A GUIDE TO

EFFECTIVE LOBBYING IN EUROPE

2009

Burson-Marsteller

Burson-Marsteller would like to thank the 500+ respondents who have made this report on lobbying in Europe possible. We would also like to thank Penn, Schoen and Berland (PSB) who carried out the interviews in the 16 countries surveyed and our partners below for their support. A special thanks to European Commission Vice-President Siim Kallas for agreeing to write the foreword to this report.

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TABLE OF CONTENTS

FOREWORD

by Vice President Siim Kallas

Member of the European Commission responsible for Administration, Audit and Anti-Fraud

This survey will be of interest to members of the lobbying profession. Indeed, officials in EU institutions and Member States interviewed for the survey have revealed how they take decisions, including whom they trust for information and expertise. This gives the lobbyists and those with money to spend on lobbying, an insight into what techniques and channels are most effective.

The survey should also be read by those taking the decisions. Because, in turn, whom we trust and listen to obviously affects whether the decisions we take can be trusted by the wider public as fair and unbiased. Judging from the results, it would seem that the decisions of senior EU officials are more influenced by colleagues, staff, personal research and other EU institutions than interest representation from industry or NGOs. This, I think, is how our relationship with lobbyists should be: we listen, but do not allow interest representation to dominate our work.

The survey can also be used to assess whether on-going regulatory efforts, such as the European Transparency Initiative and its Register for Interest Representatives, are on target. From that point of view, a few policy lessons can be drawn from the survey.

First, the survey sends a clear message to all lobbyists that your EU interlocutors care whether you are transparent about the interest you represent. In fact, this is shared across Europe, where an average of two-thirds of those interviewed state that the degree of transparency does influence the decision whether to speak to a lobbyist. Understandably, over 70% of officials are also open to talk to lobbyists if the topic lies within their field of expertise and is of interest. As such, public institutions are likely to be open to transparent and targeted lobbying. We seem less impressed by indiscriminate "carpet-bombing" campaigns. This reassures me, because I would not like to see those with the largest PR budgets receive privileged treatment by the EU institutions.

Second, the more lobbying efforts are channelled via indirect channels such as public affairs consultancies, law firm or think tanks, the greater the challenge to appear transparent about the underlying interests. And as the survey would indicate, such indirect lobbying tools are considered almost as effective as direct interest representation. Regulators therefore have to cover both the direct and the indirect lobbying channels, as indeed the European Transparency Initiative aims to do.

Finally, when looking at the perceived "poor practices" in lobbying, it is encouraging that a lack of transparency is considered a lot less problematic at the EU level compared to the national level. I can only see that as a sign that the positive and pioneering steps taken by lobbyists to join the EU Register for Interest Representatives are beginning to pay off. This represents anecdotal evidence that the Commission's approach, reflected in the ever increasing number of registrants – fast approaching 2,000 – was the right one.

WELCOME TO BURSON-MARSTELLER'S GUIDE TO EFFECTIVE LOBBYING IN EUROPE

by Jeremy Galbraith

CEO Burson-Marsteller Europe, Middle East & Africa

It is eight years since Burson-Marsteller produced its first evidence-based guide to European lobbying. That first report focused on influencing the European Parliament; we have since produced reports on lobbying the European Commission and in 2005 our Definitive Guide to Lobbying the European Institutions.

This latest report takes a deeper and wider look at the attitudes of regulators and policy-makers across Europe towards lobbying. Produced with the support of our network of offices and partners across Europe, based on research by Penn, Schoen & Berland (PSB), this report highlights and explains perceptions towards lobbying in Brussels and 15 national capitals. The findings are timely, as we move into an exciting new phase for lobbying: at EU level, we begin a new institutional cycle with a new Parliament and Commission, while across Europe, the growth of digital media and greater transparency requirements are changing the way lobbying is carried out.

Transparency is one of the major themes of this report, with our research showing that it is an increasingly important consideration for politicians and officials both in Brussels and in national capitals. As the results of the survey demonstrate, for more and more regulators a declaration of interest is becoming an essential pre-condition to contact with any lobby group, whether they be a trade association, company, NGO, law firm or consultancy. Our report shows that many organisations - including public affairs consultancies - fare badly in terms of perceived transparency. I am pleased to say that Burson-Marsteller has been a leader in promoting transparency. Openly declaring client interests in contacts with stakeholders is a key part of our global Code of Values which every employee signs and we were the first major consultancy to sign up to the European Commission's voluntary register.

Another important finding is that public affairs agencies rate lower as effective lobbyists than trade associations, companies and NGOs. This entirely supports the approach of Burson-Marsteller across Europe: we act as intelligence gatherers, message developers, campaign strategists and programme managers for clients. We rarely act as their advocates, because politicians and officials prefer hearing directly from our clients.

On this topic and others, this survey aims to increase knowledge of effective lobbying techniques and to be your guide to the perceptions of politicians and officials across the continent - with the ultimate goal of improving the quality of lobbying throughout Europe.

We hope that you find this report interesting and its findings useful in your work.

BACKGROUND & METHODOLOGY

The survey summarised in the following pages is designed to increase knowledge about lobbying with a view to improving the understanding and quality of lobbying throughout Europe. This is the fourth Burson-Marsteller survey to focus on lobbying, but this one expands coverage to 15 national European markets and Brussels from the more narrow EU-institutional focus in the three previous reports[1]. This report, we believe, points to the strengths and weaknesses of lobbying which we hope will provide a useful basis for needed corrections or adaptations.

This survey is based on over 500 interviews carried out by Penn, Schoen & Berland (PSB) on behalf of Burson-Marsteller and our partners in six of the European countries surveyed, during the period February to July 2009. The interviews involved a basic series of 18 questions to identify perception among policy elites about lobbying and lobbyists. They were conducted either online, by phone or face-to-face with politicians (both Members of national Parliaments (MPs) and Members of the European Parliament (MEPs)) and senior officials from national governments and the European institutions.

In total, just over 50 interviews were done in the EU policy community in Brussels and at least 30 in each of the following countries:

- Austria
- Czech Republic
- Denmark
- Finland
- France
- Germany
- Greece[2]
- Hungary
- Italy
- Netherlands
- Norway
- Poland
- Spain
- Sweden
- UK

1. Spring 2005: http://www.bmbrussels.eu/images/upload/guideeurinst.pdf; Spring 2003: http://www.bmbrussels.eu/images/upload/guideeurcom.pdf; http://www.bmbrussels.eu/images/upload/guideeurparl.pdf

2. The survey in Greece was conducted by MRB

EXECUTIVE SUMMARY

Lobbying attracts mixed perceptions among policy-makers across Europe. Respondents acknowledge lobbying's positive aspects (such as constructive input to decision-making and sharing of expertise), but negative aspects are also highlighted (a lack of transparency and biased information being cited most frequently). Lack of transparency is the most often identified weakness and is most keenly criticised in Poland, the Nordic countries and the Netherlands.

TRANSPARENCY

Transparency emerges as the leitmotif of the survey. Public officials identify trade unions, companies and trade associations as the most transparent lobbying groups, ahead of NGOs. Despite efforts to improve transparency, public affairs consultancies trail further behind.

Transparency is the single most important factor in making up an official's mind to speak to an interest group. Yet surprisingly, they do not appear to consider registration on a public lobbying register as an important factor.

EFFECTIVENESS

While our 2005 report (covering lobbying in the EU institutions) indicated that industry and NGOs were equally effective, this report points to a perception of greater industry effectiveness across all sectors. In many cases (including energy and healthcare & pharmaceuticals) the perceived gap in favour of industry is substantial. In only one case, the consumer goods, food & drinks sector, have NGO lobbyists almost reached parity with their business counterparts.

Trade associations are seen overall as the most effective lobbyists. Grouped close together (and not far behind) are companies, NGOs and public affairs consultancies, followed in turn by think-tanks and law firms.

POOR LOBBYING PRACTICES

Lack of transparency and aggressiveness come at the top of the criticisms of industry lobbyists, but the fact that one quarter of respondents still mention unethical inducements as one of the most frequently committed practices by industry is of major concern. With spikes in Greece and Germany, such corruption cannot be attributed to a cultural North-South divide.

CHANNELS OF INFLUENCE

Nationality: The markets seem perfectly divided as to whether officials think it important to be approached by someone of their own nationality on an issue of national interest, with half considering it important and half not. Of course this division belies significant national differences, to which it will be crucial to pay attention when approaching decision-makers.

Information sources for decision-makers: Industry rates amongst the most helpful sources for making informed decisions. Although a decision-maker's own research, his staff, colleagues and national public authorities remain the most important sources of information, industry was identified as helpful, as were the EU institutions.

Digital versus traditional media: While digital media appear to out-perform traditional media as a source of information, results suggest that the vast majority of digital media include online editions of newspapers or websites of established broadcasters. Top-tier media therefore remain important targets in any campaign.

Information delivery: meetings are viewed as the favoured way to receive information by respondents followed by site visits and written briefing materials. Only one fifth of respondents like to receive information by phone or email, and less than one fifth view luncheon and breakfast briefings as useful. DVD & videos, exhibitions and evening receptions surface as even less popular. The overall averages do however mask significant differences among the countries, with for example EU-level respondents revealing themselves to be particularly sceptical about the usefulness of site visits while the Finns much prefer site visits to receiving written briefing materials. Norwegians are particularly critical of exhibitions and DVD & videos, and the Polish topped the chart with their preference for meetings; while the French welcome exhibitions, evening receptions and breakfast briefings as means to communicate information. This section of the survey also revealed considerable uniformity in the way the Nordics appraise information channels.

B-M 12 TIPS FOR EFFECTIVE LOBBYING

1. **Be transparent about your interests:** stakeholders demand transparency as a pre-condition to discussion.

2. **Be part of the process:** it is easiest to influence a policy in its infancy, and important to follow through during all stages of policy development.

3. **Understand the legislative process and its technicalities:** it helps to ensure that you arrive with the right arguments at the right time.

4. **Think politically:** identify the focus of political argument, the values and interests involved and the potential basis for consensus.

5. **Back up political arguments** with independent evidence and sound science in order to convince politicians and regulators.

6. **Identify your ultimate audience and clearly set realistic objectives** at the beginning of your campaign. Be prepared to adapt your strategy in response to both external and internal changes.

7. **Know the wide range of people that you need to talk to,** but target the decision-makers and influencers that matter at the right time.

8. **Mobilise people to act:** search for allies and work within coalitions whenever possible. Ad hoc and temporary issue specific coalitions can be just as influential as longstanding partnerships.

9. **Use all relevant channels of communications:** digital information is widely seen by politicians, regulators and their assistants and influences their thinking.

10. **Recognise and respect Europe's diversity** in culture, language and thought and where possible work with it to your advantage. Always keep in mind the local, national and European dimension of a policy issue and leverage links between Brussels and national capitals, reflecting the interplay of influence in policy and decision-making.

11. **Remember you will not always get 100% of what you want:** those who craft the compromise often win.

12. **Be creative and memorable** from start to finish. Briefing materials and events that draw attention to your messages do help achieve success.

PERCEPTIONS OF LOBBYING

WHO ARE THE LOBBYISTS?

Trade associations and public affairs agencies are widely perceived as lobbyists

Trade associations (61%) followed by public affairs agencies (57%) are identified as the most common manifestation of the lobbyist - a perception most strongly held in Finland (83% & 80%) and Norway (81% & 74%). Austria (81%), Sweden (74%) and the UK (66%) also score above average in identifying public affairs firms as lobbyists. At EU-level as well, respondents rate public affairs firms (65%), along with trade associations (65%) as the most prevalent form of lobbyist.

