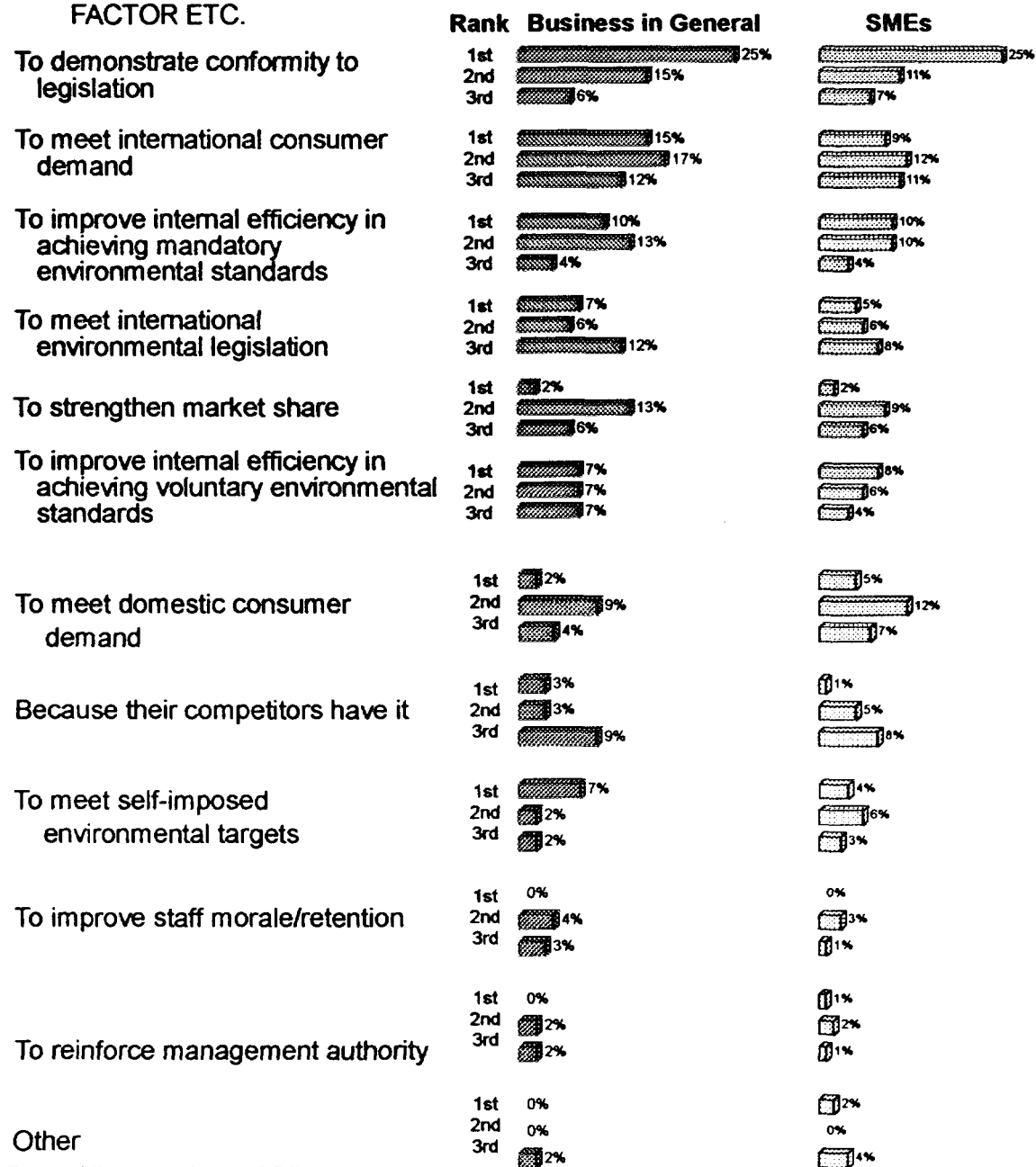
Base: All Version A (106)

(All assigning 1, 2 or 3 to each item)	Business	SMEs
	in general	
	%	%
To demonstrate conformity to legislation	46	42
To meet international consumer demand	44	33
To improve internal efficiency in achieving mandatory environmental standards	27	25
To meet international environmental legislation	25	19
To strengthen market share	21	12
To improve internal efficiency in achieving voluntary environmental standards	20	17
To meet domestic consumer demand	15	24
Because their competitors have it	15	13
To meet self-imposed environmental targets	10	12
To improve staff morale/retention	7	4
To reinforce management authority	4	4
Others	2	6

ASKED OF ALL RESPONDENTS

Q42 In your opinion, which of these factors, if any, are likely to influence business in general and small/medium enterprises (SMEs) most in favour of adopting the ISO 14001 specification?

PLEASE RANK THE THREE MOST DETERRING FACTORS, WRITING IN 1 FOR THE MOST DETERRING FACTOR, 2 FOR THE SECOND MOST DETERRING FACTOR ETC.



Base: All respondents (351)

Deterrents to Adopting ISO 14001 (Q43, version A, Q26, version B)

As with ISO 9000, the deterrents to adopting ISO 14001 centre around non-recognition of the benefits, and costs. There are again issues compounding the situation, such as perceived lack of management commitment, while the requirement for additional technical equipment plays a greater role for ISO 14001.

A lack of awareness of the benefits of ISO 14001 is seen as a particular deterrent for SMEs, but is far less important for business in general. This may reflect which types of business have been targeted in the promotion of ISO 14001.

A perceived deterrent for all companies, however, are associated costs. For business in general the most important costs are those specifically linked to consultancy and registration/certification. For SMEs specially, set-up costs in general are mentioned frequently. Allied to non-recognition of benefits, SMEs are more often also seen as enjoying low commercial returns.

The lack of market pressures are a third area seen as having a negative effect on potential uptake of the standard, but these operate in different ways for different sized companies: for business in general the lack of foreign pressure is more frequently seen as a problem than the lack of local demand. This is since the spur for larger businesses to adopt the standard would be due to demands from their foreign purchasers, where the standard is more commonly in place. For SMEs, the reverse is true: the lack of local demand is the more common barrier, since for small businesses the significant demands are from the domestic (not foreign) market.

An additional problem is linked to the company's internal operations. Of special importance for ISO 14001 is the lack of technical equipment, and although given less emphasis than with ISO 9000, the lack of management commitment is also viewed as important, although less so for SMEs than for business in general.

ASKED OF ALL RESPONDENTS

Q43 Similarly, which of these factors, if any, might deter business in general and small/medium enterprises (SMEs) most from adopting the ISO 14001 specification?

PLEASE RANK THE THREE MOST DETERRING FACTORS, WRITING IN 1. FOR THE MOST DETERRING FACTOR, 2. FOR THE SECOND MOST DETERRING FACTOR, ETC.

Base: All respondents (351)

(All assigning 1, 2 or 3 to each item)	Business		SMEs	
	in general			
	14001	(9000)	14001	(9000)
Cost of consultancy	40	(26)	26	(29)
Cost of registration/certification	40	(21)	21	(23)
Cost of setting up an ISO 14001 Environmental Management System	26	(48)	43	(41)
No management commitment	24	(30)	17	(22)
Lack of technical equipment	21	(10)	15	(11)
Lack of foreign pressure	20	(12)	8	(10)
Lack of competence/experience	14	(20)	15	(17)
Adoption of such standards will expose non-compliance to legislation	14	(6)	10	(6)
Lack of awareness of benefits	12	(46)	38	(35)
Lack of local demand	12	(23)	17	(19)
Adoption of standards will generate more legislation	10	(6)	6	(5)
Impracticality	10	(9)	8	(10)
Low commercial return	10	(19)	20	(18)
Cost of meeting environmental standards	5	(N/A)	4	(N/A)
Others	*	(3)	0	(4)

Costs of Adopting ISO 14001 (Q45, version A, Q27, 28, 29, 30, version B)

Almost three-quarters (74%) of all respondents say that compliance with **mandatory** environmental standards involves a cost burden on business, fewer overall saying that ISO 14001 does (60%, with far fewer rating those costs 'great'). Large commercial organisations - probably those under the greatest pressure to comply with mandatory standards - are the organisations most likely to say there is a burden.

Not surprisingly, there is less implied criticism of **voluntary** environmental agreements - though the difference is one of degree, not absolute. Indeed, almost half (47%) do feel such schemes involve significant cost burdens, though in this case the largest group rate these as 'a fair amount' (40%) rather than a 'great deal' (7%).

ASKED OF ALL RESPONDENTS

Q45 To what extent does compliance with the following involve a cost burden on business?

Base: All respondents (351)

	Mandatory environmental standards	Voluntary environmental agreements	ISO 14001
	%	%	%
"A great deal"	44	7	23
"A fair amount"	29	40	37
"Not very much"	5	20	7
"Not at all"	1	3	1
"Don't know"	21	30	32
All stating either a "Great deal" or a "fair amount"	74	47	60
All stating either "Not very much" or "not at all"	5	23	8

Most respondents from private companies (Version B respondents) are not averse to passing at least some of the costs onto customers. Just over half (53%) state that costs could be 'partially' incorporated into the product price, with a further 14% saying they could be 'fully' incorporated. Only one-sixth (18%) think that the costs cannot be passed on.

ASKED OF ALL VERSION B ONLY

Q28 To what extent do you think the costs of complying with ISO 14001 could be incorporated into the prices of products?

Base: All Version B (245)

	All Version B (245) %	SME Organisations only (91) %	Non-SME Organisations only (70) %
'Fully'	14	20	14
'Partially'	53	38	63
'Not at all'	18	24	17
'Don't know' / No answer given	15	18	6

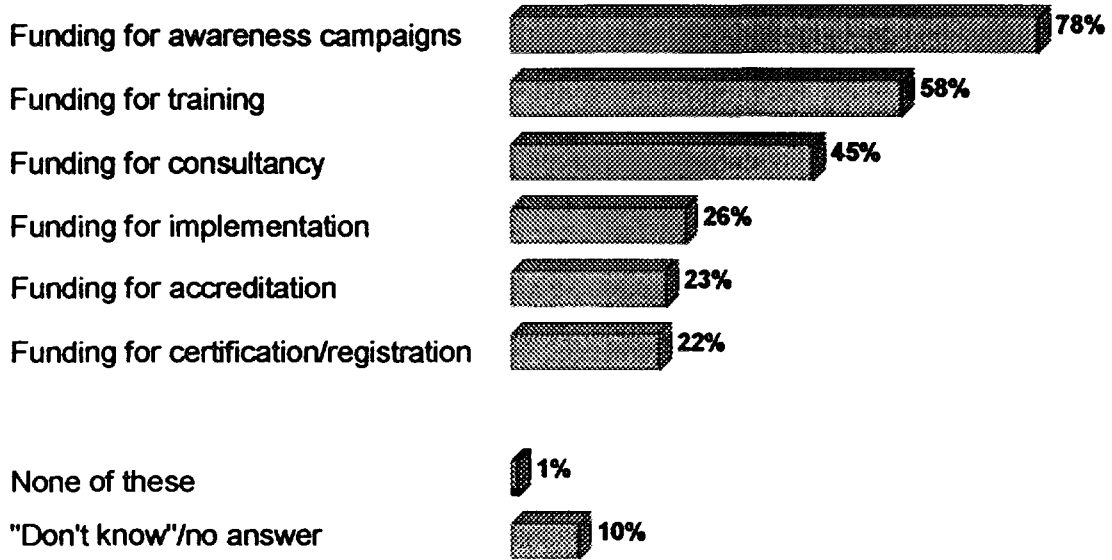
When the specific cost areas of ISO 14001 are looked at (Q29, below), it is clear that (as with ISO 9000), the government is expected to bear some costs, although only in certain defined areas. Version B respondents expect the government to bear the cost of promoting awareness of the standard (85%). To a lesser extent it is also expected to bear some of the initial costs encountered by each business, two-fifths (40%) saying the government should bear consultancy and training fees.

Companies do acknowledge that the responsibility for other costs lies firmly with the companies themselves. Approximately three-quarters say that the company should bear the cost of registration (78%), certification (74%) and implementation (70%). The company is also seen by around half to be responsible for costs associated with consultancy and training, and promotion. Despite two-thirds saying that ISO 14001 costs in general could be at least partially incorporated into the product price (Q28, above), less than one in ten (9% or less in each case) here say that the consumer should bear the costs.

The areas where government should encourage compliance with voluntary environmental standards (including ISO 14001) match those identified previously. Private companies (Version B respondents) say that State efforts should be focused on funding awareness campaigns (78%) and funding consultancy (45%) and training (58%). Significantly fewer mention funding for each of implementation (26%). Certification/registration (22%) and accreditation (23%).

