








## What is the Executive Opinion Survey?

The Executive Opinion Survey is a major component of *The Global Competitiveness Report*. Launched in 1979, the World Economic Forum's *Global Competitiveness Report* ([www.weforum.org/gcr](http://www.weforum.org/gcr)) is widely recognized as the world's leading assessment of competitiveness covering over 130 economies. The Executive Opinion Survey gathers valuable information on a broad range of critical aspects of competitiveness for which hard data sources are scarce or nonexistent.

The results of the Survey are also a key ingredient for our other report series, such as *The Global Information Technology Report*, *The Travel & Tourism Competitiveness Report*, *The Global Enabling Trade Report*, *The Global Gender Gap Report*, *The Human Capital Report*, *The Inclusive Growth and Development Report*, and *The Global Risks Report*.

### Guidelines for completing the Executive Opinion Survey

-  If you do not know the answer to a question or if the question does not apply, **please leave it blank.**
-  Please note that all questions referring to "your country" denote **the country in which you currently work.**
-  Please answer the questions in view of the situation in your country in **international comparison.**
-  **Confidentiality:** We realize that some of the questions address potentially sensitive information. Confidentiality of survey respondents is ensured. Individual respondents are not identified.
-  **This survey requires approximately 40 minutes to complete.**

## I. About Your Company

### 1.01 In what country, state/province, and city do you currently work?

Country: \_\_\_\_\_ State/Province: \_\_\_\_\_ City: \_\_\_\_\_

### 1.02 In what country are your company's global headquarters located?

Country: \_\_\_\_\_

### 1.03 Are you a citizen of the country in which you currently work?

Yes      No

### 1.04 Did you complete the Executive Opinion Survey last year (EOS 2017)?

Yes      No

### 1.05 What is the approximate size of your company based on number of employees?

Micro <10      Small <50      Medium <250      Large <1,000      Very Large >1,000

a. In your country:

b. Globally:

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**1.06 Please indicate (roughly) the percentage of your company that is:**

Owned by the domestic private sector: \_\_\_\_\_%

State owned: \_\_\_\_\_%

Foreign owned: \_\_\_\_\_%

**1.07 What is your company's main activity (please select only one response):**

Agriculture

Industry: Manufacturing

Industry: Non-Manufacturing (mining and quarrying, electricity, gas and water supply, construction)

Services

**II. Most Problematic Factors for Doing Business****2.01 From the following list, please select the five most problematic factors for doing business in your country and rank these five factors from 1 (most problematic) to 5 (least problematic):**

- |  |   |
|--|---|
| a. <input type="checkbox"/> Limited access to financing        | i. <input type="checkbox"/> Government instability            |
| b. <input type="checkbox"/> Restrictive labor regulations      | j. <input type="checkbox"/> Crime and theft                   |
| c. <input type="checkbox"/> Foreign currency regulations       | k. <input type="checkbox"/> Corruption                        |
| d. <input type="checkbox"/> Inadequate infrastructure          | l. <input type="checkbox"/> Complexity of tax regulations     |
| e. <input type="checkbox"/> Inefficient government bureaucracy | m. <input type="checkbox"/> High tax rates                    |
| f. <input type="checkbox"/> Inadequately educated labor force  | n. <input type="checkbox"/> Inflation                         |
| g. <input type="checkbox"/> Poor work ethic in the labor force | o. <input type="checkbox"/> Poor public health                |
| h. <input type="checkbox"/> Policy instability                 | p. <input type="checkbox"/> Insufficient capacity to innovate |

**Instructions for sections III to XIV**

Many of the questions ask you to check a box “ ” number according to your opinion (using “” or “”). If you do not know the answer, please leave it blank. Most questions appear in the following format:

**10.17 In your country, to what extent is intellectual property protected?**

Not at all

1 2 3 4 5 6 7

To a great extent

Checking **1** means you **completely agree** with the answer on the left-hand sideChecking **2** means you **largely agree** with the answer on the left-hand sideChecking **3** means you **somewhat agree** with the answer on the left-hand sideChecking **4** means your opinion **is indifferent** between the two answersChecking **5** means you **somewhat agree** with the answer on the right-hand sideChecking **6** means you **largely agree** with the answer on the right-hand sideChecking **7** means you **completely agree** with the answer on the right-hand side

Please check only one number per question unless specified otherwise.