A second cluster of interest groups is less frequently defined as 'lobbyists', including non-governmental organisations (NGOs) (50%), trade unions (46%) and companies (43%). However, NGOs are much more frequently considered lobbyists in Norway (77%), Finland (67%), Austria (63%) and in Brussels (63%).

58% of EU-level respondents also identify law firms as lobbyists – far higher than the overall average for this category (24%) perhaps reflecting the lively debate in Brussels on transparency in lobbying.

In your opinion which of the following could be considered to match the description of a 'lobbyist'?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Trade associations	61	72	47	58	77	83	27	60	20	77	67	81	70	61	45	69	65
Public Affairs agencies	57	81	50	58	48	80	23	60	50	37	60	74	53	74	29	66	65
NGOs	50	63	50	45	61	67	37	40	23	27	53	77	57	48	29	44	63
Trade unions	46	63	27	55	35	67	30	40	7	60	27	65	53	52	35	59	50
Companies	43	44	20	48	52	50	27	10	20	43	50	48	43	68	29	63	58
Think tanks	27	25	17	39	26	30	17	47	10	30	10	10	10	55	32	44	25
Individuals & Independent	24	34	37	35	13	20	10	20	23	17	10	26	7	35	10	56	29
Law firms	24	25	13	35	10	17	23	30	7	20	13	13	17	23	29	31	56
All of the above	16	9	17	26	13	17	23	10	17	7	20	6	17	13	29	16	19
Others (please specify)	6	0	7	3	6	0	0	0	8	7	10	13	0	13	13	16	6

WHAT ARE THE POSITIVE ASPECTS OF LOBBYING?

More than half of the respondents identify lobbying's capacity to raise issues of local or national importance

The most positive aspect of lobbying identified by respondents in Europe is its capacity to raise the local or national importance of an issue. Half of those interviewed highlight this, with strongest showings in Germany (74%), the UK (72%) and Italy (70%). Perhaps understandably, this aspect is seen as less significant at EU level (44%), although the low scores, such as in Denmark (23%) and Norway (26%) seem less explainable.

The second most positive aspect of lobbying is seen as its constructive input to public decision-making, with a 48% overall score. This conceals wide variations. Respondents in Italy (67%), Hungary (67%) and Austria (63%) see this aspect most positively, while in Poland only 3% see lobbying as constructive.

From the following list, what would you say are the positive aspects of lobbying?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Raising the local & national importance of an issue	50	50	60	74	23	60	53	37	30	70	67	26	50	55	35	72	44
A constructive part of the decision making process	48	63	50	48	32	40	53	53	67	67	53	61	3	45	45	38	52
Sharing expertise	47	50	50	61	39	63	40	17	30	43	50	61	63	52	48	22	60
Translating technical & scientific information into relevant information	40	50	30	48	29	60	40	53	20	30	17	39	37	39	29	44	58
Providing the right information at the right time	39	75	43	65	26	50	7	33	23	40	47	35	43	26	32	41	38
Other (Please specify)	8	6	7	10	23	3	7	0	3	13	10	10	3	10	16	6	2

WHAT ARE THE NEGATIVE ASPECTS OF LOBBYING?

Lobbyists need to be more transparent

Lack of transparency is perceived as the most prevalent weakness in lobbying practices (57% of all respondents). This is strongest in Poland (90%), a finding which correlates directly to the very low opinion of lobbying as a constructive force as explained in the previous section. Not far behind is a cluster of northern European countries led by Finland (80%), Germany and Sweden (each 65%), and The Netherlands (67%). However, less than half of the respondents in Greece (37%), Denmark (39%), France (43%) and the EU (48%) see lack of transparency as an issue.

The second most important concern (55%) is the absence of objectivity in the information lobbyists provide.

The perception of lobbying as an undue influence over the democratic process is low overall (23%), but relatively high in Germany (58%), the UK (41%) and Spain (39%). Lobbying overkill ('too many contacts'), while not generally seen as a big issue (23%), is more of a factor in the EU and the Czech Republic (each 37%).

From the following list, what would you say are the negative aspects of lobbying?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Interest not clearly outlined/ lack of transparency	**57**	50	53	65	39	80	43	37	60	60	67	58	90	65	52	50	48
Not providing neutral information	**55**	44	73	65	68	47	60	53	30	60	57	58	37	55	45	56	67
An undue influence of the democratic process	**23**	28	20	58	16	30	30	23	10	20	13	3	10	13	39	41	12
Too many contacts/ an annoyance	**23**	25	37	10	29	30	33	13	10	10	17	26	13	23	13	28	37
Reserved for the elite	**20**	28	7	23	16	17	20	17	37	27	7	23	10	29	32	22	12
Other (Please specify)	**8**	13	13	6	6	3	3	7	3	20	10	10	0	16	10	3	4

HOW TRANSPARENT ARE LOBBYISTS?

Trade unions, companies and trade associations are viewed as the most transparent

On a scale of 1 to 10, trade unions, companies and trade associations lead the field as the most transparent lobbyists, with overall average scores of 7.5 or above. In fourth place come NGOs (6.97) with much higher individual ratings in Norway (8.35), Denmark (8.19), France (7.5) and Sweden (7.48). NGOs also score high for transparency at EU level (7.6).

In the next cluster, public affairs agencies (5.58) are seen as somewhat more transparent than law firms. Although both score above 5, they are viewed as significantly less transparent than the first four categories.

Thinking about your answers to the previous question, on a scale of 1 to 10, where 1 is 'I never know who they represent' and 10 is 'I always know who they represent': to what extent would you say each of the following is transparent in lobbying?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Trade unions	7.67	8.38	7.07	8.03	8.55	7.93	7.4	8	6.77	7.53	7.69	8.39	7.12	7.74	6.61	7.78	7.67
Companies	7.57	7.72	7.83	8	8.48	7.6	6.97	7.83	8.27	6.6	7.57	8.1	6.96	7.16	6.32	7.53	7.96
Trade associations	7.57	7.63	6.83	7.61	8.16	8.27	7.4	7.48	8.23	7.87	7.33	8.52	7.27	7.16	6.39	7.66	7.38
NGOs	6.97	7.25	5.13	6.58	8.19	6.8	7.5	6	6.6	6.67	7.1	8.35	6.15	7.48	6.1	6.91	7.6
Public affairs agencies	5.58	5.44	4.47	6.32	4.84	4.73	7.3	6.1	7.03	4.97	5.1	5.94	5.19	5.42	5.42	5.31	5.71
Law firms	5.37	5.56	4.97	5.45	5.52	4.2	6.63	5.42	7.13	5.03	5.1	5.35	4.08	5	5.52	5.5	5.33
Think tanks	5.36	5.13	5.3	5.97	5.48	5.63	6.27	5.35	4.93	4.83	4.55	5.68	4.15	6.13	5.84	5.16	5.25
Individuals & Independents	4.58	3.59	3.97	5.35	4.94	4.3	6.97	3.89	4.27	4.33	3.66	5.61	2.65	3.97	5.58	5.09	4.44

WHAT INFLUENCES THE RESPONDENT'S DECISION TO SPEAK TO A LOBBYIST?

Transparency is the key factor

64% of the respondents say that transparency influences their decision to speak to lobbyists. This consideration is uniformly high on the list of all respondents with the exception of France (37%) and Spain (26%).

Unsurprisingly, clear majorities of respondents say their readiness to speak to a lobbyist is conditioned by the topic being in their field of expertise or of interest to them.

Perhaps unexpectedly, whether or not the lobbyist is listed on a public register seems to be of little importance among the lobbied. On average, only 19% said this was a factor influencing their readiness to speak to a lobbyist.

Which of the following factors influence your decision to speak to a lobbyist?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
If the lobbyist is transparent about whom he represents	**64**	75	57	74	71	73	37	83	43	70	57	77	70	71	26	63	69
If the topic is in my field of expertise	**59**	69	53	71	68	53	47	53	37	63	53	48	53	74	32	84	73
If the topic is of interest to me	**54**	50	70	55	29	77	50	23	30	67	70	68	23	65	42	59	71
If the lobbyist is well prepared	**40**	56	20	71	48	47	23	17	17	47	40	45	50	48	10	47	50
If I know the lobbyist	**32**	50	23	29	48	57	27	50	0	30	30	39	7	23	13	44	35
I have an obligation to speak to anyone calling me	**21**	9	30	13	39	17	20	10	23	60	3	29	3	16	42	16	12
If the lobbyist or his organisation is listed in a public register of lobbyists	**19**	9	10	29	16	17	10	30	20	50	17	3	20	6	6	19	29
I never speak to lobbyists	**2**	0	0	3	0	3	0	0	3	3	7	0	3	0	0	0	2
Other (please specify)	**6**	6	10	6	3	0	3	0	7	13	7	10	3	10	3	9	2

LOBBYING EFFECTIVENESS

WHO ARE THE MOST EFFECTIVE LOBBYISTS?

Trade associations are perceived as being the most effective lobbyists

The effectiveness of lobbyists is seen as being evenly spread between the various main categories – with trade associations (6.55 out of 10) being the most effective, closely followed by trade unions, companies, NGOs and public affairs agencies – all scoring around 6. The Netherlands appears to be a special case, as respondents there rated the effectiveness of all the main lobby groups as exceptionally low (ranging from 3 to 4.86 out of 10). Respondents in the Czech Republic also rate lobbyists low on effectiveness (ranging from 3.83 to 5.4).

On a scale of 1 to 10, where 1 is 'not at all effective' and 10 is 'extremely effective' how would you rate the effectiveness of lobbying by the following organisations?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Trade associations	6.55	7.38	5.03	7.16	7.45	7.97	7.17	6.3	5.83	7.2	4.36	7.03	6.19	5.94	6.45	6.63	6.52
Trade unions	6.16	6.78	5.4	6.9	6.65	7.17	6.33	5.37	4.97	6.67	4.68	6.97	6.12	5.65	6.23	6.56	6.02
Companies	6.08	6.41	5.07	7.61	6.68	6.97	7.1	4.87	6.13	6	3.32	6.58	5.62	5.81	6.1	6	6.4
NGOs	5.99	6.56	4.93	6.39	6.68	6.13	6.47	5.67	4.87	5.77	3.46	7.06	5.35	6.39	6.48	6.44	6.42
Public affairs agencies	5.93	6.72	4.67	6.61	5.03	6.9	6.53	6.33	7	5.1	3.96	6.45	5.62	5.9	6.13	5.91	5.87
Think tanks	5.39	5.56	4.73	6.1	5.45	6.37	5.9	5.63	5.3	5.23	3	4.74	4.04	6.32	6.19	5.75	5.44
Law firms	5.18	5.88	4.4	5.42	4.58	4.93	6.1	5.6	5.3	5	4.54	5.32	4.19	4.52	5.65	5.44	5.5
Individuals & Independents	4.47	4.25	3.83	5.06	4.58	4.73	5.73	4.67	6.07	3.47	3.21	4.39	3.15	4.45	4.9	5.09	3.96

IN WHICH SECTOR DO LOBBYISTS MAKE THE GREATEST EFFORT?

The lobbyists in the energy sector make the largest effort

Energy, with an overall score of 7.26 (on a scale of 1 to 10), is the sector where lobbying efforts are perceived to be greatest, with its presence felt in particular in Greece (7.83), Germany (7.81), Hungary (7.79) and Spain (7.52). Not far behind energy is the healthcare & pharmaceutical sector (7.14 overall average), with peaks in Austria (7.94) and Germany (7.68).