ASKED OF ALL VERSION B ONLY

Q30 Which, if any, of the following should the government provide to encourage compliance with voluntary environmental standards (including ISO 14001)?
(more than one answer can be given)



Base: All Version B (245)

ACCREDITATION AND CERTIFICATION FOR ISO 14000/14001

The Role of ISO 14000/14001 Accreditation and Certification Bodies (Q46, 47, 48, 49, version A)

National Accreditation Bodies

Only one-fifth of the countries surveyed report having a national accreditation body for ISO 14000.

THIS QUESTION BASED ON THOSE FROM NATIONAL STANDARDS BODIES ONLY

Q46 Does your country have a . . .

Base: All those from National Standards bodies (41)

	National Accreditation body for ISO 14000
	(41)
	%
“Yes”	24
“No”	66
“Don’t know” / No answer given	10

The majority of those with such a body think the organisations have a ‘public’ rather than a ‘private’ character (64% compared with 27% respectively). A quarter (27%) of accreditation bodies currently have mutual recognition agreements with other countries, and a third (36%) say an agreement is pending. Just under a fifth say their national accreditation body does not have an agreement, nor is one planned for the near future.

THIS QUESTION BASED ON THOSE FROM NATIONAL STANDARDS BODIES ONLY

Q49 Do/will the following bodies have mutual recognition agreements with other countries?

Base: All those from National Standards bodies who state that their country has a National Accreditation body for ISO 14000 or separate National Certification scheme for ISO 14001 (11)

		National Accreditation body for ISO 14000
		(11)
		%
“Yes”		27
“Pending”		36
“No”		18
“Don’t know” / No answer given		18
All stating either “Yes” or “Pending”	64	64

Accreditation of national certification bodies is universal, while slightly fewer (82%) say national laboratories are accredited, and under half reporting accreditation of certification organisations operating internationally.

THIS QUESTION BASED ON THOSE FROM NATIONAL STANDARDS BODIES ONLY

Q47A Which of the following does/will your national accreditation body accredit?

Base: All those from National Standards bodies who state that their country has a National Accreditation body for ISO 14000 or separate National Certification scheme for ISO 14001 (11)

	(11)
	%
“National certification bodies”	100
“National laboratories”	82
“Certification organisations operating internationally”	45
No answer given	0

(More than one answer may be given)

National Certification Bodies

Only one in ten from National Standards bodies say their country has a separate national certification scheme for ISO 14001. However, compared with when asked if their country has a National Accreditation Body for ISO 14000, a greater proportion (24%) say they 'don't know' what the situation is, or don't give an answer.

THIS QUESTION BASED ON THOSE FROM NATIONAL STANDARDS BODIES ONLY

Q46 Does your country have a . . .

Base: All those from National Standards bodies (41)

	Separate National Certification scheme for ISO 14001 (41) %
"Yes"	10
"No"	66
"Don't know" / No answer given	24

National certification bodies for ISO 14001 are felt to have a more private sector character than national accreditation bodies.

THIS QUESTION BASED ON THOSE FROM NATIONAL STANDARDS BODIES ONLY

Q48 Do/will these bodies have a more public or private character?

Base: All those from National Standards bodies who state that their country has a National Accreditation body for ISO 14000 or separate National Certification scheme for ISO 14001 (11)

	National Accreditation body for ISO 14000 (11) %	National Certification bodies for ISO 14001 (11) %
"Public"	64	36
"Private"	27	45
"Don't know" / No answer given	9	18

As with national accreditation bodies, few NCBs have mutual recognition agreements with other countries - though for both, an additional third have such an agreement pending.

THIS QUESTION BASED ON THOSE FROM NATIONAL STANDARDS BODIES ONLY

Q49 Do/will the following bodies have mutual recognition agreements with other countries?

Base: All those from National Standards Bodies who state that their country has a National Accreditation body for ISO 14000 or separate National Certification scheme for ISO 14001 (11)

	National Accreditation body for ISO 14000	National Certification bodies for ISO 14001
	(11)	(11)
	%	%
“Yes”	27	27
“Pending”	36	36
“No”	18	18
“Don’t know” / No answer given	18	18
All stating either “Yes” or “Pending”	64	64

Seven in ten of those with a national certification scheme say this body certifies or registers public national companies. More say they register private national companies, but fewer multinational companies.

THIS QUESTION BASED ON THOSE FROM NATIONAL STANDARDS BODIES ONLY

Q47B Which of the following does/will your national certification bodies certify/register?

Base: All those from National Standards bodies who state that their country Version A whose country has a National Accreditation body for ISO 14000 or separate National Certification scheme for ISO 14001 (11)

	(11)
	%
“Private national companies”	82
“Public national companies”	73
“Multinational companies”	64
No answer given	18

Attitudes Towards ISO 14000/14001 Accreditation and Certification Bodies (Q50, version A)

The need for companies to achieve conformity to internationally recognised environmental standards is clear to many Version B respondents. More than two-fifths (42%, section h below) agree that foreign environmental standards **already hinder export opportunities**, compared with one-in-five (21%) who actively disagree (Q50h). A large category of respondents (38%), however, reserve their judgement about the present situation.

Barriers are also recognised to the conformity assessment organisations. The majority of Version A respondents agree that national accreditation bodies (60%) and national certification bodies (54%) will have difficulty meeting international acceptance requirements (Q50a) and b)). For both types of organisation fewer than three in ten believe they will **not find it difficult**.

One of the clearest messages is that there should be only one unified accreditation body (Q50c)), and that ISO 14001 certification should only be provided by organisations certifying against the ISO 9000 series of standards (Q50d)). In both cases, two-thirds agree.

ASKED OF ALL VERSION A ONLY

Q50 To what extent do you agree or disagree with the following statements?

Base: All Version A (106)

	“Strongly agree” %	“Agree” %	“Disagree” %	“No opinion” %
a) National Accreditation bodies in developing and emerging economies will have difficulty meeting requirements for international acceptance	(22)	60	21	19
b) National Certification bodies in developing and emerging economies will have difficulty meeting requirements for international acceptance	(20)	54	29	17
c) There should be one single Accreditation body accrediting certification bodies for both ISO 9000 and ISO 14001 registration	(46)	67	15	18
d) ISO 14001 certification should be provided by bodies already certifying against the ISO 9000 series of standards	(36)	64	20	16
h) Foreign environmental standards already hinder export opportunities	(11)	42	21	38

A barrier for companies is access to the means to implement the systems. More than half (57%) reject the notion that there are sufficient qualified consultants, trainers and auditors - outnumbering those who think there are sufficient experts (21%) by almost three to one (Q50f).

Opinion is more divided on what the implications of this are. More people agree than disagree that businesses would have to rely on foreign sourcing for experts for ISO 14001 compliance (42% and 36%, Q50g)), although this difference is not statistically significant, and one-quarter (23%) say they have 'no opinion'.

Access to the necessary skills, experience and resources is not seen as poor for all the parties involved in implementing ISO 14001. More people agree than disagree that local business has access to necessary resources, though again there is not an overwhelming consensus of opinion (Q50e)).

ASKED OF ALL VERSION A ONLY

Q50 To what extent do you agree or disagree with the following statements?

Base: All Version A (106)

		'Strongly agree'	'Agree'	'Disagree'	'No opinion'
		%	%	%	%
g)	Businesses would have to rely on foreign sourcing for qualified consultants, trainers and auditors to enable compliance with ISO 14001	(11)	42	36	23
e)	Local business has access to the necessary skills, experience and human and other resources to meet the requirements and guiding principles of the ISO 14000 series	(10)	42	36	23
f)	There are sufficient qualified consultants, trainers and auditors to enable businesses to comply with ISO 14001 specification	(6)	21	57	23

Additional Comments about ISO 14000 (Q53, version A, Q34, version B)

The same issues for ISO 14000 arise from the (few) respondents who offer additional comments as were revealed for ISO 9000 (Q32 version A/Q16 version B). The need to provide help to companies in developing and emerging economies is mentioned by 4%, and the need for government support and promotion of the initiatives is mentioned by 5% of all respondents.

A similar number of respondents make comments acknowledging the general importance of the standard, 4%, or of the high costs associated with it, 3%.

ASKED OF ALL RESPONDENTS

Q34/53 What, if any, other comments would you like to make about the ISO 14000 series and related issues?

Base: All respondents (351)

	All respondents (351) %	All Version A (106) %	All Version B (245) %
Government should support it/make further awareness campaigns	5	4	6
Developing countries need help in order to implement ISO 14000 series	4	3	4
It is very important/totally support it/all business should go for it	4	4	4
It is a good environment management tool (EMT)	3	2	3
Cost for setting it up is expensive/grants or loans should be provided to help industries install system	3	2	3
They can be made integral part of the ISO 9000/improved compatibility with ISO series	3	5	2
Others	6	5	6
'Don't know'/No answer given	79	83	78

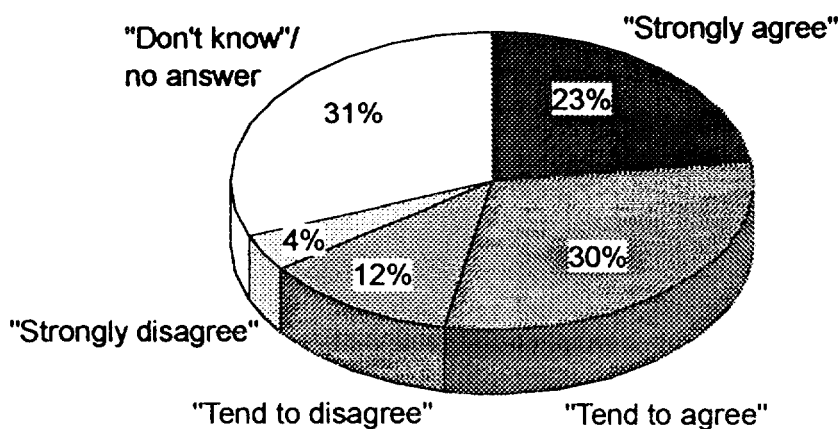
ENVIRONMENTAL LABELLING AND ISO 14020

Trade Implications of Environmental Product Labels (Q54, 55, version A, Q35, version B)

The importance of having standard national product labels is assessed differently by different types of organisation. Most (53%) Version A respondents agree that the diversity of labels already hinders export opportunities - a quarter 'strongly' agreeing.

ASKED OF ALL VERSION A ONLY

Q54 *To what extent do you agree or disagree that the multiplicity of national environmental labels already hinders export opportunities?*

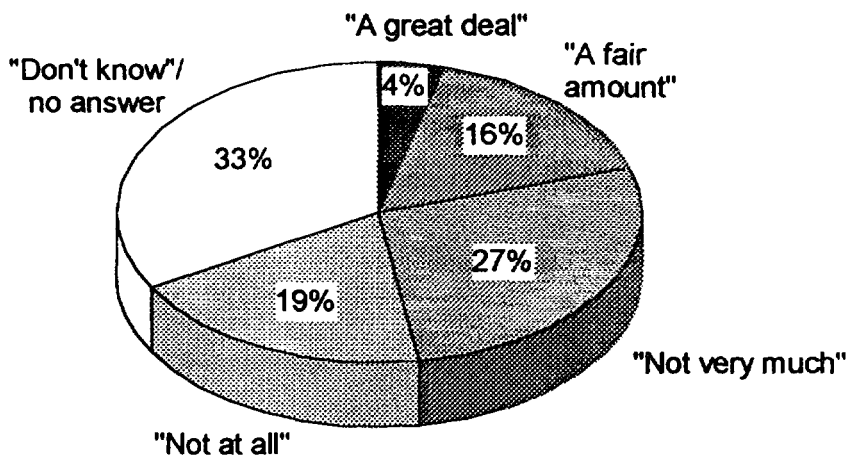


Base: All Version A (106)

In contrast, half of Version B respondents say different labels hinder exports 'Not at all' or 'Not very much'. Only one-fifth say it hinders export opportunities a 'fair amount' or more.

ASKED OF ALL VERSION B ONLY

Q35 To what extent, if at all, does the existence of different national environmental labels hinder your export opportunities?



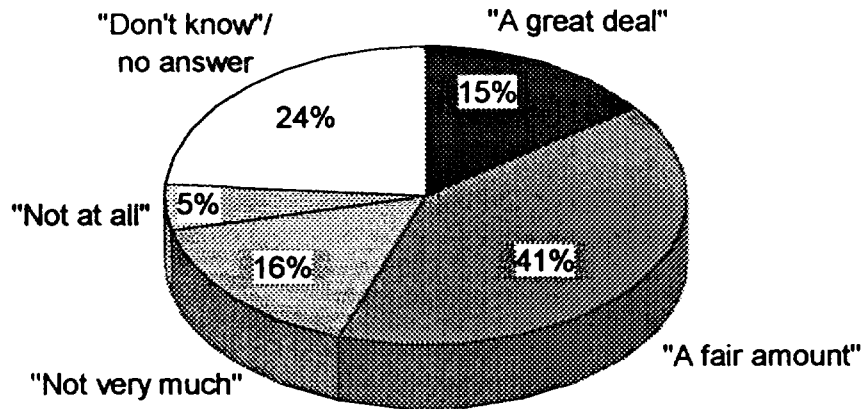
Base: All Version B (245)

In both cases a significant number (a third) are unsure of the implications, possibly indicating that the issue of environmental labelling is not a major issue for them yet. Differences in the perceived threat to trade also may reflect the broader perspective that the Version A respondents have in this respect.