### III. Infrastructure

**3.01 How do you assess the general state of infrastructure (e.g., transport, communications and energy) in your country?**

Extremely underdeveloped—  
among the worst in the world

1 2 3 4 5 6 7

Extensive and efficient—  
among the best in the world

**3.02 In your country, what is the quality (extensiveness and condition) of transport infrastructure for the following:**

Extremely poor—  
among the worst in the world

1 2 3 4 5 6 7

Extremely good—  
among the best in the world

a. Roads

b. Railroads

c. Airports

d. Seaports

(for landlocked countries: please assess access to seaports)

**3.03 In your country, how efficient (i.e., frequency, punctuality, speed, price) are the following transport services?**

Extremely inefficient—  
among the worst in the world

1 2 3 4 5 6 7

Extremely efficient—  
among the best in the world

a. Ground transportation  
(buses, subways, taxis)

b. Train services

c. Air transport services

d. Seaport services (ferries, boats)

(for landlocked countries: assess access to seaport services)

**3.04 In your country, how reliable is the electricity supply?**

Extremely unreliable—  
very frequent interruptions and/or  
voltage fluctuations

1 2 3 4 5 6 7

Extremely reliable—  
no interruption and no voltage  
fluctuation

**3.05 In your country, how reliable is the water supply (lack of interruptions and flow fluctuations)?**

Extremely unreliable—  
very frequent interruptions  
and/or flow fluctuations

1 2 3 4 5 6 7

Extremely reliable—  
no interruption and  
no flow fluctuation

### IV. Technology

**4.01 In your country, to what extent are the latest technologies available?**

Not at all

1 2 3 4 5 6 7

To a great extent

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- 
- 4.02 In your country, to what extent do information and communication technologies (ICTs) enable access for all individuals to basic services (e.g., health, education, financial services, etc.)?
- Not at all                      1   2   3   4   5   6   7                      To a great extent
- 
- 4.03 To what extent does foreign direct investment (FDI) bring new technology into your country?
- Not at all                      1   2   3   4   5   6   7                      To a great extent
- 
- 4.04 In your country, to what extent do ICTs enable new business models?
- Not at all                      1   2   3   4   5   6   7                      To a great extent
- 
- 4.05 In your country, to what extent do businesses use ICTs for transactions with other businesses?
- Not at all                      1   2   3   4   5   6   7                      To a great extent
- 
- 4.06 In your country, to what extent do businesses use the Internet for selling their goods and services to consumers?
- Not at all                      1   2   3   4   5   6   7                      To a great extent
- 
- 4.07 In your country, to what extent do ICTs enable new organizational models (e.g., virtual teams, remote working, telecommuting) within companies?
- Not at all                      1   2   3   4   5   6   7                      To a great extent
- 
- 4.08 In your country, how widely are virtual social networks used (e.g., Facebook, Twitter, LinkedIn)?
- Not used at all                      1   2   3   4   5   6   7                      Used extensively
- 
- 4.09 To what extent does the government have a clear implementation plan for using ICTs to improve your country's overall competitiveness?
- Not at all—there is no plan                      1   2   3   4   5   6   7                      To a great extent—there is a clear plan
- 
- 4.10 In your country, to what extent does the use of ICTs by the government improve the quality of government services to the population?
- Not at all                      1   2   3   4   5   6   7                      To a great extent
- 
- 4.11 How developed are your country's laws relating to the use of ICTs (e.g., e-commerce, digital signatures, consumer protection)?
- Not developed at all                      1   2   3   4   5   6   7                      Extremely well developed
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**4.12 In your country, how successful is the government in promoting the use of ICTs?**

Not successful at all      1   2   3   4   5   6   7      Extremely successful

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**4.13 In your country, to what extent do businesses adopt the latest technologies?**

Not at all      1   2   3   4   5   6   7      To a great extent

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**4.14 In your country, to what extent are Internet content and services tailored to the local population (e.g., in the local language, meeting local demand)?**

Not at all      1   2   3   4   5   6   7      To a great extent

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**4.15 In your country, to what extent have firms invested in cyber-security measures?**