A cluster of sectors - IT & telecommunications (6.58), defence (6.55), financial services (6.49), agriculture (6.45), chemicals (6.36) and transport (6.26) - occupy an overall median rank in perceived lobbying efforts. A further drop-off in perceived effort affects a number of other sectors (for example consumer goods, food & drink, electrical & electronics), with retailing bringing up the rear (5.15 average).

Among EU respondents, the energy lobby also comes out at the top (7.6), but otherwise the EU rankings differ from those given by national respondents. This seems to reflect the primacy of EU over national policy in certain sectors. Agriculture (7.46) and chemicals (7.33) score high, followed by pharmaceuticals (7.13). Utilities and retail sectors score lowest (7.65).

Please rate the following industries according to your perception of their lobbying efforts, where 1 is 'very poor' and 10 is 'very good'

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Energy	7.26	7.5	7	7.81	7.39	7.37	6.77	7.83	7.79	7.17	7.17	6.84	5.5	7.23	7.52	7.19	7.6
Healthcare & Pharmaceuticals	7.14	7.94	6.87	7.68	7.29	7.27	7.13	7.67	7.6	6.93	6.7	6.55	6.42	6.45	7.13	7.34	7.13
IT & telecommunications	6.58	7.19	6.1	6.16	6.29	6.73	6.77	7.53	7.21	6.3	6.57	5.68	5.27	6.16	7.58	6.5	6.92
Defence & aerospace	6.55	6.13	6.3	6.61	5.97	6.43	6.87	7.77	6.82	5.63	7.03	6.35	4.92	5.97	7.32	7.22	6.92
Financial Services	6.49	6.97	6.23	6.94	6.42	6.5	6.87	5.87	7.87	6.6	6.17	6.19	4.81	5.32	7.19	6.94	6.62
Agriculture	6.45	7.28	5.97	6.68	8	7.43	7.1	5	4.82	5.8	7.37	6.39	5.77	6.52	4.81	5.81	7.46
Chemicals	6.36	6.53	5.8	6.48	6.71	6.17	6.63	6.5	6.83	5.6	6.7	5.03	5.81	5.65	6.68	6.53	7.33
Transport	6.26	6.75	6.47	6.68	6.45	6.17	6.83	5.93	5.9	5.83	6.27	6	4.42	6.48	6.23	6.25	6.79
Consumer goods, food & drink	5.84	5.53	4.87	6.13	6.74	6.27	6.57	5.57	5.26	6.17	6.2	4.81	4.54	5.35	5.58	6.63	6.5
Electrical & electronics	5.79	5.31	5.3	6.13	5.65	6.27	6.7	5.4	6	5.43	5.93	5.29	4.27	5.39	6.55	5.97	6.46
Mining & natural resources	5.53	4.91	5.87	5.81	5.29	5.53	5.8	6.77	4.15	5.3	6.27	5.06	4.96	4.68	5.9	5.91	5.85
Utilities & public services	5.51	6.25	5.3	5.71	5	4.87	6.83	4.97	5.86	6.87	5.23	4.81	3.88	4.58	5.97	6.09	5.65
Retail	5.15	4.03	3.83	5.74	5.81	5.47	6.87	4.77	4.28	6.5	5.63	4.16	3.65	5.1	4.06	6.19	5.69

IN WHICH SECTORS ARE INDUSTRY MOST EFFECTIVE?

The energy and healthcare & pharmaceuticals sectors get top scores

Matching their effort level, the energy and healthcare & pharmaceuticals sectors are perceived as having clearly the most effective lobbying, scoring 88% and 85% respectively, when "very effective" and "quite effective" responses are combined. Individual national ratings are sometimes even higher, including the healthcare & pharmaceutical industry scoring a unique 100% in Germany, with France (96%) not far behind. Germany (94%) and France (96%) lead the way too for industry lobbying effectiveness in the energy sector.

The overall averages in financial services (75%) and IT & telecommunications (75%) show that they also perform well in perceived effectiveness. All other sectors score over 50% with one exception: retail's performance (45%) reflects very low scores in smaller European markets.

At the EU level, energy (95%) is the clear winner with healthcare & pharmaceuticals in second place (89%). Other high scores for effectiveness of industry lobbying (probably reflecting EU powers in these sectors) are agriculture (84%), transport (84%) and chemicals (81%).

How effective would you say the industry lobbying efforts are in each of the following sectors?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Energy	**88**	91	86	94	91	90	96	80	77	93	83	91	87	84	87	88	95
Healthcare & Pharmaceuticals	**85**	81	90	100	84	86	96	80	74	86	80	84	90	75	87	84	89
Financial Services	**75**	72	73	84	75	73	87	63	77	90	60	84	80	41	84	81	75
IT & Telecommunications	**75**	75	76	74	65	80	94	80	60	90	53	61	86	65	84	72	77
Defence & aerospace	**71**	63	80	77	55	54	84	80	57	77	74	65	73	58	80	82	79
Transport	**69**	78	76	84	61	50	83	47	40	66	70	78	70	65	61	72	84
Agriculture	**67**	69	60	61	93	67	83	23	20	63	90	77	93	68	48	60	84
Chemicals	**66**	63	47	67	65	53	80	63	50	70	77	41	87	42	80	79	81
Electrical & electronics	**61**	44	47	68	55	57	84	47	40	77	57	61	70	55	87	62	72
Mining & natural resources	**55**	41	63	58	35	60	70	63	13	67	70	39	80	29	65	63	58
Consumer goods, food & drink	**54**	34	26	68	68	47	90	43	30	67	57	39	63	32	51	75	67
Utilities & public services	**54**	60	43	62	45	30	80	34	23	90	54	38	63	39	65	69	60
Retail	**45**	25	17	64	54	40	73	40	13	63	47	23	66	35	32	72	50

IN WHICH SECTORS ARE NGOS MOST EFFECTIVE?

NGOs in the healthcare & pharmaceuticals sector get top scores

Overall, most effective NGO lobbying is perceived to be in the healthcare & pharmaceutical (61%) and energy (58%) sectors. At national level, much higher scores are registered, such as for pharmaceutical lobbying in Germany (84%), Spain (84%) and France (77%), and in the energy sector, for example in Germany (80%), the UK (75%) and France (73%).

Other sectors where NGOs also score above 50% overall are consumer goods, food & drink and agriculture. In all other sectors, the majority of respondents found NGO lobbying not very effective. However, general figures may conceal specific differences. In the case of chemicals (overall 46%) more than 60% of respondents judged the sector to be effective in Germany, France, Poland, Spain and Denmark.

At EU level, the emphasis is different. Healthcare & pharmaceuticals is perceived as the sector in which NGO lobbying is most effective, with consumer goods, food & drink (57%), agriculture (57%), chemicals (55%) next, ahead of energy (52%). NGO lobbying in all other sectors is perceived to be less effective.

How effective would you say NGO lobbying efforts are in each of the following sectors?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Healthcare &Pharmaceuticals	61	63	40	84	58	50	77	44	47	63	53	71	67	42	84	66	64
Energy	58	56	57	80	68	47	73	47	50	60	37	55	67	49	71	75	52
Consumer goods, food & drink	53	41	27	68	71	60	74	40	30	74	57	32	67	45	48	54	57
Agriculture	53	63	43	64	55	44	77	34	40	54	43	67	70	49	39	40	57
Transport	49	57	50	61	32	50	60	20	30	43	37	71	63	58	45	59	46
Utilities & public services	48	31	57	64	29	46	70	36	33	53	40	52	70	38	61	53	37
Chemicals	46	53	30	64	67	17	66	27	33	30	43	32	63	35	61	47	55
Mining & natural resources	43	31	53	48	46	57	70	47	14	40	30	45	67	22	51	44	39
IT & Telecommunications	42	38	30	45	16	16	73	43	60	37	33	29	63	36	62	47	39
Financial Services	39	31	30	61	25	3	63	33	53	40	26	42	60	22	55	59	29
Defence & aerospace	36	16	37	51	23	20	60	30	40	36	27	36	57	32	51	57	23
Retail	36	22	20	48	45	13	63	33	27	54	30	29	70	22	26	41	33
Electrical & electronics	35	34	20	38	22	13	67	16	34	30	20	29	64	23	58	34	39

INDUSTRY VERSUS NGO LOBBYING EFFECTIVENESS

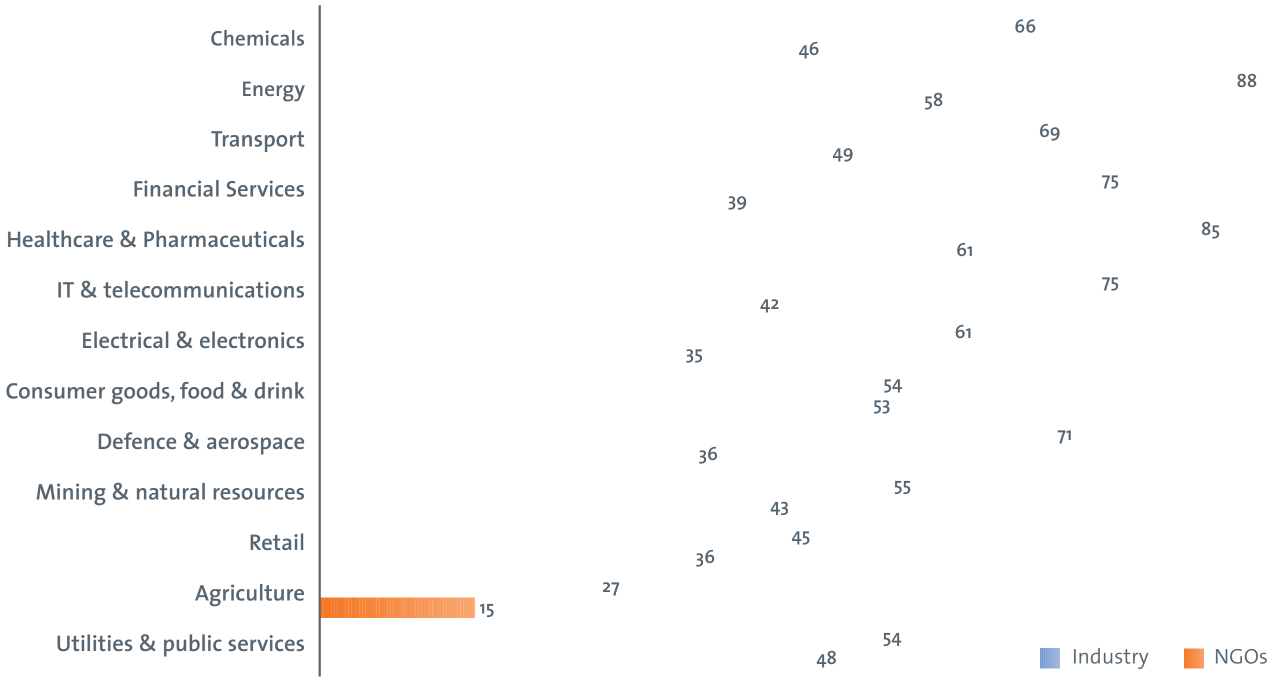
Across the board industry lobbying is seen as more effective than NGO lobbying

The overall perception is that industry lobbying is more effective than NGO lobbying in all sectors, and in some sectors significantly so.