Just over half of all respondents say an internationally recognised environmental product label would improve export opportunities, although those saying labelling currently presents a barrier are more likely to endorse a single label.

ASKED OF ALL RESPONDENTS

Q55 To what extent, if at all, do you think that internationally recognised environmental product labels (be they national or international) could improve export opportunities?



Base: All respondents (351)

National Environmental Labelling Schemes (Q58A, version A, Q38, version B)

Despite the importance of internationally recognised labels, less than half (41% of those from National Standards Bodies) report that their country either presently has a national labelling scheme (22%) or has one pending (20%). Central/Eastern European countries do appear further developed in this respect, however.

Fifty four per cent of countries are reported (again, by those from National Standards bodies only) as not having a national scheme, nor having one pending. Only 5% of those from National Standards bodies say they 'don't know' what the situation is or do not give an answer, although this figure is very much higher when all respondents are looked at - the figure rising to one-third (32%). As might be expected, Version A respondents are slightly less likely to say that they have 'no opinion' or not provide an answer than Version B respondents (23% versus 36%).

ASKED OF ALL RESPONDENTS

Q58A/38 Does your country have a national environmental labelling scheme?

Base: All those from National Standards Bodies only / All (for geographic breakdown)

	National Standards Bodies only (41) %	Central and Eastern Europe (and CIS countries) (106) %	Sub-Saharan Africa (31) %	Middle East and Mediterranean (44) %	South and East Asia (82) %	Latin America and Caribbean (87) %
"Yes"	22	27	3	9	9	8
"Pending"	20	16	13	7	9	15
"No"	54	21	55	50	43	57
"Don't know"/ no answer given	5	36	29	34	40	20
All stating either "Yes" or "Pending"	41	43	16	16	16	23

The Preferred Content of, and Knowledge about, Environmental Labels
(Q57, 58B, 59a, 59b, 59c, 60, version A, Q37, 39a, 39b, 40, version B)

Most respondents (especially those in large commercial companies) think environmental labels should be comprehensive, including both the product and production process characteristics. Far fewer say labels should reflect only the product characteristics, while indicating only the characteristics of the production processes is clearly not ideal, only 2% preferring this.

ASKED OF ALL RESPONDENTS

Q57/37 In your opinion, should environmental labels reflect . . .

Base: All (351)

	All respondents (351) %	Version A only (106) %	Version B only (245) %
“only product characteristics”	13	13	12
“only production process characteristics”	2	1	3
“both product and production process characteristics”	64	57	67
“Don’t know”	3	7	1
No answer given	19	23	17

The general level of awareness and knowledge of environmental labelling is poor, particularly among Version A respondents: small but significant numbers consistently report they have ‘no opinion’, ‘don’t know’ or do not give an answer. Similarly, only a very small number of Version A respondents are able to say how many companies in their country have either applied for or obtained foreign environmental labels (Q58B).

THIS QUESTION BASED ON THOSE FROM NATIONAL STANDARDS BODIES ONLY

Q58B As far as you are aware, how many, if any, companies in your country have . . .

Base: All those from National Standards Bodies only

	“applied for a foreign environmental label”	“obtained a foreign environmental label”
	(41)	(41)
	%	%
None	88	83
1 - 2	2	2
3 - 10	0	0
“Don’t know”/ No answer given	10	15
Average no. of companies	0.05	0.05

(The number of companies reported to have applied for/obtained labels have been grouped for analysis purposes)

This low level of awareness is again evident to all types of respondents when they are asked which product *types* have a national environmental labelling scheme, which products have companies applied for a foreign environmental label, and which products companies have obtained foreign environmental labels for. For all but one of the five questions asked, 96% or more of respondents say either that they ‘don’t know’ or that ‘none’ of the products listed have obtained foreign labels.

- Q59A For which product types does your country have a national environmental labelling scheme?
Base: All Version A who state that their country has a national environmental labelling scheme (19)
- Q59B For which product types have companies applied for a foreign environmental label?
Base: All Version A (106)
- Q59C And for which types have companies obtained a foreign environmental label?
Base: All Version A (106)
- Q39A For which , if any, products types has your company applied for a foreign environmental label?
Base: All Version B (245)
- Q39B And for which, if any, products types has your company obtained a foreign environmental label?
Base: All Version B (245)

	Q59A	Q59B	Q59C	Q39A	Q39B
Base:	(19)	All	All	All	All
	(19)	Version A	Version A	Version B	Version B
	%	(106)	(106)	(245)	(245)
	%	%	%	%	%
Batteries (consumer goods)	21	2	0	*	1
Ceramics (dishes, tiles, etc)	5	0	0	*	0
Deodorants/anti-perspirants	16	0	0	*	1
Detergents/cleaning products	47	3	1	1	1
Fertilisers	11	1	0	*	*
Light bulbs	11	0	0	*	*
Mattresses	5	0	0	*	*
Packaging/insulation material	26	0	0	2	2
Paints/varnishes	63	1	1	1	0
Paper/paper products	53	0	0	1	1
Refrigerators	21	2	1	1	*
Rubbish bags	16	1	1	0	*
Shampoos/hairsprays	21	0	0	*	*
Shoes	16	2	0	0	0
Toilet rolls/kitchen towels	47	1	1	0	0
Washing machines/dishwashers	26	0	0	0	0
None	0	9	8	45	44
'Don't know'/No answer given	21	88	90	48	52

The most frequent additional comments focus on the wish that potential environmental label monitoring systems be decentralised - both in operations and financing. One in twenty say monitoring needs to be on both a national and regional basis. A further 3% (all are representatives from commercial companies) say that the system should be financed by the government as well as regional bodies and local companies.

ASKED OF ALL RESPONDENTS

Q60/40 What, if any, other comments would you like to make about environmental labelling and related issues as the need for a monitoring system, how costs should be allocated, whether monitoring should be done regionally or nationally, the need for an overall responsible body for supervision?

Base: All respondents (351)

	All (351) %	All Version A (106) %	All Version B (245) %
Monitoring needed both nationally and regionally	7	6	8
A national body/govt agency should be formed for supervision/application of regulations and standards	4	2	5
Monitoring system should be financed by the government as well as regional bodies and local companies	3	0	4
Environmental labelling scheme is established within the state directorate for environment	2	3	2
A great deal of info/training is needed in environmental standards/management	2	3	1
Environmental labelling must be initiated	2	1	2
Can cause unnecessary costs/cost would be passed on to consumer	2	4	2
Other	4	5	3
No answer given	82	82	82

APPENDICES

Sample Profile

The sample profile is as follows:

		Number	%
		(351)	(100)
Type of Organisation	Government Department	33	9
	National Standards Body	41	12
	Certification Body	13	4
	Accreditation Body	10	3
	Industry Association	40	11
	Chamber of Commerce	10	3
	All Service Company/Enterprises	40	11
	All industrial Company/Enterprises	121	34
Questionnaire Language	English	284	81
	Spanish	57	16
	French	10	3
Geographical Breakdown	Central and Eastern Europe and CIS countries	106	30
	Sub-Saharan Africa	31	9
	Middle East & Mediterranean	44	13
	South and East Asia including Oceania	82	23
	Latin America and the Caribbean	87	25

Geographical Breakdown

The following geographic grouping of the countries approached in this study has been used in this report and separate computer analyses.

Central and Eastern Europe and CIS countries

Albania
Armenia
Belarus
Bosnia and Herzegovina
Bulgaria
Croatia
Czech Republic
Estonia
Hungary
Kyrgyzstan
Latvia
Macedonia
Poland
Romania
Russian Federation
Slovakia
Slovenia
Turkmenistan
Ukraine
Uzbekistan
Yugoslavia

South and East Asia (including Oceania)

Bangladesh
Brunei Darussalam
China
Fiji
Hong Kong
India
Indonesia
Democratic People's Republic of Korea
Republic of Korea
Malaysia
Mongolia
Nepal
Pakistan
Papua New Guinea
Philippines
Singapore
Sri Lanka
Thailand
Vietnam

Sub-Saharan Africa

Botswana
Burundi
Ghana
Kenya
Mauritius
Mozambique
Nigeria
Tanzania
Uganda
Zimbabwe

Middle East and Mediterranean

Algeria
Bahrain
Cyprus
Ethiopia
Iran
Jordan
Kuwait
Lebanon
Libya
Malta
Morocco
Oman
Qatar
Saudi Arabia
Syria
Tunisia
Turkey
United Arab Emirates

Latin America and the Caribbean

Argentina
Antigua and Barbuda
Barbados
Bolivia
Brazil
Chile
Columbia
Costa Rica
Cuba
Ecuador
Grenada

Grenada
Jamaica
Mexico
Panama
Paraguay
Peru
Saint Lucia
Trinidad and Tobago
Uruguay
Venezuela

Technical Details

Sample Design

The sample was collectively designed by UNIDO, Resource and MORI. Using the offices of three organisations, Crown Agents, UNIDO, and ISO members, a single representative was selected to act as a distributor of questionnaires to other bodies in that country.

These individuals were contacted by Resource and UNIDO prior to receiving a package of 15 questionnaires and associated material (including envelopes for returning questionnaires and written instructions) for distribution. Each representative was asked to distribute the questionnaires in the following way:

- One questionnaire to the trade or industry Government Department in their country
- One to the National Standards Body in their country
- One or two to the Certification and/or Accreditation Bodies in their country
- Eleven to companies

To maximise the response rate, a faxed reminder letter was sent to each distributor during the fieldwork period asking them to contact the organisations they had sent questionnaires to.

The Questionnaire

The questionnaire, designed specifically for the purpose of this survey was semi-structured and in a format suitable for self-completion. Two versions of the questionnaire were used, one specific to organisations involved in the administration of national and international standards, and one specific to commercial companies and associated industry associations.

Each version of the questionnaire (and associated materials) were additionally translated into Spanish and French language. Foreign language packages were sent out to a number of countries in a further effort to maximise the response rate and to facilitate questionnaire completion.

A copy of English language versions of both questionnaires is appended to this document.

Response Rate

Representatives covering 91 countries were requested to distribute 15 questionnaires to the target organisations in their country. In total, 1,365 questionnaires were despatched. Due to civil unrest or the specific national economic situation, two countries were unable to participate. The number of questionnaires received by national distributors was 1,335.

The target response rate was 30%: this would be 400 questionnaires given the number of questionnaires received by the questionnaire distributors. In total, 351 questionnaires were included in this survey - a response rate of 26%.

Data Processing

All completed questionnaires were returned to MORI offices in London, where they were checked and logged. Data entry and analysis were carried out by Numbers Data Processing Ltd.

QUESTIONNAIRES

UNIDO
United Nations Industrial
Development Organisation

Version A

Questionnaire

on the

Trade Implications of
International Standards
for Quality and Environmental
Management Systems
(ISO 9000/ISO 14000 Series)

UNIDO in collaboration with

- **ITC/UNCTAD/WTO (International Trade Centre)**
- **ISO (International Organisation for Standardisation)**
 - **Resource (Science & Technology Expertise) Ltd**
- **MORI (Market & Opinion Research International) Ltd**

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UNIDO QUESTIONNAIRE

Details of your organisation:

Name of organisation: _____

Address: _____

Contact person: _____

Telephone: _____

Telefax: _____

E-mail : _____

OFFICE USE
CARD 1

SECTION 1 - YOUR ORGANISATION

PLEASE TICK THE MOST APPROPRIATE BOX (ONE BOX ONLY)

Is your organisation a:

- | | |
|---------------------------------|------------------------------------|
| Government Department? | (10)
<input type="checkbox"/> 1 |
| National Standards Body? | <input type="checkbox"/> 2 |
| Certification Body? | <input type="checkbox"/> 3 |
| Accreditation Body? | <input type="checkbox"/> 4 |
| Other | <input type="checkbox"/> 5 |

In which country is your organisation based?