Not at all      1   2   3   4   5   6   7      To a great extent

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## V. Financial Environment

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**5.01 In your country, to what extent does the cost of financial services (e.g., insurance, loans, trade finance) impede business activity?**

To a great extent      1   2   3   4   5   6   7      Not at all

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**5.02 In your country, to what extent does the financial sector provide the products and services that meet the needs of businesses?**

Not at all      1   2   3   4   5   6   7      To a great extent

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**5.03 In your country, how do you assess the soundness of banks?**

Extremely low—banks may require recapitalization      1   2   3   4   5   6   7      Extremely high—banks are generally healthy with sound balance sheets

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**5.04 In your country, how easy is it for businesses to obtain a bank loan?**

Extremely difficult      1   2   3   4   5   6   7      Extremely easy

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**5.05 In your country, how easy is it for start-up entrepreneurs with innovative but risky projects to obtain equity funding?**

Extremely difficult      1   2   3   4   5   6   7      Extremely easy

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**5.06 In your country, to what extent can companies raise money by issuing shares and/or bonds on the capital market?**

Not at all      1   2   3   4   5   6   7      To a great extent

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5.07 In your country, to what extent do regulators ensure the stability of the financial sector?  
 Not at all 1 2 3 4 5 6 7 To a great extent

5.08 In your country, how strong are financial auditing and reporting standards?  
 Extremely weak 1 2 3 4 5 6 7 Extremely strong

5.09 In your country, to what extent are the interests of minority shareholders protected by the legal system?  
 Not protected at all 1 2 3 4 5 6 7 Fully protected

5.10 In your country, to what extent can small- and medium-sized enterprises (SMEs) access the finance they need for their business operations through the financial sector?  
 Not at all 1 2 3 4 5 6 7 To a great extent

## VI. Foreign Trade and Investment

6.01 In your country, to what extent do non-tariff barriers (e.g., health and product standards, technical and labeling requirements, etc.) limit the ability of imported goods to compete in the domestic market?  
 Strongly limit 1 2 3 4 5 6 7 Do not limit at all

6.02 In your country, how efficient are customs procedures (related to the entry and exit of merchandise)?  
 Extremely inefficient 1 2 3 4 5 6 7 Extremely efficient

6.03 In your country, how efficient are changes between different modes of transport for cargo (e.g., from port to rail or airport to roads)?  
 Extremely inefficient 1 2 3 4 5 6 7 Extremely efficient

6.04 In your country, how prevalent is foreign ownership of companies?  
 Extremely rare 1 2 3 4 5 6 7 Extremely prevalent

6.05 In your country, how restrictive are rules and regulations on foreign direct investment (FDI)?  
 Extremely restrictive 1 2 3 4 5 6 7 Not restrictive at all

6.06 In your country, how much does the time required for border clearance of imported goods fluctuate?  
 Fluctuates significantly 1 2 3 4 5 6 7 Hardly fluctuates at all

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**6.07 In your country, to what extent do taxes reduce the incentive to invest?**

To a great extent      1   2   3   4   5   6   7      Not at all

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**6.08 In your country, how efficient is the postal system?**

Not efficient at all      1   2   3   4   5   6   7      Extremely efficient

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## VII. Domestic Competition

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**7.01 In your country, how intense is competition in the local markets?**

Not intense at all      1   2   3   4   5   6   7      Extremely intense

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**7.02 In your country, how competitive is the provision of the following services?**

Not at all competitive      1   2   3   4   5   6   7      Extremely competitive

a. Professional services (legal services, accounting, engineering, etc.)

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b. Retail services

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c. Network sector (telecommunications, utilities, postal, transport, etc.)

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**7.03 In your country, on what basis do buyers make purchasing decisions?**

Solely on the lowest price      1   2   3   4   5   6   7      On sophisticated performance attributes

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**7.04 In your country, how numerous are local suppliers?**

Largely nonexistent      1   2   3   4   5   6   7      Extremely numerous

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**7.05 In your country, how do you assess the quality of local suppliers?**

Extremely poor quality      1   2   3   4   5   6   7      Extremely high quality

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**7.06 In your country, how effective are anti-monopoly policies at ensuring fair competition?**

Not effective at all      1   2   3   4   5   6   7      Extremely effective

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**7.07 In your country, how do you characterize corporate activity?**

Dominated by a few business groups      1   2   3   4   5   6   7      Spread among many firms

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7.08 In your country, how widespread are well developed and deep clusters (geographic concentrations of firms, suppliers, producers of related products & services, and specialized institutions in a particular field)?