The greatest gaps (more than 30 percentage points), perhaps unsurprisingly, are to be found in financial services, defence & aerospace, and IT & telecommunications, but they are also substantial in energy (30 percentage points) and healthcare & pharmaceuticals (24 percentage points).

The gap is at its narrowest in the consumer goods, food & drink sector – where industry lobbying effectiveness is rated at 54% and NGO effectiveness at 53%. Other relatively small gaps are in the utilities & public services sector (6 percentage points) and retail (9 percentage points).

How effective would you say the NGO & Industry lobbying efforts are in each of the following sectors?



POOR PRACTICE

WHAT ARE INDUSTRY LOBBYISTS' MAJOR FAILINGS?

Transparency was cited as the main example of poor lobbying practice by industry

Transparency was cited as the main example of poor lobbying practice by industry as a whole (52%). However, the underlying national figures vary significantly: respondents in Poland (83%) and Germany (74%) ranked this issue very high in their concerns; whereas in other places – notably at EU level (40%) lack of transparency is less frequently cited as a poor practice by industry, probably due to efforts by the EU institutions to promote transparency.

Other poor practices committed by industry include being overly aggressive and, to a lesser extent, failing to understand the decision-making process (especially those of the EU institutions). However, there was also a wide variation among countries with regard to particular practices – for example, there were some high figures for offering unethical inducements (Greece, 60%) or providing inappropriate briefing materials (Germany, 52%).

Thinking about poor practice in lobbying, which of the following would you say is the most frequently committed by the industry?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Not sufficiently transparent	52	50	40	74	39	50	53	57	33	60	37	68	83	42	48	59	40
Being too aggressive	47	53	40	65	58	43	50	37	40	37	47	39	20	45	48	56	56
Failing to understand process & procedure	39	47	13	48	55	33	37	40	17	27	47	65	0	52	32	31	62
Being too early or too late in the process	37	63	57	42	23	37	23	23	30	23	67	65	7	39	10	19	54
Lobbying by press release	27	41	20	32	0	43	27	27	23	13	20	29	40	26	13	50	23
Inappropriate briefing materials	26	38	7	52	16	23	13	33	20	20	33	16	13	32	26	25	37
Basing a position on emotion rather than facts	25	28	17	48	29	27	30	33	7	23	27	13	33	32	13	44	8
Offering unethical inducements	25	28	20	39	19	13	33	60	30	33	27	16	27	16	26	19	10
Other (please specify)	6	3	10	6	6	3	0	0	0	10	7	6	3	16	6	13	2

WHAT ARE NGO LOBBYISTS' MAJOR FAILINGS?

NGOs have a tendency to base their position on emotion rather than fact

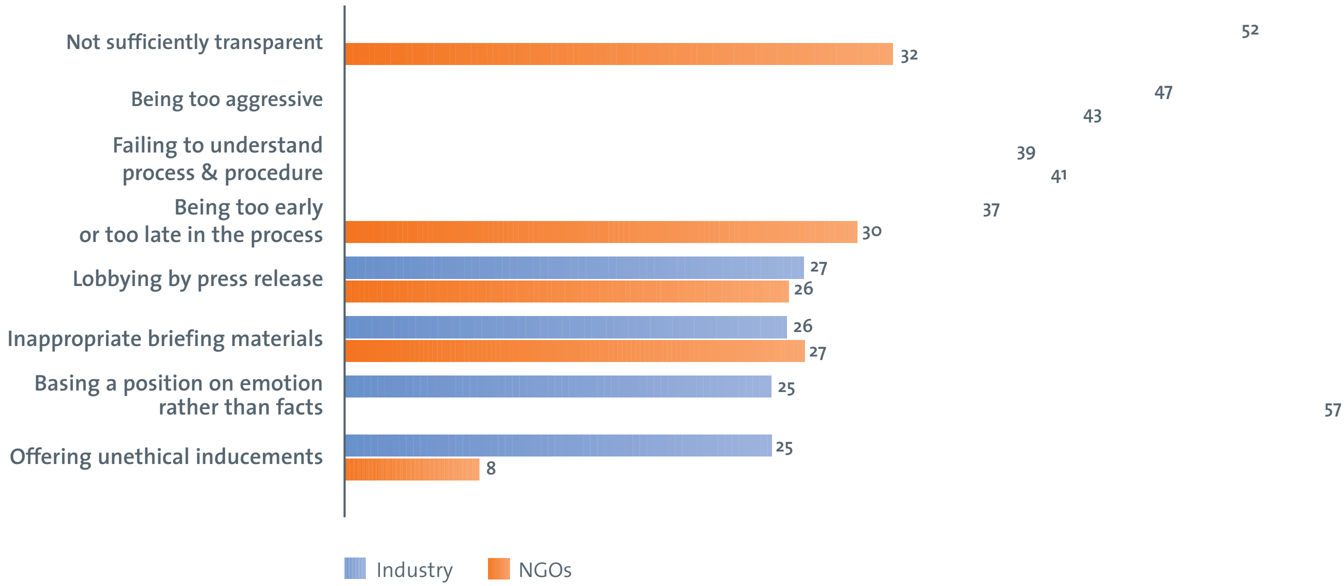
The perceptions of poor lobbying practices by NGOs were more convergent. NGOs' tendency to base positions on emotion rather than fact (57%) was the top-rated weakness, and in marked contrast to industry's score on this point (25%). In general, the perception is that NGO lobbyists fail to understand the decision-making process to more or less the same degree as their industry counterparts. However, NGOs fare better than industry in understanding the workings of the EU (44% citing this as poor practice for NGOs, compared to 62% for industry).

Only 32% of respondents criticised NGOs for a lack of transparency and only 8% for offering unethical inducements. However, in Germany (61%) and Poland (73%) NGOs were more heavily criticised for lacking transparency, and in Norway and Finland (and, to some extent Germany and Austria) there was greater criticism of NGOs' practices than in other markets.

Thinking about poor practice in lobbying, which of the following would you say is the most frequently committed by NGOs?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Basing a position on emotion rather than facts	**57**	72	73	58	61	77	27	57	60	47	53	61	53	39	58	50	63
Being too aggressive	**43**	78	60	68	45	67	43	37	27	20	37	29	30	29	23	34	54
Failing to understand process & procedure	**41**	53	37	48	52	57	17	60	37	33	27	61	23	48	26	22	44
Not sufficiently transparent	**32**	28	50	61	19	50	43	20	27	10	20	13	73	19	39	34	21
Being too early or too late in the process	**30**	31	17	23	35	40	20	27	28	27	33	74	20	52	6	22	31
Inappropriate briefing materials	**27**	28	20	35	19	47	7	30	20	23	23	48	10	29	29	31	29
Lobbying by press release	**26**	34	30	29	10	43	13	17	27	10	23	29	13	26	13	41	44
Offering unethical inducements	**8**	19	0	19	0	10	7	7	4	3	7	10	10	10	6	6	8
Other (please specify)	**8**	0	10	3	19	0	7	3	3	13	3	0	7	10	3	3	0

What are the poor practices in lobbying that Industry & NGOs most frequently commit?



CHANNELS OF INFLUENCE

WHERE DO RESPONDENTS GET THEIR INFORMATION?

Most respondents rely in the first place on their own research

For information respondents still rely most often on their own research (95%), their staff (90%), colleagues (93%), or on their national public authorities (89%). 76% found the information from EU institutions helpful, while only 64% found local or constituency information and information from networks helpful. However, local information was seen to be significantly more helpful in the Czech Republic (94%) and France (93%), while networks were seen as helpful in the Netherlands (94%) and Norway (87%).

Industry rates amongst the most helpful sources of information with three-quarters of respondents saying that representations from business help them in making informed decisions. 60% of respondents found the information from NGOs helpful.

Digital media was found to be helpful by 87% of respondents, whereas traditional media fared less well (73%) – although results suggest that the most consulted 'digital media' includes online editions of traditional media sources.

How helpful would you say each of the following sources are in providing you with what you need to make informed decisions in your work?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Your personal research	95	100	90	93	96	93	100	100	77	100	97	100	97	97	93	100	92
Your colleagues	93	94	93	96	100	96	93	87	87	93	100	84	76	91	94	101	98
Your staff	90	84	96	97	100	97	86	70	77	94	93	78	97	87	96	90	96
National public authorities	89	97	87	87	97	90	100	80	90	86	74	97	93	90	84	91	80
Digital media (internet)	87	94	77	94	78	77	97	86	76	100	93	81	97	81	91	88	87
EU institutions/authorities	76	81	66	84	84	73	90	63	83	94	70	38	97	61	65	60	92
Industry representation	75	75	60	80	87	63	87	56	80	70	70	84	94	65	68	79	80
Traditional media	73	72	50	90	64	76	83	60	64	90	77	74	90	62	68	75	77
Constituency & local information	64	72	94	64	32	23	93	57	70	67	60	49	80	68	87	75	48
Networks	64	69	30	84	61	64	83	33	40	80	94	87	67	65	77	59	44
NGO representation	60	47	40	48	48	40	70	30	57	80	60	84	80	71	58	72	66
Other EU institutions*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	77

**This question was only asked of respondents working in EU institutions in Brussels*

WHICH DIGITAL INFORMATION SOURCES ARE MOST USEFUL?

Governmental websites are cited as the most helpful digital source for information

The most useful digital source of information, governmental websites, had a mean score of 6.66 (on a scale of 1 to 10) and was seen as particularly useful in Poland, Germany and France. Germany as a whole, like Spain, France and Italy, found all categories of digital information more useful than not, whereas the Czech Republic was the most sceptical.

The second most useful category was online versions of traditional news media – especially in Brussels and Greece, where they were said to be the most useful digital source of information. Scientific or educational websites – including Wikipedia – were third overall, and seen as the most useful source in Austria, Spain and Italy. Meanwhile, corporate (including trade association) and NGO websites were seen to be less useful. Industry sites were slightly favoured over their NGO counterparts (respectively 5.93 and 5.39).

The survey suggests that truly 'new' media has some way to go as a popular source of information: blogs, RSS feeds and social networks all scored an average of less than 5 across the EU – although they fared better in Germany, France, Italy and Spain. Social networks, such as Facebook and LinkedIn, fared worst overall – due in a large part to very low scores in Finland, Norway, the UK and Brussels.

On a scale of 1 to 10, how useful would you say each of the following digital sources of information are where 1 is 'not at all useful' and 10 is 'extremely useful'?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Governmental websites	6.66	5.81	5.37	7.65	6.97	7.03	7.43	6.07	6.77	6.27	6.3	6.65	8.3	6.61	6.94	6.81	6.04
Websites of large newspapers, TV and radio stations	6.52	6.38	5.03	7.55	6.23	6.93	7.13	6.93	5.87	6.1	5.87	6.52	7.5	6.23	7.13	6.34	6.58
Scientific or educational websites (e.g Wikipedia)	6.26	6.78	5.03	7.19	5.87	6.57	6.33	6	5.63	6.73	6.27	6.26	6.47	6.26	7.16	5.78	5.96
Corporate & industry association websites	5.93	6.13	4.83	7.1	5.5	6.13	7.13	6.07	5.6	5.73	5.97	5.42	6.97	5.71	6.19	5.44	5.38
NGO websites	5.39	5.38	4.1	5.58	5	4.47	6.4	5.57	4.4	5.63	5.2	5.42	6.5	5.94	6.03	5.44	5.27
Thematic blogs or discussion forums	4.66	5.16	4.07	5.39	3.87	4.43	5.97	5.53	4.3	5.87	4.34	3.55	5	4.48	5.9	3.59	3.75
RSS feeds	4.56	4.88	4.47	5.42	3.6	3.93	5.9	4.83	4.23	5.23	3.89	3.29	4.73	4.81	6.32	4.06	3.83
Social networks (e.g. facebook, linkedin, xing...)	4.37	4.63	4.23	6	3.73	3	5.17	5	3.43	5.37	5.03	3.23	5.43	4.65	5.84	2.97	3.12

WHAT ARE THE MAIN MEDIA SOURCES OF INFORMATION ON INDUSTRY?