	(13)		
Albania	<input type="checkbox"/> 1	Libya	<input type="checkbox"/> X
Algeria	<input type="checkbox"/> 2	Lithuania	<input type="checkbox"/> Y
Argentina	<input type="checkbox"/> 3		(17)
Armenia	<input type="checkbox"/> 4	Macedonia	<input type="checkbox"/> 1
Antigua and Barbuda	<input type="checkbox"/> 5	Malta	<input type="checkbox"/> 2
Bahrain	<input type="checkbox"/> 6	Malaysia	<input type="checkbox"/> 3
Bangladesh	<input type="checkbox"/> 7	Mauritius	<input type="checkbox"/> 4
Barbados	<input type="checkbox"/> 8	Mexico	<input type="checkbox"/> 5
Belarus	<input type="checkbox"/> 9	Mongolia	<input type="checkbox"/> 6
Bolivia	<input type="checkbox"/> 0	Morocco	<input type="checkbox"/> 7
Bosnia & Herzegovina	<input type="checkbox"/> X	Mozambique	<input type="checkbox"/> 8
Botswana	<input type="checkbox"/> Y	Nepal	<input type="checkbox"/> 9
	(14)	Nigeria	<input type="checkbox"/> 0
Brazil	<input type="checkbox"/> 1	Oman	<input type="checkbox"/> X
Brunei Darussalam	<input type="checkbox"/> 2	Pakistan	<input type="checkbox"/> Y
Bulgaria	<input type="checkbox"/> 3		(18)
Burundi	<input type="checkbox"/> 4	Panama	<input type="checkbox"/> 1
Chile	<input type="checkbox"/> 5	Papua New Guinea	<input type="checkbox"/> 2
China	<input type="checkbox"/> 6	Paraguay	<input type="checkbox"/> 3
Colombia	<input type="checkbox"/> 7	Peru	<input type="checkbox"/> 4
Costa Rica	<input type="checkbox"/> 8	Philippines	<input type="checkbox"/> 5
Croatia	<input type="checkbox"/> 9	Poland	<input type="checkbox"/> 6
Cuba	<input type="checkbox"/> 0	Qatar	<input type="checkbox"/> 7
Cyprus	<input type="checkbox"/> X	Romania	<input type="checkbox"/> 8
Czech Republic	<input type="checkbox"/> Y	Russian Federation	<input type="checkbox"/> 9
	(15)	Saint Lucia	<input type="checkbox"/> 0
Ecuador	<input type="checkbox"/> 1	Saudi Arabia	<input type="checkbox"/> X
Egypt	<input type="checkbox"/> 2	Singapore	<input type="checkbox"/> Y
Estonia	<input type="checkbox"/> 3		(19)
Ethiopia	<input type="checkbox"/> 4	Slovakia	<input type="checkbox"/> 1
Fiji	<input type="checkbox"/> 5	Slovenia	<input type="checkbox"/> 2
Ghana	<input type="checkbox"/> 6	Sri Lanka	<input type="checkbox"/> 3
Grenada	<input type="checkbox"/> 7	Syria	<input type="checkbox"/> 4
Guyana	<input type="checkbox"/> 8	Tanzania	<input type="checkbox"/> 5
Hong Kong	<input type="checkbox"/> 9	Thailand	<input type="checkbox"/> 6
Hungary	<input type="checkbox"/> 0	Trinidad and Tobago	<input type="checkbox"/> 7
India	<input type="checkbox"/> X	Tunisia	<input type="checkbox"/> 8
Indonesia	<input type="checkbox"/> Y	Turkey	<input type="checkbox"/> 9
	(16)	Turkmenistan	<input type="checkbox"/> 0
Iran	<input type="checkbox"/> 1	Uganda	<input type="checkbox"/> X
Jamaica	<input type="checkbox"/> 2	Ukraine	<input type="checkbox"/> Y
Jordan	<input type="checkbox"/> 3		(20)
Kenya	<input type="checkbox"/> 4	United Arab Emirates	<input type="checkbox"/> 1
Korea, Democratic People's Republic of	<input type="checkbox"/> 5	Uruguay	<input type="checkbox"/> 2
Korea, Republic of	<input type="checkbox"/> 6	Uzbekistan	<input type="checkbox"/> 3
Kuwait	<input type="checkbox"/> 7	Venezuela	<input type="checkbox"/> 4
Kyrgyzstan	<input type="checkbox"/> 8	Vietnam	<input type="checkbox"/> 5
Latvia	<input type="checkbox"/> 9	Yugoslavia	<input type="checkbox"/> 6
Lebanon	<input type="checkbox"/> 0	Zimbabwe	<input type="checkbox"/> 7

SECTION II - THE ISO 9000 SERIES OF MANAGEMENT SYSTEMS STANDARDS FOR MANUFACTURING AND SERVICES

1. How much do you feel you know about international standards in general?

A great deal	A fair amount	Not very much	Nothing	Not sure/ no opinion	
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	21

2. In your opinion, how aware or unaware is/are ... in your country of the ISO 9000 Series?

	Very aware (22)	Fairly aware (23)	Fairly unaware (24)	Very unaware (25)	Don't know (26)
...your organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
...government depts/agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
...national standards body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
...certification bodies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
...accreditation body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
...consultants/training organisations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6
...business in general	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 7
...companies exporting goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 8
...companies importing goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 9
...multinational companies based in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0
...large national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> X
...small/medium national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Y

3. In your opinion, how important or unimportant is the ISO 9000 Series to the following types of company?

	Very important (27)	Fairly important (28)	Fairly unimportant (29)	Very unimportant (30)	Don't know (31)
Business in general	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
Companies exporting goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
Companies importing goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
Companies serving the domestic market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
Multinational companies based in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
Large national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6
Small/Medium national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 7
Manufacturers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 8
Service providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 9
Private sector companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0
Public sector companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> X

4. Do you expect the importance of the ISO 9000 Series to the following types of company to increase, decrease or remain the same in the future?

	Increase (32)	Same (33)	Decrease (34)	Don't know (35)	
Business in general	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1
Companies exporting goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2
Companies importing goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3
Companies serving the domestic market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4
Multinational companies based in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5
Large national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6
Small/Medium national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7
Manufacturers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8
Service providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9
Private sector companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0
Public sector companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X

5. For which, if any, of the following types of company is the ISO 9000 Series recommended by your organisation:

	(36)
Business in general	<input type="checkbox"/> 1
Companies exporting goods/services	<input type="checkbox"/> 2
Companies importing goods/services	<input type="checkbox"/> 3
Companies serving the domestic market	<input type="checkbox"/> 4
Multinational companies based in your country	<input type="checkbox"/> 5
Large national companies	<input type="checkbox"/> 6
Small/Medium national companies	<input type="checkbox"/> 7
Manufacturers	<input type="checkbox"/> 8
Service providers	<input type="checkbox"/> 9
Private sector companies	<input type="checkbox"/> 0
Public sector companies	<input type="checkbox"/> X
None of these	<input type="checkbox"/> Y

6a. How many companies in your country have achieved registration to an ISO 9000 system?

USE LEADING ZEROS IF NECESSARY E.G. 0001

Number	None	Don't know
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
38 39 40 41	X	Y

6b. How does the number of company registrations break down by company size?

USE LEADING ZEROS IF NECESSARY E.G. 0001

	Number	None	Don't know	
No. of multinational company registrations	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	42-45
No. of large national company registrations	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	46-49
No. of small/medium national company registrations	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	50-53

7. Which sectors have the most registrations?

PLEASE RANK THE TOP THREE SECTORS IN TERMS OF THE NUMBER OF REGISTRATIONS E.G. 1 FOR THE SECTOR WITH THE MOST REGISTRATIONS, 2 FOR THE SECTOR WITH THE SECOND LARGEST NUMBER OF REGISTRATIONS, ETC.

	(55)
Agriculture, Forestry and Fishing	<input type="checkbox"/> 1
Mining and Quarrying	<input type="checkbox"/> 2
Manufacturing	<input type="checkbox"/> 3
Electricity, Gas and Water	<input type="checkbox"/> 4
Construction	<input type="checkbox"/> 5
Wholesale and Retail Trade and Restaurants and Hotels	<input type="checkbox"/> 6
Transport, Storage and Communications	<input type="checkbox"/> 7
Financing, Insurance, Real Estate and Business Services	<input type="checkbox"/> 8
Community, Social and Personal Services	<input type="checkbox"/> 9
Other	<input type="checkbox"/> 0

8A. How important do you believe the following benefits of implementing the ISO 9000 Series in all businesses are?

	Very impor- tant (59)	Fairly impor- tant (60)	Not very impor- tant (61)	Not at all impor- tant (62)	Don't know (63)
To improve internal efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
Associated with Total Quality Management (TQM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
To meet domestic consumer demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
To meet international consumer demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
To strengthen market share	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
To demonstrate conformity to legislation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6
To improve staff morale/retention	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 7
Because their competitors have it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 8
To reinforce management authority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 9
To remove barriers to export trade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0

8B. How important do you believe the following benefits of implementing the ISO 9000 Series in small/medium enterprises (SMEs) in particular are?

	Very important (68)	Fairly important (69)	Not very important (70)	Not at all important (71)	Don't know (72)
To improve internal efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
Associated with Total Quality Management (TQM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
To meet domestic consumer demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
To meet international consumer demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
To strengthen market share	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
To demonstrate conformity to legislation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6
To improve staff morale/retention	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 7
Because their competitors have it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 8
To reinforce management authority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 9
To remove barriers to export trade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0

9. Which of these factors, if any, might deter business in general and small/medium enterprises (SME's) most from adopting the ISO 9000 series?

PLEASE RANK THE THREE MOST DETERRING FACTORS, WRITING IN 1. FOR THE MOST DETERRING FACTOR, 2. FOR THE SECOND MOST DETERRING FACTOR, ETC.

	Business in general (73)	SMEs (75)
Lack of awareness of benefits	<input type="checkbox"/>	<input type="checkbox"/> 1
Cost of consultancy	<input type="checkbox"/>	<input type="checkbox"/> 2
Cost of setting up an ISO 9000 Quality Management System	<input type="checkbox"/>	<input type="checkbox"/> 3
Cost of registration/certification	<input type="checkbox"/>	<input type="checkbox"/> 4
Adoption of such standards will expose non-compliance to legislation	<input type="checkbox"/>	<input type="checkbox"/> 5
Adoption of standards will generate more legislation	<input type="checkbox"/>	<input type="checkbox"/> 6
Lack of local demand	<input type="checkbox"/>	<input type="checkbox"/> 7
Lack of foreign pressure	<input type="checkbox"/>	<input type="checkbox"/> 8
Impracticality	<input type="checkbox"/>	<input type="checkbox"/> 9
Low commercial return	<input type="checkbox"/>	<input type="checkbox"/> 0
No management commitment	<input type="checkbox"/>	<input type="checkbox"/> X
Lack of technical equipment	<input type="checkbox"/>	<input type="checkbox"/> Y
	(74)	(76)
Lack of competence/experience	<input type="checkbox"/>	<input type="checkbox"/> 1
Others	<input type="checkbox"/>	<input type="checkbox"/> 2

CARD 2

10. Is there legislation which makes conformity with the ISO 9000 Series mandatory for certain manufacturers?

Yes 1 Pending 2 No 3 Don't know 4 (10)

ACCREDITATION AND CERTIFICATION FOR THE ISO 9000 SERIES

11. Does your country have a National Accreditation Scheme?

Yes 5 Pending 6 No 7 Don't know 8 (10)

IF NO OR DON'T KNOW AT Q11, GO TO Q17. OTHERWISE ANSWER Q12

12. Name of National Accreditation Body?

11-15

13. Is the National Accreditation Body associated with the government?

Yes 1 Pending 2 No 3 Don't know 4 (16)

14. Does your National Accreditation Body have mutual recognition agreements with other countries?

Yes 1 Pending 2 No 3 Don't know 4 (17)

IF YES AT Q14 ANSWER Q15A. OTHERWISE ANSWER Q16A

15A. With how many countries does your National Accreditation Body have mutual recognition agreements?

- | | |
|--------------|----------------------------|
| | (18) |
| 1-5 | <input type="checkbox"/> 1 |
| 6-10 | <input type="checkbox"/> 2 |
| 11-15 | <input type="checkbox"/> 3 |
| 16-20 | <input type="checkbox"/> 4 |
| 21-25 | <input type="checkbox"/> 5 |
| 26-30 | <input type="checkbox"/> 6 |
| More than 30 | <input type="checkbox"/> 7 |
| Don't know | <input type="checkbox"/> 8 |

15B. With which countries?

19-23

15C. What is the purpose of these agreements?

25
24-25

16A. Please indicate which of the following your National Accreditation Body accredits.

- (26)
- National Certification Bodies 1
- National Laboratories 2
- Certification organisations operating internationally 3

16B. What are the names of the main bodies/laboratories?

30
27-30

17. Does your country have a National Certification scheme for registration to ISO 9000?

- (31)
- Yes 1
- Pending 2
- No 3
- Don't know 4

IF YES AT Q17, ANSWER Q18 OTHERWISE GO TO Q29A.