Nonexistent 1 2 3 4 5 6 7 Widespread in many fields

7.09 In your country, how much economic activity do you estimate to be undeclared or unregistered?

Most economic activity is undeclared or unregistered 1 2 3 4 5 6 7 Most economic activity is declared or registered

## VIII. Business Operations and Innovation

8.01 On what is the competitive advantage of your country's companies in international markets based?

Primarily based on low-cost labor or natural resources 1 2 3 4 5 6 7 Primarily based on unique products and processes

8.02 In your country, how broad is companies' presence in the value chain?

Narrow, primarily involved in individual steps of the value chain (e.g. resource extraction or production) 1 2 3 4 5 6 7 Broad, present across the entire value chain (e.g. including production and marketing, distribution, design, etc.)

8.03 In your country, to what extent do domestic companies control the international distribution of their products?

Not at all 1 2 3 4 5 6 7 To a great extent

8.04 In your country, how sophisticated are production processes?

Not at all—production uses labor-intensive processes 1 2 3 4 5 6 7 Highly—production uses the latest technologies

8.05 In your country, who holds senior management positions in companies?

Usually relatives or friends without regard to merit 1 2 3 4 5 6 7 Mostly professional managers chosen for merit and qualifications

8.06 In your country, to what extent does senior management delegate authority to subordinates?

Not at all 1 2 3 4 5 6 7 To a great extent

8.07 In your country, to what extent is management accountable to investors and boards of directors?

Not at all 1 2 3 4 5 6 7 To a great extent

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8.19 In your country, to what extent do businesses and universities collaborate on research and development (R&D)?

Not at all                      1   2   3   4   5   6   7                      To a great extent

8.20 In your country, to what extent do companies collaborate in sharing ideas and innovating?

Not at all                      1   2   3   4   5   6   7                      To a great extent

8.21 In your country, to what extent do companies employ a diverse workforce (e.g., in term of ethnicity, religion, sexual orientation, gender)?

Not at all                      1   2   3   4   5   6   7                      To a great extent

8.22 In your country, to what extent do companies invest in emerging technologies (e.g., Internet of Things, advanced analytics and artificial intelligence, augmented virtual reality and wearables, advanced robotics, 3D printing)?

Not at all                      1   2   3   4   5   6   7                      To a great extent

## IX. Security

9.01 In your country, to what extent does the threat of terrorism impose costs on businesses?

To a great extent—imposes huge costs                      1   2   3   4   5   6   7                      Not at all—imposes no costs

9.02 In your country, to what extent does the incidence of crime and violence impose costs on businesses?

To a great extent—imposes huge costs                      1   2   3   4   5   6   7                      Not at all—imposes no costs

9.03 In your country, to what extent does organized crime (mafia-oriented racketeering, extortion) impose costs on businesses?

To a great extent—imposes huge costs                      1   2   3   4   5   6   7                      Not at all—imposes no costs

9.04 In your country, to what extent can police services be relied upon to enforce law and order?

Not at all                      1   2   3   4   5   6   7                      To a great extent

## X. Governance

10.01 In your country, how efficient is the government in spending public revenue?

Extremely inefficient                      1   2   3   4   5   6   7                      Extremely efficient

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10.12 In your country, to what extent are property rights, including financial assets, protected?  
 Not at all                      1   2   3   4   5   6   7                      To a great extent

10.13 In your country, how independent is the judicial system from influences of the government, individuals, or companies?  
 Not independent at all                      1   2   3   4   5   6   7                      Entirely independent

10.14 In your country, how common is illegal diversion of public funds to companies, individuals, or groups?  
 Very commonly occurs                      1   2   3   4   5   6   7                      Never occurs

10.15 In your country, how do you rate the corporate ethics of companies (ethical behavior in interactions with public officials, politicians, and other firms)?  
 Extremely poor—  
among the worst in the world                      1   2   3   4   5   6   7                      Excellent—  
among the best in the world