National newspapers and the internet are the most important sources of information

National newspapers and the internet were seen as the key sources of information on industry: an average of 75% of respondents cited these categories of media as 'key sources' (with the exception of digital media in France, 53%, and Greece with 0%).

EU-wide media were seen as important in Brussels (73%) and in Poland their popularity was even higher (80%). Yet on average EU media (44%) and other media categories such as television (36%) and radio (26%) lagged well behind the two frontrunners. Nevertheless, TV and radio were seen as quite useful in a number of northern European markets, including Denmark, Norway, Poland, Sweden and the UK.

What are your key sources of information on industry?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
National newspapers	75	75	60	74	80	83	70	100	67	80	70	90	87	84	65	75	60
Digital media/internet	74	88	87	87	63	80	53	0	77	60	93	65	100	84	74	78	75
EU-wide newspapers	44	56	20	58	53	43	53	0	37	23	47	39	80	19	29	41	73
TV	36	34	43	32	63	43	10	0	27	23	33	55	50	45	35	50	29
Radio	26	25	30	19	33	27	10	0	23	10	17	39	40	48	42	41	17
Other	12	9	23	10	17	10	3	0	3	0	23	19	13	26	10	16	6

HOW IS INFORMATION BEST COMMUNICATED TO YOU?

The face-to-face meeting remains the preferred way for politicians and officials to receive information. 50% of respondents cited meetings as the preferred way to receive information while 41% of respondents identified site visits as desirable. 35% view written briefing materials as a good way to communicate information. Conference & workshops are effective means for 28% of respondents, and 28% also favour reading information in the media. Email and phone calls are favoured by only one fifth of respondents: 21% see email as a good way to receive information, and only 20% like receiving information over the phone. Breakfast meetings are also not popular: only 17% view them as useful. Respondents consider DVD/videos (9%), exhibitions (11%) and evening receptions (12%) as even less useful sources of information.

These survey-wide figures belie significant differences among the countries. For example with regard to meetings, 77% of Polish respondents view them as the preferred channel for information, while only 27% of the Finns do. The Nordics were uniformly sceptical of exhibits and DVDs/videos with the Norwegian respondents ranking them both at 0%, the Swedes at respectively 3% and 0%, Finland at 3% and 0%, and Denmark respectively 6% and 3%.

Practitioners at the EU level should also pay attention to the different preferences for communicating data: while site visits may be the second most popular means overall, only 13% of EU respondents find them useful. Face-to-face meetings (40%) and written briefing materials (37%) are more popular. Only 4% of EU-level respondents view DVDs/videos or exhibits as useful, and only 2% think evening receptions are useful sources of information.

How useful would you say each of the following are in providing you with information for your work?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Meetings	50	41	53	68	48	27	57	53	67	60	50	42	77	29	39	59	40
Site visits	41	47	37	55	19	40	40	37	50	40	60	48	67	23	45	47	13
Written briefing materials	35	47	30	48	35	13	43	37	17	20	27	58	57	19	19	47	37
Conference/seminar/Workshop	28	31	20	52	26	17	33	27	27	57	23	19	63	10	13	31	15
Media	28	34	20	42	35	33	50	37	17	37	20	19	53	3	32	19	13
E-mail	21	25	10	23	26	20	27	13	13	37	27	16	27	23	29	16	15
Phone	20	41	10	13	32	17	30	7	23	27	30	16	20	10	26	19	8
Dinner/Lunch briefings	17	13	7	23	13	13	27	33	37	7	27	16	13	26	13	6	8
Breakfast briefings	17	28	7	13	10	3	37	27	30	13	33	13	13	16	10	9	13
Evening receptions	12	9	3	23	6	3	30	7	23	17	7	13	20	16	16	3	2
Exhibitions	11	0	3	19	6	3	40	20	13	30	7	0	0	3	13	22	4
DVD/videos	9	3	7	19	3	0	20	13	13	23	3	0	7	0	10	19	4

HOW WELL-INFORMED ARE RESPONDENTS ABOUT EU DECISIONS?

The vast majority feel well-informed

Across Europe, the majority of respondents (83%) feel themselves to be 'fairly well informed' (24%) or 'very well informed' (59%) about EU decisions in the area in which they work. In each market, more than 50% of respondents class themselves as 'fairly well informed', with the exception of Denmark, where 60% consider themselves 'very well informed'.

Overall the analysis shows that less than one in six respondents feels badly informed – and in no market did more than 7% of respondents suggest that they were 'very badly informed'. In Brussels, only 38% of respondents said that they were 'very well informed' (one percentage point less than in Germany), although no respondent said that he felt badly informed. Roughly one third of respondents in Sweden and Greece considered themselves badly informed.

How well informed do you feel about EU decisions?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Very well informed	24	28	23	39	60	33	23	20	10	23	30	6	10	10	23	25	38
Fairly well informed	59	53	57	52	33	53	67	50	67	63	53	71	83	61	68	56	63
Fairly badly informed	13	16	13	6	3	10	10	27	20	13	10	16	7	29	3	16	0
Very badly informed	3	3	7	3	3	3	0	3	3	0	7	6	0	0	6	3	0

DOES NATIONALITY IMPACT A DECISION TO SPEAK TO A LOBBYIST?

Half the respondents feel that nationality is an important factor

Overall, opinions appear to be divided as to whether respondents think that nationality is important in communicating information: a total of 50% think it is 'very important' (16%) or 'quite important' (34%) to be approached by someone of their own nationality on an issue of national interest. But a total of 50% of respondents view it as 'not very important' (28%) or 'not at all important' (22%).

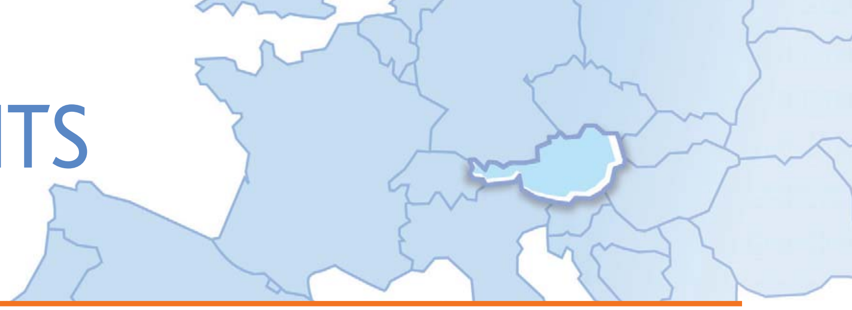
These figures however mask significant differences of opinion among the member states. In Spain, for example, 97% of respondents believe it is either 'very' or 'quite important' to receive the information of a fellow countryman, followed by France with a total of 83%. Close behind with clear national preferences are Austria (60%), Germany (58%) and the Czech Republic (56%).

Interestingly, there is a big split in Sweden, where 29% of people consider such an approach to be 'very important', but an even higher percentage - 39% - consider it to be 'not at all important'.

How important is it that you are approached by someone of your own nationality on an issue of national interest?

	All	AT	CZ	DE	DK	FI	FR	GR	HU	IT	NL	NO	PL	SE	ES	UK	EU
Very important	16	21	4	19	6	27	30	27	6	13	4	3	4	28	39	16	6
Quite important	34	38	53	39	32	43	53	53	27	30	33	23	23	10	58	16	27
Not very important	28	25	20	23	39	27	17	17	30	20	40	42	43	23	3	34	38
Not at all important	22	16	23	19	23	3	0	3	37	37	23	32	30	39	0	34	29

COUNTRY INSIGHTS
Austria



- **Austrian respondents are more likely than others in Europe to define public affairs agencies as 'lobbyists'**
- **Personal networks count: more than half of the respondents said that knowing the lobbyist personally influences the decision about whether or not to talk to him**
- **The healthcare & pharmaceutical sectors are perceived as the most effective lobbyists**

For respondents from Austria, providing the right information at the right time is the most positive aspect of lobbying (75%) - far higher than the European average (39%). However, on other indicators, responses in Austria match those in the rest of Europe. For example, 50% of Austrian respondents view lack of transparency as a major failing in industry lobbying compared to 57% in other European countries.

The vast majority (81%) of Austrian respondents perceive public affairs agencies as lobbyists - far exceeding the European average (57%). Trade associations are deemed to be lobbyists by 72% of respondents, whereas the European average is 61%. However, in terms of transparency, trade unions lead the rankings in Austria, as in most other European countries.

On a scale ranging from 1 to 10, trade associations (7.38) followed by trade unions (6.78) and public affairs agencies (6.72) are associated with the most effective lobbying in Austria (6.72).

Lobbying efforts by the energy industry are considered to be the most effective (91%), followed by healthcare & pharmaceutical (8%) and transport (78%). Lobbying efforts by the retail (25 %) and consumer goods industries (34%) are perceived to be the least effective.

Knowing the lobbyist personally is far more important in Austria (50%) than elsewhere in Europe (32%). Other factors which influence a respondent's decision to talk to a lobbyist are transparency about their client interests (75% in Austria compared to the 64% average) and if the topic is in the respondent's area of expertise (69%) in contrast to the 59% average.

- **On a scale ranging from 1 to 10, trade associations (7.38) followed by trade unions (6.78) and public affairs agencies (6.72) are associated with the most effective lobbying in Austria.**
- **Lobbying efforts of the energy industry are considered to be the most effective (91%), followed by healthcare & pharmaceutical industry (81%) and transport (78%).**
- **Lobbying efforts of the retail (25%) and consumer goods industries (34%) are perceived to be the least effective.**

Brussels: EU Institutions

- **One particularity among the majority of EU-level respondents is their broad definition of a lobbyist**
- **The best lobbies come in key EU policy fields: energy, chemicals and agriculture**
- **Respondents to the survey considered, in general, that there was a high level of transparency in Brussels - particularly among companies and NGOs**

The highly-developed status of EU-level lobbying – as well as the particular nature of the EU activities and powers – are reflected in the survey results for Brussels.

Not unexpectedly, raising an issue of national importance cuts less ice in Brussels than in national capitals, with only 44% of respondents considering such an approach to be a positive aspect of lobbying. More important positive aspects of lobbying are those that reflect the nature of the EU's legislative and regulatory output: sharing expertise (60%) and transforming technical information into user-friendly material (58%) rate more positively in Brussels than in other European markets. Lobbying is widely seen as an accepted part of the decision-making process: only 12% see it negatively.

Another particularity of Brussels lies in respondents broad definition of a lobbyist. Law firms are perceived as lobbyists by 56% of EU-level respondents, in contrast to the 24% survey-wide average. Similarly, more Brussels respondents identified trade associations, companies, NGOs and public affairs agencies as lobbyists, than in other European markets, perhaps in recognition of the high level of activity in Europe's capital.

Transparency has been the subject of much debate in recent years. Respondents to the survey considered, in general, that there was a high level of transparency in Brussels - particularly among companies and NGOs. It is considered important that the lobbyist is transparent about his client interests, and that he registers this interest in the public register set up through the European Transparency Initiative (ETI): 29% of respondents felt that this helps determine if they will meet a lobbyist or not, compared to an overall average of 19%.