18. Please indicate how many of the following bodies exist in your country.

- USE LEADING ZEROS IF NECESSARY E.G. 01
- | | | |
|---|---|-------|
| National Certification Bodies | <input type="text"/> <input type="text"/> | 32/33 |
| Certification Organisations Operating Internationally
(issuing certificates in your country) | <input type="text"/> <input type="text"/> | 34/35 |
| Certification Organisations Operating Internationally
(with an office in your country) | <input type="text"/> <input type="text"/> | 36/37 |

19. Is certification from your national certification bodies recognised by...

- (38)
- ... most of your trading partners 1
- ... some of your trading partners 2
- ... your main trading partners only 3

20. Is certification from your national certification bodies recognised for certain sectors only?

Yes 1 No 2 Don't know 3 (39)

IF YES AT Q20, ANSWER Q21. OTHERWISE GO TO Q22

21. For which, if any, of these sectors?

(40)

- Agriculture, Forestry and Fishing 1
- Mining and Quarrying 2
- Manufacturing 3
- Electricity, Gas and Water 4
- Construction 5
- Wholesale and Retail Trade and Restaurants and Hotels 6
- Transport, Storage and Communications 7
- Financing, Insurance, Real Estate and Business Services 8
- Community, Social and Personal Services 9
- Other 0

22. How many, if any, of the certification bodies operating in your country are accredited by...

USE LEADING ZEROS IF NECESSARY E.G. 01

- | | Number |
|---|---|
| ... National Accreditation body only | <input type="text"/> <input type="text"/> 41/42 |
| ... Accreditation Organisation operating internationally only | <input type="text"/> <input type="text"/> 43/44 |
| ... Both national and at least one International body | <input type="text"/> <input type="text"/> 45/46 |

23. Is there any pressure on certification bodies operating in your country to be accredited?

Yes 1 No 2 Don't know 3 (47)

IF YES AT Q23, ANSWER Q24. OTHERWISE GO TO Q25.

24. From where does this pressure come?

(48)

- Legislation requirement 1
- Domestic customer requirement 2
- Foreign customer requirement 3

25. Do national certification bodies have mutual recognition agreements with foreign certification bodies?

Yes 1 No 2 Don't know 3 (49)

IF YES AT Q25, ANSWER Q26A. OTHERWISE GO TO Q27

26A. What are the names of these foreign certification bodies?

53
50-53

26B. What is the purpose of these mutual recognition agreements?

55
54-55

27. Does your main national certification body also test products?

Yes 1 No 2 Don't know 3 (56)

IF YES AT Q27, ANSWER Q28. OTHERWISE GO TO Q29A

28. Does your main national certification body insist on conformity with ISO 9000 as well as compliance with the appropriate product standard?

Yes 1 No 2 Don't know 3 (57)

29A. How important, if at all, do you consider product certification, and its assurances to be, in comparison to quality management systems certification?

Very impor- tant	Fairly impor- tant	Not very impor- tant	Not at all impor- tant	Don't know	
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	(58)

29B. The following statements refer to QSAR (Quality Systems Assessment Recognition) - details in accompanying letter. To what extent do you agree or disagree with each of these statements?

	Strongly agree	Tend to agree	Tend to disagree	Strongly disagree	No opinion	
	1	2	3	4	5	
a) QSAR will facilitate my country's international trade if our national accreditation body secures QSAR recognition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(59)
b) I expect our certification bodies to experience a great deal of difficulty in securing QSAR recognition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(60)
c) It will be more difficult for developing and emerging economies to meet QSAR requirements than fully industrialised countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(61)
d) Accreditation and certification bodies in developing and emerging economies should be helped to gain QSAR recognition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(62)

30. To what extent do you agree or disagree with each of the following statements?

	Strongly agree (63)	Tend to agree (64)	Tend to disagree (65)	Strongly disagree (66)	No opinion (67)
a) ISO 9000 registration will do little to expand our international trade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _1
b) Foreign customers increasingly request ISO 9000 certification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _2
c) Foreign customers are reluctant to accept ISO 9000 certificates issued by bodies other than their own national certification bodies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _3
d) It is difficult to secure certification from a certification organisation operating internationally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _4
e) It is costly to secure certification from a certification organisation operating internationally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _5
f) Exporters experience problems because ISO 9000 registration certificates are not always recognised in foreign countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _6
g) Small exporters benefit more than large exporters from ISO 9000 registration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _7
h) ISO 9000 registration helps domestic producers to compete against imported products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _8

31. To what extent, if at all, could certification requirements of importers in industrialized countries strengthen non-tariff barriers to international trade?

A great deal	A fair amount	Not very much	Not at all	Don't know
<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5

(75)

32. What, if any, other comments would you like to make about the ISO 9000 Series and related issues?

76-80

CARD 3

SECTION III : THE ISO 14000 SERIES OF ENVIRONMENTAL SYSTEMS STANDARDS FOR MANUFACTURING AND SERVICES

33. How much do you think you know about national environmental ...?

	A great deal	A fair amount	Not very much	Nothing at all	Don't know	
...regulatory requirements	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
...voluntary agreements	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 0	(10)

34. Does your Government have a declared policy on environmental issues, or not?

Yes 1 No 2 Don't know 3 (11)

35. Are companies in your country under significant pressure to avoid environmental damage?

Yes 1 No 2 Don't know 3 (13)

IF YES AT Q35, ANSWER Q36. OTHERWISE GO TO Q37B

36. From which, if any, of these sources is pressure placed on companies to avoid environmental damage?

(14)

Government	<input type="checkbox"/> 1
General public	<input type="checkbox"/> 2
Domestic customers	<input type="checkbox"/> 3
Foreign customers	<input type="checkbox"/> 4
Importing companies	<input type="checkbox"/> 5
Trade organisations	<input type="checkbox"/> 6
Consumer organisations	<input type="checkbox"/> 7
Environmental organisations	<input type="checkbox"/> 8
None of these	<input type="checkbox"/> 9
Don't know	<input type="checkbox"/> 0

37A. In your opinion, is the pressure placed on companies in your country to avoid environmental damage.....

...increasing? 1 ...decreasing? 2 ...remaining the same? 3 (15)

37B. Do you think that compliance with the ISO 14000 series would lead to pressure on companies to avoid environmental damage....

...increasing? 1 ...decreasing? 2 ...remaining the same? 3 (16)

38. In your opinion, how aware or unaware is/are.... In your country of the ISO 14000 series?

	Very aware (17)	Fairly aware (18)	Fairly unaware (19)	Very unaware (20)	Don't know/ no opinion (21)
...your organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
...government depts/agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
...national standards body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
...certification bodies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
...accreditation body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
...consultants/training organisations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6
...business in general	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 7
...companies exporting goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 8
...companies importing goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 9
...multinational companies based in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0
...large national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> X
...small/medium national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Y

39A Does the government have an active policy to promote environmental awareness in industry?

Yes 1 No 2 Don't know 3 (22)

IF YES AT Q39A, ANSWER Q39B OTHERWISE GO TO Q40

39B To which, if any, of the following types of company does the government actively promote...

	All Businesses	Large Companies only	Small/ medium companies only	None of these
...general environmental awareness?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> (23)
...ISO 14000 series awareness?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4 (24)

40. In your opinion, to what extent do the following understand the objectives of the ISO 14000 series standards?

	A great deal (25)	A fair amount (26)	Not very much (27)	Not at all (28)	Don't know (29)
Government	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
Business in general	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
Small/medium national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
Consumers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
Consultants/trainers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
Accreditation/certification bodies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6

THE ISO 14001 ENVIRONMENTAL MANAGEMENT SYSTEMS STANDARD

41. To what extent do you agree or disagree that conformance with the requirements of ISO 14001 will facilitate wider compliance with national environmental regulations?

Strongly agree	Tend to agree	Tend to disagree	Strongly disagree	No opinion
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

(30)

42. In your opinion, which of these factors, if any, are likely to influence business in general and small/medium enterprises (SMEs) most in favour of adopting the ISO 14001 specification?

PLEASE RANK THE THREE MOST INFLUENTIAL FACTORS WRITING IN 1. FOR THE MOST INFLUENTIAL FACTOR, 2. FOR THE SECOND MOST INFLUENTIAL FACTOR, ETC.

	Business in general (31)	SMEs (32)
To demonstrate conformity to legislation	<input type="checkbox"/>	<input type="checkbox"/> 1
To improve internal efficiency in achieving voluntary environmental standards	<input type="checkbox"/>	<input type="checkbox"/> 2
To improve internal efficiency in achieving mandatory environmental standards	<input type="checkbox"/>	<input type="checkbox"/> 3
To meet domestic consumer demand	<input type="checkbox"/>	<input type="checkbox"/> 4
To meet international consumer demand	<input type="checkbox"/>	<input type="checkbox"/> 5
To meet international environmental legislation	<input type="checkbox"/>	<input type="checkbox"/> 6
To meet self-imposed environmental targets	<input type="checkbox"/>	<input type="checkbox"/> 7
To strengthen market share	<input type="checkbox"/>	<input type="checkbox"/> 8
To improve staff morale/retention	<input type="checkbox"/>	<input type="checkbox"/> 9
Because their competitors have it	<input type="checkbox"/>	<input type="checkbox"/> 0
To reinforce management authority	<input type="checkbox"/>	<input type="checkbox"/> x
Others	<input type="checkbox"/>	<input type="checkbox"/> y

43. Similarly, which of these factors, if any, might deter business in general and small/medium enterprises (SMEs) most from adopting the ISO 14001 specification?

PLEASE RANK THE THREE MOST DETERRING FACTORS WRITING IN 1. FOR THE MOST DETERRING FACTOR, 2. FOR THE SECOND MOST DETERRING FACTOR, ETC.

	Business in general (33)	SMEs (35)
Lack of awareness of benefits	<input type="checkbox"/> 1	<input type="checkbox"/> 1
Cost of consultancy	<input type="checkbox"/> 2	<input type="checkbox"/> 2
Cost of setting up an ISO 14001 Environmental Management System	<input type="checkbox"/> 3	<input type="checkbox"/> 3
Cost of registration/certification	<input type="checkbox"/> 4	<input type="checkbox"/> 4
Adoption of such standards will expose non-compliance to legislation	<input type="checkbox"/> 5	<input type="checkbox"/> 5
Adoption of standards will generate more legislation	<input type="checkbox"/> 6	<input type="checkbox"/> 6
Lack of local demand	<input type="checkbox"/> 7	<input type="checkbox"/> 7
Lack of foreign pressure	<input type="checkbox"/> 8	<input type="checkbox"/> 8
Impracticality	<input type="checkbox"/> 9	<input type="checkbox"/> 9
Low commercial return	<input type="checkbox"/> 0	<input type="checkbox"/> 0
No management commitment	<input type="checkbox"/> X	<input type="checkbox"/> X
Lack of technical equipment	<input type="checkbox"/> Y	<input type="checkbox"/> Y
	(34)	(36)
Lack of competence/experience	<input type="checkbox"/> 1	<input type="checkbox"/> 1
Costs of meeting environmental standards	<input type="checkbox"/> 2	<input type="checkbox"/> 2
Others	<input type="checkbox"/> 3	<input type="checkbox"/> 3

44. In your organisation, for which, if any, of the following types of company are ISO 14001 management systems considered appropriate?

Business in general	(37) <input type="checkbox"/> 1
Companies exporting goods/services	<input type="checkbox"/> 2
Companies importing goods/services	<input type="checkbox"/> 3
Companies serving the domestic market	<input type="checkbox"/> 4
Multinational companies based in your country	<input type="checkbox"/> 5
Large national companies	<input type="checkbox"/> 6
Small/Medium national companies	<input type="checkbox"/> 7
Manufacturers	<input type="checkbox"/> 8
Service providers	<input type="checkbox"/> 9
Private sector companies	<input type="checkbox"/> 0
Public sector companies	<input type="checkbox"/> X
None of these	<input type="checkbox"/> Y

45. To what extent does compliance with the following involve a cost burden on business?

- | | A great deal | A fair amount | Not very much | Not at all | Don't know | |
|---------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|------|
| A) Mandatory environmental standards | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | (38) |
| B) Voluntary environmental agreements | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | (39) |
| C) ISO14001 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | (40) |
| | 1 | 2 | 3 | 4 | 5 | |

ACCREDITATION AND CERTIFICATION FOR ISO 14000/14001

46. Does your country have a.....

- | | Yes | No | Don't know | |
|--|--------------------------|--------------------------|--------------------------|------|
| A) National Accreditation Body for ISO 14000? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | (41) |
| B) Separate National certification scheme for ISO 14001? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | (42) |
| | 1 | 2 | 3 | |

IF YES AT Q46A OR Q46B, ANSWER Q47. OTHERWISE GO TO Q50.