10.16 In your country, to what extent do individuals have the opportunity to improve their economic situation through their personal efforts regardless of the socioeconomic status of their parents?  
 Not at all                      1   2   3   4   5   6   7                      To a great extent

10.17 In your country, to what extent is intellectual property protected?  
 Not at all                      1   2   3   4   5   6   7                      To a great extent

10.18 In your country, how common is it for companies to make undocumented extra payments or bribes in connection with the following:

Very commonly occurs                      1   2   3   4   5   6   7                      Never occurs

- a. Imports and exports
- b. Public utilities (e.g., telephone, electricity)
- c. Tax payments
- d. Awarding of public contracts and licenses
- e. Obtaining favorable judicial decisions

10.19 In your country, how fast is the legal framework adapting to digital business models (e.g., e-commerce, sharing economy, FinTech, etc.)?  
 Not fast at all                      1   2   3   4   5   6   7                      Very fast

10.20 In your country, to what extent does the government have a long-term vision in place?  
 Not at all                      1   2   3   4   5   6   7                      To a great extent

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**11.11 To what extent does your country attract talented people from abroad?**

Not at all                      1    2    3    4    5    6    7                      To a great extent

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**11.12 In your country, to what extent are scientists and engineers available?**

Not available at all                      1    2    3    4    5    6    7                      To a great extent

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**11.13 In your country, to what extent do companies provide women with the same opportunities as men to rise to positions of leadership?**

Not at all                      1    2    3    4    5    6    7                      To a great extent

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**11.14 In your country, how do you characterize labor-employer relations?**

Generally confrontational                      1    2    3    4    5    6    7                      Generally cooperative

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**11.15 In your country, how are wages generally set?**

By a centralized bargaining process    1    2    3    4    5    6    7                      By each individual company

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**11.16 In your country, to what extent do taxes and social contributions reduce the incentive to work?**

To a great extent                      1    2    3    4    5    6    7                      Not at all

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**11.17 In your country, how restrictive are regulations related to the hiring of foreign labor?**

Highly restrictive                      1    2    3    4    5    6    7                      Not restrictive at all

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**11.18 In your country, for similar work, to what extent are wages for women equal to those of men?**

Not at all—they are significantly below those of men    1    2    3    4    5    6    7                      Fully—they are equal to those of men

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**11.19 In your country, to what extent does a formal social safety net provide adequate protection to the general population (e.g., protection against job loss, disability, old age, poverty, etc.)?**

Not at all—it doesn't provide any protection    1    2    3    4    5    6    7                      Fully—it provides full protection

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**11.20 In your country, how do you assess the quality of vocational training?**

Extremely poor—among the worst in the world    1    2    3    4    5    6    7                      Excellent—among the best in the world

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**11.21 In your country, to what extent do graduating students possess the skills needed by businesses at the following levels:**

- |                        |   |   |   |   |   |   |   |                   |
|------------------------|---|---|---|---|---|---|---|-------------------|
| Not at all             | 1 | 2 | 3 | 4 | 5 | 6 | 7 | To a great extent |
| a. Secondary education |   |   |   |   |   |   |   |                   |
| b. University level    |   |   |   |   |   |   |   |                   |

**11.22 In your country, to what extent are unemployed people supported in reskilling and finding new employment?**

Not at all	1	2	3	4	5	6	7	To a great extent
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**11.23 In your country, how do you assess the style of teaching?**

Passive— focused on memorizing	1	2	3	4	5	6	7	Interactive— focused on creative and critical thinking
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**11.24 In your country, to what extent do people move to other parts of the country to pursue professional opportunities?**

Not at all	1	2	3	4	5	6	7	To a great extent
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**11.25 In your country, to what extent is the Internet used in schools for learning purposes?**

Not at all	1	2	3	4	5	6	7	To a great extent
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## XII. Health

**12.01 In your country, how accessible is healthcare to all individuals?**

Limited— only the privileged have access to healthcare	1	2	3	4	5	6	7	Universal— all individuals have access to healthcare
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**12.02 In your country, how do you assess the quality of healthcare (public and private) provided to ordinary citizens?**

Extremely poor— among the worst in the world	1	2	3	4	5	6	7	Excellent— among the best in the world
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**12.03 How serious an impact do you consider the following diseases will have on your company in the next five years (e.g., death, disability, medical and funeral expenses, productivity and absenteeism, recruitment and training expenses, revenues)?**