Other key considerations for meeting a lobbyist include whether the subject is in the respondent's field of expertise (73% versus the overall average of 59%), if the topic is of interest (71% versus a 54% average), and finally whether the lobbyist is well prepared.

In terms of effectiveness, Brussels responses did not differ greatly from other markets, although companies and NGOs generally fared better in Brussels than elsewhere.

The most effective industry lobbies are the energy (95%), healthcare & pharmaceuticals (89%), agriculture and transport (both at 84%), chemical (81%) sectors, reflecting the EU's competences and current priorities. In contrast, the mining & natural resources (58%), utilities & public services (60%) and retail (50%) sectors were less effective.

NGOs fared less well and were rated below average in a number of sectors. They are seen as the most effective in healthcare & pharmaceuticals (64%). Consumer goods, food & drink and agriculture both scored 57%, followed closely by the chemical and energy sectors scoring respectively 55% and 52%.

Given the complexity of the EU system, one of the most frequently cited examples of poor practice by industry lobbyists was ignorance of the decision-making process (62%). Being too early or too late in the process (54%), or being too aggressive (56%) were also oft-cited complaints. For

40% of respondents, lack of transparency remains an issue.

Poor lobbying practices among NGOs in Brussels were closely aligned with those across Europe: too emotional lobbying (63% versus 57% in other markets); too aggressive (57% versus 43%) and ignorance of the legislative process (44% versus 41%). Transparency is not perceived as a major weakness in NGO lobbying: only 21% identified it as a failing compared to the 32% average.

As for sources of useful information for making decisions, the EU institutions were rated highly in both Brussels by 92% of respondents and an overall average of 72% across all the markets. Brussels respondents rely much less on networks (44%) and constituencies (48%) for information. Digital sources of information were rated at 87% usefulness in both Brussels and the other markets. Traditional media ranked lower at 77% in Brussels compared to 73% at national level.

Respondents in Brussels preferred receiving information from lobbyists in meetings (40%) or as written briefing materials (37%). All other methods rated 15% or less by respondents. Evening receptions are rated very low as a source of information at 2% as are DVDs and videos. Only 13% of respondents see site visits as useful.

- **Transparency is not perceived as a major weakness in NGO lobbying: only 21% identified it as a failing compared to the 32% average.**
- **As for sources of useful information for making decisions, the EU institutions were rated highly in both Brussels by 92% of respondents and an overall average of 72% among the markets.**
- **One of the most frequently cited examples of poor lobbying practice by industry is ignorance of the decision-making process (62%).**

Czech Republic

- **Nearly three quarters of Czech respondents are concerned that lobbyists provide biased information**
- **Of all the countries polled, Czech officials rate individuals' lobbying as the least transparent**
- **Almost three quarters of Czech officials criticise NGOs for emotion-based campaigns**

The failure to provide neutral information is the leading criticism of lobbyists among Czech respondents, considerably outscoring all other listed factors (73% compared with 55% across Europe). This score is the highest of all polled countries. Lack of transparency, the second-most highly criticised aspect of lobbying in the Czech Republic, scored 53%.

Czech respondents seem rather reluctant to define specific groups as lobbyists, except in the cases of public affairs agencies, NGOs and trade associations. Yet even in these cases, the percentages assigned are lower than or equal to the EU average. Czech respondents consider companies (20%) and trade unions (27%) as lobbyists much less often than in the other surveyed countries. However, individuals are perceived as lobbyists more often in the Czech Republic than in the EU (37% versus a European average of 24%). Furthermore, they are viewed as the least transparent lobbyists.

Whether the topic is of interest is the main consideration for a Czech respondent to speak to a lobbyist (70% compared with 54% across Europe). Transparency is the second most important criteria (57%). Whether the topic is in the field of the official's expertise comes third in the reasons to talk to a lobbyist. It is also much less important to Czech officials whether the lobbyist is well-prepared (20%) compared to the survey's average of 40%.

The most frequently highlighted poor practice on the part of NGOs is basing their arguments on emotion rather than fact (73% compared with the 57% average). This score is higher than in any other polled country. Czech respondents identified being too early or too late in the legislative process as the leading poor lobbying practice by industry, scoring 57% in comparison to the 37% average.

- **The failure to provide neutral information is the leading criticism of lobbyists among Czech respondents**
- **Czech respondents seem rather reluctant to define specific groups as lobbyists, except in the cases of public affairs agencies, NGOs and trade associations.**
- **Whether the topic is of interest is the main consideration for a Czech respondent to speak to a lobbyist (70% compared with 54% across Europe).**

Denmark

- **Danish respondents generally have a positive view of lobbying**
- **Nearly three quarters cite transparency as a key issue, and over a third find lobbyists to be insufficiently transparent, particularly industry lobbyists**
- **Industry lobbyists are more effective than NGOs in almost every sector**

Despite the lack of a clear consensus, respondents agree that the most positive aspects of lobbying are the capacity to share expertise (39%) and to play a constructive role in the decision-making process (32%). Very few respondents say that lobbying exerts undue influence over the democratic process (16%).

Across the board, transparency was viewed by 71% as a key factor in determining whether to speak to a lobbyist. 39% mentioned that industry lobbyists often failed to be sufficiently transparent.

Other criteria determining whether a respondent would meet with a lobbyist include whether the subject is of interest (68%), knowing the lobbyist (48%) and his being well-prepared (48%). Access to Danish regulators is easier than in other European markets, with 39% feeling an obligation to speak with anyone who calls - nearly double the 21% average of the surveyed markets.

Among the poor lobbying practices by industry, Danish respondents identify the failure to understand legislative processes (55%), as well as being too aggressive (58%). Interestingly, NGOs score similarly on these weaknesses: 52% for failing to understand processes, and 45% for being too aggressive. For NGOs, the most prevalent shortcoming is basing their policy position on emotion rather than on fact (61%).

Regarding effectiveness, agriculture (93%) and energy (91%) are by far the most effective industries when it comes to lobbying, with healthcare & pharmaceuticals coming third with 84%. Among NGOs, groups working in the consumer goods, food & drink (71%), energy (68%) and chemicals (67%) sectors are the most effective lobbyists.

The results also show that Danish respondents rely heavily on their staff (100%) and colleagues (100%) for information and that they find digital media to be a more helpful source of information (78%) than traditional media (64%).

- **Access to Danish regulators is markedly easier than in other European markets, with 39% feeling an obligation to speak with anyone who calls - nearly double the 21% average of the surveyed markets.**
- **Among the poor lobbying practices by industry, Danish respondents identify the failure to understand legislative processes (55%), as well as being too aggressive (58%).**
- **They find digital media to be a more helpful source of information (78%) than traditional media (64%).**

Finland

- **The great majority of Finnish respondents see lack of transparency as the most negative aspect of lobbying**
- **Trade associations are rated as the most effective lobbyists**
- **It is considered extremely important that positions are based on facts rather than emotions**

Trade associations are seen as lobbyists by 83% of Finnish respondents, which is significantly higher than in other European countries (61%). 80% also identify public affairs agencies as lobbyists, but only 50% see companies as lobbyists. 67% identify NGOs and trade unions as lobbyists.

Finnish respondents identify the positive aspects of lobbying as sharing expertise (80%), raising the local or national importance of an issue (60%) and transforming technical information into user-friendly material (60%). Lack of transparency is identified as the most negative aspect of lobbying by 80% of Finnish respondents, followed far behind by a failure to provide neutral information (47%).

The most transparent organisations according to Finnish respondents are trade associations (8.27 out of 10) and trade unions (7.93). Companies (7.6) are seen as more transparent than NGOs (6.8). In terms of effectiveness, the respondents rate the energy sector most highly, with a 90% score, followed closely by the healthcare & pharmaceuticals sector at 86%. The IT & telecommunications sector scores 80%.

60% of Finnish respondents found NGOs in the consumer goods, food & drink sectors effective followed by those in the mining & natural resources (57%), healthcare & pharmaceuticals (50%) and transport (50%) sectors.

Finnish respondents are most willing to speak to lobbyists if the topic is of interest to them (77%) and if the lobbyists are transparent about whom they represent (73%). Sources of information that respondents find helpful in making decisions are their own staff (97%) their personal research (93%), their colleagues (96%), digital media (77%) and traditional media (76%). Of digital information sources, governmental websites (7.03 out of 10) and websites of large newspapers (6.93) are the most popular.

- **Lack of transparency is identified as the most negative aspect of lobbying by 80% of Finnish respondents, followed far behind by a failure to provide neutral information (47%).**
- **The energy industry is perceived as the most effective lobby by 90% of respondents.**
- **Trade associations are seen as lobbyists by 83% of Finnish respondents, which is significantly higher than in European countries on average (61%).**

France

- **Just over four fifths of French respondents prefer being approached by lobbyists of their own nationality**
- **NGOs were cited more often as lobbyists than either companies or trade associations**
- **Only one tenth are more receptive to meeting a lobbyist when he is listed in a public registry of lobbyists**

53% of French respondents rate lobbying positively for both its role in raising issues of local or national importance and as a constructive part of the decision-making process. The negative aspects of lobbying include providing biased information (60%) and lack of transparency (43%).

In France there is no clear definition of lobbying. NGOs were the most often cited example of lobbyist (37%), followed by trade associations (27%), public affairs agencies (23%), companies (27%) and trade unions (30%). Each of these scores is significantly lower than the European average.

With regards to transparency, the lobbyists with the highest scores are NGOs (7.5 out of 10 points), then trade associations and trade unions, which both scored 7.4, followed by public affairs agencies (7.3) and companies (6.97).

The top two reasons for French respondents to speak to a lobbyist are if the issue interests them (50%) or if the topic lies is in their field of expertise (47%). However, only 37% of French respondents cited a lobbyist's transparency about his client interests when deciding whether to meet, and only 10% are more receptive to meeting a lobbyist if his organisation is listed in a public registry of lobbyists.

As for effectiveness, trade unions (7.17 out of 10) and companies (7.1) are considered the most effective lobbyists followed by public affairs agencies (6.53). Individuals & independents have the lowest score in France (5.73). Nevertheless, this low score is the highest score throughout the markets covered by this survey.

Top scores for lobbying effectiveness go to the energy and healthcare & pharmaceuticals sectors (96%) and among NGOs to those active in the agriculture and healthcare & pharmaceuticals areas (77%).

Concerning poor lobbying practices, 43% of French respondents consider that NGOs are both too aggressive and not sufficiently transparent. Interestingly, the third most cited complaint against NGOs is that they base their lobbying practices on emotion rather than facts (27% in contrast to the 57% overall average). French respondents identified the leading weaknesses in industry's lobbying as a lack of transparency (53%), being too aggressive (50%), and failure to understand regulatory processes (37%).

French respondents identified their main sources of intelligence for making informed decisions as their personal research (100%) and information given by national authorities (100%), followed by digital media (97%), colleagues (93%) and the EU institutions (90%). Traditional media scored 83%.