47. A) Which of the following does/will your national accreditation body accredit?
B) Which of the following does/will your national certification bodies certify/register?

- | | A)
National
Accreditation
Body
(44) | | B)
National
Certification
Bodies
(45) |
|--|---|----------------------------|---|
| National certification bodies | <input type="checkbox"/> 1 | Private national companies | <input type="checkbox"/> 1 |
| National laboratories | <input type="checkbox"/> 2 | Public national companies | <input type="checkbox"/> 2 |
| Certification organisations
operating internationally | <input type="checkbox"/> 3 | Multinational companies | <input type="checkbox"/> 3 |

48. Do/will these bodies have a more public or private character?

- | | Public | Private | Neither | Don't know | |
|---|--------------------------|--------------------------|--------------------------|--------------------------|------|
| National Accreditation Body for ISO 14000 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | (50) |
| National Certification Bodies for ISO 14001 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | (51) |
| | 1 | 2 | 3 | 4 | |

49. Do/will the following bodies have mutual recognition agreements with other countries?

- | | Yes | No | Pending | Don't know | |
|---|--------------------------|--------------------------|--------------------------|--------------------------|------|
| National Accreditation Body for ISO 14000 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | (53) |
| National Certification Bodies for ISO 14001 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | (54) |
| | 1 | 2 | 3 | 4 | |

50. To what extent do you agree or disagree with the following statements?

	Strongly agree (56)	Tend to agree (57)	Tend to disagree (58)	Strongly disagree (59)	No opinion (60)
a) National Accreditation Bodies in developing and emerging economies will have difficulty meeting requirements for international acceptance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ₁
b) National Certification Bodies in developing and emerging economies will have difficulty meeting requirements for international acceptance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ₂
c) There should be one single Accreditation Body accrediting certification bodies for both ISO 9000 and ISO 14001 registration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ₃
d) ISO 14001 certification should be provided by bodies already certifying against the ISO 9000 series of standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ₄
e) Local business has access to the necessary skills, experience and human and other resources to meet the requirements and guiding principles of the ISO 14000 series	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ₅
f) There are sufficient qualified consultants, trainers and auditors to enable businesses to comply with ISO 14001 specification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ₆
g) Businesses would have to rely on foreign sourcing for qualified consultants, trainers and auditors to enable compliance with ISO 14001	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ₇
h) Foreign environmental standards already hinder export opportunities (PLEASE GIVE ANY SPECIFIC EXAMPLES IN YOUR ANSWER TO Q53)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ₈

51A. How likely is it that the introduction of ISO 14001 could strengthen non-tariff barriers to international trade?

Very likely	Fairly likely	Not very likely	Not at all likely	No opinion	
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	(62)

51B. How likely is it that the introduction of European Union Eco-Management and Audit Scheme (EMAS) could strengthen non-tariff barriers to international trade?

Very likely	Fairly likely	Not very likely	Not at all likely	No opinion	
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	(63)

52. To what extent, if at all, could the environmental demands/supply chain requirements of importers in industrialized countries strengthen non-tariff barriers to international trade?

A great deal

 1

A fair amount

 2

Not very much

 3

Not at all

 4

No opinion

 5

(66)

53. What, if any, other comments would you like to make about the ISO 14000 series and related issues?

67-70

54. To what extent do you agree or disagree that the multiplicity of national environmental labels already hinder export opportunities?

Strongly agree

 1

Tend to agree

 2

Tend to disagree

 3

Strongly disagree

 4

No opinion

 5

(72)

55. To what extent, if at all, do you think that internationally recognised environmental product labels (be they national or international) could improve export opportunities?

A great deal

 1

A fair amount

 2

Not very much

 3

Not at all

 4

Don't know

 5

(73)

ENVIRONMENTAL LABELLING

56. To what extent do you agree or disagree that the introduction of an international environmental labelling guideline like ISO 14020 will lead to a worldwide harmonisation of national environmental labelling? IF YOU DISAGREE, PLEASE EXPLAIN WHY IN YOUR ANSWER AT Q60

Strongly agree	Tend to agree	Tend to disagree	Strongly disagree	No opinion	
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	(74)

57. In your opinion, should environmental labels reflect...

...only product characteristics	<input type="checkbox"/> 1	(75)
...only production processes characteristics	<input type="checkbox"/> 2	
...both product and production processes characteristics	<input type="checkbox"/> 3	
No opinion	<input type="checkbox"/> 4	
Don't know	<input type="checkbox"/> 5	

58A. Does your country have a national environmental labelling scheme?

Yes 1 Pending 2 No 3 Don't know 4 (76)

CARD 4

58B. As far as you are aware, how many, if any, companies in your country have...

USE LEADING ZEROS IF NECESSARY E.G. 0001

	Number	None	Don't know	
...applied for a foreign environmental label?	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	10-13
...obtained a foreign environmental label?	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	14-17
		X	Y	

IF YES AT Q58A, ANSWER Q59A. OTHERWISE GO TO Q59B

59A. For which product types does your country have a national environmental labelling scheme?

CODE IN 'SCHEME' COLUMN BELOW

59B. For which product types have companies applied for a foreign environmental label?

CODE IN 'APPLIED' COLUMN BELOW

59C. And for which product types have companies obtained a foreign environmental label?

CODE IN 'OBTAINED' COLUMN BELOW

	Q59A Scheme (18)	Q59B Applied (20)	Q59C Obtained (22)
Batteries (for consumer goods)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
Ceramics (dishes, tiles etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
Deodorants/antiperspirants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
Detergents/cleaning products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
Fertilizers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
Light bulbs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6
Mattresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 7
Packaging/insulation material	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 8
Paints/varnishes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 9
Paper/paper products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0
Refrigerators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> X
Rubbish bags	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Y
	(19)	(21)	(23)
Shampoos/hairsprays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
Shoes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
Toilet rolls/kitchen towels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
Washing machines/dishwashers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
Don't know	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0
None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> X

60. What, if any, other comments would you like to make about environmental labelling and related issues such as the need for a monitoring system, how costs should be allocated, whether monitoring should be done regionally or nationally, the need for an overall responsible body for supervision?

Horizontal lines for handwritten answers to question 60.

61. Would you be willing for your views to be attributed to you in the report to UNIDO, or would you prefer that your answers remain anonymous?

Can be attributed 1 Prefer to be anonymous 2 (31)

62. Would you be willing for your name and address to be passed to UNIDO as someone who has taken part in the survey, or not? Your details would be added to UNIDO's mailing list so that you could be informed about and involved in technical developments.

Yes, can pass on my name and address 1
No, cannot pass on my name and address 2 (32)

IF YOU ARE WILLING FOR YOU NAME AND ADDRESS TO BE PASSED ON TO UNIDO, PLEASE SIGN HERE _____

THANK YOU FOR YOUR TIME AND HELP.

PLEASE NOW RETURN THE QUESTIONNAIRE IN THE ENVELOPE PROVIDED. YOUR ANSWERS WILL REMAIN CONFIDENTIAL UNLESS YOU HAVE GIVEN PERMISSION ABOVE.

LANGUAGE CODE (OFFICE USE ONLY)

(33)

- English 1
Spanish 2
French 3

**UNIDO
United Nations Industrial
Development Organisation**

Version B

Questionnaire

on the

Trade Implications of International Standards for Quality and Environmental Management Systems (ISO 9000/ISO 14000 Series)

UNIDO in collaboration with

- **ITC/UNCTAD/WTO (International Trade Centre)**
- **ISO (International Organisation for Standardisation)**
 - **Resource (Science & Technology Expertise) Ltd**
- **MORI (Market & Opinion Research International) Ltd**

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UNIDO QUESTIONNAIRE

Details of your organisation:

Name of organisation: _____

Address: _____

Contact person: _____

Telephone: _____

Telefax: _____

E-mail : _____

OFFICE USE
CARD 1

SKIP COL	10
----------	----

SECTION 1 - YOUR ORGANISATION
PLEASE TICK THE MOST APPROPRIATE BOX

Is your organisation a:

(ONE MAIN BOX ONLY)

. **Industry Association?**

(11)
 1

(IF INDUSTRY ASSOCIATION TICKED)

. **For which industrial sector?**

Agriculture, Forestry and Fishing

2

Mining and Quarrying

3

Manufacturing

4

Electricity, Gas and Water

5

Construction

6

Wholesale and Retail Trade and Restaurants and Hotels

7

Transport, Storage and Communications

8

Financing, Insurance, Real Estate and Business Services

9

Community, Social and Personal Services

0

Others

X

. **Chamber of Commerce?**

Y

(12)

. **Service Company/Enterprise (SME)?**

1

. **Service Company/Enterprise (Not SME)?**

2

. **Industrial Company/Enterprise (SME)?**

3

. **Industrial Company/Enterprise (Not SME)?**

4

. **Other**

5

In which country is your organisation based?

	(13)		
Albania	<input type="checkbox"/> 1	Libya	<input type="checkbox"/> X
Algeria	<input type="checkbox"/> 2	Lithuania	<input type="checkbox"/> Y
Argentina	<input type="checkbox"/> 3		(17)
Armenia	<input type="checkbox"/> 4	Macedonia	<input type="checkbox"/> 1
Antigua and Barbuda	<input type="checkbox"/> 5	Malta	<input type="checkbox"/> 2
Bahrain	<input type="checkbox"/> 6	Malaysia	<input type="checkbox"/> 3
Bangladesh	<input type="checkbox"/> 7	Mauritius	<input type="checkbox"/> 4
Barbados	<input type="checkbox"/> 8	Mexico	<input type="checkbox"/> 5
Belarus	<input type="checkbox"/> 9	Mongolia	<input type="checkbox"/> 6
Bolivia	<input type="checkbox"/> 0	Morocco	<input type="checkbox"/> 7
Bosnia & Herzegovina	<input type="checkbox"/> X	Mozambique	<input type="checkbox"/> 8
Botswana	<input type="checkbox"/> Y	Nepal	<input type="checkbox"/> 9
	(14)	Nigeria	<input type="checkbox"/> 0
Brazil	<input type="checkbox"/> 1	Oman	<input type="checkbox"/> X
Brunei Darussalam	<input type="checkbox"/> 2	Pakistan	<input type="checkbox"/> Y
Bulgaria	<input type="checkbox"/> 3		(18)
Burundi	<input type="checkbox"/> 4	Panama	<input type="checkbox"/> 1
Chile	<input type="checkbox"/> 5	Papua New Guinea	<input type="checkbox"/> 2
China	<input type="checkbox"/> 6	Paraguay	<input type="checkbox"/> 3
Colombia	<input type="checkbox"/> 7	Peru	<input type="checkbox"/> 4
Costa Rica	<input type="checkbox"/> 8	Philippines	<input type="checkbox"/> 5
Croatia	<input type="checkbox"/> 9	Poland	<input type="checkbox"/> 6
Cuba	<input type="checkbox"/> 0	Qatar	<input type="checkbox"/> 7
Cyprus	<input type="checkbox"/> X	Romania	<input type="checkbox"/> 8
Czech Republic	<input type="checkbox"/> Y	Russian Federation	<input type="checkbox"/> 9
	(15)	Saint Lucia	<input type="checkbox"/> 0
Ecuador	<input type="checkbox"/> 1	Saudi Arabia	<input type="checkbox"/> X
Egypt	<input type="checkbox"/> 2	Singapore	<input type="checkbox"/> Y
Estonia	<input type="checkbox"/> 3		(19)
Ethiopia	<input type="checkbox"/> 4	Slovakia	<input type="checkbox"/> 1
Fiji	<input type="checkbox"/> 5	Slovenia	<input type="checkbox"/> 2
Ghana	<input type="checkbox"/> 6	Sri Lanka	<input type="checkbox"/> 3
Grenada	<input type="checkbox"/> 7	Syria	<input type="checkbox"/> 4
Guyana	<input type="checkbox"/> 8	Tanzania	<input type="checkbox"/> 5
Hong Kong	<input type="checkbox"/> 9	Thailand	<input type="checkbox"/> 6
Hungary	<input type="checkbox"/> 0	Trinidad and Tobago	<input type="checkbox"/> 7
India	<input type="checkbox"/> X	Tunisia	<input type="checkbox"/> 8
Indonesia	<input type="checkbox"/> Y	Turkey	<input type="checkbox"/> 9
	(16)	Turkmenistan	<input type="checkbox"/> 0
Iran	<input type="checkbox"/> 1	Uganda	<input type="checkbox"/> X
Jamaica	<input type="checkbox"/> 2	Ukraine	<input type="checkbox"/> Y
Jordan	<input type="checkbox"/> 3		(20)
Kenya	<input type="checkbox"/> 4	United Arab Emirates	<input type="checkbox"/> 1
Korea, Democratic People's Republic of	<input type="checkbox"/> 5	Uruguay	<input type="checkbox"/> 2
Korea, Republic of	<input type="checkbox"/> 6	Uzbekistan	<input type="checkbox"/> 3
Kuwait	<input type="checkbox"/> 7	Venezuela	<input type="checkbox"/> 4
Kyrgyzstan	<input type="checkbox"/> 8	Vietnam	<input type="checkbox"/> 5
Latvia	<input type="checkbox"/> 9	Yugoslavia	<input type="checkbox"/> 6
Lebanon	<input type="checkbox"/> 0	Zimbabwe	<input type="checkbox"/> 7

SECTION II - THE ISO 9000 SERIES OF MANAGEMENT SYSTEMS STANDARDS FOR MANUFACTURING AND SERVICES

1. How much do you feel you know about international standards in general?

A great deal	A fair amount	Not very much	Nothing	Not sure/ no opinion	
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	21

2. In your opinion, how aware or unaware is/are ... in your country of the ISO 9000 Series?

	Very aware (22)	Fairly aware (23)	Fairly unaware (24)	Very unaware (25)	Don't know (26)
...your organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
...government depts/agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
...national standards body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
...certification bodies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
...accreditation body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
...consultants/training organisations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6
...business in general	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 7
...companies exporting goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 8
...companies importing goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 9
...multinational companies based in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0
...large national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> X
...small/medium national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Y

3. In your opinion, how important or unimportant is the ISO 9000 Series to the following types of company?

	Very important (27)	Fairly important (28)	Fairly unimportant (29)	Very unimportant (30)	Don't know (31)
Business in general	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
Companies exporting goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
Companies importing goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
Companies serving the domestic market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
Multinational companies based in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
Large national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6
Small/Medium national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 7
Manufacturers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 8
Service providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 9
Private sector companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0
Public sector companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> X

4. Do you expect the importance of the ISO 9000 Series to the following types of company to increase, decrease or remain the same in the future?