- |                  |   |   |   |   |   |   |   |                  |
|------------------|---|---|---|---|---|---|---|------------------|
| A serious impact | 1 | 2 | 3 | 4 | 5 | 6 | 7 | No impact at all |
| a. HIV/AIDS      |   |   |   |   |   |   |   |                  |
| b. Tuberculosis  |   |   |   |   |   |   |   |                  |
| c. Malaria       |   |   |   |   |   |   |   |                  |

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## XIII. Travel and Tourism

13.01 How high a priority is the development of the travel and tourism industry for the government of your country?

Not a priority at all      1   2   3   4   5   6   7      A top priority

13.02 How effective are your country's marketing and branding campaigns in attracting tourists?

Not effective at all      1   2   3   4   5   6   7      Extremely effective

13.03 In your country, to what extent is the travel and tourism sector developed in an environmentally sustainable way?

Not at all      1   2   3   4   5   6   7      To a great extent

13.04 In your country, how do you assess the quality of tourism infrastructure (e.g., hotels, resorts, entertainment facilities)?

Very poor—  
among the worst in the world      1   2   3   4   5   6   7      Excellent—  
among the best in the world

13.05 To what extent do international tourists visit your country mainly for its natural assets (i.e., parks, beaches, mountains, wildlife, etc.)?

Not at all      1   2   3   4   5   6   7      To a great extent

## XIV. Environment

14.01 How do you assess the stringency of your country's environmental regulations?

Very lax—  
among the worst in the world      1   2   3   4   5   6   7      Excellent—  
among the world's most stringent

14.02 In your country, how do you assess the quality of the natural environment?

Extremely poor—  
among the worst in the world      1   2   3   4   5   6   7      Excellent—  
among the world's most pristine

14.03 In your country, how do you assess the enforcement of environmental regulations?

Very lax—  
among the worst in the world      1   2   3   4   5   6   7      Excellent—  
among the world's most rigorous

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## XV. Risks

**15.01** From the following list, check the five global risks that you believe to be of most concern for doing business in your country within the next 10 years:

- |   |                                     |
|---|-------------------------------------|
| Asset bubble                                  | Food crises                         |
| Biodiversity loss and ecosystem collapse      | Illicit trade                       |
| Critical information infrastructure breakdown | Inter-state conflict                |
| Cyber attacks                                 | Large-scale involuntary migration   |
| Data fraud or theft                           | Man-made environmental catastrophes |
| Deflation                                     | Misuse of technologies              |
| Energy price shock                            | Natural catastrophes                |
| Extreme weather events                        | Profound social instability         |
| Failure of climate-change adaptation          | Spread of infectious diseases       |
| Failure of critical infrastructure            | State collapse or crisis            |
| Failure of financial mechanism or institution | Terrorist attacks                   |
| Failure of national governance                | Unemployment or underemployment     |
| Failure of regional or global governance      | Unmanageable inflation              |
| Failure of urban planning                     | Water crises                        |
| Fiscal crises                                 | Weapons of mass destruction         |

Survey responses are confidential and individual respondents are not identified. If you don't know the answer to a question, leave it blank. Please note that all questions referring to "your country" denote the country in which you currently work.

# Thank you very much for completing this Survey!

Please see the results of the Global Competitiveness Reports under [www.weforum.org/gcr](http://www.weforum.org/gcr)

## Respondent Information (optional)

We would appreciate it if you would provide us with your contact details, keeping in mind that responses remain confidential.

Please staple your business card here or fill in the information below (in print)

Country: \_\_\_\_\_

Name:      Mr      Mrs \_\_\_\_\_

Position: \_\_\_\_\_

Level:                      Top Executive/Owner                      Middle Management & Advisers  
                                   Senior Executive/Board Member                      Functional Staff  
                                   Head of Business Unit/Head of Region                      Other, specify: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Postal Code/City: \_\_\_\_\_

E-mail: \_\_\_\_\_

May we contact you for quality control purposes?                      Yes                      No

I confirm I have personally completed the Survey and that I have assessed the country in which I currently work.                      Yes

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### Please return by 31 March 2018 to:

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