- **The third most-cited complaint against NGOs is that they base their lobbying practices on emotion rather than facts (27% in contrast to the 57% overall average).**
- **83% of French respondents consider it very important to be approached by someone of their own nationality when dealing with an issue of national interest.**
- **Top scores for lobbying effectiveness go to the energy and healthcare & pharmaceuticals sectors (96%) and among NGOs to those active in the agriculture and healthcare & pharmaceuticals areas (77%).**

Germany

- **German respondents are very concerned about undue influence, but are open to dialogue with lobbyists**
- **The most positive aspect of lobbying is to raise issues of local and national importance**
- **NGO lobbying is seen by two thirds of German respondents as too aggressive**

For 74% of German respondents the most positive role of lobbying is to raise issues of local and national importance, in contrast to the report's 50% average. At the same time they have by far the greatest concern that lobbying represents an undue influence on the democratic process (58% compared to the 23% survey-wide average).

Similar to other European countries, 65% of German respondents see lobbying negatively when it lacks transparency. 74% felt that industry falls into this trap compared to the 52% average, while 61% have similar concerns with regard to the transparency of NGO lobbying (far higher than the 32% average).

Aside from transparency concerns, NGO lobbying is seen by 68% of German respondents as being too aggressive (compared to the 43% average) and by 58% as too emotional (57% average). With regard to industry lobbying, 65% of respondents believe that industry is overly aggressive versus the overall mean of 47%. 48% view industry lobbying as too emotional in contrast to the 25% average.

The receptivity of German respondents to speaking with a lobbyist depends greatly on how well the lobbyist has prepared his case (71%). 65% of German respondents value lobbying when it provides the right information at the right time (compared to an average of 39%). Compared to their European counterparts (26%), twice as many German respondents (52%) felt that being provided with poor briefing materials was a key example of poor lobbying practice by industry.

In contrast to other European markets, individual companies are seen as the most effective lobbyists by German respondents (7.61 out of 10), narrowly outscoring trade associations (7.16).

In Germany 100% of respondents identified the healthcare & pharmaceutical sector as effective lobbyists, followed closely by the energy sector with 94%.

NGOs active in the same sectors are also rated as highly effective, with 84% for healthcare & pharmaceuticals and 80% for the energy sector.

- **65% of German respondents see lobbying negatively when it lacks transparency.**
- **65% believe that industry lobbying is overly aggressive versus the overall mean of 47%.**
- **Compared to their European counterparts (26%), twice as many German respondents (52%) felt that being provided with poor briefing materials was a key example of poor lobbying practice by industry.**

Greece

- **60% of Greek respondents believe that unethical inducements are the most frequently committed poor lobbying practice by industry**
- **Transparency is crucial in determining whether to meet a lobbyist**
- **Just over half view lobbying as a constructive part of the decision-making process**

Lobbying is viewed as a constructive part of the decision-making process by 53% of Greek respondents compared to the report's 48% average. However, only 37% believe that lobbying is an effective tool for raising issues of national or local importance, compared to the 50% average. Only 17% consider lobbying to play a constructive role in sharing expertise.

In Greece only 10% of respondents include companies in the definition of a lobbyist. While trade associations and public affairs agencies are viewed by 60% of respondents as lobbyists, NGOs and trade unions score 40%.

Offering unethical inducements is seen by 60% of Greek respondents as the most frequently committed lobbying failure by industry, compared to the 25% average. Other perceived weaknesses in industry lobbying were in line with the average responses in the other markets: lack of transparency (57%), failing to understand the legislative process (40%), and being too aggressive (37%) compare to respective overall averages.

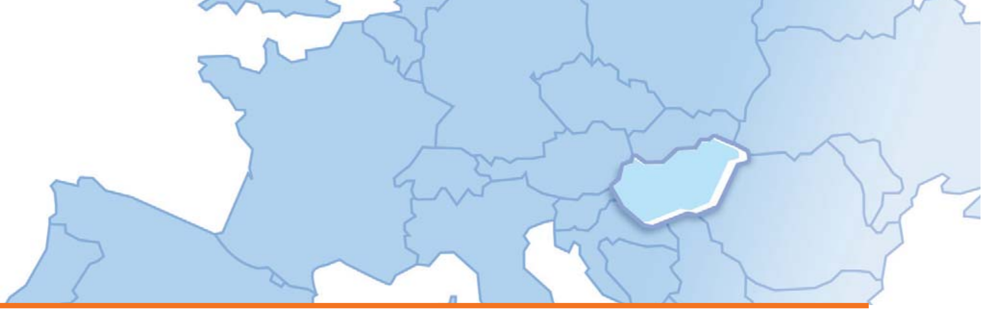
57% of respondents criticised NGOs for basing positions on emotions rather than facts, and 37% described NGO lobbying as too aggressive. Only 20% felt NGO lobbyists lacked transparency.

Public affairs agencies are seen as the most effective lobbyists by Greek respondents (6.33 out of 10) followed by trade associations (6.3). Consultancies and NGOs have similar levels of transparency (respectively 6.1 and 6). Trade unions, however, score 8 out of 10 on transparency, the highest score for transparency in the entire survey.

The highest score for effective lobbying among NGOs is in the energy and mining sectors (both 47%) followed by healthcare & pharmaceuticals (44%). For industry, four sectors score 80% in terms of effectiveness: energy, healthcare & pharmaceuticals, IT & telecommunications and defence & aerospace. A further three industry sectors score 63% in terms of lobbying effectiveness: financial services, chemicals and mining.

86% of Greek respondents consider the internet helpful in providing them with what they need in order to make informed decisions, but their key source of information on industry remains national newspapers (100%).

- **Offering unethical inducements is seen by 60% of Greek respondents as the most frequently committed lobbying failure by industry, compared to the 25% average**
- **57% of respondents criticised NGOs for basing positions on emotions rather than facts, and 37% described NGO lobbying as too aggressive.**



Hungary

- **Two thirds of Hungarian respondents view lobbying as a constructive part of the decision-making process**
- **Transparency is a key issue as in the rest of Europe**
- **Public affairs agencies are seen as the most effective lobbyists by Hungarian respondents, narrowly outscoring individual companies**

For 67% of Hungarian respondents lobbying is a constructive part of the decision-making process, compared to the 48% survey-wide average. There are, nevertheless, some complaints about the way lobbying is practised. In line with other European countries, 60% of Hungarian respondents see a lack of transparency as the main failing of lobbying.

40% of respondents criticised industry for overly aggressive lobbying, slightly below the 47% average. 33% felt that another weakness in industry lobbying is a lack of transparency. Like their counterparts in other markets, 30% of Hungarian respondents felt that being too early or too late in the process was a key example of poor lobbying practice by industry (37% European average).

The top criticisms of NGOs lie in basing a position on emotion rather than fact (60%), followed by failing to understand the legislative process (37%). Nearly 30% of respondents felt that NGOs were also either too early or too late in the process (28%), too aggressive (27%) or not sufficiently transparent (27%).

The top factors determining the Hungarian respondent's decision to speak with a lobbyist include transparency (43%), whether the topic is in his field of expertise (37%) and finally if the topic interests him (30%). Only in Hungary did respondents claim that knowing an individual would have no influence on whether to meet a lobbyist, compared to the report's 32% average.

For 77% of respondents, the energy and financial services sectors tied as the most effective industry lobbyists. This was followed closely by healthcare & pharmaceuticals (74%) and then the IT & Telecommunications sectors, scoring 60%. In contrast, the NGOs in the IT & telecommunications sectors are viewed as the most effective by 60% of respondents, followed by financial services (53%), energy (50%) and healthcare & pharmaceuticals (47%).

The key sources of information identified by respondents for helping them take decisions in their work included national authorities (90%), colleagues (87%), EU institutions (83%) and industry representatives (80%).

- **For 67% of respondents transparency is important.**
- **Only in Hungary did respondents claim that knowing an individual would have no influence on whether to meet a lobbyist, compared to the report's 32% average.**

Italy

- **Lobbying is seen as a constructive part of the decision-making process**
- **Lack of transparency by industry is by far its weakest practice**
- **Two thirds of respondents felt an obligation to speak to anyone who called them**

For 70% of Italian respondents raising the local and national importance of an issue is lobbying's most positive trait, compared to the report's 50% average. 67% consider lobbying a constructive part of the decision-making process, significantly higher than the survey's 48% average.

However, 60% of Italian respondents are concerned that lobbying not only lacks transparency but that it also does not provide neutral information. In Italy a public registry of lobbyists does not exist – although 50% of the respondents, well above the survey average of 19%, said that they would be more inclined to speak with a lobbyist listed on a public transparency register.

This is also reflected in the finding that transparency is a determining factor in whether to meet or speak to a lobbyist for 70% of respondents. 60% of Italian respondents are more inclined to speak to an individual out of an obligation to do so, in comparison with the 21% overall average.

Italian respondents consider trade associations (77%), followed by trade unions (60%), to best match the definition of a 'lobbyist'. Only 37% viewed public affairs agencies as lobbyists, and 27% identified NGOs as such, contrasting markedly from the respective 57% and 50% average.

In general, Italian respondents rank highly the effectiveness of lobbying by industry. In particular, the energy industry (93%), IT & telecommunications (90%), financial services (90%) and healthcare & pharmaceuticals (86%) sectors are perceived as the most effective sectors. The public services and utilities are also seen as particularly effective by 90% of respondents – well above the 54% average.

With regards to NGOs, the most effective, according to Italian respondents, operate in the consumer goods, food & drinks sector, with 74% compared to the 53% survey average, followed by NGOs in the healthcare & pharmaceuticals (63%) and energy (60%) sectors.

100% of Italian respondents rely on their own research and the internet as key sources of information in helping make decisions. This is closely followed by their staff (94%), EU institutions (94%), colleagues (93%) and traditional media (90%).

- **100% of Italian respondents view the internet as a key source of information for making decisions**
- **Transparency is a determining factor in whether to meet or speak to a lobbyist for 70% of respondents.**

The Netherlands

Companies are not seen as effective lobbyists
The internet has become the main source of information for politicians when they want to get information about an industry
NGO lobbying is often seen as overly based on emotion

Dutch respondents are more sceptical about the effectiveness of lobbying than any other country covered by the survey. Their scores ranged from 3 out of 10 for think tanks to a high of 4.68 for trade unions. These compare to the overall average of 5.39 for think tanks and 6.16 for trade unions. Even companies and public affairs agencies are perceived as barely effective, scoring respectively 3.32 and 3.96 (out of 10). This is a remarkable result and something for the Dutch lobbying community to review.

Against this background, the agricultural industry is viewed as effective by 90% of respondents, followed by the energy sector (83%) and the healthcare & pharmaceuticals sector (80%). 57% of respondents view NGO activity in the consumer goods, food & drink sector as effective, followed by healthcare & pharmaceuticals (53%). NGOs in the chemical and agricultural sectors tie for a distant third with 43%.

For the Dutch, 70% of respondents would speak to a lobbyist if the topic is of interest, followed by 57% who appreciate transparency and 53% if the topic is in their area of expertise. However, 7% of the Dutch respondents never speak to lobbyists, in contrast to the 2% average.

In line with the survey's average scores, the Dutch respondents deem lack of transparency (67% compared to 57% average) and the failure to provide neutral information (57% compared to 55%) as the most negative aspects of lobbying. Only 13% of respondents saw lobbying as exerting an undue influence over the democratic process. The positive aspects of lobbying identified by respondents lie in raising the local and national importance of an issue (67%) while 53% view it as a constructive part of the decision-making process. Sharing expertise is an important aspect for 50% of respondents.

67% of Dutch respondents feel that industry lobbying is either too early or too late in the legislative process, while 47% view industry as both too aggressive and failing to understand the legislative process. 37% criticise industry for lack of transparency.

Meanwhile, the only poor practice amongst NGOs identified by more than half the Dutch respondents (53%) was their tendency to rely on emotion rather than fact in their positions. 37% of respondents criticised NGOs for being too aggressive.