	Increase (32)	Same (33)	Decrease (34)	Don't know (35)
Business in general	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
Companies exporting goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
Companies importing goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
Companies serving the domestic market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
Multinational companies based in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
Large national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6
Small/Medium national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 7
Manufacturers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 8
Service providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 9
Private sector companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0
Public sector companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> X

5. In your opinion, quality awareness in business is...

	(37)
...promoted by the government to all businesses	<input type="checkbox"/> 1
...promoted by the government to large companies only	<input type="checkbox"/> 2
...promoted by the government to small/medium companies only	<input type="checkbox"/> 3
...not promoted by the government	<input type="checkbox"/> 4

6. Please indicate in which, if any, of the following ways the government supports compliance with the ISO 9000 Series?

	(54)
Funds awareness campaigns	<input type="checkbox"/> 1
Funds consultancy	<input type="checkbox"/> 2
Funds training	<input type="checkbox"/> 3
Funds implementation	<input type="checkbox"/> 4
Funds small/medium enterprises only	<input type="checkbox"/> 5
None of these	<input type="checkbox"/> 6

**7. Would you describe access to the following in your country as:
adequate?
adequate but costly?
inadequate?**

	Adequate (56)	Adequate but costly (57)	In- adequate (58)
Information on ISO 9000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
Consultancy for implementation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
Training for implementation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
Trained assessors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
Certification to domestic requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
Certification for international recognition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6

8. In your opinion, who should bear the following costs associated with the adoption of the ISO 9000 Series?

	The government (64)	The company (65)	The customer (66)	Other (67)
Promoting awareness costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
Consultancy and training costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
Implementation costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
Registration costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
Certification costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
Promotional costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6

9. Which of these factors, if any, might deter business in general and small/medium enterprises (SME's) most from adopting the ISO 9000 series?

PLEASE RANK THE THREE MOST DETERRING FACTORS, WRITING IN 1. FOR THE MOST DETERRING FACTOR, 2. FOR THE SECOND MOST DETERRING FACTOR, ETC.

	Business in general (73)	SMEs (75)
Lack of awareness of benefits	<input type="checkbox"/>	<input type="checkbox"/> 1
Cost of consultancy	<input type="checkbox"/>	<input type="checkbox"/> 2
Cost of setting up an ISO 9000 Quality Management System	<input type="checkbox"/>	<input type="checkbox"/> 3
Cost of registration/certification	<input type="checkbox"/>	<input type="checkbox"/> 4
Adoption of such standards will expose non-compliance to legislation	<input type="checkbox"/>	<input type="checkbox"/> 5
Adoption of standards will generate more legislation	<input type="checkbox"/>	<input type="checkbox"/> 6
Lack of local demand	<input type="checkbox"/>	<input type="checkbox"/> 7
Lack of foreign pressure	<input type="checkbox"/>	<input type="checkbox"/> 8
Impracticality	<input type="checkbox"/>	<input type="checkbox"/> 9
Low commercial return	<input type="checkbox"/>	<input type="checkbox"/> 0
No management commitment	<input type="checkbox"/>	<input type="checkbox"/> x
Lack of technical equipment	<input type="checkbox"/>	<input type="checkbox"/> y
	(74)	(76)
Lack of competence/experience	<input type="checkbox"/>	<input type="checkbox"/> 1
Others	<input type="checkbox"/>	<input type="checkbox"/> 2

CARD 2

10. The following statements refer to QSAR (Quality Systems Assessment Recognition) - details in accompanying letter. To what extent do you agree or disagree with each of these statements?

		Strongly agree	Tend to agree	Tend to disagree	Strongly disagree	No opinion	
		1	2	3	4	5	
a)	QSAR will facilitate my country's international trade if our national accreditation body secures QSAR recognition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(59)
b)	I expect our certification bodies to experience a great deal of difficulty in securing QSAR recognition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(60)
c)	It will be more difficult for developing and emerging economies to meet QSAR requirements than fully industrialised countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(61)
d)	Accreditation and certification bodies in developing and emerging economies should be helped to gain QSAR recognition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(62)

11. To what extent do you agree or disagree with each of the following statements?

	Strongly agree (63)	Tend to agree (64)	Tend to disagree (65)	Strongly disagree (66)	No opinion (67)
a) ISO 9000 registration will do little to expand our international trade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
b) Foreign customers increasingly request ISO 9000 certification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
c) Foreign customers are reluctant to accept ISO 9000 certificates issued by bodies other than their own national certification bodies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
d) It is difficult to secure certification from a certification organisation operating internationally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
e) It is costly to secure certification from a certification organisation operating internationally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
f) Exporters experience problems because ISO 9000 registration certificates are not always recognised in foreign countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6
g) Small exporters benefit more than large exporters from ISO 9000 registration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 7
h) ISO 9000 registration helps domestic producers to compete against imported products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 8

12. Do you have any specific experience with quality systems certification demands being imposed by importers in industrialized countries?

Yes 1 No 2 (68)

IF YES
Please explain the kind of experience you have had giving examples.

13. Do any of your purchasers require registration to an ISO 9000 system, or not?

	Domestic (71)	International (72)
No, none	<input type="checkbox"/>	<input type="checkbox"/>
Yes, a few	<input type="checkbox"/>	<input type="checkbox"/>
Yes, about half	<input type="checkbox"/>	<input type="checkbox"/>
Yes, most or all	<input type="checkbox"/>	<input type="checkbox"/>
Don't know	<input type="checkbox"/>	<input type="checkbox"/>

14. How important, if at all, do you consider product certification, and its assurances to be, in comparison to quality management systems certification?

Very important	Fairly important	Not very important	Not at all important	Don't know	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(73)
1	2	3	4	5	

15. And how important, if at all, do you consider consultancy and internal assessment to be in comparison to global accreditation of certification arrangements?

Very important	Fairly important	Not very important	Not at all important	Don't know	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(74)
1	2	3	4	5	

16. What, if any, other comments would you like to make about the ISO 9000 Series and related issues?

76-8C

CARD 3

SECTION III : THE ISO 14000 SERIES OF ENVIRONMENTAL SYSTEMS STANDARDS FOR MANUFACTURING AND SERVICES

17. How much do you think you know about national environmental ...?

	A great deal	A fair amount	Not very much	Nothing at all	Don't know	
...regulatory requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
...voluntary agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(10)
	1	2	3	4	5	
	6	7	8	9	0	

18. Does your Government have a declared policy on environmental issues, or not?

Yes <input type="checkbox"/>	No <input type="checkbox"/>	Don't know <input type="checkbox"/>	
1	2	3	(11)

19. In your opinion, how effectively, if at all, does your government enforce environmental regulations?

Very effectively
 1

Fairly effectively
 2

Not very effectively
 3

Not at all effectively
 4

Don't know
 5

(12)

20. Are companies in your country under significant pressure to avoid environmental damage?

Yes 1

No 2

Don't know 3

(13)

IF YES AT Q20 ANSWER Q21. OTHERWISE GO TO Q22

21. From which, if any, of these sources is pressure placed on companies to avoid environmental damage?

(14)

Government

1

General public

2

Domestic customers

3

Foreign customers

4

Importing companies

5

Trade organisations

6

Consumer organisations

7

Environmental organisations

8

None of these

9

Don't know

0

22. In your opinion, is the pressure placed on companies in your country to avoid environmental damage.....

...increasing? 1

...decreasing? 2

...remaining the same? 3 (15)

23. Do you think that compliance with the ISO 14000 series would lead to pressure on companies to avoid environmental damage....

...increasing? 1

...decreasing? 2

...remaining the same? 3 (16)

24. In your opinion, how aware or unaware is/are.... in your country of the ISO 14000 series?

	Very aware (17)	Fairly aware (18)	Fairly unaware (19)	Very unaware (20)	Don't know/ no opinion (21)
...your organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
...government depts/agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
...national standards body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
...certification bodies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
...accreditation body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
...consultants/training organisations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6
...business in general	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 7
...companies exporting goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 8
...companies importing goods/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 9
...multinational companies based in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0
...large national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> X
...small/medium national companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Y

25A. Does the Government have an active policy to promote environmental awareness in industry?

Yes 1 No 2 Don't know 3 (22)

IF YES AT Q25A, ANSWER Q25B. OTHERWISE GO TO Q26.

25B. To which, if any, of the following types of company does the Government actively promote...?

	All Businesses	Large Companies only	Small/ medium companies only	None of these
...general environmental awareness?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> (23)
...ISO 14000 series awareness?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4 (24)

THE ISO 14001 ENVIRONMENTAL MANAGEMENT SYSTEMS STANDARD

26. Which of these factors, if any, might deter business in general and small/medium enterprises (SME'S) most from adopting the ISO 14001 specification?

PLEASE RANK THE THREE MOST DETERRING FACTORS, WRITING IN 1. FOR THE MOST DETERRING FACTOR, 2 FOR THE SECOND MOST DETERRING FACTOR, ETC.

	Business in general (33)	SMEs (35)
Lack of awareness of benefits	<input type="checkbox"/> 1	<input type="checkbox"/> 1
Cost of consultancy	<input type="checkbox"/> 2	<input type="checkbox"/> 2
Cost of setting up an ISO 14001 Environmental Management System	<input type="checkbox"/> 3	<input type="checkbox"/> 3
Cost of registration/certification	<input type="checkbox"/> 4	<input type="checkbox"/> 4
Adoption of such standards will expose non-compliance to legislation	<input type="checkbox"/> 5	<input type="checkbox"/> 5
Adoption of standards will generate more legislation	<input type="checkbox"/> 6	<input type="checkbox"/> 6
Lack of local demand	<input type="checkbox"/> 7	<input type="checkbox"/> 7
Lack of foreign pressure	<input type="checkbox"/> 8	<input type="checkbox"/> 8
Impracticality	<input type="checkbox"/> 9	<input type="checkbox"/> 9
Low commercial return	<input type="checkbox"/> 0	<input type="checkbox"/> 0
No management commitment	<input type="checkbox"/> X	<input type="checkbox"/> X
Lack of technical equipment	<input type="checkbox"/> Y	<input type="checkbox"/> Y
	(34)	(36)
Lack of competence/experience	<input type="checkbox"/> 1	<input type="checkbox"/> 1
None of these	<input type="checkbox"/> 0	<input type="checkbox"/> 0

27. To what extent does compliance with the following involve a cost burden on business?

	A great deal	A fair amount	Not very much	Not at all	Don't know	
A) Mandatory environmental standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(38)
B) Voluntary environmental agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(39)
C) ISO14001	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(40)
	1	2	3	4	5	

28. To what extent do you think the costs of complying with ISO 14001 could be incorporated into the prices of products?

Fully	<input type="checkbox"/> 1	Partially	<input type="checkbox"/> 2	Not at all	<input type="checkbox"/> 3	Don't know	<input type="checkbox"/> 4	(43)
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29. In your opinion, who should bear the following costs associated with the ISO 14001 management model?

	The government (46)	The company (47)	The consumer (48)	Other (49)
Promoting awareness costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1
Consultancy and training costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 2
Implementation costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 3
Registration costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 4
Certification costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 5
Promotional costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6

30. Which, if any, of the following should the government provide to encourage compliance with voluntary environmental standards (including ISO 14001)?

	(52)
Funding for awareness campaigns	<input type="checkbox"/> 1
Funding for consultancy	<input type="checkbox"/> 2
Funding for training	<input type="checkbox"/> 3
Funding for implementation	<input type="checkbox"/> 4
Funding for certification/registration	<input type="checkbox"/> 5
Funding for accreditation	<input type="checkbox"/> 6
None of these	<input type="checkbox"/> 7
Don't know	<input type="checkbox"/> 8

31. To what extent do you agree or disagree that compliance with ISO 14001 will/would help you to access new markets and strengthen your market position?

Strongly agree	Tend to agree	Tend to disagree	Strongly disagree	No opinion	
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	(55)

32. To what extent do you agree or disagree that foreign environmental standards already hinder export opportunities?

Strongly agree	Tend to agree	Tend to disagree	Strongly disagree	No opinion	
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	(61)

33. How likely is it that the introduction of the European Union Eco-Management and Audit Scheme (EMAS) could strengthen non-tariff barriers to international trade?

Very likely
1

Fairly likely
2

Not very likely
3

Not at all likely
4

Don't know
5

(63)

WRITE IN, WITH EXAMPLES...

64-65

No experience of this 65/0

34. What, if any, other comments would you like to make about the ISO 14000 series and related issues?

67-70

ENVIRONMENTAL LABELLING

35. To what extent, if at all, does the existence of different national environmental labels hinder your export opportunities?

A great deal
1

A fair amount
2

Not very much
3

Not at all
4

Don't know
5

(71)

36. To what extent, if at all, do you think that internationally recognized environmental product labels (be they national or international) could improve your export opportunities?

A great deal
1

A fair amount
2

Not very much
3

Not at all
4

Don't know
5

(73)

37. In your opinion, should environmental labels reflect...

...only product characteristics

(75)
1

...only production processes characteristics

2

...both product and production processes characteristics

3

No opinion

4

Don't understand the question

5

38. Does your country have a national environmental labelling scheme?

Yes 1 Pending 2 No 3 Don't know 4 (76)

CARD 4

39A. For which, if any, products types has your company applied for a foreign environmental label?

CODE IN 'APPLIED' COLUMN BELOW

39B. And, for which, if any, products types has your company obtained a foreign environmental label?

CODE IN 'OBTAINED' COLUMN BELOW

	Q39A Applied (24)	Q39B Obtained (26)
Batteries (for consumer goods)	<input type="checkbox"/>	<input type="checkbox"/> 1
Ceramics (dishes, tiles etc)	<input type="checkbox"/>	<input type="checkbox"/> 2
Deodorants/antiperspirants	<input type="checkbox"/>	<input type="checkbox"/> 3
Detergents/cleaning products	<input type="checkbox"/>	<input type="checkbox"/> 4
Fertilizers	<input type="checkbox"/>	<input type="checkbox"/> 5
Light bulbs	<input type="checkbox"/>	<input type="checkbox"/> 6
Mattresses	<input type="checkbox"/>	<input type="checkbox"/> 7
Packaging/insulation material	<input type="checkbox"/>	<input type="checkbox"/> 8
Paints/varnishes	<input type="checkbox"/>	<input type="checkbox"/> 9
Paper/paper products	<input type="checkbox"/>	<input type="checkbox"/> 0
Refrigerators	<input type="checkbox"/>	<input type="checkbox"/> k
Rubbish bags	<input type="checkbox"/>	<input type="checkbox"/> l
	(25)	(27)
Shampoos/hairsprays	<input type="checkbox"/>	<input type="checkbox"/> 1
Shoes	<input type="checkbox"/>	<input type="checkbox"/> 2
Toilet rolls/kitchen towels	<input type="checkbox"/>	<input type="checkbox"/> 3
Washing machines/dishwashers	<input type="checkbox"/>	<input type="checkbox"/> 4
Other	<input type="checkbox"/>	<input type="checkbox"/> 5
Don't know	<input type="checkbox"/>	<input type="checkbox"/> 6
None	<input type="checkbox"/>	<input type="checkbox"/> k

40. What, if any, other comments would you like to make about environmental labelling and related issues such as the need for a monitoring system, how costs should be allocated, whether monitoring should be done regionally or nationally, the need for an overall responsible body for supervision?

28-30

41. Would you be willing for your views to be attributed to you in the report to UNIDO, or would you prefer that your answers remain anonymous?

Can be attributed ₁ Prefer to be anonymous ₂ (31)

42. Would you be willing for your name and address to be passed to UNIDO as someone who has taken part in the survey, or not? Your details would be added to UNIDO's mailing list so that you could be informed about and involved in technical developments.

Yes, can pass on my name and address ₁
 No, cannot pass on my name and address ₂ (32)

IF YOU ARE WILLING FOR YOUR NAME AND ADDRESS TO BE PASSED ON TO UNIDO, PLEASE SIGN HERE

THANK YOU FOR YOUR TIME AND HELP.

PLEASE NOW RETURN THE QUESTIONNAIRE IN THE ENVELOPE PROVIDED. YOUR ANSWERS WILL REMAIN CONFIDENTIAL UNLESS YOU HAVE GIVEN PERMISSION ABOVE.

LANGUAGE CODE (OFFICE USE ONLY)

English ⁽³³⁾
 Spanish ①
 French 2
 3

DISTRIBUTOR AND RESPONDENT NOTES



UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION

VIENNA INTERNATIONAL CENTRE

P.O. BOX 300, A-1400 VIENNA, AUSTRIA

TELEPHONE: 211 310 TELEGRAPHIC ADDRESS: UNIDO VIENNA TELEX: 135612 uno a FAX: 232156

April 1997

Trade Implications of International Standards for Quality and Environmental Management Systems (ISO 9000/ISO 14000 Series)

Notes for Questionnaire Distributors

Thank you for agreeing to help in this important study. The attached letter explains in more detail the purpose of the study and the organisations involved.

We would like you to act as a national distributor for your country - to send on questionnaires for completion to a small number (approximately 15) of organisations in your country. These organisations will fall into four basic groups, as follows:

- Trade and Industry Government Departments
- National Standards Bodies
- Certification/Accreditation Bodies
- Private Companies*

* Companies may cover small/medium sized enterprises (SMEs) as well as larger companies, and also trade associations/chambers of commerce.

You have been provided with 15 questionnaires, accompanying letters (which gives more information on the study) and printed envelopes for participants to return completed questionnaires. We have also provided 15 blank envelopes for your own distribution purposes. We would like you to distribute the questionnaires, letters and envelopes as follows:

One to your country's trade/industry government department (questionnaire version A)

One to your country's National Standards Body (questionnaire version A)

One or two to the Certification/Accreditation Bodies (ideally one to each) (questionnaire version A)

The remainder (**eleven**) to companies (questionnaire version B). These should be evenly split between SMEs (those employing less than 200 people) and larger organisations, and should be primarily from the manufacturing/industrial sectors: we suggest eight questionnaires be sent to these with one or two to service sector companies. One or two should be sent to relevant trade associations/chambers of commerce/business associations (questionnaire version B).

In the case of Government Departments, National Standards Bodies and Certification /Accreditation bodies you should send the questionnaire to a senior official with direct involvement in the trade aspects of quality systems. In companies, the questionnaires should go to the Board Director with direct responsibility for quality/quality systems.

All questionnaires and covering letters should be sent to the respondents as soon as possible. The respondents themselves will be asked to complete the questionnaires by the end of June (as indicated in the covering letter) and return them directly to MORI in London.

You should send version A of the questionnaire to the Government Departments, National Standards Bodies and Certification/Accreditation Bodies, and version B to the companies, trade associations and chambers of commerce.

All completed questionnaires should be posted back directly to the survey company MORI (Michele Corrado), but we should be grateful if you could also be available to answer any questions which people may have. However, when answering people's questions, please try not to influence the way in which they answer.

If you have any questions about the survey or your role, please contact any of the people below:

Michele Corrado/
John Leaman
MORI
32 Old Queen Street
LONDON SW1H 9HP
UNITED KINGDOM

Tel: +44 171 222 0232
Fax +44 171 222 1653

Email

mori@mori.com

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Trade Implications of International Standards for Quality and Environmental Management Systems (ISO 9000/ISO 14000 Series)

April 1997

Dear Respondent,

UNIDO would like to hear your views about issues relating to the implementation of the ISO 9000 series in developing and emerging economies as well as the ISO 14000 series of standards for management systems to monitor and reduce the impact of business activities on the environment.

The questionnaire enclosed aims to give you the opportunity to air your views on the trade implications for your country of adopting or not adopting international standards for quality and environmental management systems (ISO 9000/ISO 14000 series). We appreciate that you may not be in a position to answer all of the questions asked. Please fill in as much of the questionnaire as you can.

The findings from the survey will form the basis of a report addressing any concerns developing and emerging economies have with regard to the implementation of these international standards and their implications for both domestic and international trade. A similar study was conducted in 1995 by UNIDO and one of the aims is to update information and use it comparatively to identify any positive or negative trends in opinions and attitudes towards the ISO 9000/ISO 14000 series since the last survey.

We believe that your input would be valuable to this survey since the issue of standards for trade is becoming important in discussions all over the world (for example WTO is creating a special group to study its implications) and we would very much like you to participate. At the end of the questionnaire we have provided you with the opportunity to comment freely about each of the international standards and we would encourage you to be frank and open in your response and to comment on other pertinent issues which may not have been covered during the course of the questionnaire. We have attached some notes to help you in the completion of the questionnaire.

Since the results of this survey will be examined at an Expert Group Meeting in Vienna in September 1997, organised by UNIDO with the participation of ISO, UNCTAD/ITC/WTO, RESOURCE and members of some Developing Countries, **we require your completed questionnaire by the end of June at the latest.**

The completed questionnaire along with any queries or comments relating to this questionnaire should be placed in the printed envelope provided and sent by airmail. Any further correspondence should be sent to:

Attn: Ms. Michele Corrado, Director of Social Research
MORI¹ (on behalf of UNIDO/RESOURCE)
32 Old Queen Street
London
SW1H 9HP
UNITED KINGDOM

Tel: +44 171 222 0232
Fax: +44 171 222 1653
EMail: mori@mori.com

Thank you in advance for taking the time to complete the questionnaire. Your responses and comments will help to increase awareness of any concerns about quality and environmental quality systems so that these can be properly addressed.

Yours sincerely,



Dmitri I. Piskounov
Managing Director
Human Resource, Enterprise and
Private Sector Development Division

¹ MORI (Market & Opinion Research International), an independent survey organisation, has been commissioned by RESOURCE (Science & Technology Expertise) Ltd on behalf of UNIDO to conduct this survey. The survey is confidential: nobody at RESOURCE or UNIDO will know that you took part, and no answers or comments you give will be attributed to you.

- **ISO 9000 Series of Quality Management Standards**
 Provide criteria and guidelines for establishing systems to ensure consistent quality both in manufacturing and service activities. Demonstration of compliance with the ISO 9000 Standard increasingly requires assessment and certification (registration) of a company's quality management systems by an independent certification body, either national or international.
- **Quality Systems Assessment Recognition (QSAR)**
 QSAR is a global unified scheme developed by ISO in association with the International Electrotechnical Commission (IEC) to enable certification bodies to obtain international acceptance of their competence and consequently the validity of the ISO 9000 certificates they issue.
- **ISO 14000 Series of Standards**
 Includes:

ISO 14001 (Environmental Management System/EMS)
 Provides organizations with a specification on how to implement, maintain and improve environmental performance.

ISO 14010/ISO 14011/ISO 14012 (Environmental Auditing/EA)
 ISO 14010 informs organizations about the general principles common to the execution of environmental audits. ISO 14011 provides specific procedures for the conduct of EMS audits. ISO 14012 addresses the qualification criteria for auditors.

ISO 14020 (Environmental Labelling/EL)
 Provides organizations with guidance for certification procedures for the development of environmental labelling.
- **Small and Medium Sized Enterprises (SMEs)**
 Definitions of small and medium sized enterprises vary from country to country. When completing the questionnaire, please use the definition which is valid for your country. If no such definition exists, assume that SMEs are businesses employing fewer than 200 people.
- **Accreditation**
 The process of approval of an organization (i.e. a certification body) wishing to certify other companies' quality and environmental management systems. Generally, accreditation bodies have a national standing and act on behalf of or in an advisory capacity to the government or a government department.
- **Certification (or Registration)**
 The approval of management or products systems against the requirements of the relevant standard.