The top-ranking sources of information for decision-making are identified by respondents as colleagues (100%), personal research (97%) and staff (93%) all in line with the survey-wide averages. 94% of the Dutch however also rely on their networks for such information, significantly above the 64% average.

- **Dutch respondents are more sceptical about the effectiveness of lobbying than any other country covered by the survey.**
- **67% of Dutch respondents feel that industry lobbying is either too early or too late in the legislative process.**
- **94% of the Dutch respondents rely on their networks as a source of information for decision-making.**

Norway

- Lobbying is seen as part of the democratic process
- NGOs are the most transparent and effective lobbyists
- Written materials and on-site visits are more popular than face-to-face meetings

61% of Norwegian respondents find that lobbying represents both a constructive part of the decision-making process and a way to share expertise. Only 3% criticised lobbying for exerting an undue influence, compared to a 23% average. At the same time, 58% identified as negative aspects both lack of transparency and the failure to provide neutral information.

Surprisingly, less than half the Norwegian respondents view companies as lobbyists (48%), but 81% identify trade associations as such. 77% of the respondents also deem NGOs as lobbyists, and public affairs agencies score 74%. Trade associations take top billing for transparency scoring 8.52 out of 10, followed shortly behind by trade unions with 8.39, NGOs with 8.35 and companies with 8.1. On the other hand, public affairs agencies score only 5.94 on transparency, which is nevertheless slightly above the report-wide average of 5.58.

The biggest flaws committed by industry lobbyists are their lack of transparency (68%), and failing to understand the legislative process (65%), thereby being too early or too late in the process (65%). Less than half of those interviewed view lobbyists as too aggressive (47%), emotional (13%) or unethical (26%).

NGO lobbying is criticised by 61% of respondents for both basing positions on emotions and for failing to understand the legislative procedure, so that they are either too early or too late in the process (74%).

Norwegian respondents find lobbying efforts most effective in the energy sector (91%), while both healthcare & pharmaceuticals and financial services score 84%. NGOs are viewed as most effective in the transport and healthcare & pharmaceuticals sectors, scoring 71%, followed by agriculture with 67%. Just over one half of respondents (55%) felt that NGOs in the energy sector were effective.

When making informed decisions, Norwegian policymakers depend on their own personal research (100%) followed by national authorities (97%), with EU institutions, unsurprisingly for a non-EU member state, coming out as the least important source when making a decision, at 38% of respondents.

- **Only 3% of Norwegian respondents find that lobbying has an undue influence on the democratic process.**
- **Trade associations take top billing for transparency, scoring 8.52 out of 10.**
- **The biggest flaws committed by industry lobbyists are their lack of transparency (68%) and failing to understand the legislative process (65%).**

Poland

- **Polish respondents view lobbying more as an additional source of information than a legitimate part of the decision-making process**
- **Concerns about the lack of transparency in lobbying activities are stronger than anywhere else in Europe (90%), referring both to businesses and NGOs**
- **The healthcare & pharmaceutical industry is seen by far as the most effective lobbying sector**

Only 3% of Polish respondents consider lobbying to be a legitimate part of the decision-making process, reflecting perhaps the recent trials for alleged corruption where the media labelled the accused as 'lobbyists'. This is in stark contrast to the survey-wide 48% average. Interestingly, Poles more frequently than other markets point out that lobbying provides the opportunity to share expertise (63% versus the 47% average) and that it provides decision-makers with useful information at the right time (43%).

Transparency therefore plays an important role in determining whether to speak to a lobbyist (70%), followed by whether the issue lies in the respondent's field of expertise. Only 7% said that knowing the lobbyist would influence the decision to meet him, compared to the 32% report-wide average.

Only 7% of respondents consider individuals to be lobbyists (compared to the report's 24% average) while 70% identify trade associations as such. Respondents also viewed NGOs (57%) and public affairs agencies (53%) as lobbyists.

To a far greater extent than the survey-wide 57% average, 90% of Polish respondents name the lack of transparency as the single most negative aspect of lobbying. At the same time, a lack of transparency is also mentioned as the most common example of poor lobbying practices within the industry (83% in comparison to the 52% average). 73% of respondents felt this criticism is equally valid for NGOs, well above the survey average of 32%.

93% of respondents identified the agricultural sector as the most effective industry lobby, compared to the 67% overall average. 90% found the healthcare & pharmaceuticals sector effective, followed by the energy and chemical sectors (87%). The most effective NGOs lobbies are found in the agriculture, retailing, and utilities & public service sectors according to 70% of the respondents.

- **Only 3% of Polish respondents consider lobbying to be a legitimate part of the decision-making process.**
- **Only 7% said that knowing the lobbyist would influence the decision to meet him, compared to the 32% report-wide average.**
- **73% of respondents felt that NGOs lack transparency.**

Spain

- **Lobbying is becoming an important part of the democratic process**
- **NGOs and trade associations are the most effective lobbyists**
- **Energy, healthcare & pharmaceuticals and IT & telecommunications are the most effective lobbyists for both industry and NGOs**

For 48% of Spanish respondents shared expertise is one of the most positive aspects of lobbying, while 45% consider lobbying to be a constructive part of the decision-making process, in line with the overall average of 48%.

The negative aspects identified by the respondents are a lack of transparency (by 52%), followed by the provision of biased information (45%). Specific weaknesses for industry highlighted in the survey by the Spanish respondents are a lack of transparency (48%) and being too aggressive (also 48%). For NGOs, 58% of respondents felt that they are overly emotional in their lobbying and 39% felt that they lacked transparency.

42% of those interviewed would speak to a lobbyist only if the topic were of interest or because they had an obligation to speak to anyone calling them. For 26% transparency was an important reason in determining whether to meet a lobbyist, compared to the 64% survey-wide average.

Spanish respondents rated trade associations (6.45 out of 10) and NGOs (6.48) as the most effective lobbyists, closely followed by trade unions (6.23) and public affairs agencies (6.13).

Industry lobbying is considered by respondents most effective in the sectors of energy (87%), healthcare & pharmaceuticals (87%) and electrical & electronics (87%), followed by IT & telecommunications (84%) and financial services (84%). With regards to NGOs, 84% of Spanish respondents considered that their lobbying efforts were most effective in the sectors of healthcare & pharmaceuticals (84%) and energy (71%).

- **For 48% of Spanish respondents shared expertise is one of the most positive aspects of lobbying.**
- **The negative aspects identified by the respondents are a lack of transparency (by 52%), followed by the provision of biased information (45%).**

Sweden

- **Transparency is a key issue for Swedish respondents, and industry and NGOs both rate well**
- **Failing to understand the legislative process is a weakness for both industry and NGOs**
- **Industry lobbies in the energy sector and NGO lobbies in transport are most effective**

55% of Swedish respondents rate positively the role of lobbying in raising the local and national importance of an issue, while only 13% believe lobbying exerts an undue influence on the political process (compared to the 23% overall average).

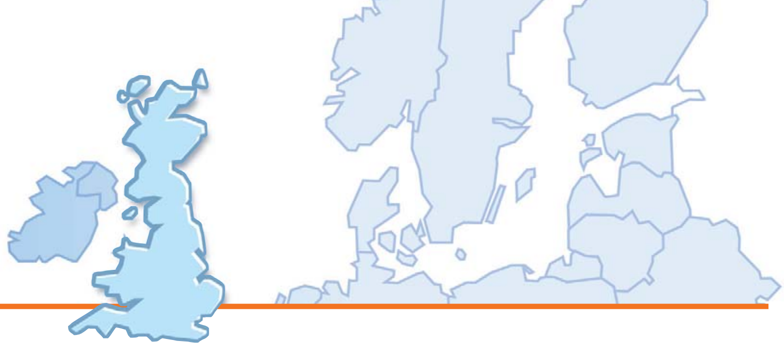
Transparency and relevance are virtues ranked highly by Swedish respondents. 71% consider transparency one of the most influential factors behind a decision to talk to a lobbyist (compared to the 64% overall average). For 74% of Swedish respondents it is even more important in determining whether to speak with the lobbyist if the topic is in the regulator's field of expertise.

Similar to respondents in other European countries, 65% of Swedish respondents see lobbying negatively when it lacks transparency. However, when Swedish respondents rate industry and NGOs on transparency, they are more positive than respondents in other countries: within industry, 42% lack transparency, compared to an overall European figure of 52%; for NGOs, only 19% of Swedish respondents have negative views, compared to 32% for the whole of Europe.

Weaknesses in NGO lobbying are the failure to understand the legislative process (48%) and thus being either too early or too late when engaging the process (52%). The corresponding figures on a European level are 41% and 30%. Failing to understand the decision-making process is also a factor held against industry by 52% of Swedish respondents in contrast to the overall 39% average.

According to 84% of Swedish respondents, the most effective industry lobby is the energy sector, followed by 75% for healthcare & pharmaceuticals and 68% for agriculture. Among NGOs those active in the transport sector are viewed as the most effective by 58% of respondents, followed by 49% for both the energy and agricultural sectors.

- **65% of Swedish respondents see lobbying negatively when it lacks transparency.**
- **71% consider transparency about the lobbyist's client one of the most influential factors behind a decision to talk to a lobbyist.**



UK

- **Only one third of respondents mentioned lobbying as a constructive part of the decision-making process**
- **More than half of the respondents identified lack of transparency as an issue for industry, but only a third cited this as an issue for NGOs**
- **Industry and NGOs in the energy sector are seen as the most effective**

The energy industry is seen as the most persuasive in the UK, with 88% of respondents rating it as an effective lobby, closely followed by the healthcare & pharmaceutical sector (84%), defence & aerospace (82%) and financial services (81%). Agriculture (60%), mining (63%) and electronics (62%) are perceived as the least effective industry lobbies in the UK. The most effective NGO lobbies can be found in the energy sector (75%), healthcare & pharmaceuticals (66%) and transport and financial services (both scoring 59%).

Over 70% of UK respondents view raising the local or national importance of an issue as a positive aspect of lobbying, way ahead of other potentially positive aspects such as transforming complex information into user-friendly explanations (44%) or providing the right information at the right time (41%). Only 38% of respondents mentioned lobbying as a constructive part of the decision-making process.

84% of respondents would speak with a lobbyist if the issue was in his field of expertise and 63% if the lobbyist was transparent. Trade unions are viewed as the most transparent of lobbyists, scoring 7.78 out of 10 followed by trade associations (7.76). Public affairs agencies scored 5.31.

Negative aspects of lobbying were identified by respondents as a lack of neutral information (56%) followed by lack of transparency (50%). The leading industry specific weaknesses were identified as lack of transparency (by 58% of respondents) and as being too forceful (by 56%). 44% said industry based its positions on emotions rather than fact. Regarding NGOs, the leading criticism is a tendency to base positions on emotions (50%) followed by lack of transparency (34%).

The top-rated sources for information on which to base decisions are personal research (100%), colleagues (100%) and staff (90%). Furthermore, industry representation is seen as helpful by 79% of respondents with regard to making an informed decision in their work, compared to 72% for NGOs. 60% of respondents said that the EU institutions provided, useful information for making decisions compared to a survey-wide average of 76%.

- **72% of UK respondents rate positively the role of lobbying in raising the local and national importance of an issue.**
- **Trade unions are viewed as the most transparent of lobbyists, scoring 7.78 out of 10 followed by trade associations (7.76).**
- **79% of UK respondents view industry representation as helpful in making an informed decision.**

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